Online Application Users Guide

National Committee for Quality Assurance
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Washington, DC 20005

NCQA Customer Support: 888-275-7585

Technical Assistance: my.ncqa.org
or phone your NCQA HEDIS account manager

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The Application and Scheduling Tool

Welcome to the NCQA online Application and Scheduling Tool for Accreditation, Certification and Distinction programs. Organizations applying for the programs listed below can use the NCQA Application and Scheduling Tool to apply for their survey.

Accreditation Programs

- Health Plan
- Health Equity
- Multicultural Health Care
- Managed Behavioral Healthcare Organization
- Case Management
- Case Management for Long-Term Services and Supports
- Population Health Program
- Utilization Management-Credentialing-Provider Network
- Wellness and Health Promotion
- Specialty Pharmacy Accreditation

Certification Programs

- Credentialing Verification Organization
- Health Information Products
- Physician and Hospital Quality
- Wellness and Health Promotion

Distinction Programs

- Health Plan Long-Term Services and Supports
- Managed Behavioral Health Organization Long-Term Services and Supports
- Case Management for Long-Term Services and Supports

What's New

Health Equity Accreditation. This program adds new requirements to NCQA's Multicultural Health Care standards, which focus on organizational diversity, equity, inclusion and reducing bias; collecting gender identity and sexual orientation data; and reporting race/ethnicity stratified HEDIS measures.

The voluntary **Health Equity Accreditation Plus** option includes standards for assessing and addressing social determinants of health.

Specialty Pharmacy Accreditation. This comprehensive, standards-based program evaluates a specialty pharmacy's ability to deliver patient-centered care. NCQA-Accredited pharmacies demonstrate best practices for delivering the right medication to the right patient, at the right time—with well-coordinated patient care and follow-up.

Providing high-quality patient care is a top priority for specialty pharmacies. Specialty Pharmacy Accreditation shifts the dynamic to a more collaborative experience that embraces innovation and aligns stakeholders.

NCQA-Accredited Specialty Pharmacies demonstrate best practices for patient-centered care, making them ideal partners in value-based payment arrangements that reward quality**.**

Specialty Pharmacy Accreditation evaluates these areas:

- Patient Programs.
- Organization, Administration and Compliance.
- Specialty Pharmacy Operations.
- Quality and Performance Improvement.

National Survey Application. For large organizations (with multiple sites) applying for a National Survey, there is a new “Sites” tab. Organizations can add, update or remove affiliated accounts associated with the survey, and are only required to purchase one IRT survey tool. Accreditation statuses map to each site entity. Refer to National Survey.

Eligibility Tab. Contains general qualifying questions relating to the specific survey product of Accreditation.

Survey Type. “Type” of survey has been added to the *Home* page of the application selection.

What You Need to Complete the Application

You need a computer with the following components:

- Google Chrome.
- Windows 32-bit operating system.
- Internet service.
- Active email account.

How to Access the Application

Step 1 Go to the My NCQA website.

Step 2 Your username is the professional email address you use to conduct business with NCQA on behalf of your organization.

Enter your username in the **Username** field. Enter your password in the **Password** field. Click **Submit**.

*If this is your first time logging on, or if you don’t remember your password, click **Forgot Your Password?** and follow the instructions.*

Step 3 When you have changed your password, click **close this window** to return to the *Login* screen and log in.

Step 4 Click **My Apps**. Click **Go to Site** for **NCQA Application Online**. The *Application* home page displays.

How to Access Agreements

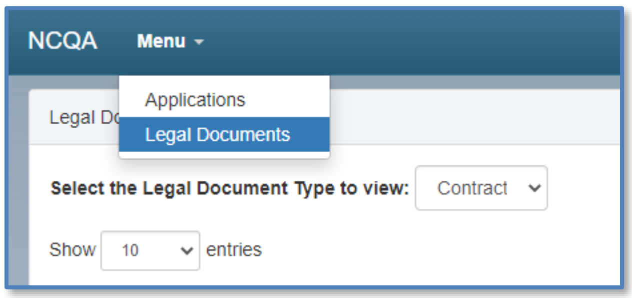
You can view and download the most current Agreement and Pricing Policy for the product you are applying for under the **Menu** link on the main screen of the online application.

