## Revision History

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**Project ID:** URAC-001

**Project Name:** eCase Accreditation Solution

**Prepared By:**

**Approved By:** Gracelyn McDermott
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1 Introduction

This document is intended for all URAC Accreditations 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 AccreditNet®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 AccreditNet®2.0™ using this URL from your browser: https://accreditnet2.urac.org. *Alternately, AccreditNet®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.

![Sign In page](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.

![Sign In](image)

**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?](image)

**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.
5. 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

**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.
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](image)

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: LoriMarie

Primary E-Mail: *

lengolia@ains.com

Alternate Email: elori2012@gmail.com

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

Username: *

LoriTest

Current Organization: ABC Company

Title:

CEO

Save/Finish Cancel/Return to Index

2.5.1 Change Password

1. To change your password, click on Change Password within the Manage My Profile screen.
2. 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.
Table 1: Password Criteria Rules

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

### 2.6 Help/Training

The **Help/Training** section provides detailed documentation to assist with AccreditNet®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 AccreditNet®2.0™.

   ![Help/Training Link](image)

   **Figure 2-11: Help/Training Link**

2. The Applicant Portal User Guide is available as a hyperlink.
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 AccreditNet®2.0™ website.
3 AccreditNet® Dashboard

When you sign in to AccreditNet®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.

Users who only belong to one organization are taken directly to that Organization’s home page/dashboard.
The URAC AccreditNet home page has two dashboards:

1. An **Organization Dashboard** that lists all organizations the user has access to.
2. An **AccreditNet 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 AccreditNet®2.0™ logo** in the upper left to return to the AccreditNet Dashboard at any time.
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.

![Figure 4-1: AccreditNet Dashboard](image)
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

Application Number: HPL005254

Application Type: Accreditations

URAC Reviewer: Admin Admin
Account Manager: Admin Admin*
Primary Contact: John Doe

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.
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.
5. 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 x 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.

4.1.1 Company Information

1. Company Information is the first section in Application Part 1. Click on Continue next to Company Information from the Application Overview page.

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. 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.
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.
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.
3. Multiple records can be created using this button. Each record should be completed individually.

4. 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”.

5. **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.*

6. 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.

7. You can also click **Save and add another** to save the previous record.
8. 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.

9. 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.

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

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.

7. 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.

![Program Information Section](image)

**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.
2. Click **Continue** within the section marked **Incomplete**.

3. 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.*

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

5. **Save** all changes.

6. 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”.

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.
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

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

Site Information

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

Documentation & Supporting Materials

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

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

Documentation & Supporting Materials
Submit your documentation and supporting materials required to demonstrate compliance with URAC Standards

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:

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.
Click **Upload** again. You should see a message that says “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.
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](image)

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.

![Figure 4-25: Validation Error](image)
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](image)

### 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](image)
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.

4. Enter the **details** and **Save** the information. Once saved, the site appears as shown below.
5. Click **Continue** to respond to questions related to this site.

6. Use the **Remove site from Scope** button to delete the site name, address, and site questions.

7. 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.

8. Provide a response to the question within each site by clicking **Continue**.

9. 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.
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.
2. Click on a *Standard* with the *Documentation Status*, **Pending**.

![Figure 4-32: Level Enabled Application](image)

3. 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**.

![Figure 4-33: Each Focus Area Along with the Status](image)

4. 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

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.
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.

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.
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**.

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.
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.

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:
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.*

6. Add your **initials** to the textbox to indicate there is no Personal Health Information (PHI) data contained within the attachment.
7. Use the ‘i’ icon to access any additional information or description available on this Standard.

8. 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.

9. Select the **Save** button at the bottom of the page to save and update your entries.

10. 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:

11. Follow the instructions in the error message to proceed to unlink/edit the documentation/citation.

12. 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.*
A dialog box will open with information about the Focus Area. Text related to Rationale, Scope and Bright Ideas will appear.

