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AccreditNet®2.0™

Applicant Portal User Guide

Version 3.6

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1 Introduction

This document is intended for all URAC AccreditedNet Portal Users. It provides guidance through the application process, describes features and functionalities of the Portal, and uses screenshots to help users navigate through the site. Please refer to the *URAC Glossary of Terms in the Accreditation Standards Guides* for abbreviations and unfamiliar terms.

2 Portal Access

2.1 Access

1. Portal access information is sent via email to the organization Primary Contact automatically from AccreditedNet®2.0™. This email communication directs the portal user to click on “Reset your password” on the portal login page.
2. If needed, the URAC Account Manager or IT Specialist will create the account.

2.2 Login

1. Launch AccreditedNet®2.0™ using this URL from your browser:
<https://accreditnet2.urac.org>. *Alternately, AccreditedNet®2.0™ can be reached via a link in the right upper corner of the www.urac.org home screen.*
2. Enter your Username and Password and click on Sign In.

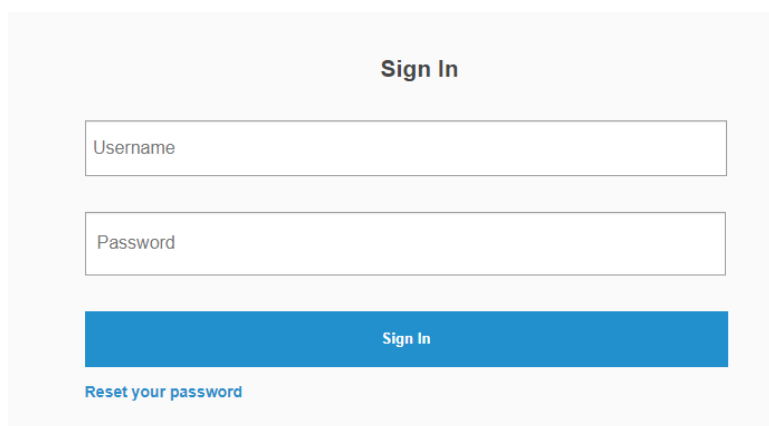
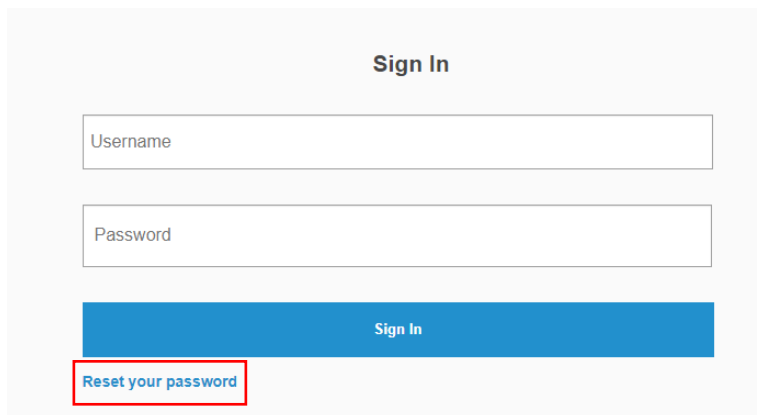
The screenshot shows a 'Sign In' page with a light gray background. At the top center is the title 'Sign In'. Below it are two white input fields with gray borders. The first field is labeled 'Username' and the second is labeled 'Password'. Below these fields is a solid blue button with the text 'Sign In' in white. At the bottom left of the form area is a blue hyperlink that says 'Reset your password'.

Figure 2-1: Sign In page

2.3 Forgot Password

1. If you have forgotten your password, you can recover it by clicking on the **Reset your password** button from the login screen. You will be redirected to the password recovery page.



The image shows a 'Sign In' form. It has two input fields: 'Username' and 'Password'. Below these fields is a blue 'Sign In' button. At the bottom of the form, there is a red-bordered button labeled 'Reset your password'.

Figure 2-2: Forgot Password

2. Provide your username and click **Submit**. This information should match the corresponding data in your profile.
3. The system displays an error message if the username doesn't exist in our records. *If you need assistance, please contact your Customer Relations Manager at URAC.*

Forgot your password?

Think you might have a record in our database? Let's find out. Type your user name below and then press Submit. If we can identify your record, we will send additional instructions to the email address on file in our database.

Username not found, please contact support at (202) 326-3979 or accreditnet@urac.org.

User Name:

Submit

Figure 2-3: Forgot Password Error Message

4. If a match is found, a recovery email with additional instructions will be sent to the email address on file.

Check your email to change your password

An email has been sent to the user's email address. The email message will provide you with instructions on how to change your password.

Figure 2-4: Recovery Email

- The user should open the link in the email to reset the password. The link will stay active for 60 minutes.

Forgot your password?

Think you might have a record in our database? Let's find out. Type your user name below and then press Submit. If we can identify your record, we will send additional instructions to the email address on file in our database.

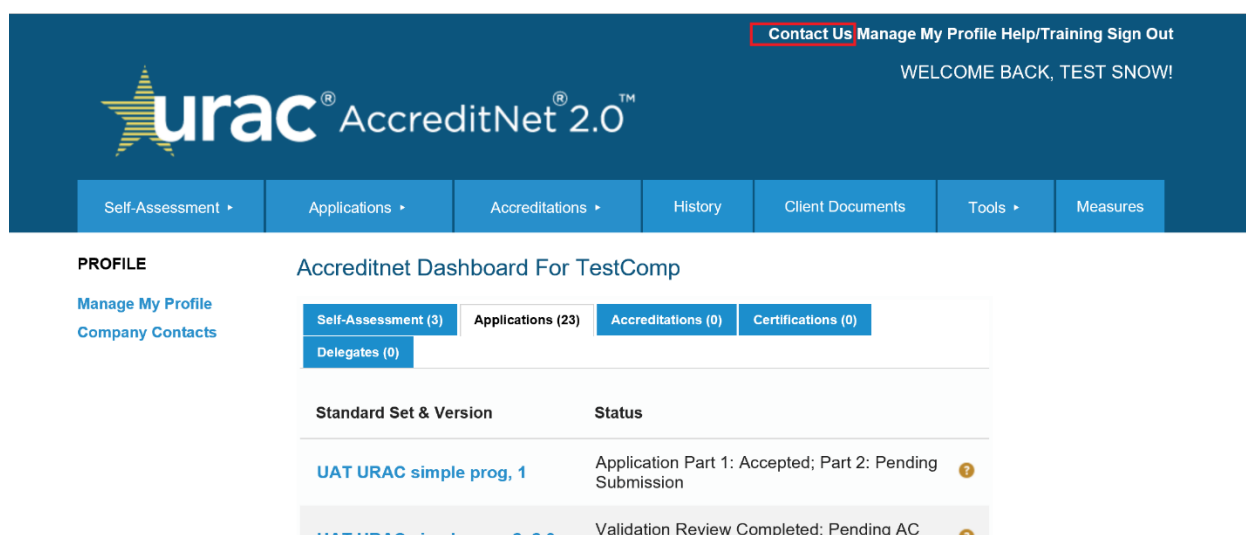
User Name:

Submit

Figure 2-5: Forgot Password

2.4 Contact Us

Contact Us is the first link available in the upper right corner menu. When clicked, you will be directed to the *Contact Us* page to view various URAC departments that are available to assist you with your needs.



The screenshot shows the URAC AccreditedNet 2.0 dashboard. The top navigation bar includes links for 'Contact Us', 'Manage My Profile', 'Help/Training', and 'Sign Out'. The 'Contact Us' link is highlighted with a red box. Below the navigation bar, the dashboard is titled 'Accreditnet Dashboard For TestComp'. The left sidebar shows 'PROFILE' with links for 'Manage My Profile' and 'Company Contacts'. The main content area displays a table with columns for 'Standard Set & Version' and 'Status'. The table lists two entries: 'UAT URAC simple prog, 1' with status 'Application Part 1: Accepted; Part 2: Pending Submission', and 'UAT URAC simple prog 2 2.0' with status 'Validation Review Completed; Pending AC'.

Standard Set & Version	Status
UAT URAC simple prog, 1	Application Part 1: Accepted; Part 2: Pending Submission
UAT URAC simple prog 2 2.0	Validation Review Completed; Pending AC

Figure 2-6: Contact Us

2.5 Manage My Profile

Follow the steps below to edit your personal profile information.

1. Click on **Manage My Profile** at the top of the page.

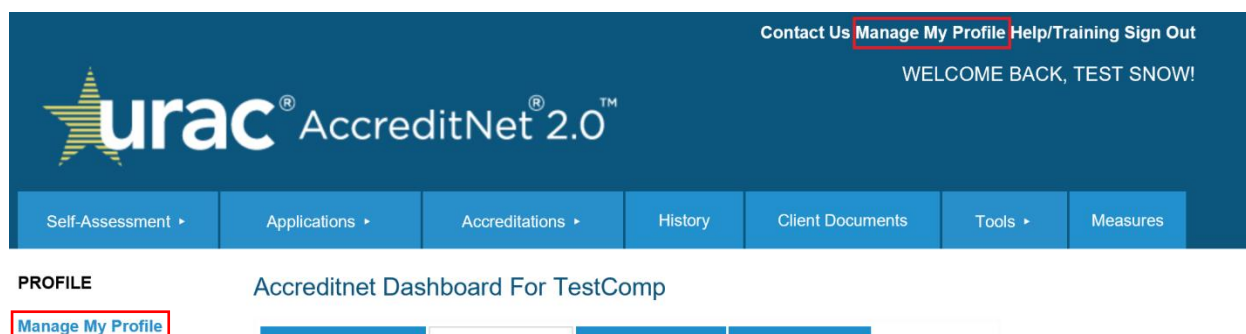


Figure 2-7: Manage My Profile

2. To change any information, start typing in the text area. You can change your nickname, secondary e-mail, and title from this page. The Primary Email and Username fields are read-only. After completion, click on **Save/Finish**.

Edit Your Record

Basic Information

Please enter/edit your information and then click Save/Finish

LoriTest

Please contact URAC at accreditnet@urac.org if you need to change your name.

Nickname:

For example, Jon might be a nickname for Jonathan.

Primary E-Mail: *

Alternate Email:

Login Account: Enter the username and password that you will use to access Accreditednet.

Username: *

[Change Password](#)

Current Organization:

Please contact URAC at accreditnet@urac.org if you need to change your organization.

ABC Company

Title:

[Save/Finish](#)[Cancel/Return to Index](#)

Figure 2-8: Manage My Profile

2.5.1 Change Password

1. To change your password, click on **Change Password** within the Manage My Profile screen.

Edit Your Record

Basic Information

Please enter/edit your information and then click Save/Finish

LoriTest

Please contact URAC at accreditnet@urac.org if you need to change your name.

Nickname:

For example, Jon might be a nickname for Jonathan.

Primary E-Mail: *

Alternate Email:

Login Account: Enter the username and password that you will use to access Accreditednet.

Username: *

Current Organization:

Please contact URAC at accreditnet@urac.org if you need to change your organization.

ABC Company

Title:

Figure 2-9: Change Password

- You will receive a pop-up box informing you that a link will be sent to your primary email address with a link to reset your password. Click **OK** to continue.

You will receive an email with password reset link. Are you sure you want to change your password?

Figure 2-10: Changing Password

Table 1: Password Criteria Rules

Password Criteria Rules	
1.	Passwords are valid for 90 days, and then they expire.
2.	Remind user 5 days before password expiration.
3.	Do not allow reuse of last 1 password (including current).
4.	Password can contain up to 2 consecutive repeating characters.
5.	Minimum password length 10 characters.
6.	Maximum password length 16 characters.
7.	Password must contain at least 1 upper case letter.
8.	Password must contain at least 1 lower case letter.
9.	Password must contain at least 1 special character.
10.	Password must contain at least 1 numeric character.
11.	Login fails after 6 invalid login attempts.
12.	The User ID cannot be used as the password.
13.	After 50 minutes, the user is timed out of the portal due to inactivity.
14.	The user will be made inactive after 60 days of inactivity.

2.6 Help/Training

The **Help/Training** section provides detailed documentation to assist with AccreditedNet@2.0™ application submission.

1. Click on the **Help/Training** link at the top of the screen. This link can be accessed from any page in AccreditedNet@2.0™.

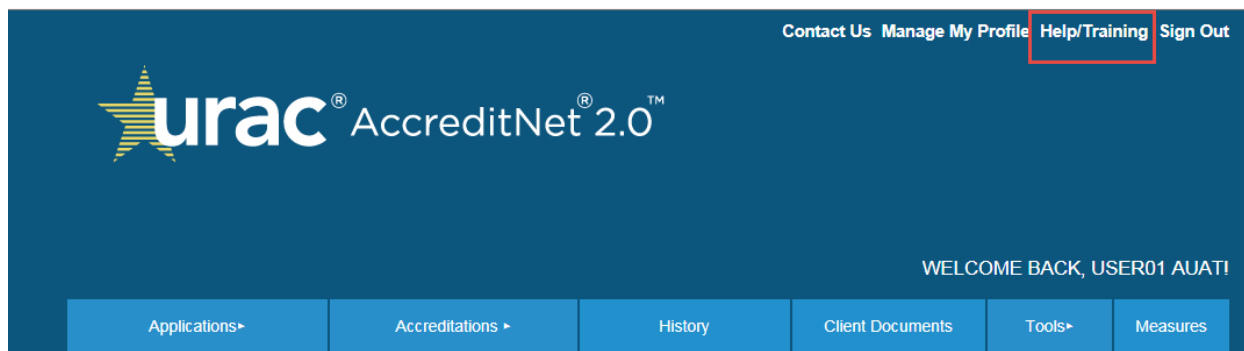


Figure 2-11: Help/Training Link

2. The Applicant Portal User Guide is available as a hyperlink.



Figure 2-12: Help Page

3. Click on the text link to download the document onto your computer.

2.7 Sign Out

Click the **Sign Out** hyperlink to log out of the URAC AccreditedNet®2.0™ website.

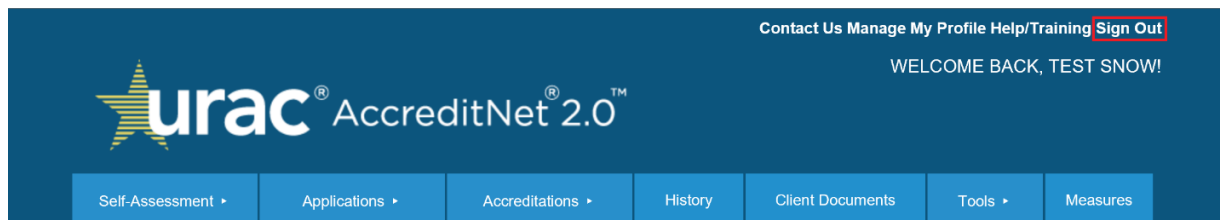



Figure 2-13: Sign Out

3 AccreditedNet® Dashboard

When you sign in to AccreditedNet®2.0™, the home page is displayed.

- Enterprise POC (Point of Contact) users will see a list of all Organizations under the Enterprise.
- Users who are a member of two or more Organizations will see a list of all their Organizations. To access an Organization's home page/dashboard, click **Select** next to the name. Once in an Organization's dashboard, click **Switch** to change to a different Organization.


WELCOME BACK, KAREN PORTALI

Organization Dashboard




Name	Address					
	Address1	Address2	City	State	Postal Code	
 Healthcare, Inc.	6950 Columbia Gateway Drive		Columbia	MD	21046	Select
 TestComp	1220 L ST Northwest	Suite 400	WASHINGTON	District of Columbia	20005	Select
 Health Plan, Inc.	3663 Woodward Ave., Suite 120	Orchestra Place	Detroit	Michigan	48201	Select

Figure 3-1: Organization Dashboard

Accreditednet Dashboard For ABC Company [Switch](#)

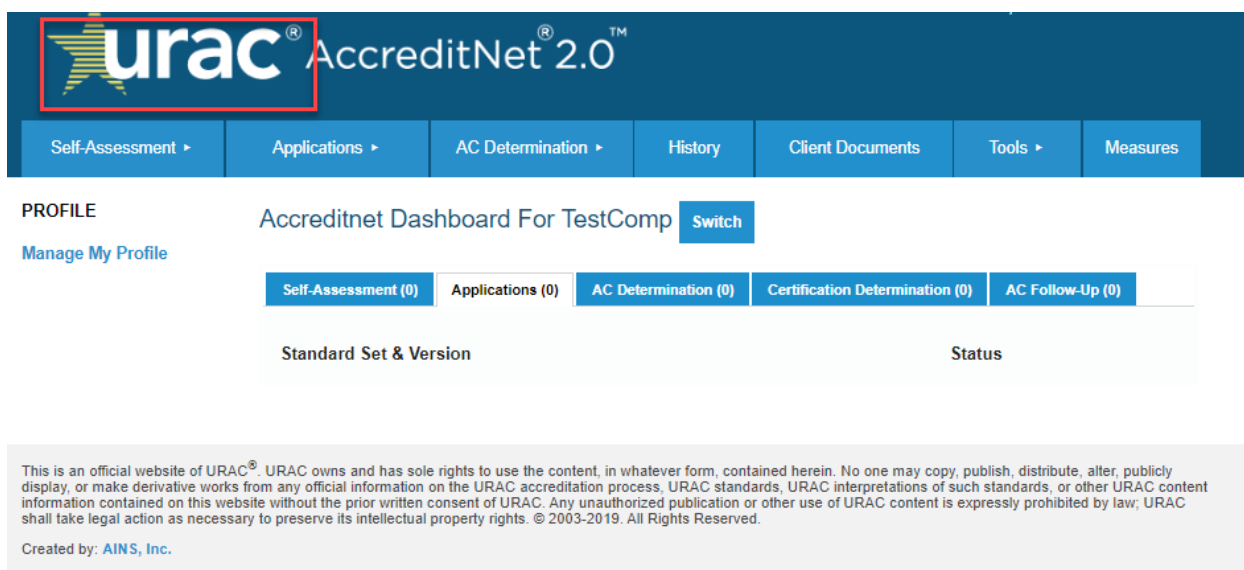
Self-Assessment (0)
Applications (1)
AC Determination (0)
Certification Determination (0)
AC Follow-Up (0)

Standard Set & Version	Status
Medicare Home Infusion Therapy Supplier, 1.1	Application Part 1: Accepted; Part 2: Pending Submission ?

- Users who only belong to one organization are taken directly to that Organization's home page/dashboard.