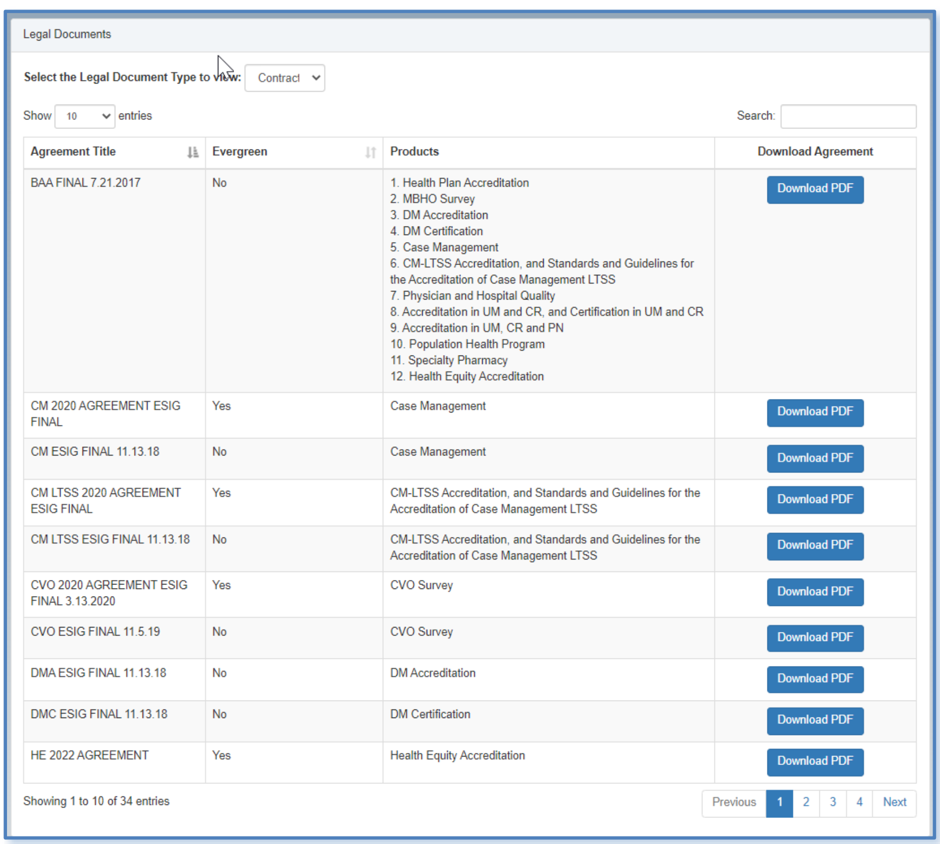
Step 1 Click **Menu** on the Navigation Bar at the top of any screen.

Step 2 Click **Legal Documents**.

Step 3 Click the down arrow in the menu to select **Contracts** or **Pricing** and access a list of documents.

Step 4 Click **Download** next to the document you want and save it to your computer or network.





Agreement Title	Evergreen	Products	Download Agreement
BAA FINAL 7.21.2017	No	1. Health Plan Accreditation 2. MBHO Survey 3. DM Accreditation 4. DM Certification 5. Case Management 6. CM-LTSS Accreditation, and Standards and Guidelines for the Accreditation of Case Management LTSS 7. Physician and Hospital Quality 8. Accreditation in UM and CR, and Certification in UM and CR 9. Accreditation in UM, CR and PN 10. Population Health Program 11. Specialty Pharmacy 12. Health Equity Accreditation	Download PDF
CM 2020 AGREEMENT ESIG FINAL	Yes	Case Management	Download PDF
CM ESIG FINAL 11.13.18	No	Case Management	Download PDF
CM LTSS 2020 AGREEMENT ESIG FINAL	Yes	CM-LTSS Accreditation, and Standards and Guidelines for the Accreditation of Case Management LTSS	Download PDF
CM LTSS ESIG FINAL 11.13.18	No	CM-LTSS Accreditation, and Standards and Guidelines for the Accreditation of Case Management LTSS	Download PDF
CVO 2020 AGREEMENT ESIG FINAL 3.13.2020	Yes	CVO Survey	Download PDF
CVO ESIG FINAL 11.5.19	No	CVO Survey	Download PDF
DMA ESIG FINAL 11.13.18	No	DM Accreditation	Download PDF
DMC ESIG FINAL 11.13.18	No	DM Certification	Download PDF
HE 2022 AGREEMENT	Yes	Health Equity Accreditation	Download PDF