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

   Disease Management, 4.1
   Status: Application Part 1: Accepted; Part 2
   Company: ABC Company
   Application Number: DMT060192
   Application Type: New Application

   Disease Management, 4.1
   The accreditation application process involves several steps. Yo submitting the application.

2. Click on Copy Evidence in Part 2
3. The system displays a list of all eligible source applications

4. 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.
3. If that application folder and the opened standard are both eligible for the copy feature, you will see a **Copy from Other applications** button.

4. 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](image)

9. From this page you can **Add New Inquiry** or click **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.
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](image1)

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

Status: Completed

![Site Information](image2)

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

Status: Incomplete

![Documentation & Supporting Materials](image3)

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

Status: Incomplete

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.
3. 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.

![Type of Insurance Risk](image)

**Figure 2144: Type of Insurance Risk**

4. After making all changes to rejected responses, **Save** it.

5. If all returned questions have a response, the status of that section changes to **Completed**.

6. 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.

7. From this page, below **Action Items**, you will see a **Request for Information Report** section.

![Request for Information Report](image)

**Figure 4-45: Generate Score Report**

8. 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**”.

9. 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.

<table>
<thead>
<tr>
<th>Standards/Elements</th>
<th>Score</th>
<th>Issues</th>
<th>Recommendations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core - 1 - (M)</td>
<td>Not Met - 0%</td>
<td>Issue</td>
<td>Recommendation</td>
</tr>
<tr>
<td>Core - 2 - (4)</td>
<td>Not Met - 0%</td>
<td>Issues</td>
<td>reco core 2</td>
</tr>
<tr>
<td>Core - 3 - (2)</td>
<td>Not Met - 0%</td>
<td>Issue core 3</td>
<td>recommendations core 3</td>
</tr>
</tbody>
</table>

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.

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.
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.

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.

![AccreditNet Dashboard](image)

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>
<thead>
<tr>
<th>Accreditation Status</th>
<th>Applicant Portal Publishing tab</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>AC Determination</td>
</tr>
<tr>
<td>Full Accreditation</td>
<td>X</td>
</tr>
<tr>
<td>Full Accreditation - Eligible for Third Year</td>
<td>X</td>
</tr>
<tr>
<td>Full Accreditation - Not Eligible for Third Year</td>
<td>X</td>
</tr>
<tr>
<td>Full Accreditation - Third Year Accepted</td>
<td>X</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>--</td>
</tr>
<tr>
<td>Conditional Accreditation</td>
<td>X</td>
</tr>
<tr>
<td>Provisional Accreditation</td>
<td>X</td>
</tr>
<tr>
<td>Corrective Action</td>
<td>X</td>
</tr>
<tr>
<td>Denial</td>
<td>X</td>
</tr>
<tr>
<td>Full Certification</td>
<td>X</td>
</tr>
<tr>
<td>Full Certification - Eligible for Third Year</td>
<td>X</td>
</tr>
<tr>
<td>Full Certification - Not Eligible for Third Year</td>
<td>X</td>
</tr>
<tr>
<td>Full Certification - Third Year Accepted</td>
<td>X</td>
</tr>
<tr>
<td>Conditional Certification</td>
<td>X</td>
</tr>
<tr>
<td>Provisional Certification</td>
<td>X</td>
</tr>
<tr>
<td>Qualified</td>
<td>X</td>
</tr>
<tr>
<td>Established</td>
<td>X</td>
</tr>
<tr>
<td>Certified</td>
<td>X</td>
</tr>
</tbody>
</table>

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](image)