The URAC AccreditedNet home page has two dashboards:

1. An **Organization Dashboard** that lists all organizations the user has access to.
2. An **AccreditedNet Dashboard** with tabs displaying a list of all Self-Assessments, Applications, AC Determinations, Accreditations, Certification Determinations, and AC Follow-Ups. The total number for each category is shown in parenthesis next to the category name.
3. Click the **URAC AccreditedNet®2.0™ logo** in the upper left to return to the AccreditedNet Dashboard at any time.



urac® AccreditedNet® 2.0™

Self-Assessment ▾ Applications ▾ AC Determination ▾ History Client Documents Tools ▾ Measures

PROFILE

Manage My Profile

Accreditednet Dashboard For TestComp **Switch**

Self-Assessment (0) Applications (0) AC Determination (0) Certification Determination (0) AC Follow-Up (0)

Standard Set & Version	Status
------------------------	--------

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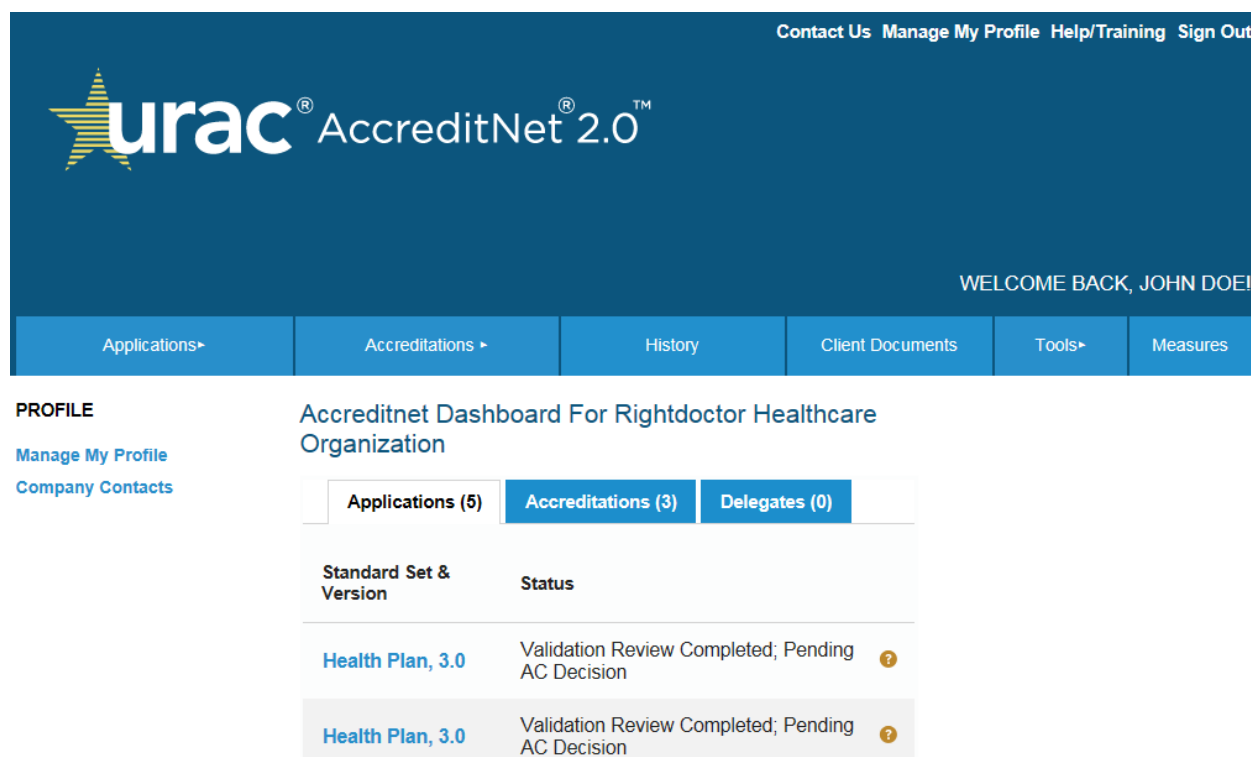
4 Applications

The *Applications* tab lists all available applications (in progress) for users listed as either a Member/Organization POC for their Organization and/or an Application POC/Application User under the Organization. These users will be indicated as: **Application POC** or **Application User**.

Note: If you are unable to access an application and believe this is in error, please contact URAC.

On the *Applications* tab, *Standard Set & Version* displays the program name and application version number. *Status* displays the current status of the application. This can be used to identify the progress on the application.

1. The example below shows the hyperlink *Health Plan, 3.0* that will redirect you to that application.



urac[®] AccreditedNet[®] 2.0[™]

Contact Us Manage My Profile Help/Training Sign Out

WELCOME BACK, JOHN DOE!

Applications ▾ Accreditations ▾ History Client Documents Tools ▾ Measures

PROFILE

Manage My Profile
Company Contacts

Accreditnet Dashboard For Rightdoctor Healthcare Organization

Applications (5) Accreditations (3) Delegates (0)

Standard Set & Version	Status
Health Plan, 3.0	Validation Review Completed; Pending AC Decision ?
Health Plan, 3.0	Validation Review Completed; Pending AC Decision ?

Figure 4-1: AccreditedNet Dashboard

2. Once in the application, *Company Name*, *Application Number*, *Application Type*, *URAC Reviewer*, *Account Manager*, and *Primary Contact* are displayed at the top of the page. Depending on the program it belongs to, the **Application Type** will be either *Accreditations* or *Certifications*.

Health Plan, 3.0

Status: Application Part 1: Pending Submission ?

Company: Rightdoctor Healthcare Organization

URAC Reviewer: Admin Admin

Account Manager: Admin Admin*

Application Number: HPL005254

Primary Contact: John Doe

Application Type: Accreditations

Figure 4-2: Application summary

3. The **Application Number** is the most important detail to reference in any communication with URAC.
4. Follow the instructions for submitting your application as shown in the example below.

Health Plan, 3.0

The accreditation application process involves several steps. You must complete each section of the application before submitting the application.

Figure 4-3: Instructions for submitting Application

5. Complete the *Action Items* for the application. Part 1 has up to 3 sections: *Company Information*, *Issuer Information* (if applicable) and *Program Information*. Click on the **Continue** button to work on section content.
6. Alternatively, the links to each **Action Item** can be found under *Part 1* from the left panel.

Action Items

Submit Application Part 1

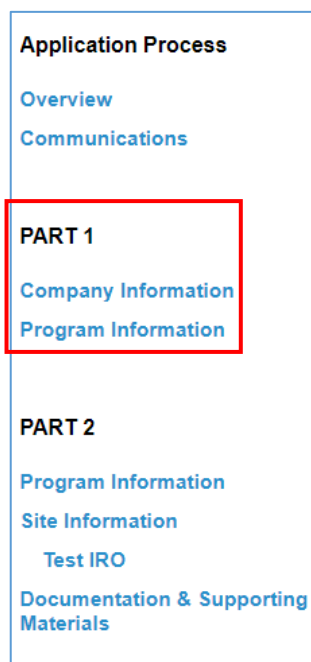
PART 1

Company Information
This section contains questions regarding the demographics of your company.

Status:
Incomplete

Continue

Figure 4-4: Action Items



4.1 Application Part 1

Note: The Medicare Advantage Organization and Contact Center programs skip Part 1 of the Application process. If you are seeking accreditation in either of these programs, please skip to the Application Part 2 section of this document. Additionally, other programs may skip Part 1 and go directly to Part 2. Please contact URAC if you have any questions about the process of your application.

Part 1 of the Application contains the following three sections that must be completed:

1. Company Information;

2. Issuer Information (if applicable); and
3. Program Information.

Action items can be completed in any order and are accessible from the left panel menu. The application status should be either:

- Application Part 1: Pending Submission; or
- Application Part 1: Reviewed, RFI to Applicant.

Details cannot be edited if the status is:

- Application Part 1: RFI Submitted by Applicant; or
- Application Part 1: Submitted, Pending Review; or
- Application Part 1: Accepted, Part 2: Pending Submission.

The *Issuer Information* section is only available for applications created under programs that have issuer information. Typically, *Issuer Information* applies to applications created for the programs: *Health Plan*, *Health Plan with Health Insurance Marketplace*, and *Dental Plan*. If your application does not belong to either of these programs, it will have only two sections. All available sections must be completed in order to submit Part 1.

The sections are displayed along with the section name, status, and **View/Edit** button. The status is either **Incomplete** or **Complete**. The status is '*Completed*' if all required questions within that section have a response. If any of these required fields are left incomplete, the status remains as **Incomplete**. When the application is in status "*Application Part 1: Pending Submission*", the **Edit** button will be enabled. If you see the **View** button, changes cannot be made, but responses can be reviewed.

1. To start with Application Part 1, click on the program name link under standard set and version from the application home screen.
2. Once opened, **Action Items** for the application will appear below.
3. Each section contains questions with different response types including: drop down menus, multi-select lists, attachments, and yes/no selections. Other questions have small or large textboxes for written answers.
4. To respond to a question using a drop down menu, **select** one of the options. Other response options may require multiple selections, percentage values, or completing a text box.

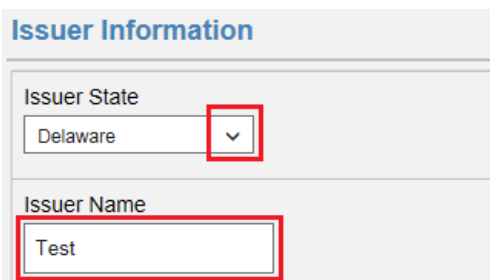


Figure 4-5: Check Box and Textbox to Enter Answers

- For questions requiring an attachment with the response, click **Select** to browse your computer for the document. Click **Open**. The document will upload and the status displayed to the left of the file name. Click on the **hyperlink** to **view** the document or click the **Remove** hyperlink to the right of the file name to remove the document.

NOTE: Please ensure the file names do not contain any special characters such as <, >, /, (,), %, @, etc. Also, the recommended file size is 20 MB or less.

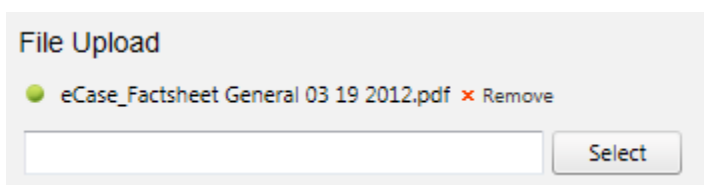
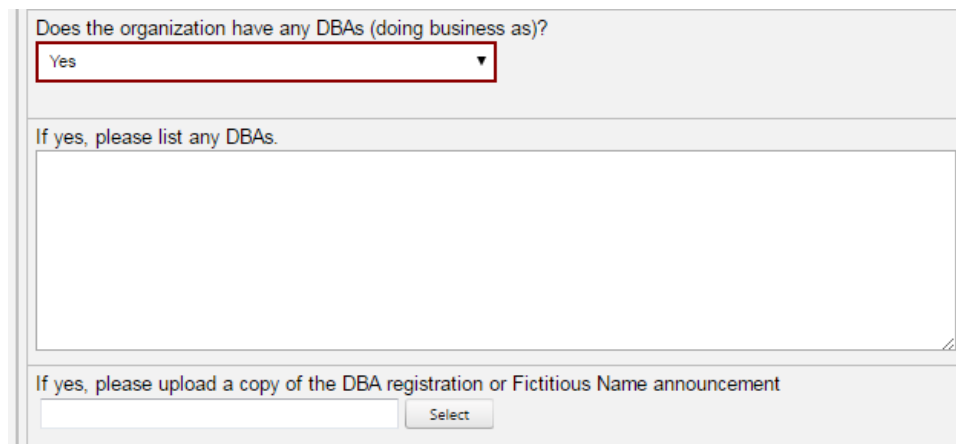


Figure 4-6: Uploading a Document

4.1.1 Company Information

- Company Information is the first section in Application Part 1. Click on **Continue** next to *Company Information* from the *Application Overview* page.
- Provide responses to all the questions. All questions require a response. If a question does not apply to you, please list "N/A".
- Certain questions will load based on answers to previous questions. In the example below, if the response to the question: "*Does the organization have any DBAs (Doing Business As)?*" is **Yes**, 2 more questions will load. These dependent questions should also be answered. If the response is **No**, the dependent questions will not load.



Does the organization have any DBAs (doing business as)?

Yes

If yes, please list any DBAs.

If yes, please upload a copy of the DBA registration or Fictitious Name announcement

Select

Figure 4-7: Dependent Questions

4. Be sure to **save** your responses frequently throughout the process. Click **Save** at the top or bottom of the page.
5. When saved successfully, the following message appears: **Responses saved successfully**.
6. Required questions left incomplete will be highlighted in red and a validation error will appear stating that the section remains **Incomplete**.

Company Information

This section contains questions regarding the demographics of your company. Please respond to all questions.

Completed responses were saved. Please provide a response to all the required fields below. This section will remain "Incomplete" until all the required fields below are completed

Figure 4-8: Incomplete Validation Error

7. When finished with a section, click **Next Section** at the bottom of the page to continue. Choose **Return to Overview** to go back to the *Application Main Page*. From there, click **Continue** under any other section from the *Action Items* menu or go to the specific section using the left panel navigation.

Off-shoring

Are any of the functions covered under the scope of the accreditation performed off-shore?

▼

Save

Return to Overview
Next Section
Continue to Submit

Figure 4-9: Company Information Section

Company Information
Status: Incomplete

This section contains questions regarding the demographics of your company.

Continue

4.1.2 Issuer Information

The Issuer Information section is available only for applications created under programs that have issuer information. Typically it applies to applications created for the programs: Health Plan, Health Plan with Health Insurance Marketplace, or Dental Plan. If your application does not belong to any of these programs, it will have only two sections (Company Information and Program Information). Multiple issuer information records can be created within the issuer information section, if available. All available sections must be completed to be able to submit Part 1.

1. Click **Continue** next to *Issuer Information* from the *Application Overview* page.
2. Click on **Add Issuer Information**.

Issuer Information

This section contains questions regarding the state(s), market(s), and product(s) offered by your organization.

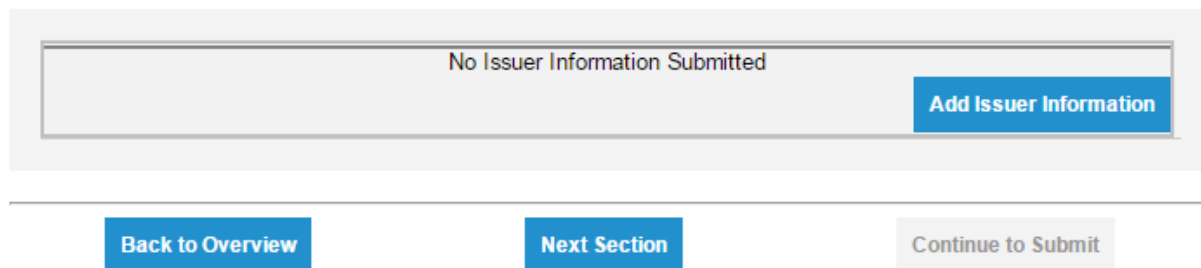


Figure 4-10: Add Issuer Information

- Multiple records can be created using this button. Each record should be completed individually.
- The user enters the details for the first issuer information record. All fields within this section are required. If a question does not apply to you, please list "N/A".

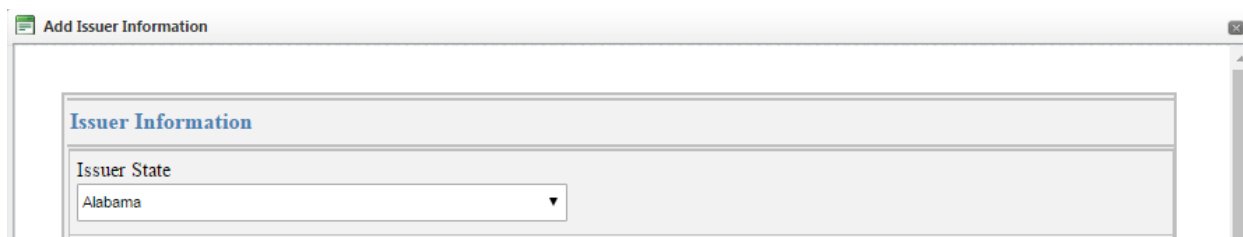


Figure 4-11: Issuer Information Details

- Issuer Information* is the second section of Application Part 1 and may or may not apply to your specific application. If applicable, additional sections will be shown within this section. As you are completing questions, click **Save** at the bottom of the page. A success message stating "**Responses saved successfully**" will confirm the saved section responses.

Note: Please save your responses frequently.

- To add another record, click **Add Issuer Information**. Combinations of values entered for *Issuer State*, *Market Type* and *Product Type* should be unique across all records. For example, if you select **Maryland** for the *State*, **Commercial** as the *Market Type* and **Point of Service** as the *Product Type*, you will not be able to add another *Issuer Information* record with the same combination.
- You can also click **Save and add another** to save the previous record.

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

2

Save Save and Add Another

Figure 4-12: Save and Add Another

- To delete a record, click the red **delete button**. In the example below, note that the *State*, *Market Type*, and *Product Type* combinations are different – allowing the entry of similar records.

Issuer Information

This section contains questions regarding the state(s), market(s), and product(s) offered by your organization.



State	Market Type	Product Type	
Maryland	Commercial	Point of service	
Maryland	Commercial	Preferred provider organization	
			Add Issuer Information

Figure 4-13: Delete a Record

- After finishing a section, click on **Next Section** to move to the next section. You can also click on **Return to Overview** to go back to your Application Main Page. From there, click **Continue** for any other section under the Actions Items menu, or go to the specific section using the left panel navigation.

4.1.3 Program Information

The second section of Application Part 1 is *Program Information*.

- Click **Continue** next to *Program Information* from the *Application Overview* page.

Program Information
Status: Incomplete

Submit information regarding the program to which you are applying for accreditation.

Continue

2. Provide responses to all the questions. All questions require a response. If a question does not apply to you, please list "N/A".
3. Based on the responses, some questions will load additional, dependent questions. The example below illustrates additional questions related to the answer **Yes**. A response of **No** would result in no additional questions.

Does the organization have any DBAs (doing business as)?

Yes ▼

If yes, please list any DBAs.

If yes, please upload a copy of the DBA registration or Fictitious Name announcement

Figure 4-14: Additional Questions

4. Click **Save** often throughout the process of completing questions.
5. A message stating "**Responses saved successfully**" will display when responses are saved correctly.
6. Any required questions left unanswered will result in a **validation error**. Entered information will be saved but the section will remain **Incomplete** until all required questions are answered.

Company Information

This section contains questions regarding the demographics of your company. Please respond to all questions.



Figure 4-15: Validation Error

- Click **Return to Overview** to go back to your *Application Main Page*. From there, click **Continue** under any other section from the *Action Items* menu or go to the specific section using the left panel navigation.

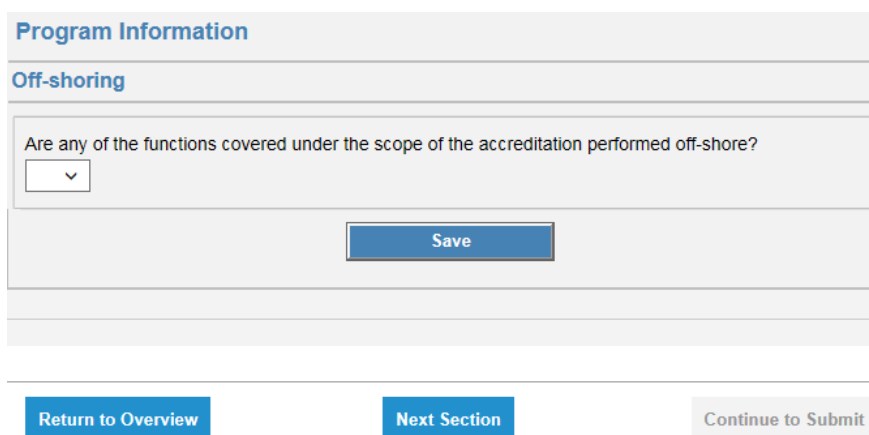


Figure 4-16: Program information Section

4.1.4 Submitting Application Part 1

When all *Sections* are marked **Completed**, click the enabled **Continue to Submit** button.