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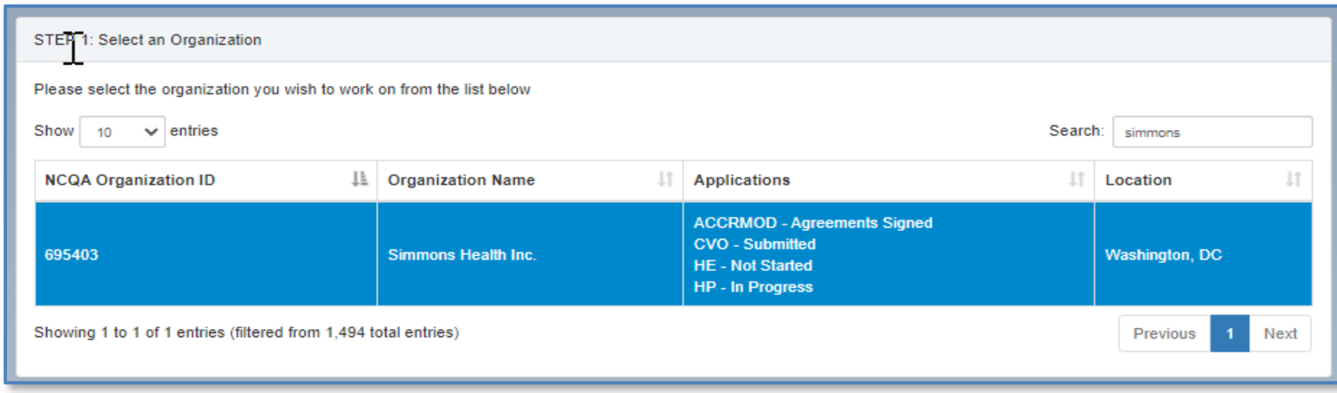
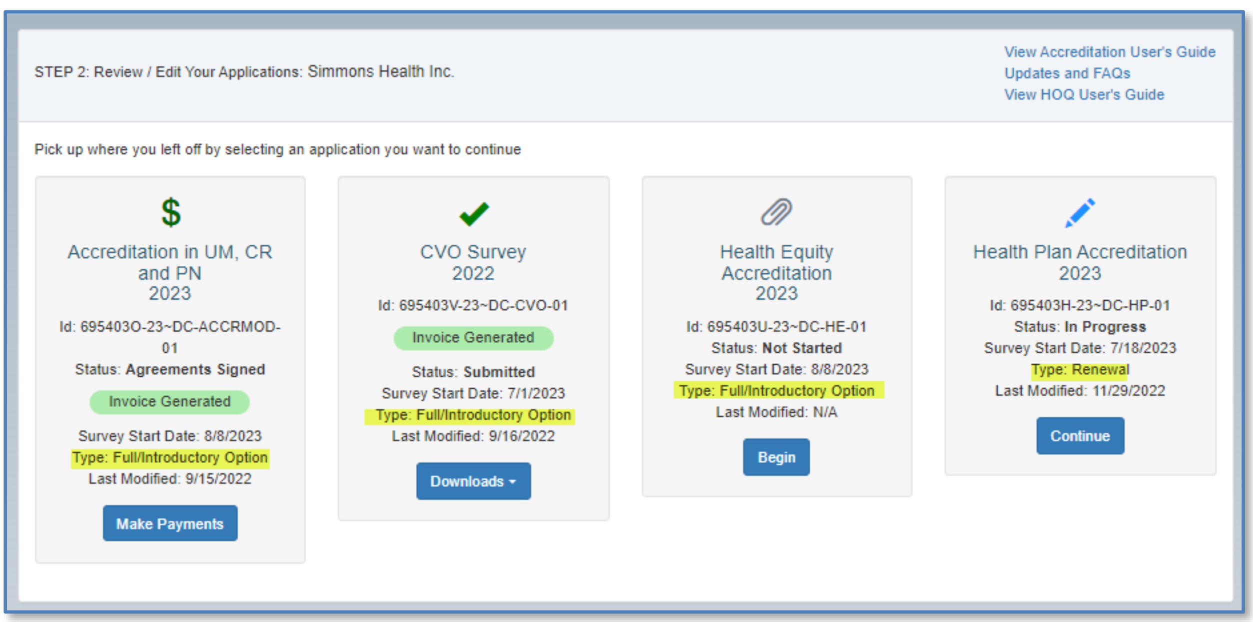
Getting Started

Step 1 After you log in, enter the name of your organization in the **Search** field or use the up/down arrows to scroll through the list of organizations. Click to highlight your organization.

If you don't see your organization, refer to What if I Don't Find My Organization?

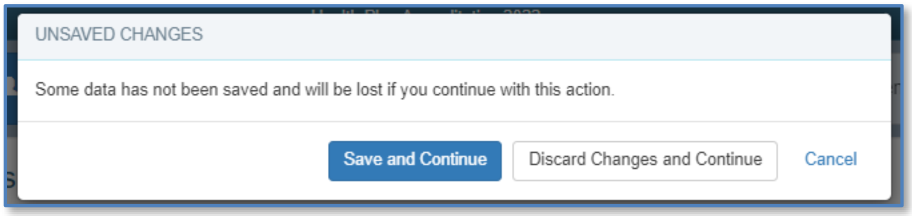


Step 2 The applications pertaining to your organization will display in the **STEP 2: Review / Edit Your Applications** section of the screen.