**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

<table>
<thead>
<tr>
<th>Accreditation Status</th>
<th>Doc/Web Publishing</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ASR</td>
</tr>
<tr>
<td>Full Accreditation</td>
<td>X</td>
</tr>
<tr>
<td>Full Accreditation - Eligible for Third Year</td>
<td>X</td>
</tr>
<tr>
<td>Full Accreditation - Not Eligible for Third Year</td>
<td>X</td>
</tr>
<tr>
<td>Full Accreditation - Third Year Accepted</td>
<td>X</td>
</tr>
<tr>
<td>Conditional Accreditation</td>
<td>X</td>
</tr>
<tr>
<td>Provisional Accreditation</td>
<td>X</td>
</tr>
<tr>
<td>Corrective Action</td>
<td>X</td>
</tr>
<tr>
<td>Denial</td>
<td>X</td>
</tr>
<tr>
<td>Full Certification</td>
<td>X</td>
</tr>
<tr>
<td>Full Certification - Eligible for Third Year</td>
<td>X</td>
</tr>
<tr>
<td>Full Certification - Not Eligible for Third Year</td>
<td>X</td>
</tr>
<tr>
<td>Full Certification - Third Year Accepted</td>
<td>X</td>
</tr>
<tr>
<td>Conditional Certification</td>
<td>X</td>
</tr>
<tr>
<td>Provisional Certification</td>
<td>X</td>
</tr>
<tr>
<td>Qualified</td>
<td>X</td>
</tr>
<tr>
<td>Established</td>
<td>X</td>
</tr>
<tr>
<td>Certified</td>
<td>X</td>
</tr>
</tbody>
</table>

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.
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).
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.

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.

![Image of Seals Availability to Accredited Applicants]

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

3. Click **Notice Of Change**.
4. Click **Add Notice of Change**.

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

5. 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*. 
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.
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 AccreditNet®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.

![Figure 28-1: History Tab](image-url)
7 Client Documents

*Client Documents* is the fifth tab of the AccreditNet®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**.

![Client Documents Search Criteria](image)

*Figure 7-1: Client Documents Search Criteria*
2. 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.

![Add Document]

Figure 7-2: Uploading a Document to Client Documents

3. 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.
Figure 29: Replace File
8 Tools

*Tools* is the sixth tab of the AccreditNet®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](image)
9 Management Features (Point of Contact (POC) Only)

9.1 Roles

There are four roles in the AccreditNet®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.

![Company Contacts Menu from the Home Page](image)

*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.

![Add New User as Org POC](image)

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.
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.
2. All the Staff working for your Organization will be listed under the Staff Roster table.

3. 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, Jane. 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, click "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

<table>
<thead>
<tr>
<th>Member</th>
<th>John Doe (Primary Contact)</th>
<th>Edit Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:jdoe@urac.org">jdoe@urac.org</a></td>
<td>User123 (xuat)</td>
<td>Edit Profile</td>
</tr>
</tbody>
</table>

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.

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.

![Self-Assessment from Dashboard](image)

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

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”.

Figure 10-4: Self-Assessment standards and FAs
3. Read the guide language and rate yourself. Select *Met, Partially Met, Not Met, or Not Applicable.*

![Figure 10-5: View from within a standard – add score](image)

1 Organizational Structure

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 button]

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

4. 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.

5. Use the “?” icon to submit an inquiry at that element level. Click **Save** after adding. Click **Back to Overview** when finished.

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

6. Repeat steps 2-5 until all standards are displayed with a “Complete” status.
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.
# 11 Appendix 1: Abbreviations

The table below presents the abbreviations used throughout this document.

**Table 4: Abbreviations**

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DTR</td>
<td>Desktop Review</td>
</tr>
<tr>
<td>FA</td>
<td>Focus Area</td>
</tr>
<tr>
<td>ISCA</td>
<td>Information System Capacity Assessment</td>
</tr>
<tr>
<td>NOC</td>
<td>Notice of Change</td>
</tr>
<tr>
<td>POC</td>
<td>Point of Contact</td>
</tr>
<tr>
<td>RFI</td>
<td>Request for Information</td>
</tr>
<tr>
<td>VR</td>
<td>Validation Review</td>
</tr>
</tbody>
</table>