Any sections with incomplete questions will remain incomplete and the **Continue to Submit** button will remain disabled.

To check the completion of any section, go to your *Application Main Page* by selecting the **Overview** option from the left panel menu. Under *Action Items*, **Incomplete** sections will be indicated.

Before you can submit Part 1, you must attest to the eligibility criteria as presented on the Eligibility page. To **agree** to the terms and conditions, please select the checkbox "*I agree to the*

terms and conditions” and click **Submit**. A popup appears with the message “Are you sure you want to submit?” Click **OK** to submit Part 1 of the application.

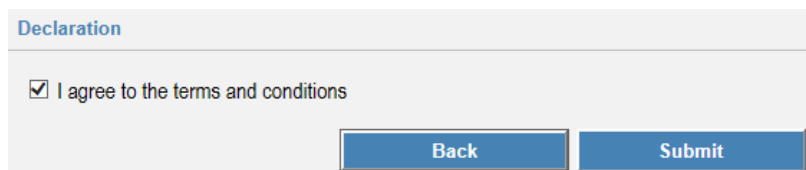
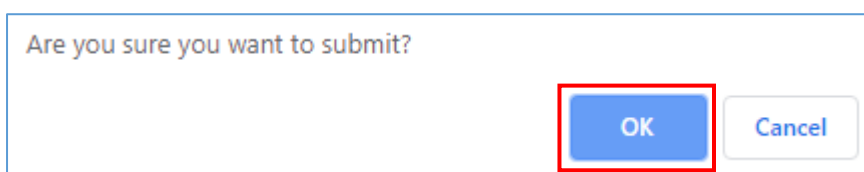


Figure 4-17: Declaration



When Part 1 is successfully submitted, the application status will appear as “*Application Part 1: Submitted, Pending Review*”.

Once submitted, URAC will review responses and reach out to the application Point of Contact (POC) for any required clarifications. Responses to Part 1 questions cannot be edited. When all responses are accepted by URAC, the second part of the application will be released.

4.1.5 Responding to RFI

Once application Part 1 is submitted, each question will be reviewed by URAC for acceptance or return. If the questions are returned, you may be asked to provide responses based on URAC’s Comments for that question. The status of the application will be “*Application Part 1: Reviewed, RFI to Applicant*”.

If the status is listed as “*Application Part 1: RFI Submitted by Applicant*” or “*Application Part 1: Submitted, Pending Review*”, the details submitted under Part 1 **cannot be edited**.

1. When an *Application Part 1* is sent to **RFI**, only the section containing returned questions will show as ‘**Incomplete**’. In the example application below, all questions under *Company Information* and *Program Information* were accepted. One or more questions under *Issuer Information* section were returned.

Action Items

Submit Rfi Response Part 1

PART 1

Company Information This section contains questions regarding the demographics of your company.	Status: Completed (Edit)
Issuer Information This section contains questions regarding the state(s), market(s), and product(s) offered by your organization.	Status: Incomplete Continue
Program Information Submit information regarding the program to which you are applying for accreditation.	Status: Completed (Edit)

Figure 4-18: Application Part 1: Incomplete Alert

- Click **Continue** within the section marked **Incomplete**.
- Rejected questions will be highlighted in a red box along with URAC comments. Review the information in the comments and provide responses accordingly.

Note: Questions accepted by the reviewer cannot be edited.

- In the example, the question 'Type of Insurance Risk' was accepted. The other question was rejected so the responses should be changed.

Type of Insurance Risk
 Insured

HIOS Issuer ID
 09weufniuo

☐ Mark As Not Applicable

URAC Comments:
 Enter the code

Figure 4-19: Rejected Questions

- Save** all changes.
- When all returned questions have a response, the section status will change to **Completed**.

Once all changes are made, the RFI can be submitted. The Application POC or Organization POC should navigate to the **Overview** page (via the left panel **Overview** button) and click **Submit RFI Response Part 1**. The application status will change to “*Application Part 1: RFI Submitted by Applicant*”.

Application Process
Overview
Communications

PART 1
Company Information
Issuer Information
Program Information

PROFILE
Manage My Profile
Company Contacts
Application Access

Program march 24th, 1
Status: Application Part 1: Reviewed, RFI to Applicant

Company:
Application Number: BPM005481
Application Type: New Application

URAC Reviewer: None Assigned
Account Manager: John Doe
Primary Contact: Test Raj

Program march 24th, 1
The accreditation application process involves several steps. You must complete each section of the application before submitting the application.

Action Items

Submit Rfi Response Part 1

PART 1

Company Information
Status: Completed (Edit)

This section contains questions regarding the demographics of your company.



Figure 4-20: Submit RFI Response

4.2 Application Part 2

Note: The Medicare Advantage Organization and Contact Center programs only have two sections in Part 2 – the Questionnaire and Documentation and Supporting Materials.

To begin the Application Part 2 process, click on an application with the Status – “*Application Part 1: Accepted; Part 2: Pending Submission*” from the home page.

Accreditnet Dashboard For ABC Company [Switch](#)

Self-Assessment (0)	Applications (2)	AC Determination (0)	Certification Determination (0)	AC Follow-Up (0)
Standard Set & Version		Status		
Medicare Home Infusion Therapy Supplier, 1.1		Application Part 1: Accepted; Part 2: Pending Submission 		
CORE, 3.0		Application Part 1: Accepted; Part 2: Pending Submission 		

Required elements of Part 2 include: *Program Information*, *Site Information*, and *Documentation and Supporting Materials*. Each section is a unique action item on the *Application Main Page*. The action items can be completed in any order and are accessible from the left panel menu.

PART 2

Program Information

Status: Incomplete

Submit information regarding the program to which you are applying for accreditation.

Continue

Site Information

Status: Incomplete

This section pertains to the individual sites that will be included within the scope of the accreditation.

Continue

Documentation & Supporting Materials

Status: Incomplete

Submit your documentation and supporting materials required to demonstrate compliance with URAC Standards

Continue

PART 1

Company Information

Program Information

PART 2

Program Information

Site Information

Documentation & Supporting
Materials

In order to work on Application Part 2, the application status must be either:

- *Application Part 1: Accepted, Part 2: Pending submission; or*
- *DTR: RFI to Applicant.*

Part 2 **cannot be edited** if the status is one of the following:

- *DTR: RFI Submitted by Applicant; or*
- *Application Part 2: Submitted, Pending Review Assignment; or*
- *Reviewer Assigned; Initial Desktop Review in Progress; or*
- *DTR: Completed; Validation Review in Progress.*

The sections are displayed along with the section name, status, and **View/Edit** button. The status is either **Incomplete/Complete**. The status is '**Completed**' only if all required questions within that section have a response. If any of these required fields are left incomplete, the status remains **Incomplete**. When the application status is "*Application Part 1: Accepted, Part 2: Pending Submission*", the **Edit** button will be enabled. If you see the **View** button, changes cannot be made but responses can be reviewed.

PART 2

Program Information Submit information regarding the program to which you are applying for accreditation.	Status: Completed Edit	✓
Site Information This section pertains to the individual sites that will be included within the scope of the accreditation.	Status: Incomplete	Continue
Documentation & Supporting Materials Submit your documentation and supporting materials required to demonstrate compliance with URAC Standards	Status: Incomplete	Continue

4.2.1 Self-Assessment

Note: The Self-Assessment in the Medicare Advantage Organization and Contact Center programs are part of the Accreditation process and are separate from the Self-Assessment described in Section 10 of this document. The Self-Assessment described in this section is mandatory for the Medicare Advantage Organization program and optional for the Contact Center program. Please reach out to URAC if you have any questions.

The Self-Assessment upload/download section for Medicare Advantage Organization and Contact Center looks similar to the below:

Self-Assessment:

[Upload](#)
[Download](#)

Please Note: Subsequent uploads will overwrite the previously uploaded file.

Figure 4-21: Self-Assessment Upload/Download Box

1. Click the **Download** button to open and save a copy of the Self-Assessment onto your computer. You may download the Self-Assessment as many times as needed.
2. When you have completed the Self-Assessment, click the **Upload** button, then click **Select**. You will be able to choose the Self-Assessment file from your computer to upload.

Self-Assessment: _____

Please Note: Subsequent uploads will overwrite the previously uploaded file.

Figure 4-22: Self-Assessment Select Feature

Click **Upload** again. You should see a message that says “File Uploaded Successfully”.

Self-Assessment: _____

Please Note: Subsequent uploads will overwrite the previously uploaded file.

File Uploaded Successfully

Note: Only the Application Point of Contact (POC) can upload the final Self-Assessment.

4.2.2 Program Information

The first section of Application Part 2 (if your application is not Medicare Advantage Organization or Contact Center) is *Program Information*. This section contains questions with differing response types. Some have a pre-defined answer such as percent, drop down menus, multi-select lists, and yes/no selections. Other questions have small or large textboxes for written answers. Some questions support attachment uploads.

1. Click **Continue** next to *Program Information* from the *Application Overview* page.
2. Provide **responses** to all questions.
3. For questions with a drop down menu, select one of the **options** to answer. Other response options may require multiple selections, percentage values, or text.

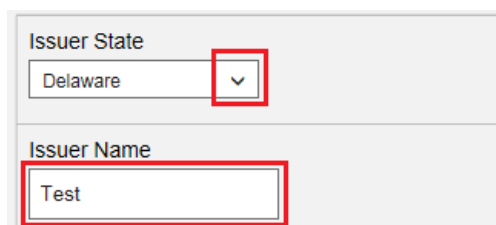


Figure 4-23: Check Box and Textbox to Enter Answers

4. Certain questions will load based on answers to previous questions. In the example, if the question “*Does the organization have any DBAs (Doing Business As)?*” has a response of ‘**Yes**’, 2 additional questions will load. **Answer** these dependent questions. No additional questions will load if the response is ‘**No**’.

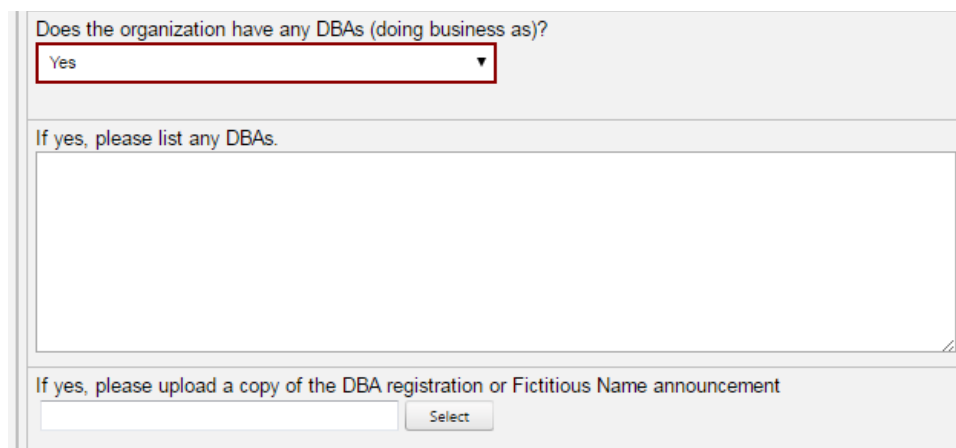


Figure 4-24: Additional Questions

5. Click **Save** frequently throughout the question completion process. The **Save** button is available at the top and bottom of the page.
6. A message stating “**Responses saved successfully**” will verify the section responses have been saved.
7. Required questions left unanswered will result in a validation error and the section will remain **Incomplete**. Those questions requiring a response will be highlighted in red.

Completed responses were saved. Please provide a response to all the required fields below. This section will remain “Incomplete” until all the required fields below are completed

Figure 4-25: Validation Error

8. Click **Return to Overview** to go back to the *Application Main Page*. From there, click **Continue** under any other section from the **Action Items** menu or go to the specific section using the left panel navigation.

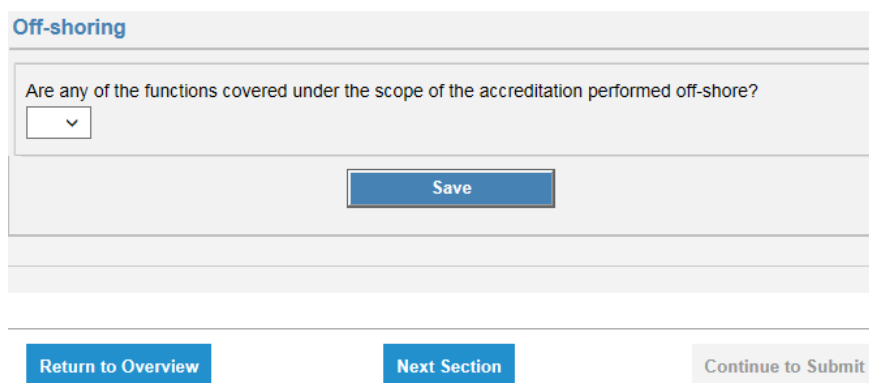


Figure 13-26: Program Information Section

4.2.3 Site Information

Site Information is the second section of Application Part 2. Questions in this section must be answered for each site added to scope. For this section to be fully completed, the “*Maximum number of sites that you can add to scope*” and “*Number of sites that are already added*” should be the same and each added site should have a “**Completed**” status.

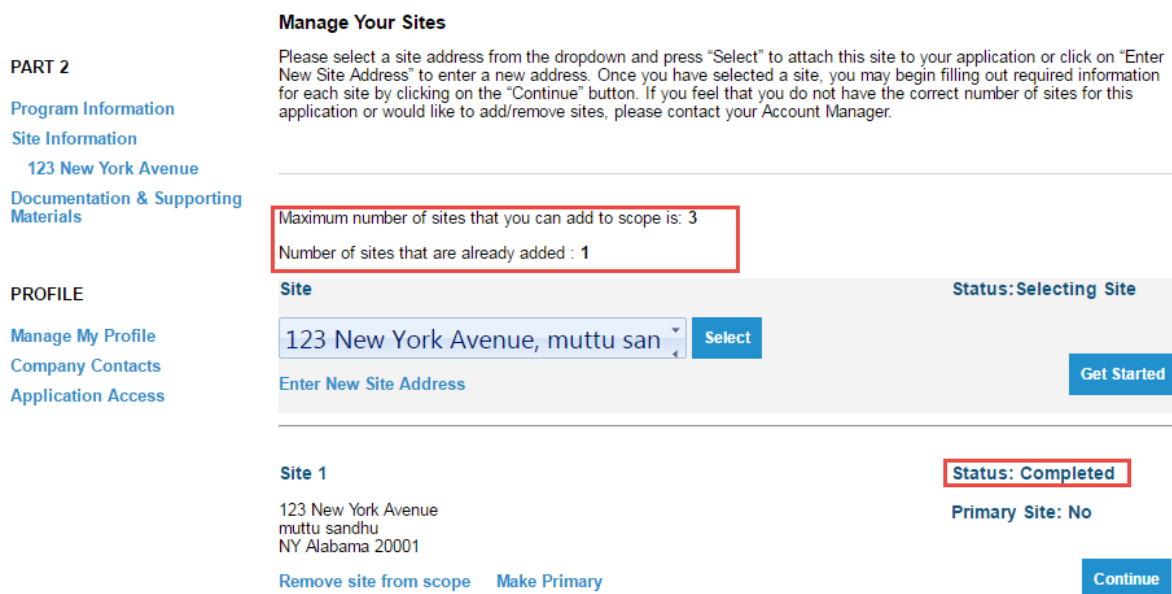
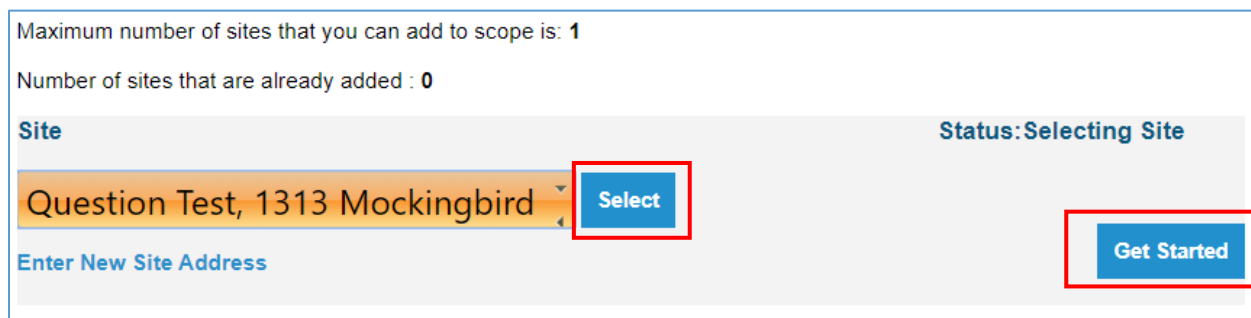


Figure 4-27: Status: Completed

1. Click **Continue** within *Site Information* from the *Application Overview* page.
2. If the site address is available from the dropdown, select it and click on **Select** or **Get Started** to start responding to the question for this site.



3. If the site is not available from the drop-down, you will be able to add a new site. Click the **Enter New Site Address** button to input an address. When clicked, the second screenshot page (Figure 4-28) appears.

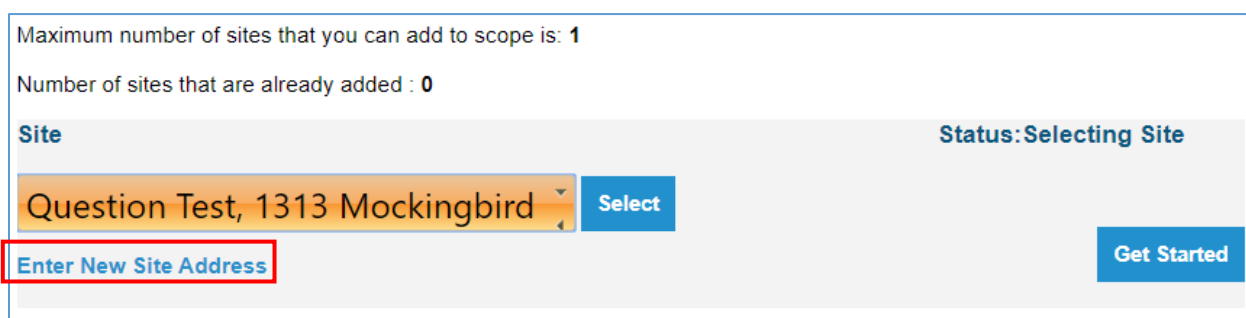
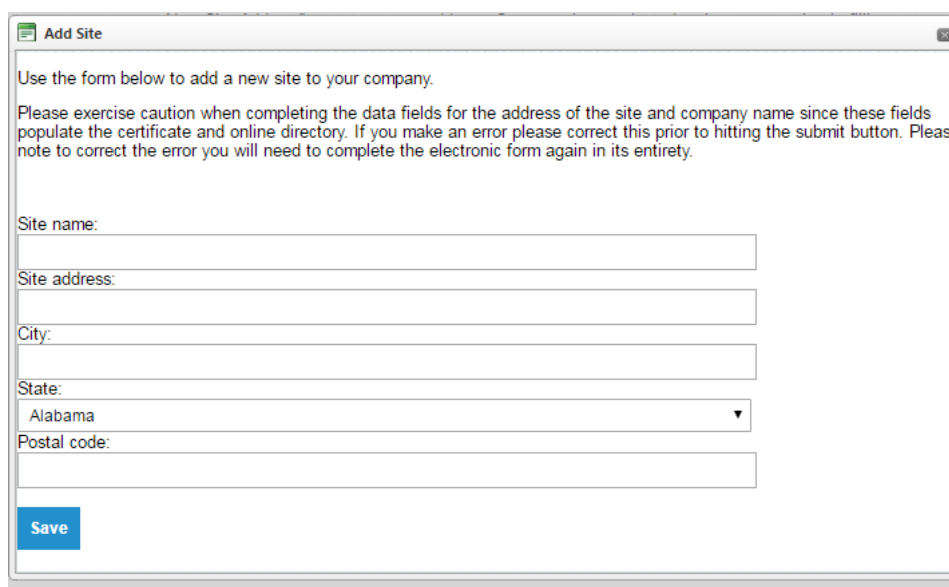



Figure 1428: Add Site

4. Enter the **details** and **Save** the information. Once saved, the site appears as shown below.

Site 2 DC 4444 Kilimanjaro Alabama 90011 Remove site from scope Make Primary	Status: Pending Primary Site: No Continue
---	---

Figure 159: Site Saved Screen

- Click **Continue** to respond to questions related to this site.
- Use the **Remove site from Scope** button to delete the site name, address, and site questions.
- If the application has an Issuer Information section in Part 1, the **Make Primary** button is visible. Use this button to make the selected site the primary site. If the application has only one site, that will be the primary site by default. If the application has more than one site, at least one site should be marked as primary for that section to be completed.
- Provide a response to the question within each site by clicking **Continue**.