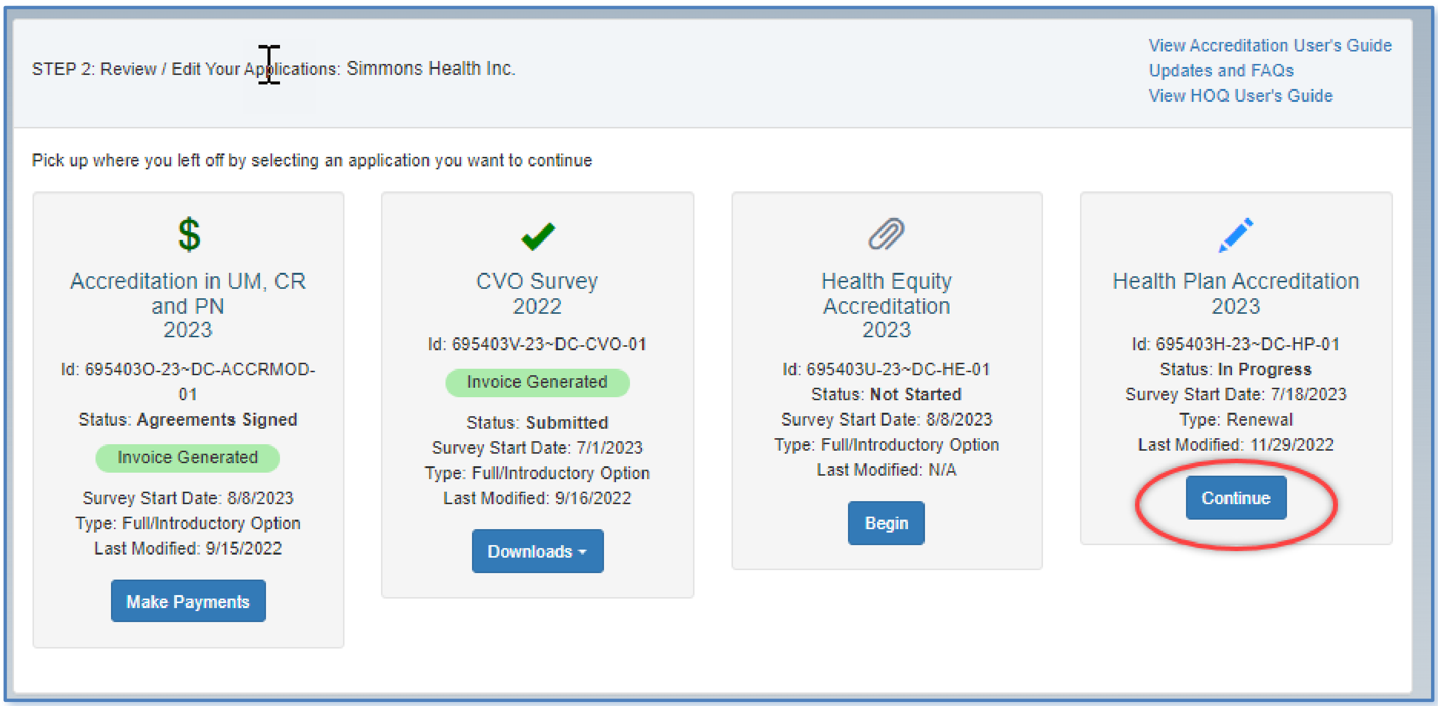


Step 3 Click **Begin** under the product for which you want to apply.

If you can’t complete the application in one session, you can save it and continue later. You will be prompted to save your changes. Click **Save and Continue**.



Step 4 When you are ready to continue, log on and click **Continue**.



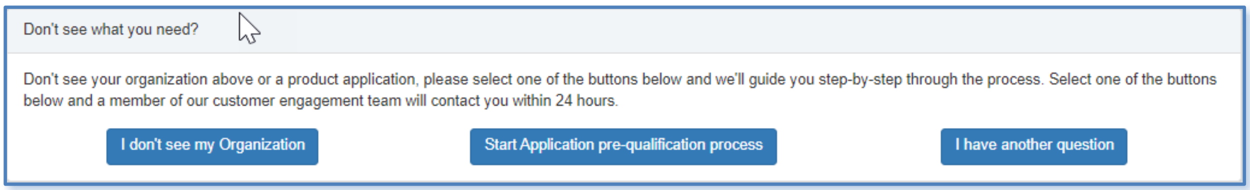
If You Can't Find Your Organization…

Only the organizations to which you are assigned as a contact will display. If you don't see your organization, follow these steps.