Save

Site Information
 Test IRO
 12 IRO Way,
 Falls Church, Virginia 22042

Organizational Information
 Please list any specifics about this site. If none, please list "N/A"

Save

Figure 4-30: Additional Questions

- After finishing any section, click **Next Section** to work on the next section. You can also click on **Return to Overview** to go back to your *Application Main Page*. From there, click **Continue** under any other section from the *Action Items* menu, or go to the specific section using the left panel navigation.



Figure 4-31: Site Information Section

NOTE 1: Site name and address should be entered as they are expected to appear on the Accreditation/Certification Certificate upon award. Please double check the accuracy of the information provided.

NOTE 2: If the application has Issuer Information, the site marked as primary will be displayed across all certificates.

4.2.4 Documentation and Supporting Materials

Documentation & Supporting (D&S) Materials is the third section of Application Part 2. It is also accessible from the left panel menu within the Application. In D&S, organizations must submit documentation and supporting materials necessary to demonstrate compliance with URAC Standards. Evidence and citation is required for standards and elements of performance that are rated.

If the application is level-enabled, only standards for that level and less than that level will be displayed. For example, if the application has **Level Sought** as 2, standards from Level 1 will be displayed along with standards from Level 2.

1. The columns headers are: Standards, Module, Number of Evidences, and Documentation Status.

Standards	Module	No. of Evidences	Documentation Status
Focus Area: Organizational Structure - View Additional Information			
CORE 1-Organizational Structure	CORE	0	Pending
Focus Area: Policies and Procedures - View Additional Information			
CORE 3-Policy and Procedure Maintenance, Review and Approval	CORE	0	Pending
Focus Area: Network Management - View Additional Information			
N-NM 1- Scope of Services	Health Network	0	Pending
N-NM 2- Provider Network Access and Availability	Health Network	0	Pending
N-NM 3- Provider Selection Criteria	Health Network	0	Pending
N-NM 4- N/A	Health Network	0	Pending

Figure 4-32: Level Enabled Application

- Click on a *Standard* with the *Documentation Status*, **Pending**.

Standards	Module	No. of Evidences	Documentation Status
Focus Area: Business Relationships			
Written Business Agreements	Health Plan and HIM	0	Pending
Client Satisfaction	Health Plan and HIM	2	Completed
Focus Area: Organizational Structure			

Figure 4-33: Each Focus Area Along with the Status

- If this standard is not applicable, check box next to: **Mark as Non Applicable Standard**. If marked as “Not Applicable”, a reason must be provided to URAC as to why the standard element is not applicable. You will also be able to add documents while marking a standard as **Non Applicable**.

PCMHP 2 - Plan Promotion of PCMH

2 : As part of its promotion of the Patient Centered Medical Home (PCMH), the organization transparently communicates incentives to the affected parties including providers and consumers; (Numerically Weighted);

[View Additional Information](#) [FAQ](#) [Interpretations](#)

Documents Associated to the Standard

☐ Mark as Non Applicable Standard

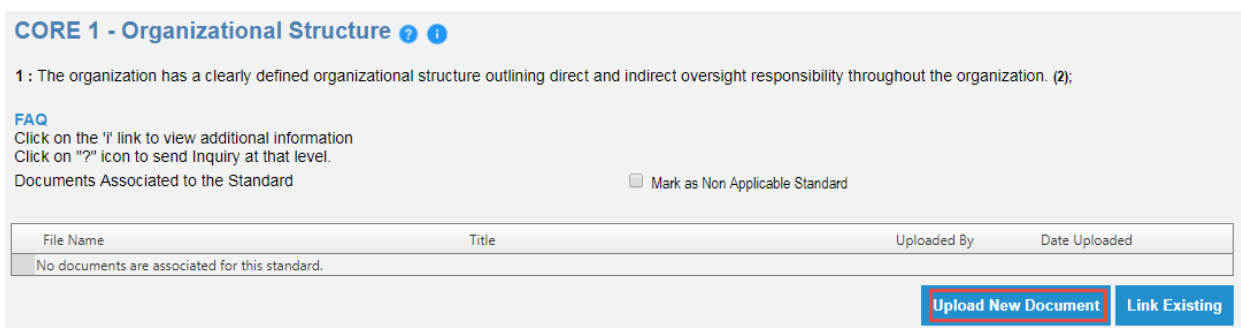
Figure 164: Marking a Standard as Not Applicable

- If the application is for a vendor certification, documents can only uploaded for the specified number of non-Core standards. Example: if the applicant identifies that he or she will meet 5 non-Core standards and URAC limits to only those standards in the

system, the applicant will only be able to upload documents for 5 non-core standards. All other non-Core standards should be marked as Not Applicable.

Note: Documents cannot be submitted for any number less than or greater than the number specified (in eCase). If this number should be increased/decreased, the applicant should get in touch with URAC.

5. If a standard is applicable, click the **Upload New Document** button to add a new document to the *Document Library*, or click **Link Existing** to reuse a document previously added to the *Document Library*.
 - a. When adding new documents, click the **Upload New Document** button and then click **Select** to browse files on your computer



CORE 1 - Organizational Structure ? i

1 : The organization has a clearly defined organizational structure outlining direct and indirect oversight responsibility throughout the organization. (2);

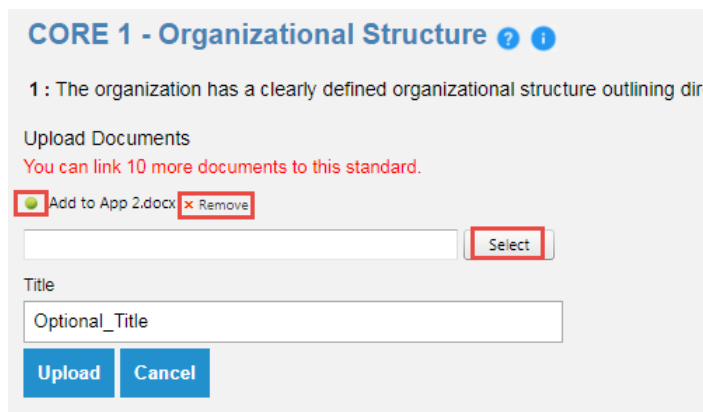
FAQ
Click on the 'i' link to view additional information
Click on "?" icon to send Inquiry at that level.
Documents Associated to the Standard

☐ Mark as Non Applicable Standard

File Name	Title	Uploaded By	Date Uploaded
No documents are associated for this standard.			

Upload New Document **Link Existing**

- b. The status of the document that was added is displayed with a green indicator. If the indicator is red, it means that the document format is not accepted by the system. Try uploading a document in a different format. If the document has to be removed, click on **Remove** next to the document. This button cannot be used after clicking on the **Upload** button. An optional title can be added for each document. **Note: Please ensure the file names do not contain any special characters such as <, >, /, (,), %, @, etc. Also, the recommended file size is 20 MB or less.**



CORE 1 - Organizational Structure ? i

1 : The organization has a clearly defined organizational structure outlining direct and indirect oversight responsibility throughout the organization. (2);

Upload Documents
You can link 10 more documents to this standard.

☒ Add to App 2.docx ☐ Remove

Select

Title

Upload **Cancel**

- c. After uploading all of the documents, click on the **Upload** button
- d. The file name and title is shown in the table of documents and linked/added to each standard along with **Uploaded By** and **Uploaded Date** information

File Name	Title	Uploaded By	Date Uploaded	
> this is a test sheet 3.xlsx		Test Snow	11/20/2019	Unlink
		Upload New Document Link Existing		

File Name	Title	Uploaded By	Date Uploaded
<div> <div>CQC 6-1 [redacted] Decision making.docx</div> <div> <input checked="" type="checkbox"/> CQC 6-1(a) The information the Practice will make available to support the clinical decision-making of patients <input checked="" type="checkbox"/> Citation In Document <div>Document name</div> </div> <div> <input type="checkbox"/> CQC 6-1(b) The strategy for engaging patients in decision making their care <input type="checkbox"/> Citation In Document <div>Linking/unlinking documents to standards/ EPs</div> </div> </div>		Amand [redacted]	07/08/2016
> CQC 6-1 b Choosing or Switching Providers.docx		Amand [redacted]	07/08/2016

- e. When uploading documents, documents with the same file name as an already existing file cannot be uploaded to the documents library. If the system displays an error message, click on **Cancel** and then click on the **Link Existing** button. This page displays a list of all documents that were ever uploaded for this Organization. The document can be located by using the search filters. As a workaround, the document name can also be changed and re-uploaded.

Upload Documents

You can link 10 more documents to this standard.

The following files are already existing, Please use Link Existing.

File Name	Uploaded By
Add to App 2.docx	Naseem Kasam

Title

Figure 4-35: Maximum of 10 Documents

- f. **A maximum of ten documents can be added or linked per standard for each round.** Either by using **Upload New Document** or **Link Existing**, you can add up to 10 documents for each standard.
- g. If you clicked **Link Existing**, you will be taken to the documents library page where you can access all documents for that Organization. Select up to 10 documents and click on **Link**.

Search

File Name:

Uploaded By:

Status:

Date Uploaded: From To

Link More Documents

You can link 9 more documents to this standard.

Select up to 10 docs by using the check box next to each document name and then click on **Link**

Specify one or more filters and hit **Search** for finding specific documents

File Name	Title	Uploaded By	Date Uploaded
<input type="checkbox"/> 3Core_04_Cover_234.doc	Core 04 Cover.doc	Mig_User Mig_User	11/20/2015
<input type="checkbox"/> 2Core_05_Cover_234.doc	Core 05 Cover.doc	Mig_User Mig_User	11/20/2015
<input type="checkbox"/> 3Core_03_Cover_234.doc	Core 03 Cover.doc	Mig_User Mig_User	11/20/2015

Figure 4-36: Link Existing

- h. A document can be added/uploaded but cannot be saved without associating it to at least one element (citation). After selecting the list of documents to add, select the **Standard/Element of Performance** to which it is linked.

Add Citations

Click on the **?** link to view additional information
Click on **Expand** and Inquiry at that level.
Document to the Standard

☐ Mark as Non Applicable Standard

File Name	Title	Uploaded By	Date Uploaded	
Demo Preparation files.docx	Document for evidence	Test Raj	06/05/2017	Unlink
<input checked="" type="checkbox"/> N-NM 1-(a) The types of health care services offered by the provider network.	<input type="checkbox"/> Citation In Document			
<input type="checkbox"/> N-NM 1-(b) The geographic area served by the provider network.	<input type="checkbox"/> Citation In Document			

Check page number 3

Select the Std/EP for which this doc is being uploaded

Check either the Citation in document check box or

Unlink to remove the link between this doc and the standard

Read the text below and sign it

Enable the check box if all docs and citations have been added. Then click Save. If it is incomplete, just click on Save

Initials

By entering your initials in the text box above, you attest that this evidence submission contains no protected health information.

☐ Mark as Complete **Save** **Close**

Upload New Document **Link Existing**

Figure 4-37: Element Association

- i. **Each document must have at least one citation.** There are two types of citations: in-document citations and textbox comment citations. Expand the document row by clicking on the “>” icon on the far left. Mark the **Citation Included in Document** checkbox if the citation is included. Otherwise, please provide a citation in the textbox.

>	File Name	Title	Uploaded By	Date Uploaded	
>	this is a test sheet 3.xlsx		Test Snow	11/20/2019	Unlink

Upload New Document **Link Existing**

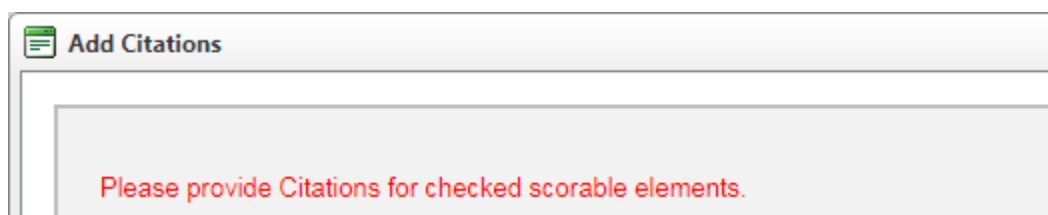
Note: Each document should be linked to at least one Standard/EP. Each association must have citation information or the system will display an error and the information cannot be saved. If either of these rules are not satisfied, the system will display one of the following errors:

Add Citations

Please associate atleast one element to the document.

PC 5 - Patient Rights and Responsibilities ?

5 : Patient rights and responsibilities are the cornerstone of a patient centered medical home, and as such a means of establishing a mutually respectful and beneficial relationship. (0);



- j. Using the **Unlink** button will remove the documentation and citation information from that page. However, the document will still be stored in the library and can be accessed later. Just the association between the document, citation, and the standard will be removed.

*Note: For each standard checked, citation information has to be provided as mentioned above either by using the checkbox or the comment textbox. If **either** a Citation In Document checkbox is checked **OR** the comments are provided in the textbox comments citation, the standards checkbox would get selected automatically.*

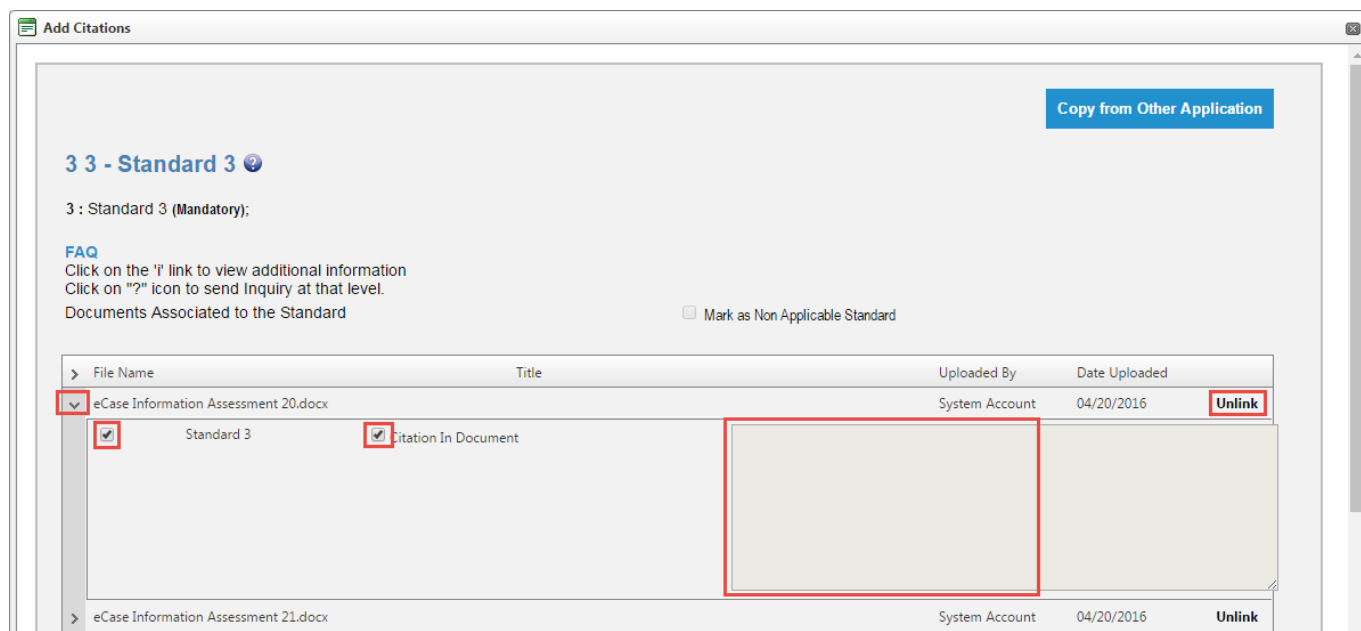


Figure 1738: Linking Documents and Saving Evidence Information

6. Add your **initials** to the textbox to indicate there is no Personal Health Information (PHI) data contained within the attachment.

File Name	Title	Uploaded By	Date Uploaded
> this is a test sheet 3.xlsx		Test Snow	11/20/2019

Unlink

Upload New Document Link Existing

Initials

By entering your initials in the text box above, you attest that this evidence submission contains no protected health information.

☐ Mark as Complete Save Close

- Use the 'i' icon to access any additional information or description available on this Standard.
- When you are done adding documents and citations to a standard, select the **Mark as Complete** checkbox to mark this standard as complete with evidence information.

File Name	Title	Uploaded By	Date Uploaded
> this is a test sheet 3.xlsx		Test Snow	11/20/2019

Unlink

Upload New Document Link Existing

Initials

By entering your initials in the text box above, you attest that this evidence submission contains no protected health information.

☐ Mark as Complete Save Close

- Select the **Save** button at the bottom of the page to save and update your entries.
- If documents/citation information has to be edited for a completed Standard, open that standard. If the Unlink button is clicked the system will display the following error:

Add Citations

This standard is marked as completed, you cannot Unlink the documents. Please uncheck 'Mark as Completed', save the standard. Then reopen the standard and try to unlink.

PC 5 - Patient Rights and Responsibilities ?

5 : Patient rights and responsibilities are the cornerstone of a patient centered medical home, and as such need to be communicated as soon as possible to the patient as a means of establishing a mutually respectful and beneficial relationship. (0);

- Follow the instructions in the error message to proceed to unlink/edit the documentation/citation.
- Click on **Close** to return to the standard page without saving the documentation and citation.

Note: You will be able to view the addition information for a Focus area by going to the standards view and clicking on View Additional Information.

Standards	Module	No. of Evidences
<div> <div>Focus Area: Business process management</div> <div>View Additional Information</div> </div>		
Core 1-Organizational Structure	FA with 5 standards	1
Core 2-Organization Documents	FA with 5 standards	0
Core 3-Policy and Procedure Maintenance, Review and Approval	FA with 5 standards	0
Core 4-Inter-Departmental Coordination	FA with 5 standards	0
Non core 5-Information Management	FA with 5 standards	0
<div> <div>Focus Area: FA for citation and show or hide 1 - View Additional Information</div> <div>1 1-STD1</div> </div>	Non Core	0

Figure 4-39: View Additional Information

A dialog box will open with information about the Focus Area. Text related to Rationale, Scope and Bright Ideas will appear.

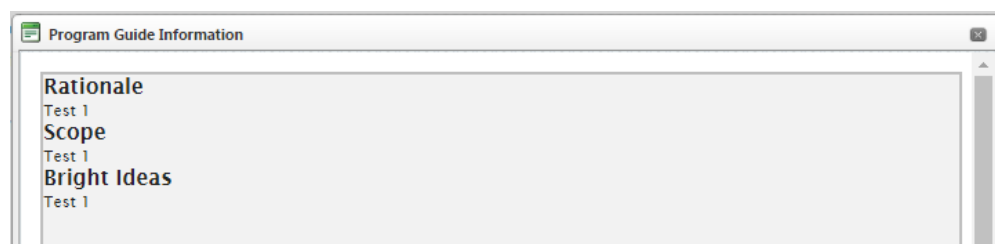


Figure 4-40: Focus Area Information

13. **Repeat** this process for all standards. There should be no standard with the documentation status as **Pending**.
14. When all standards are either **completed** or **marked as N/A**, the status of the Documentation and Supporting Materials section changes to **Completed**.

Note: Once the status of Documentation and Supporting Materials section changes to Completed and once Part 2 or the Part 2 RFI is submitted, the documents and citations will not be editable. The documents cannot be unlinked either. In the next round (subsequent RFI), completed standards cannot be edited. Documents and citation information completed in the previous round cannot be edited either. Only standards that have a status of 'Additional Info Requested' will be available for editing and only new documents and new citation information can be added for those standards.

4.2.4.1 Copy feature

Documents and citations can be copied over from one application folder to the other. This feature is useful for copying information from one folder to another without having to redo the

same work. The folder where the copy feature is used (or where it is copied to) is the destination folder, and the folder from where the evidence is copied from is the source folder. The copy feature will work only if all the below conditions are met:

1. The source folder and the destination folder should have at least one matching Standard (both by Standard name and by Standard Version).
2. The source folder and the destination folder should be part of the same Organization or part of 2 different Organization folders that are linked through an Enterprise folder.
3. The Copy feature should be enabled from the destination application. This must be done by URAC in eCase.

Note: The rules and eligibility to qualify for use of the copy feature can be verified with URAC.

4.2.4.1.1 Copy Evidence for all matching Standards

Once an application is eligible for using the Copy feature, you can see a **Copy Evidence** button from the Application Overview page

1. Navigate to the respective application and click on Overview from the left pane

<p>Application Process</p> <p>Overview</p> <p>Communications</p> <p>PART 1</p> <p>Company Information</p> <p>Program Information</p> <p>PART 2</p> <p>Program Information</p> <p>Site Information</p> <p>Documentation & Supporting Materials</p>	<p>Disease Management, 4.1</p> <p>Status: Application Part 1: Accepted; Part 2</p> <p>Company: ABC Company</p> <p>Application Number: DMT006192</p> <p>Application Type: New Application</p> <hr/> <p>Disease Management, 4.1</p> <p>The accreditation application process involves several steps. Yo submitting the application.</p> <hr/>
---	---

2. Click on **Copy Evidence** in Part 2

PART 2

Copy Evidence

Program Information

Status: Incomplete

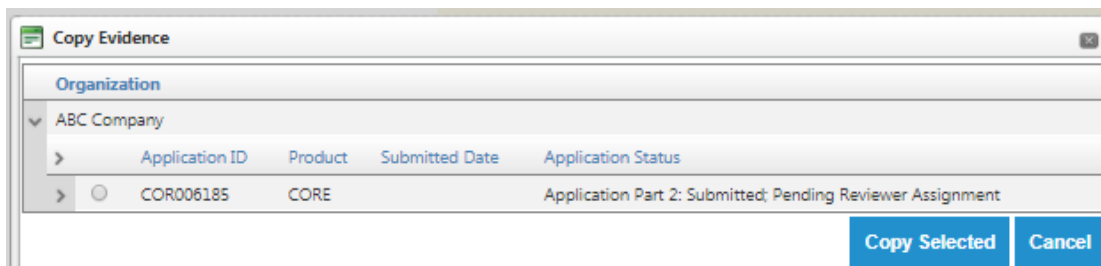
Submit information regarding the program to which you are applying for accreditation.

Continue

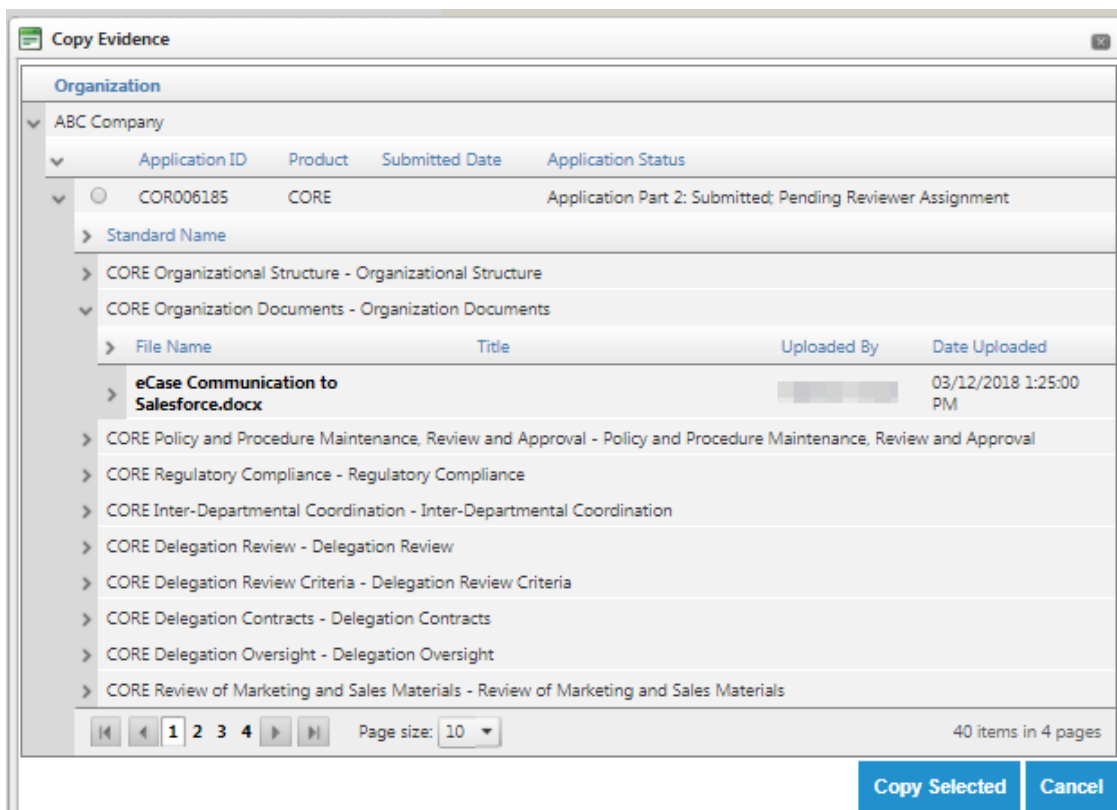
Site Information

Status: Incomplete

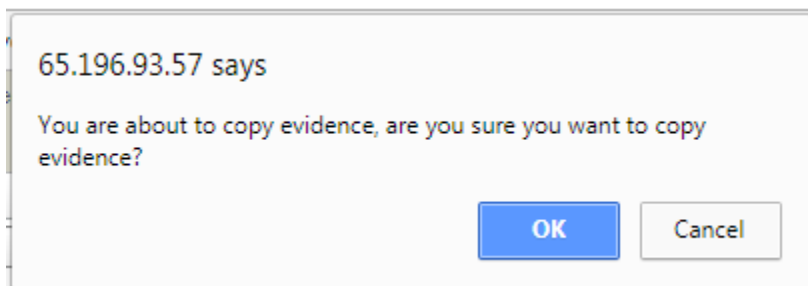
- The system displays a list of all eligible source applications



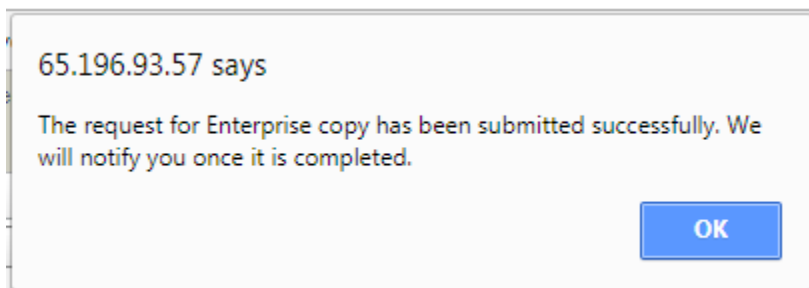
- Use the expand icon to view the list of standards and documents



5. Select the folder and click on **Copy Selected**
6. You will be prompted with a confirmation message. Click Ok if you would like to proceed.



7. A success message is displayed.



8. You will be receiving a confirmation after the copy is done to your email address on file. Please give it 15 to 30 minutes.

Notes:

- *The copy evidence feature replaces all existing documents in the destination folder. If documents and citation have already been submitted for a few standards, attempt the copy feature standard by standard (explained in next section).*
- *Please be aware that the folder from which you clicked on Copy Evidence is the destination and the folder that you selected using the radio button is the source folder.*

4.2.4.1.2 Copy evidence standard by standard

Once an application is eligible for use of the Copy feature, you can see a **Copy from Other Applications** button from within a standard.

1. Navigate to the respective application and click on Documents and Supporting Materials section from the left pane.
2. Click on a standard to open it.

Application Process

Overview

Communications

PART 1

Company Information

Program Information

Disease Management, 4.1

Status: Application Part 1: Accepted; Part 2: Pending Submission ?

Company: [REDACTED]

Application Number: DMT006192

Application Type: New Application

URAC Reviewer: M [REDACTED]

Account Manager: [REDACTED]

Primary Contact: M [REDACTED]

PART 2

Program Information

Site Information

Documentation & Supporting Materials

Documentation & Supporting Materials

Submit your documentation and supporting materials required to demonstrate compliance with URAC Standards.

PROFILE

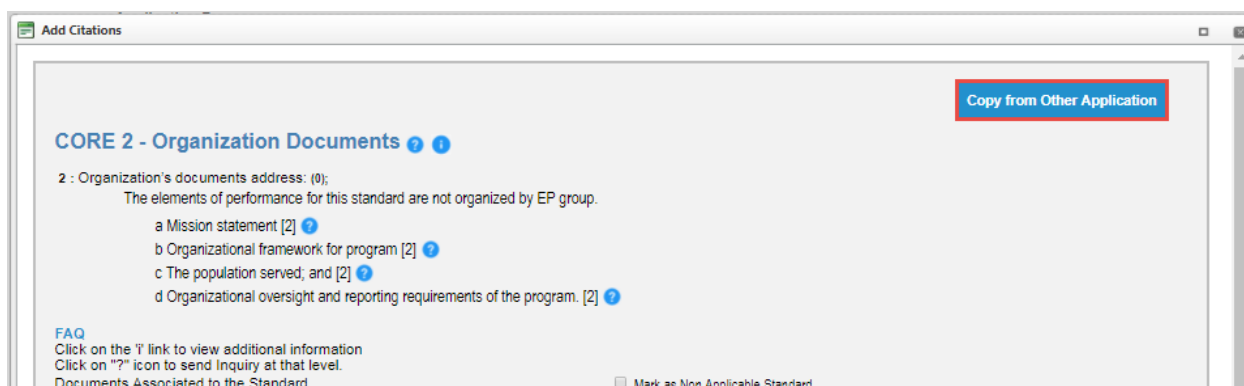
Manage My Profile

Company Contacts

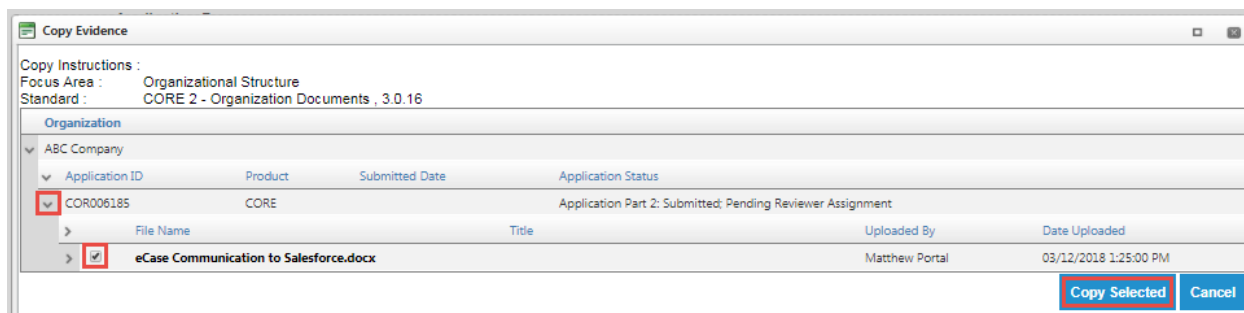
Application Access

Standards	Module	No. of Evidences	Documentation Status
Focus Area: Organizational Structure - View Additional Information			
CORE 1-Organizational Structure	CORE	2	Pending
CORE 2-Organization Documents	CORE	1	Pending
Focus Area: Policies and Procedures - View Additional Information			
CORE 3-Policy and Procedure Maintenance, Review and Approval	CORE	2	Completed
Focus Area: Regulatory Compliance - View Additional Information			
CORE 4-Regulatory Compliance	CORE	1	Pending

- If that application folder and the opened standard are both eligible for the copy feature, you will see a **Copy from Other applications** button.



- Click on that button and you will see a list of eligible source Organization folders and source Application folders.



5. Use the expand icon to view the list of documents. Select the documents that you want to copy over and then click **Copy Selected**.



6. A success message is displayed after the documents are copied over

4.2.4.2 Submitting Interpretation Inquiries in Part 2 Evidence

When information provided in the *Add Citations* dialog box is unclear, an **Interpretation Inquiry** can be submitted.

7. Navigate to the documentation and supporting materials section within the application and open the standard for which you have a question.
8. Click on the **question mark icon** to the right of the Standard name or an element name.

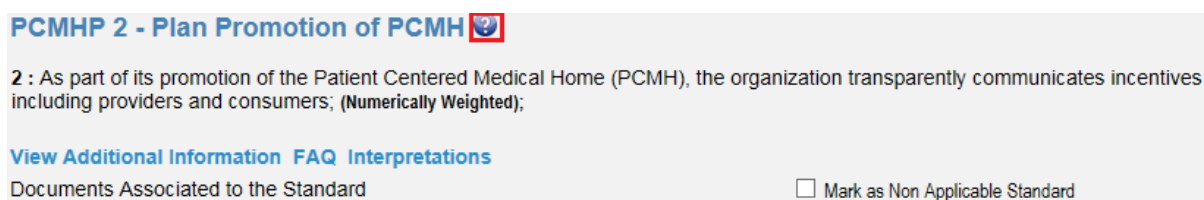


Figure 18: Interpretation Question Submission

9. From this page you can **Add New Inquiry** or click **Back**.

[Add New Inquiry](#)[Back](#)

10. Click **Add New Inquiry**. You will be taken to a new page where you can enter all the information and **Submit**.

4.2.5 Submitting Application Part 2

Once you complete all of the required information, each *Action Item* will be marked **Completed** and the **Submit Application** button will be enabled on the *Application Overview Page*. The Application Point of Contact (POC) or Organizational Point of Contact (POC) can now submit the application.

*Note: Any section that contains questions with incomplete responses will remain incomplete and the **Continue to Submit** button will remain disabled.*

To check the completion of any section, go to your *Application Main Page* by selecting the **Overview** option from the left panel menu. Under *Action Items*, **Incomplete** sections will be indicated.

Before you can successfully submit Part 2, you must **re-attest** to the eligibility criteria as presented on the *Eligibility* page. To agree to the terms and conditions:

1. Select the checkbox **"I agree to the terms and conditions"** and click **Submit**.
2. A popup message will ask: **"Are you sure you want to submit?"** Click **OK** to submit or **Cancel**.

Once Part 2 is successfully submitted, the status of the application will show as **"Application Part 2: Submitted, Pending Review"**. A submitted Application Part 2 cannot be edited. A reviewer from URAC will review the information and either send an **RFI** (seeking additional information) or send it for **Onsite Review**.

4.2.6 Responding to an RFI in Part 2

Once Part 2 is successfully submitted, the status of the application becomes **"Application Part 2: Submitted, Pending Review"**. A submitted Application Part 2 cannot be edited. A reviewer from URAC will review the information submitted as part of this application and will either send an RFI (seeking additional information) or send it for Onsite Review. If the reviewer decides to send an RFI, they will assign it back to you (applicant).

The application can be accessed from the Portal and edited to provide the necessary information. The Application has a status – **"DTR: RFI to Applicant"**. RFIs can be issued by URAC throughout the application process.

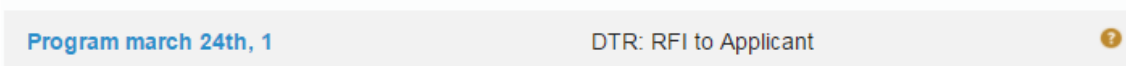


Figure 19: Application with RFI Status

When the Application is opened, the action item displays the particular section requiring additional information. These sections are indicated as **Status: Incomplete**.

1. Only the section containing returned questions will be displayed as 'Incomplete' during an RFI. In the example below, all questions under *Program Information* were accepted – indicated by **Status: Completed**. The *Site Information* and *Documentation & Supporting Materials* sections were **Incomplete**.

PART 2

Program Information Submit information regarding the program to which you are applying for accreditation.	Status: Completed (Edit)	✓
Site Information This section pertains to the individual sites that will be included within the scope of the accreditation.	Status: Incomplete	<div>Continue</div>
Documentation & Supporting Materials Submit your documentation and supporting materials required to demonstrate compliance with URAC Standards	Status: Incomplete	<div>Continue</div>

Figure 20: Incomplete Supporting Materials

2. Click **Continue** next to the Site Information section to view the rejected questions. These questions are highlighted in a red box along with URAC comments. Review the information in the comments and respond accordingly.

Note: Answers to questions that have been accepted cannot be edited.

- Example: the question 'Type of Insurance Risk' was accepted. But the other question was rejected and so it is highlighted in red and the response to this question should be changed.