Step 1 *If your organization has a current Accreditation/Certification,* click **I don't see my Organization**. An NCQA account representative will contact you.

If your organization does not have a current Accreditation/Certification, click **Start Application pre-qualification process** and indicate the product for which your organization wants to apply. An NCQA account representative will contact you to determine your organization's eligibility.

If you have a general question about the application and scheduling process, click **I have another question**. An account representative will contact you.



The Application Home Page

The *Application* home page lists all sections that must be completed. NCQA suggests you complete the application in this order:

1. Organization.
2. Eligibility.
3. Contacts.
4. Products (not all NCQA product applications have a "Products" tab).
5. Survey.
6. Sites (not all NCQA product applications have a "Sites" tab).
7. Review.
8. Documents.
9. Finish.

Sections 1–5 These sections contain information NCQA has on file for your application. Fields marked with an asterisk (*) are required; you must enter and save the information.

You cannot submit the application without completing the required fields.

Section 6 View and verify the changes you made in sections 1–4.

Section 7 Download and upload the documents pertaining to your application.

Section 8 E-sign the contract Agreement, generate a purchase order for the application fee and submit the completed application to NCQA.

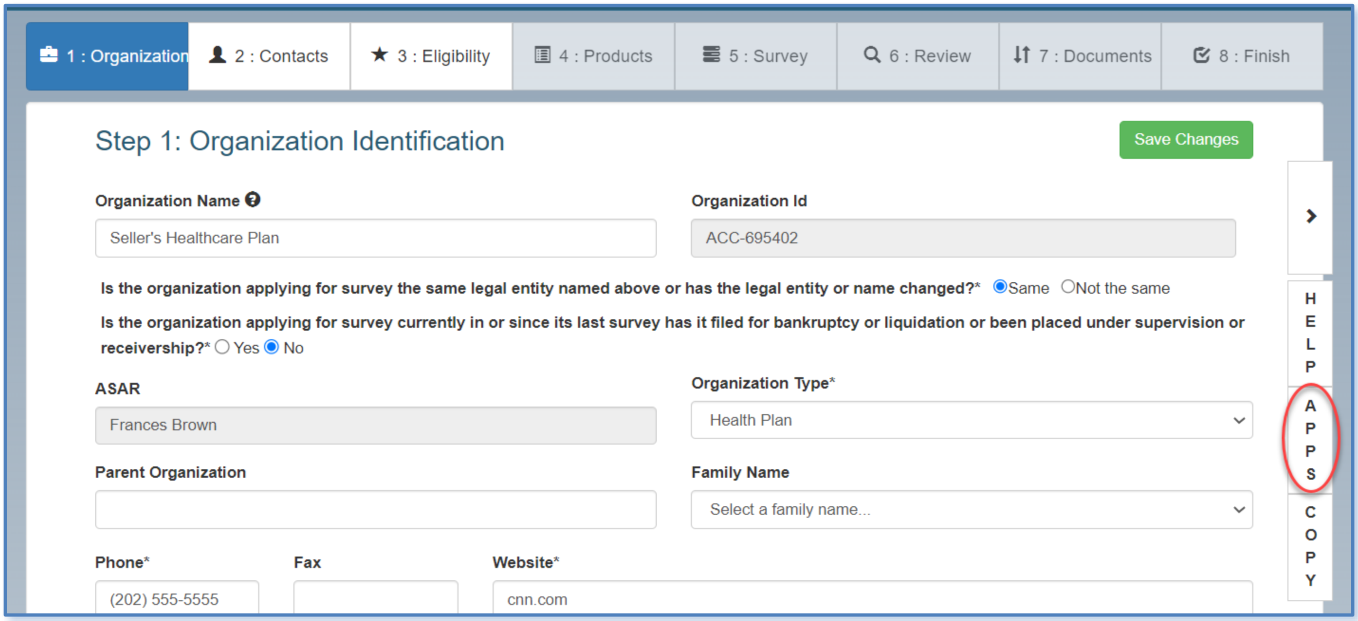
Click the arrows at the side of the screen to navigate through the application, or click the section tabs.