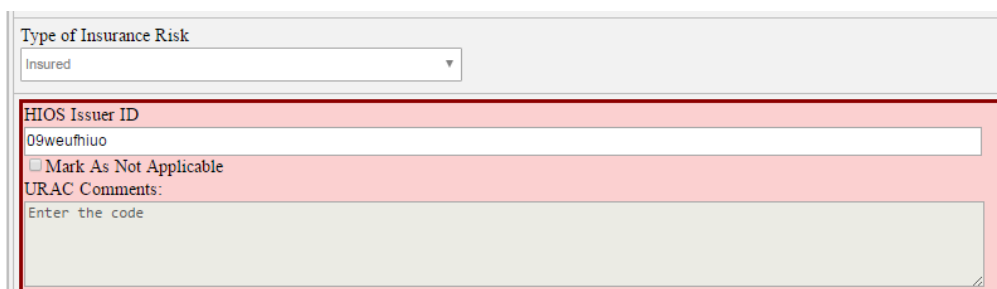


Figure 2144: Type of Insurance Risk

- After making all changes to rejected responses, **Save** it.
- If all returned questions have a response, the status of that section changes to **Completed**.
- Before proceeding to respond to URAC's comments on the *Documentation and Supporting Materials* section, go to the *Overview* page by clicking on **Overview** from the left panel.
- From this page, below *Action Items*, you will see a *Request for Information Report* section.

Action Items

Submit Rfi Response Part 2

Request for Information Report

You can view the Scores, Issues and Recommendations for Standards and EP Elements by generating a Request for Information Report.

Generate Request for Information Report

Figure 4-45: Generate Score Report

- You will be able to generate a report using the **Generate Request for Information Report** button. This button will only be available if the application status is "DTR: RFI to Applicant".
- Once clicked, a report gets downloaded to your system. Please make sure that pop-ups are enabled in your browser.

10. A report with standards/EPs scored as '**Not Met**' or '**Partially Met**' are listed. Along with the score for the Standard/EPs, the issues and recommendations as documented by the reviewer are presented in a table.

Score Summary for Standards/Elements

Standards/Elements	Score	Issues	Recommendations
Core - 1 - (M)	Not Met - 0%	Issue	Recommendation
Core - 2 - (4)	Not Met - 0%	issues	reco core 2
Core - 3 - (2)	Not Met - 0%	Issue core 3	recommendations core 3

Figure 4-46: Score Summary Standard Elements

11. In the *Evidence* section, if a standard or EP was returned for RFI, the user can **add 10 additional** documents apart from the documents already added in Part 2.

Standards	Module	No. of Evidences	Documentation Status
Focus Area: Business process management - View Additional Information			
Core 1-Organizational Structure	FA with 5 standards	1	Completed
Core 2-Organization Documents	FA with 5 standards	0	Additional Info Requested
Core 3-Policy and Procedure Maintenance, Review and Approval	FA with 5 standards	0	Additional Info Requested
Core 4-Inter-Departmental Coordination	FA with 5 standards	0	Additional Info Requested
Non core 5-Information Management	FA with 5 standards	0	Additional Info Requested

Figure 4-47: Not Met and/or Partially Met Scores

12. Any standard/EP scored as '**Not Met**' or '**Partially Met**' will have the status '**Additional Info Requested**'.
13. Click to open any standard that has a documentation status as 'Additional Info Requested'.
14. The documents/citations that were added in the previous round (before submission of part 2 or previous RFI) of the application submission **cannot be removed/edited**.

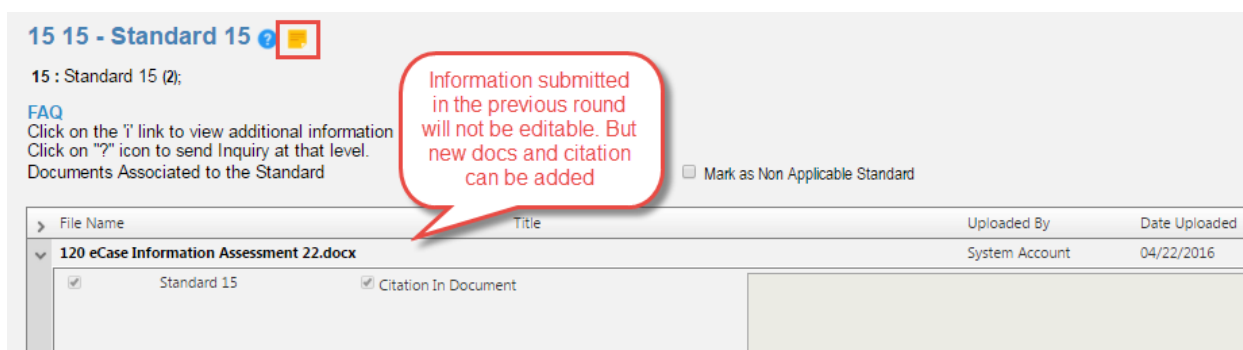


Figure 4-48: Reviewer Comments

15. Click on the **orange note icon** to see Reviewer comments. When clicked, a pop up window allows you to review the information and provide additional documentation and/or citation materials to meet the reviewer expectations.



Figure 4-49: View Issues and Recommendations

16. Once all required information is completed, the *Action Items* will be marked as **“Completed”** and the **Submit RFI** button becomes enabled on the *Application Main Page*. The Application Point of Contact (POC) or Organizational Point of Contact (POC) can now submit the application RFI.
17. If questions are incomplete in any sections, the entire section remains incomplete and the **Continue to Submit RFI** button will remain disabled.
18. To check the completion of any section, go to your *Application Main Page* by selecting the **Overview** option from the left panel menu. Under *Action Items*, **Incomplete** sections will be indicated.
19. Once all changes are made, the RFI can be submitted. Navigate to the *Overview* page and click **Submit RFI Response Part 2**.

20. Before you can completely submit the RFI, you must **attest** to the eligibility criteria as presented on the *Eligibility* page. To agree to the terms and conditions, please select the checkbox “**I agree to the terms and conditions**” and click **Submit**.
21. Once the RFI is successfully submitted, the status of the application will change to “**DTR: RFI Response Submitted by Applicant**”. Information in the application cannot be edited at this point.

5 Accreditations/Certification

Accreditations/Certifications are accessible from the last three tabs on the home page. These tabs have a list of all applications that are accredited (Full, Provisional, Conditional, Corrective Action, Established, Qualified, and Certified) AND today’s date should be within the date range of accreditation start date and end (or expiration) date.

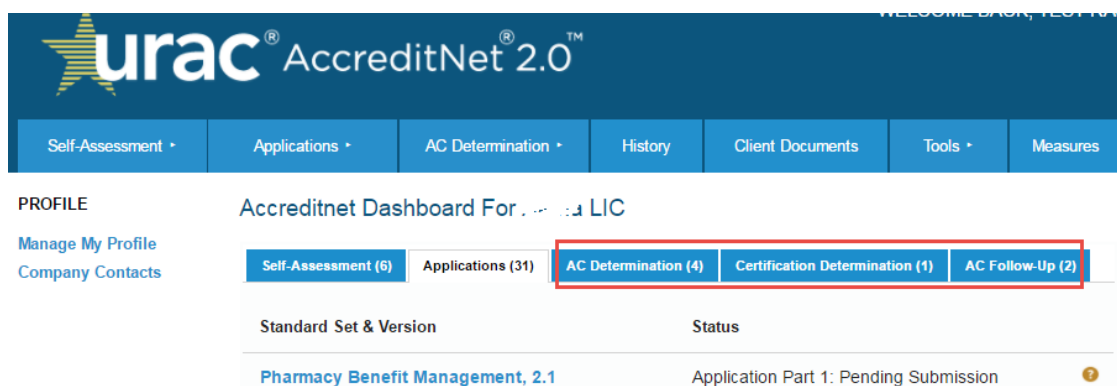


Figure 22-1: Accreditation/Certification

The tabs are titled *AC Determination*, *Certification Determination*, and *AC Follow Up*. The number of applications in each tab is displayed in parentheses.

When an application receives a committee decision, it will be displayed on the tab that corresponds to the accreditation decision. The following table lists the *Accreditation Status* and its corresponding tab:

Table 5-1: Accreditation Status

Accreditation Status	Applicant Portal Publishing tab		
	AC Determination	Certification Determination	AC Follow-Up
Full Accreditation	X		
Full Accreditation - Eligible for Third Year	X		
Full Accreditation - Not Eligible for Third Year	X		

Full Accreditation - Third Year Accepted	X		
Conditional Accreditation			X
Provisional Accreditation			X
Corrective Action			X
Denial	X	X	
Full Certification		X	
Full Certification - Eligible for Third Year		X	
Full Certification - Not Eligible for Third Year		X	
Full Certification - Third Year Accepted		X	
Conditional Certification			X
Provisional Certification			X
Qualified		X	
Established		X	
Certified		X	

If your application receives a “Corrective Action” accreditation decision, it will be displayed in the *AC Follow-Up* tab. All applications that are marked as “Vendor Certification” will be available from the *Certification Determination* tab. Applications that were terminated, in progress, or not submitted will not be displayed in any of these 3 tabs.

Accreditnet Dashboard For [REDACTED]

Self-Assessment (6)	Applications (31)	AC Determination (4)	Certification Determination (1)	AC Follow-Up (2)
Standard Set & Version		Status	Expiration	
Program April 22nd 20 mandatory standards, 1		Corrective Action	8/4/2017	
PROG Sep for Accreditation, 1		Corrective Action	11/30/2018	

Figure 23-2: AC Follow-Up

When you access any of the tabs, the applications are displayed as a list with *Standard Set & Version*, the corresponding *Status* for the accreditation, and the *Expiration* date. Select an active accreditation to go to the accreditation summary page.

5.1 Accessing Accreditation Summary Report (ASR), Seals and Certificates

When you click on an application, you will be taken to the page from which you can download the ASR, Seals, and Certificates. The availability of any of these items for download is directly dependent on the accreditation status that the application receives. The mapping table is as follows:

Table 5-2: Mapping Table

Accreditation Status	Doc/Web Publishing			
	ASR	Certificate	Seals	Directory
Full Accreditation	X	X	X	X
Full Accreditation - Eligible for Third Year	X	X	X	X
Full Accreditation - Not Eligible for Third Year	X	X	X	X
Full Accreditation - Third Year Accepted	X	X	X	X
Conditional Accreditation	X	X	X	X
Provisional Accreditation	X	X	X	X
Corrective Action	X			
Denial	X			
Full Certification	X	X	X	X
Full Certification - Eligible for Third Year	X	X	X	X
Full Certification - Not Eligible for Third Year	X	X	X	X
Full Certification - Third Year Accepted	X	X	X	X
Conditional Certification	X	X	X	X
Provisional Certification	X	X	X	X
Qualified	X	X	X	X
Established	X	X	X	X
Certified	X	X	X	X

If the application received a “Corrective Action” or “Denial” status, you will not be able to download the Certificates or Seals.

5.1.1 Downloading the ASR

When you click on an application, you will be taken to the page from which you can download the ASR. The Application Scoring Summary Report section will provide you with a button to download the Accreditation Summary Report (ASR). Click the **Download** button to download the document to your computer.

PART 1 Company Information Program Information	Application Type: Accreditation Primary Contact: Test Raj
PART 2 Program Information Site Information 123 New York Avenue Documentation & Supporting Materials	PROG SEP FOR ACCREDITATION, 1 The certification application process involves several steps. You must complete each section of the application before submitting the application.
PROFILE Manage My Profile Company Contacts Application Access	<div data-bbox="454 567 1404 693"> Application Scoring Summary Report A summary of application scoring and the determination rendered is available for your download. <div data-bbox="1266 609 1404 693" style="border: 2px solid red; padding: 5px; display: inline-block;"> Download </div> </div> <div data-bbox="454 714 1404 884"> Notice of Change Form If you have had any changes to your accreditable environment, please submit a Notice of Change Form. <div data-bbox="1177 829 1388 871" style="border: 1px solid blue; padding: 5px; display: inline-block;"> Submit Notice of Change </div> </div>

Figure 24-3: Downloading an ASR

From this page, you will also be able to access the application and go to Part 1 or Part 2 and review the information. Though you can navigate and view the details, you might not be able to edit any responses unless you have received an RFI.

5.1.2 Generating and Downloading Certificates

The next section of the page, *Certificate of Award Information*, provides a link to generate and download certificates. Electronic versions of the certificates can be downloaded from here.

1. If your application has issuer information in Part 1, you will be able to download one certificate for each unique combination of State, Market Type and Product Type. All of these certificates will have the site address of the site that was marked as primary (from the *Site Information* section in Part 2).

Certificate of Award Information

Certificate(s) of Award are made available here for electronic download. Certificates are generated per combination of State, Market Type, and Product Type as entered into the Issuer Information section of your application. These combination certificates should be used when providing evidence of your accreditation to regulatory bodies in applying for Marketplace participation. These are only generated for the primary site location within your application.

The certificate is produced based on the exact detail entered within the application. If there are changes or if a mistake was made, URAC asks that you submit a Notice of Change form through the above link with the relevant details for edit.

Please note that, upon receiving Full Accreditation, you will also receive paper copies of your Certificate of Award by mail, if you have not already. If there are any questions, concerns about the above information, or if certificates are required for other sites included under the scope of accreditation, please contact your URAC Account Manager for assistance.

Alabama - Commercial - Consumer Operated & Oriented Plan

Alaska - Medicaid - Consumer Operated & Oriented Plan

Alberta - Medicare Advantage - Exclusive Provider Organization

Figure 25-4: Certificate of Award Information

2. If your application does not have an *Issuer Information* section from Part 1, you will be able to generate one Certificate for each site that has been added to scope from the *Site Information* section in Part 2.

Certificate of Award Information

Certificate(s) of Award are made available here for electronic download. Certificates are generated per site location included under the scope of the application. The certificate is produced based on the exact detail entered within the application. If there are changes or if a mistake was made, URAC asks that you submit a Notice of Change form through the above link with the relevant details for edit.

Please note that upon receiving Full Accreditation, you will receive also paper copies of your Certificate of Award by mail, if you have not already. If there are any questions or concerns about the above information, please contact your URAC Account Manager.

NY, Alabama - 12345

Figure 26: Download Site Certificate

3. Use the buttons within this section to download a copy of the certificate for a particular site. All certificates will have the name of the *Organization* (not the name of the *Site*), along with each individual Site address.

5.1.3 Viewing and Downloading Seals

The next section, *URAC Accreditation Seals Information*, provides a link to generate and download Seals. Electronic versions of the Seals can be downloaded from here. This section also displays instructions on how to use the Seal on your website. Below are the instructions for **Download** buttons with options to download your URAC seal for print or digital/website use.

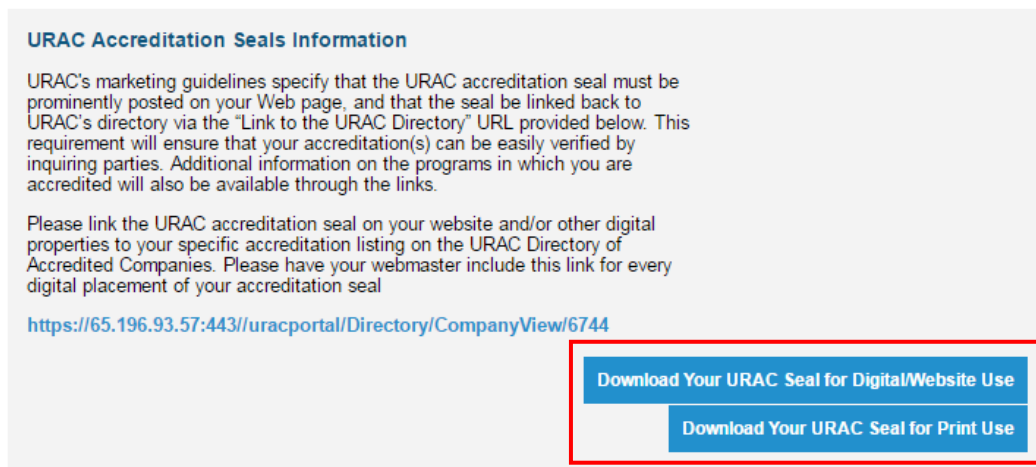


Figure 27: Seals Availability to Accredited Applicants

5.1.4 Submitting Notices of Change

There are two types of NOC's: Application change type and Organization change type. NOC's can be submitted from two locations, as explained below.

5.1.4.1 Submitting NOC from Organization Profile Page

If the change type is Organizational, only the ORG POC can submit a request by using the "Submit NOC" option on the *Organizational Profile* page. To submit a request:

1. Go to the home page and click **Company Contacts**.

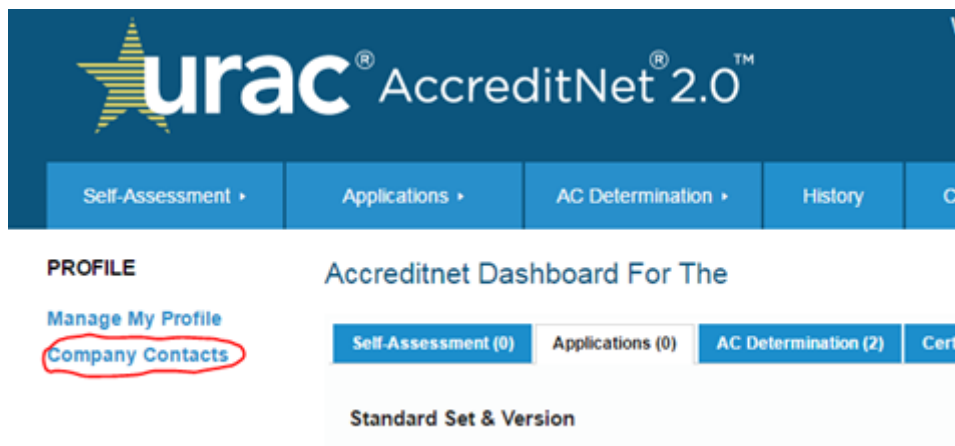


Figure 5-7: Company Contacts

2. Click **View/Edit Your Organization Profile**.

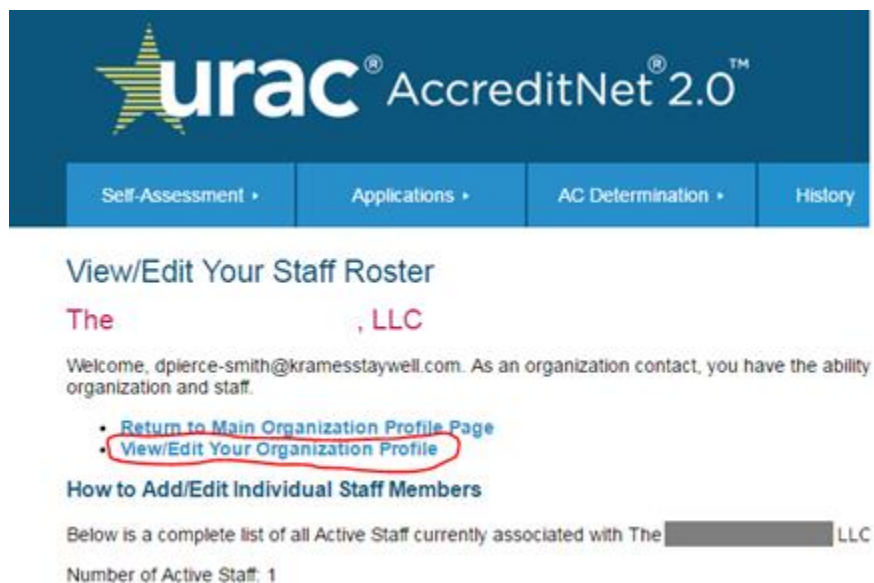


Figure 5-8: View/Edit Organization Profile

3. Click **Notice Of Change**.

View/Edit your Organization Profile

The LLC

Below is the information currently in our database about your organization:

- [Return to Main Organization Profile Page](#)

Basic Information

Organization Name: The LLC

Organization DBA:

Website: www. .com

Address [\(Edit\)](#)

The following is the Organization Address:

780 Road

[Notice Of Change](#)

[Return to Main Organization Profile Page](#)

This is an official website of ICDAS®. ICDAS® does not bear any liability for any data loss.

Figure 5-9: Notice of Change

- Click **Add Notice of Change**.

Note: You will also be able to access other NOC's that had been submitted earlier from this page.

Self-Assessment ▾	Applications ▾	Accreditations ▾	History	Client Documents	Tools ▾	Measures
						Add Notice Of Change
Change Level	Change Type	Status	Details			
No records to display.						

Figure 5-10: Add Notice of Change

- From here, the user will be able to submit both Application and Organization level changes. If an application is not selected from the **Select Applications** drop-down, the change level is *Organizational*. If an application is selected, the change level is *Application*.

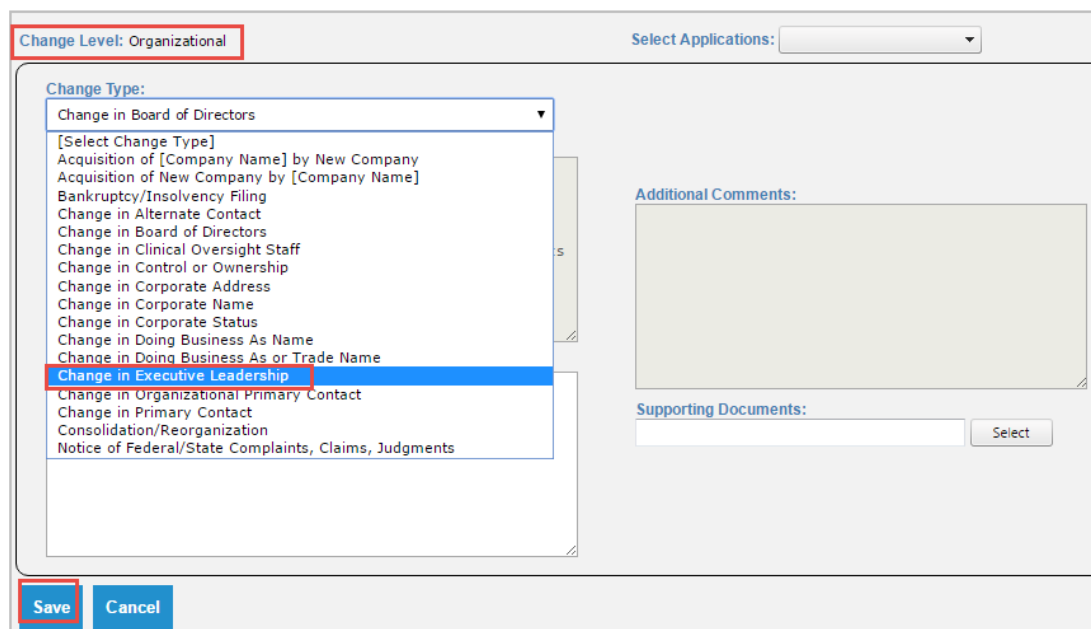


Figure 5-11: Change Level

6. The drop-down options change based on the change level.
7. Select the appropriate options from the drop-down, add additional information and supporting comments, then click **Submit**.

5.1.4.2 Submitting NOC from Accredited Applications

While submitting NOC's from within the application, the change level is always Application. The user will be able to submit the NOC application type only after receiving a decision from the committee. You can access an active (accredited) application from any of the 3 tabs: *AC Determination*, *Certification Determination*, or *AC follow up*.

The second section of this page provides a link to submit organizational change notices. Please notify URAC immediately of any of the below organizational changes.

1. To submit a notice of change form, click **Submit Notice of Change** from the *Accredited Application Main Page*.

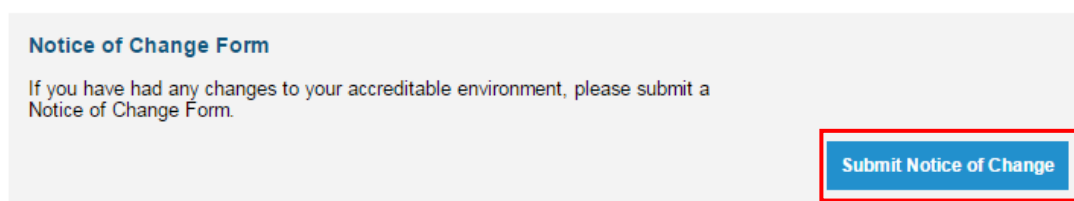


Figure 5-12: Opening Notice of Change Form

The following changes are required to be reported to the URAC Account Manager:

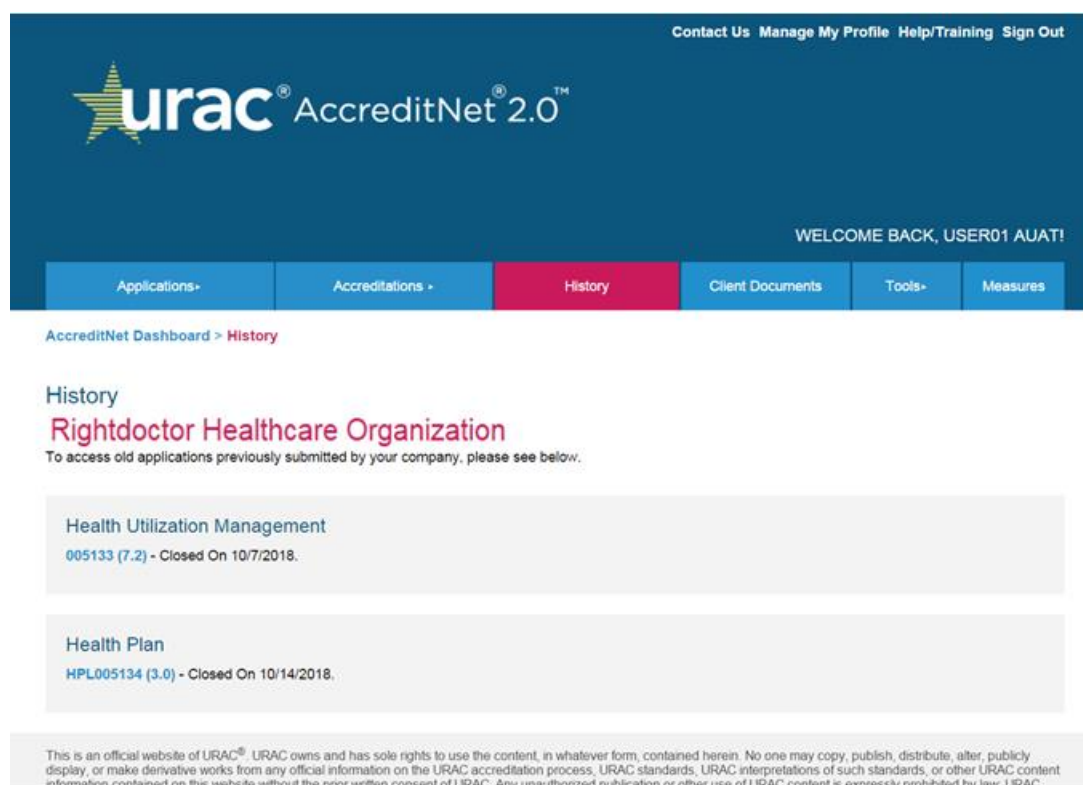
- Change in Organizational Primary Contact
 - Change in Alternate Contact
 - Change in Location(s) of Accredited Site(s)
 - Addition of Site
 - Closure of Site
 - Addition of Disease Conditions
 - Deletion of Disease Conditions
 - Change in Lines of Business Included in Scope of Accreditation
 - Change in Lines of Business Excluded in Scope of Accreditation
 - Change in Quality Oversight Program
 - Change in Scope of Delegation
 - Change in Element of Performance Applicability
 - Notice of Application Termination
 - Notice of Accreditation Withdrawal
2. Under the **Change Type** drop-down, select the change type option.
 3. **Add** the required information such as instructions, the description of change, and additional comments in the text box provided. A document can also be uploaded.
 4. When the applicant navigates inside an application and tries to submit an NOC, the options displayed in the drop-down will be limited to an Application change type NOC.
 5. Click **Save** to submit the notice of change to URAC.

6 History

Non-active applications are available under the *History* tab of the AccreditedNet®2.0™ outer dashboard menu. Non-active applications are the applications that received an Accreditation/Certification but have expired.

This tab shows a history of accreditation per program.

Selecting an application will open the application in read-only mode. Certificates and Seals are not available for these applications.



The screenshot shows the URAC AccreditedNet 2.0 dashboard. At the top, there is a navigation bar with links: Contact Us, Manage My Profile, Help/Training, and Sign Out. Below this is the URAC AccreditedNet 2.0 logo and a welcome message: "WELCOME BACK, USER01 AUAT!". A horizontal menu contains several tabs: Applications, Accreditations, History (highlighted in red), Client Documents, Tools, and Measures. Below the menu, the breadcrumb "AccreditedNet Dashboard > History" is visible. The main heading is "History" followed by "Rightdoctor Healthcare Organization". A subheading reads: "To access old applications previously submitted by your company, please see below." Below this, there are two application entries:

- Health Utilization Management**
005133 (7.2) - Closed On 10/7/2018.
- Health Plan**
HPL005134 (3.0) - Closed On 10/14/2018.

At the bottom, there is a disclaimer: "This is an official website of URAC®. URAC owns and has sole rights to use the content, in whatever form, contained herein. No one may copy, publish, distribute, alter, publicly display, or make derivative works from any official information on the URAC accreditation process, URAC standards, URAC interpretations of such standards, or other URAC content information contained on this website without the prior written consent of URAC. Any unauthorized publication or other use of URAC content is expressly prohibited by law, URAC."

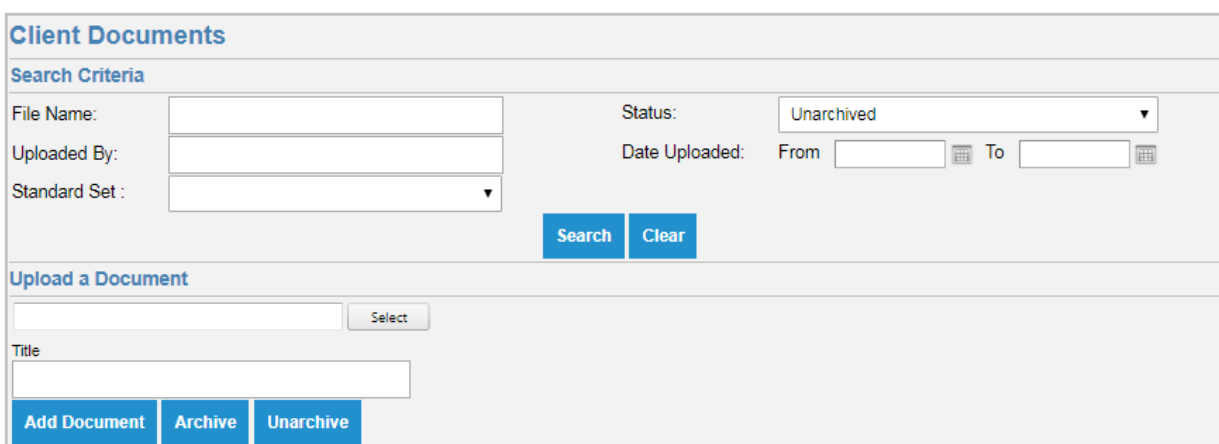
Figure 28-1: History Tab

7 Client Documents

Client Documents is the fifth tab of the AccreditedNet®2.0™ outer dashboard menu. This tab is a repository for all documents. There are options to search all existing documents and upload new documents.

The documents required for evidence in *Application Part 2: Evidence Information (Documentation & Supporting Materials)* section can be added by any user who has access to the application in the Portal.

1. For searching, specify a date range, enter a keyword, or use the filters and click **Search**.



The screenshot shows the 'Client Documents' interface. It has a header 'Client Documents' and a sub-header 'Search Criteria'. Below this, there are input fields for 'File Name:', 'Uploaded By:', and 'Standard Set:'. To the right, there is a 'Status:' dropdown menu set to 'Unarchived' and a 'Date Uploaded:' section with 'From' and 'To' date pickers. Below these fields are 'Search' and 'Clear' buttons. Underneath the search section is an 'Upload a Document' section. It contains a file selection button labeled 'Select' and a 'Title' input field. At the bottom of this section are three buttons: 'Add Document', 'Archive', and 'Unarchive'.

Figure 7-1: Client Documents Search Criteria

- You can also upload a document to store in the document library by selecting a document from your computer and uploading it using the **Add Document** button.

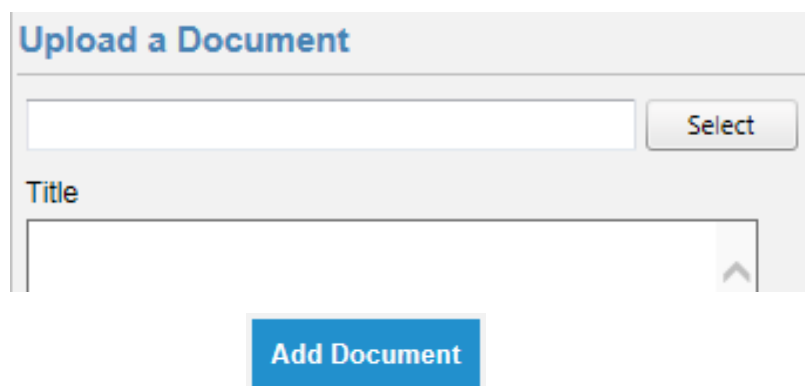


Figure 7-2: Uploading a Document to Client Documents

- The *Client Documents* tab also has a table that displays all available documents with column options *File Name*, *Title*, *Uploaded By*, *Date Uploaded*, and *Citations*.

Document Library					
Search Criteria					
Upload Date Range					
Start Date	<input type="text"/>		End Date	<input type="text"/>	
Keyword (Searches Document title)					
<input type="text"/>					
Search					
Upload a Document					
<input type="text"/>					
ADD DOCUMENT					
Documents					
	File Name	Title	Uploaded By	Date Uploaded	Act Citations
>	Text Doc1.txt	Text Doc1	Sanjeev G	08/04/2015	
>	Test.docx	Test	Sanjeev G	08/04/2015	
>	Test.txt	Test	Sanjeev G	08/04/2015	
>	c.docx	c	Sanjeev G	08/04/2015	
>	Test123.txt	Test123	Sanjeev G	08/05/2015	
>	Test123.docx	Test123	Sanjeev G	08/05/2015	

Figure 7-3: Client Documents listed in the Documents Library

AccreditNet Dashboard > Client Documents

Client Documents

LIC

The client documents contains all documents uploaded as evidence to your accreditation application(s). Use the "Search Criteria" box to search for documents by date uploaded, keyword. For more information, please review the Accreditednet Resource Manual in the "Tools" section.

Client Documents

Search Criteria

File Name:
Uploaded By:
Standard Set:

Status:
Date Uploaded: From To

Upload a Document

Title:

Documents


	File Name	Title	Uploaded By	Date Uploaded	Status	Actions
>	Demo Preparation.docx		System Account	04/18/2016	Unarchived	

Figure 29: Replace File

8 Tools

Tools is the sixth tab of the AccreditedNet®2.0™ outer dashboard menu. Under the *Tools* tab, the user has access to *Resources*, *Frequently Asked Questions (FAQs)*, *Workshops*, *Webinars*, and *Standards Interpretations*. These are all resources to help you through the application process.

Other resources are available under the “*Help/Training*” link in the upper right of the screen, to the left of the sign-out button.

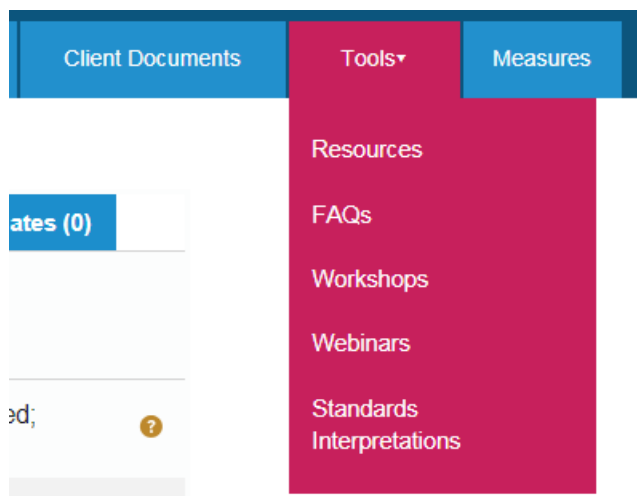
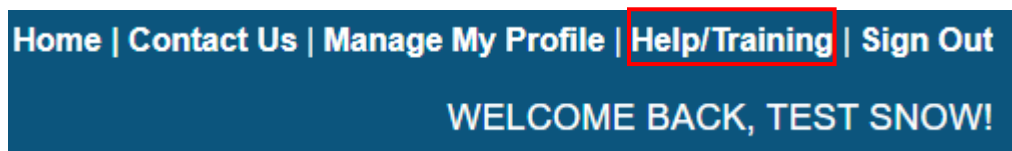


Figure 8-1: Tools Menu



9 Management Features (Point of Contact (POC) Only)

9.1 Roles

There are four roles in the AccreditedNet®2.0™ system: *Application User*, *Application Point of Contact (POC)*, *Organizational Point of Contact (POC)*, and *Enterprise Point of Contact (POC)*.

The *Application User* role has access to individual applications as designated by the *Application POC*. *Application POCs* control access to individual applications for already existing users and can submit applications.