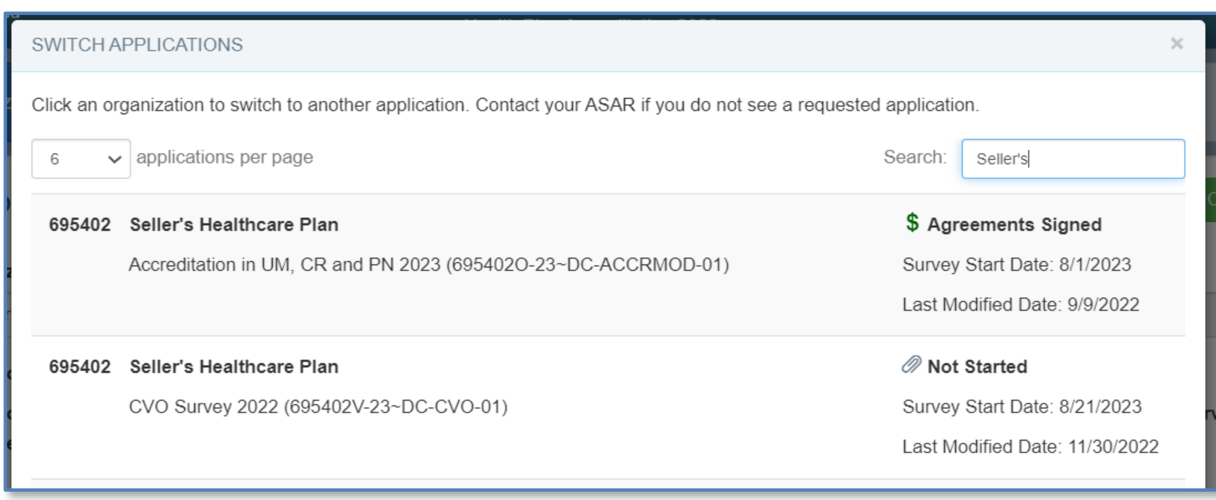
How to Switch Between Applications

If you are completing more than one application at the same time, you can easily switch between them without returning to the main application menu by following the steps below.

Step 1 Click **APPS** at the right side of any screen.

Step 2 Search for the application you want to move to. Click it to go directly to the application.





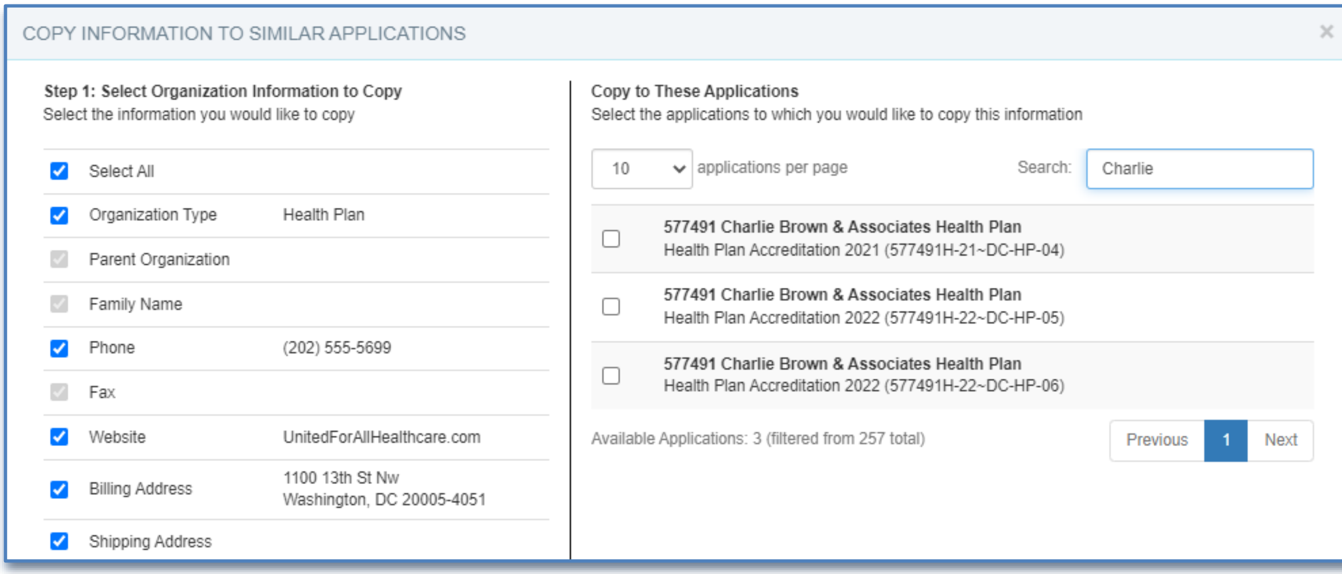
How to Copy Information to Another Application

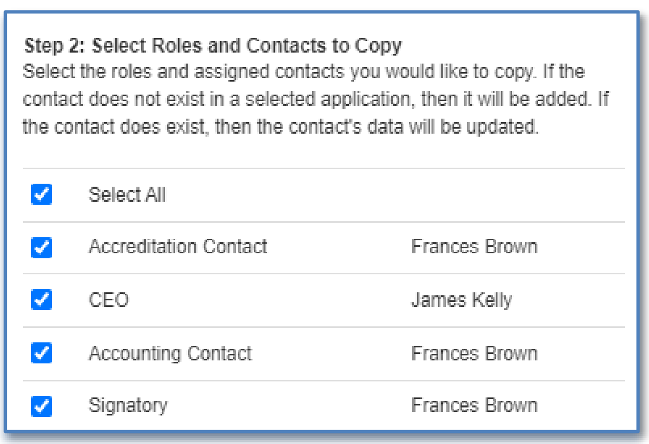
Step 1 Click **COPY** at the right side of any screen.

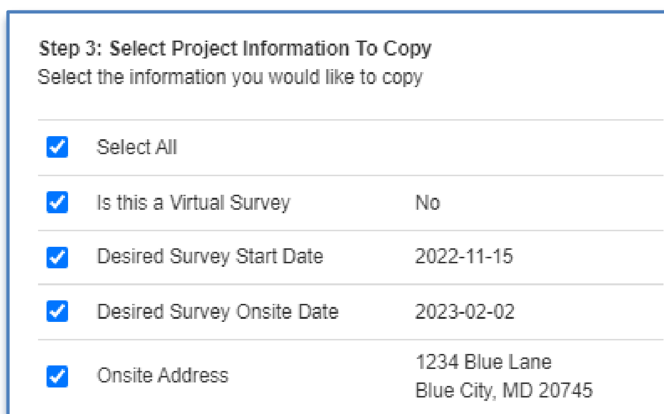
Step 2 Under each section, click to check the box next to each field you want to copy. Click to check **Select All** to copy all fields listed under each section.

Step 3 Search for the applications where you want to copy the selected fields. Click to check the box next to each application to which you want to copy.

Step 4 Click **Copy**.







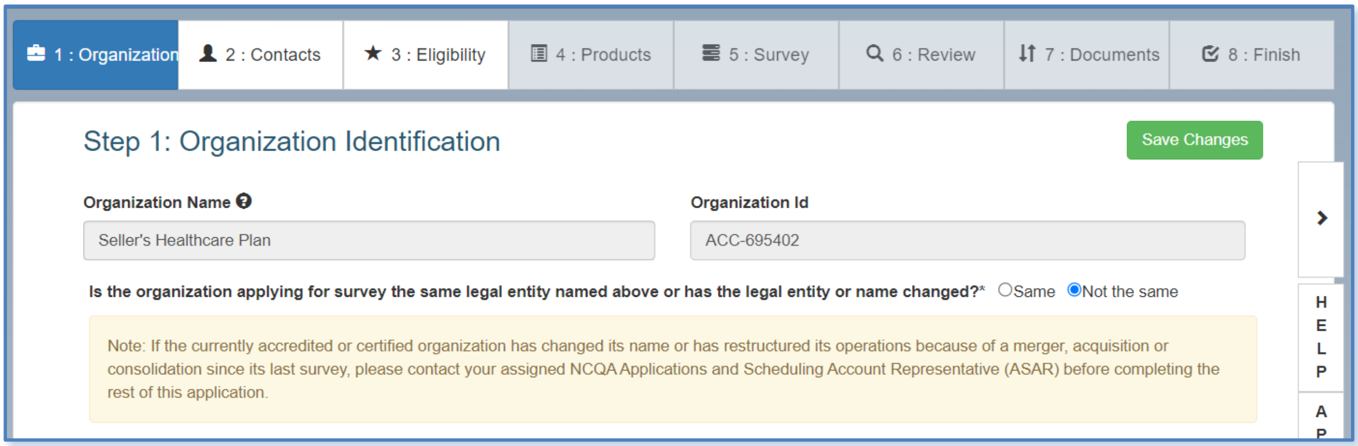
How to Enter or Update Organization Information

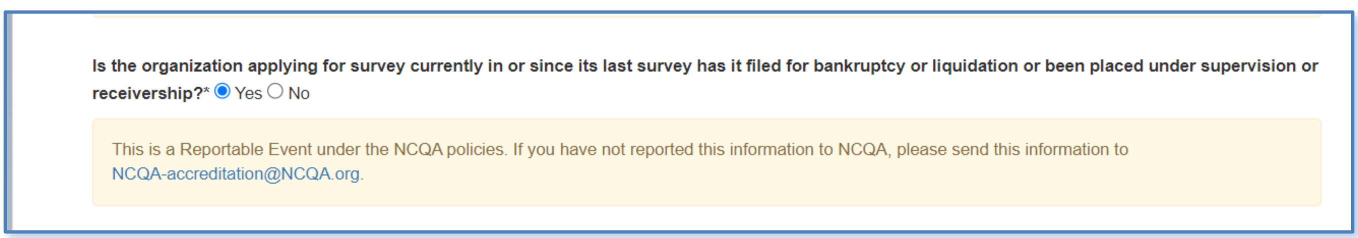
The **Organization** section contains general information about your organization. It also identifies the Application and Scheduling Account Representative (ASAR) assigned to your application. You can review, verify and edit this information.