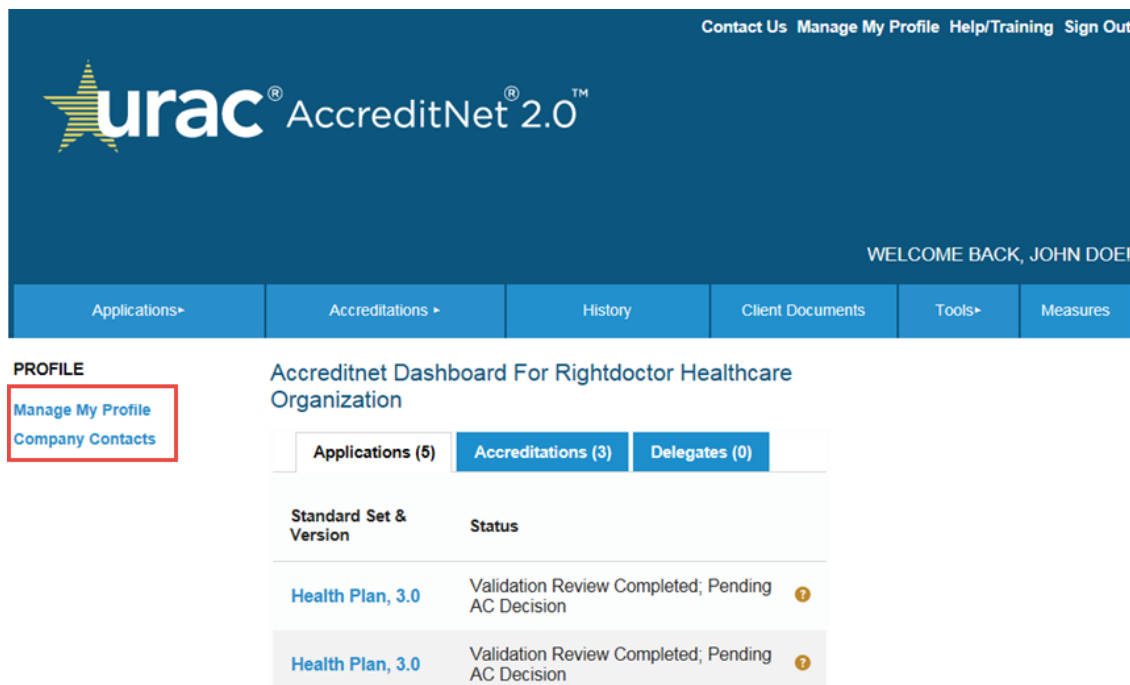
Enterprise and *Organizational POCs* can access and edit multiple applications, add new users, modify/delete users, and manage Client Documents.

Please submit a **Notice of Change (NOC)** with a change type “*Change in Organizational Primary Contact*” if any POC needs to be changed. For clarification about submitting Notices of Change, please see the **Submitting Notices of Change** sub-section of this guide.

9.2 Adding Organization Users

1. To add a new user, you must be the assigned Organization Point of Contact (POC).
Click **Company Contacts** from the home page.

Note: Company Contacts is visible only if you are an Organization POC of that Organization.



The screenshot shows the urac AccreditedNet 2.0 dashboard. At the top, there is a navigation bar with links: Contact Us, Manage My Profile, Help/Training, and Sign Out. Below this is the urac AccreditedNet 2.0 logo and a welcome message: WELCOME BACK, JOHN DOE!. A horizontal menu bar contains: Applications, Accreditations, History, Client Documents, Tools, and Measures. On the left, under the 'PROFILE' section, there are two links: 'Manage My Profile' and 'Company Contacts'. The 'Company Contacts' link is highlighted with a red box. The main content area is titled 'Accreditnet Dashboard For Rightdoctor Healthcare Organization'. It features three tabs: Applications (5), Accreditations (3), and Delegates (0). Below the tabs is a table with two columns: 'Standard Set & Version' and 'Status'.

Standard Set & Version	Status
Health Plan, 3.0	Validation Review Completed; Pending AC Decision
Health Plan, 3.0	Validation Review Completed; Pending AC Decision

Figure 9-1: Company Contacts Menu from the Home Page

2. As an Organization Point of Contact (POC), you can modify the information URAC has on record for your organization and staff. Click the **Add a New Individual** button from the *View/Edit Your Staff Roster* page to add a new user.

View/Edit Your Staff Roster

Rightdoctor Healthcare Organization

Welcome, jdoe. As an organization contact, you have the ability to modify the information URAC has on record for your organization and staff.

- [Return to Main Organization Profile Page](#)
- [View/Edit Your Organization Profile](#)

How to Add/Edit Individual Staff Members

Below is a complete list of all Active Staff currently associated with Rightdoctor Healthcare Organization in our database:

Number of Active Staff: 3

If an individual's title, job function, e-mail, or other demographic characteristic has changed, click "Edit Profile" next to his or her name.

If an individual has left your organization, click "Mark as former staff" next to his or her name.

If an individual has newly joined your organization, [Add a New Individual](#) to your roster.

If you would like to change the Primary Contact for Rightdoctor Healthcare Organization or you have other questions, please contact URAC at accreditnet@urac.org or call (202) 216-9010.

[Add a New Individual](#)

Staff Roster

Member

John Doe (Primary Contact)

[Edit Profile](#)

jdoe@urac.org

User01 Auat

[Edit Profile](#)

[Mark as former staff](#)

Figure 9-2: Add New User as Org POC

3. Enter all of the basic information to complete the new user's profile. The Primary email and Alternate email must match and the username must be unique from an already existing username in the system. After entering all the details, click **Save/Finish** to create the user. The primary email address entered will receive an email with instructions on how to set up a password for the new user's account.

Add a New Individual

Basic Information

Please enter/edit information for this individual and then click Save/Continue

Prefix:

Example: Mr., Ms., etc.

Middle Name:

Suffix:

Nickname:

For example, Jon might be a nickname for Jonathan.

Primary E-Mail: *

Alternate Email:

Login Account: Enter the username that you will use to access Accreditednet.

Username: *

Title:

Work Phone: *

- ext.

Mobile:

First Name: *

Last Name: *


Save/Finish

Cancel/Return to Index

9.3 Modifying/Deleting Organization Users

1. To modify/delete a new user, you must be the assigned Organization Point of Contact (POC). Click **Company Contacts** from the home page.

[Contact Us](#)
[Manage My Profile](#)
[Help/Training](#)
[Sign Out](#)



WELCOME BACK, SARAH PORTAL!

[Applications▾](#)
[Accreditations ▾](#)
[History](#)
[Client Documents](#)
[Tools▾](#)
[Measures](#)

PROFILE
[Manage My Profile](#)
[Company Contacts](#)

Accreditnet Dashboard For CVS

[Applications \(3\)](#)
[Accreditations \(0\)](#)
[Delegates \(0\)](#)

Standard Set & Version	Status	
Mail Service Pharmacy, 3	Validation Review Completed; Pending AC Decision	?
Health Plan, 3.0	Validation Review Completed; Pending AC Decision	?
Health Plan, 3.0	Validation Review Completed; Pending AC Decision	?

Figure 9-3: Edit Company Contacts

- All the Staff working for your Organization will be listed under the *Staff Roster* table.
- To delete, click the **Mark as Former Staff** button next to the respective staff member's name.

View/Edit Your Staff Roster

Rightdoctor Healthcare Organization

Welcome, jdoe. As an organization contact, you have the ability to modify the information URAC has on record for your organization and staff.

- [Return to Main Organization Profile Page](#)
- [View/Edit Your Organization Profile](#)

How to Add/Edit Individual Staff Members

Below is a complete list of all Active Staff currently associated with Rightdoctor Healthcare Organization in our database:

Number of Active Staff: 3

If an individual's title, job function, e-mail, or other demographic characteristic has changed, click "Edit Profile" next to his or her name.
If an individual has left your organization, click "Mark as former staff" next to his or her name.
If an individual has newly joined your organization, [Add a New Individual](#) to your roster.

If you would like to change the Primary Contact for Rightdoctor Healthcare Organization or you have other questions, please contact URAC at accreditnet@urac.org or call (202) 216-9010.

[Add a New Individual](#)

Staff Roster

Member

John Doe (Primary Contact)

[Edit Profile](#)

jdoe@urac.org

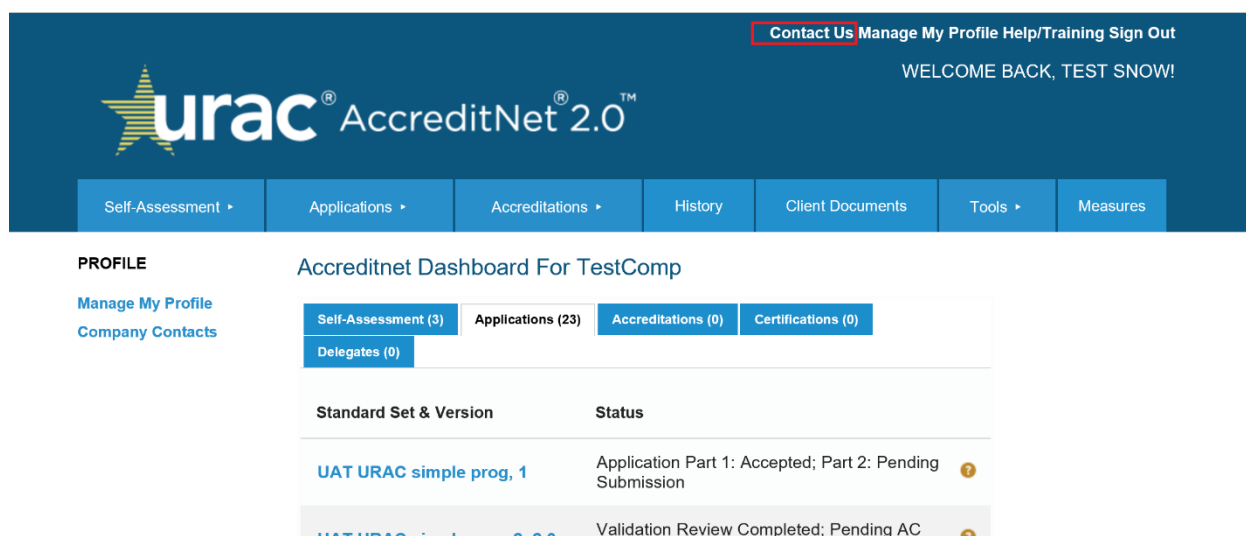
User01 Auat

[Edit Profile](#)

[Mark as former staff](#)

Figure 9-4: Edit and Remove Company Staff

To modify, click **Edit Profile** next to the respective user's name. **Contact Us** is the first link available in the upper right corner menu. When clicked, you will be directed to the *Contact Us* page to view various URAC departments that are available to help you with your needs.



The screenshot shows the URAC AccreditedNet 2.0 dashboard. In the top right corner, there is a navigation menu with links: [Contact Us](#), [Manage My Profile](#), [Help/Training](#), and [Sign Out](#). Below this, a welcome message reads "WELCOME BACK, TEST SNOW!". The main navigation bar includes links for Self-Assessment, Applications, Accreditations, History, Client Documents, Tools, and Measures. The left sidebar shows the "PROFILE" section with links for "Manage My Profile" and "Company Contacts". The main content area is titled "Accreditnet Dashboard For TestComp" and displays a table of applications. The table has columns for "Standard Set & Version" and "Status". The first row shows "UAT URAC simple prog, 1" with a status of "Application Part 1: Accepted; Part 2: Pending Submission". The second row shows "UAT URAC simple prog 2, 2.0" with a status of "Validation Review Completed; Pending AC".

Figure 9-5: Contact Us

10 Self Assessment

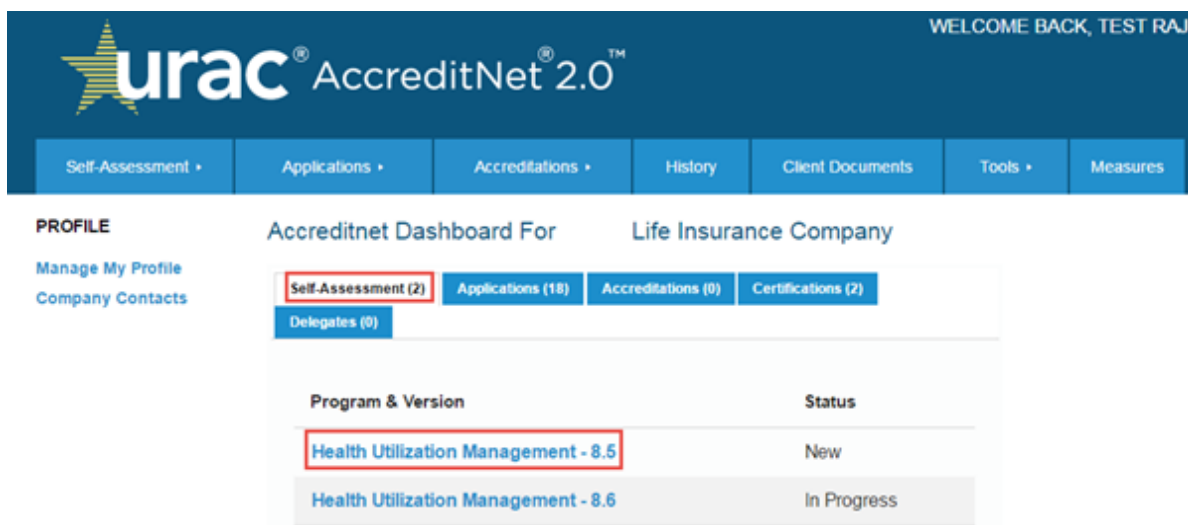
The self-assessment can be used by the applicant to understand the expectations of a program and assess their readiness for a program. This is a tool to self-evaluate and review the guide language to understand the expectations. They can mark an element as met or not met by anticipating their organization readiness without having to submit evidence. Based on their self-evaluation, a score is displayed.

Certain elements depict the actual process of submitting evidence to prove compliance and the scoring of a reviewer based on whether they perceive themselves to meet the expectations of that particular standard or not. The results also simulate the way the score will be calculated.

10.1 Self-Assessment Overview

Within the *Self-Assessment* tab, you will see a list of all self-assessment applications. The list is ordered with the column headings: *Program & Version* and *Status*.

1. In the picture below, “Health Utilization Management – 8.5” is displayed as a hyperlink. When clicked, you will be redirected to that application. Once you are in the application, the top of the page will display information such as Company Name and Program Name along with version number and Status of that application as shown below.



WELCOME BACK, TEST RAJI

urac[®] AccreditedNet[®] 2.0[™]

Self-Assessment • Applications • Accreditations • History • Client Documents • Tools • Measures

PROFILE

Manage My Profile
Company Contacts

Accreditnet Dashboard For Life Insurance Company

Self-Assessment (2) Applications (18) Accreditations (0) Certifications (2)
Delegates (0)

Program & Version	Status
Health Utilization Management - 8.5	New
Health Utilization Management - 8.6	In Progress

Figure 10-1: Self-Assessment from Dashboard

2. Immediately below this are written instructions for submitting your application.

Health Utilization Management - 8.5

Status: New

Company: . Life Insurance Company

Number: 2015-SA-00005

Health Utilization Management - 8.5

Below you will find your Self-Assessment. If you wish to include any designations (if applicable) within the assessment, please check the box in the designations section below. Click the Begin Self-Assessment button to start your assessment. Once started, you can return to this page at any time to restart the assessment. Please note that restarting will delete any previously entered information. You may fill out the assessment as many times as you wish.

Designations:

No Designation Available

Action Items



Figure 10-2: Self-Assessment Overview Page

3. If designations are available, they are displayed under *Designations*. Choose all designations that apply from the list. The standards of addendum type designation will be listed here. The user can include this along with the self-assessment by selecting a check box.
4. The instructions below are Action Items for this application. If the self-assessment is yet to be started, click **Start Self-Assessment**. If it is already started, click **Continue Self-Assessment**. Click **Restart Self-Assessment** if the assessment has to be restarted. Click **Complete Self-Assessment** to finish it.

Note: The restart clears out all information added to the standards. Complete submits it and gives a final score.

Action Items



Figure 10-3: Self-Assessment Action items

10.2 Scoring

The status has to be *New* or *In Progress* in order to add interpretive information and score it to demonstrate readiness to comply with URAC Standards. The table is displayed with all Focus Areas (FA's) and standards along with the **Module** name and **Status**.

1. Click on a **Standard** with a status of "*Incomplete*".

Status: In Progress

Company: Life Insurance Company
 Number: 2015-SA-00005

Compliances Self Evaluation
 Title and Instruction needed.

Standards	Module	Status
Organizational Structure	CORE	Incomplete
Organization Documents	CORE	Incomplete
Policies and Procedures		
Policy and Procedure Maintenance, Review and Approval	CORE	Incomplete
Inter-Departmental Coordination		
Inter-Departmental Coordination	CORE	Incomplete
Business Relationships		
Client Satisfaction	CORE	Incomplete
Staff Qualifications		
Job Descriptions	CORE	Incomplete

Result Summary

Level/Addendum	Score	Number of Mandatory Elements Not Sufficiently Met	Readiness
N/A	0.00 %	1	No

Figure 10-4: Self-Assessment standards and FAs

2. The standard title and Element of Performance (EP) title is displayed here. The rating weight is also displayed as "M", "1", "2", "3", or "4".

- Read the guide language and rate yourself. Select *Met*, *Partially Met*, *Not Met*, or *Not Applicable*.

Back To Overview

1 Organizational Structure

② 1 The organization has a clearly defined organizational structure outlining direct and indirect oversight responsibility throughout the organization. ?

☒ Met - 100%
 ☐ Partially Met - 50%
 ☐ Not Met - 0%
 ☐ Not Applicable

Evidence

Demonstration of compliance - DTR

+

CORE - 1

Demonstration of compliance - VR

+

CORE - 1

Save

Figure 10-5: View from within a standard – add score

- Use the “+” sign to expand the demonstration of compliance for DTR and VR. Answer the questions under demonstration of compliance for DTR and VR. Select all that are applicable.
- Use the “?” icon to submit an inquiry at that element level. Click **Save** after adding. Click **Back to Overview** when finished.

Evidence

Demonstration of compliance - DTR

<div style="border: 1px solid #007bff; padding: 2px; display: inline-block;">+</div>	CORE - 1		
	Required Evidence 1 Top-level organization charts depicting key positions and entities, including (as applicable) parent company and subsidiaries, board of directors, senior executive staff, key committees, staff, and departments.	<div style="border: 1px solid #007bff; padding: 2px; display: inline-block;">Have Evidence</div>	
	Document Name Location/ Filename Owner	<div style="border: 1px solid #ccc; height: 30px; width: 100%;"></div>	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Ready To Submit</div>
	Notes	<div style="border: 1px solid #ccc; height: 30px; width: 100%;"></div>	

Figure 10-6: View from within a standard – adding guide information

- Repeat steps 2-5 until all standards are displayed with a “Complete” status.

Standards	Module	Status
Organizational Structure		
Organizational Structure	CORE	Complete
Organization Documents	CORE	Complete
Policies and Procedures		
Policy and Procedure Maintenance, Review and Approval	CORE	Complete
Inter-Departmental Coordination		
Inter-Departmental Coordination	CORE	Complete
Business Relationships		
Client Satisfaction	CORE	Complete
Staff Qualifications		
Job Descriptions	CORE	Complete

Result Summary

Level/Addendum	Score	Number of Mandatory Elements Not Sufficiently Met	Readiness
N/A	30.00 %	0	No

Figure 10-7: Self-Assessment standards completion status and results summary

10.3 Results

After scoring and adding information to the demonstration of compliance for DTR and VR, the score is displayed at the bottom of the page. The score is updated after each successive save for standards.

If the program is level-enabled, the score is calculated for each level and the score is displayed individually. The number of mandatory standards not met and readiness is also calculated individually for each level.

The score also indicates if the applicant score meets URAC's expectations.

Result Summary

Level/Addendum	Score	Number of Mandatory Elements Not Sufficiently Met	Readiness
Level 1	0.00 %	1	No
Level 2	0.00 %	2	No

Figure 10-830: Results for a program with levels

11 Appendix 1: Abbreviations

The table below presents the abbreviations used throughout this document.

Table 4: Abbreviations

Abbreviation	Description
DTR	Desktop Review
FA	Focus Area
ISCA	Information System Capacity Assessment
NOC	Notice of Change
POC	Point of Contact
RFI	Request for Information
VR	Validation Review