*The **Organization Name** and **ID** are read-only and cannot be changed.*

Answer both required questions at the top of the page.

If the legal entity or name has changed, click to select **Not the same** and contact your ASAR before continuing.





If you answer “Yes” to the question above, this is a Reportable Event under NCQA policies.

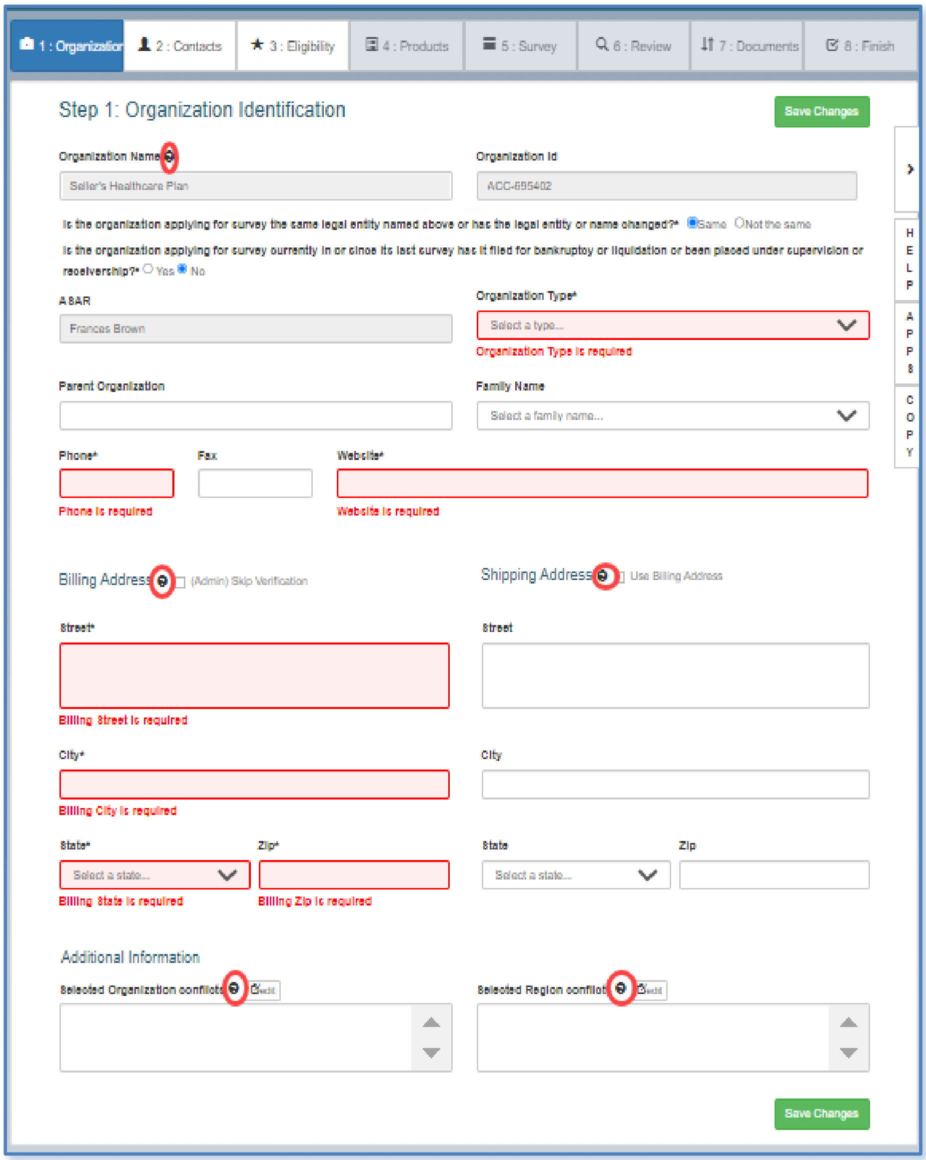
Contact NCQA-accreditation@NCQA.org to report this information.

Step 1 Complete the required fields for your organization.

Click the question mark icon for information about each section.

NCQA does not assign surveyors who work for competitors or organizations that have a contractual relationship with your organization and are selected as conflicts, or who work for competitors or organizations in the regions selected as conflicts.

Step 2 Click **Save Changes**. Click the next tab.



How to Edit or Update a Contact

The *Contacts* section contains general information about organization staff whom NCQA may contact regarding your application and survey. You can review, verify and edit this information.

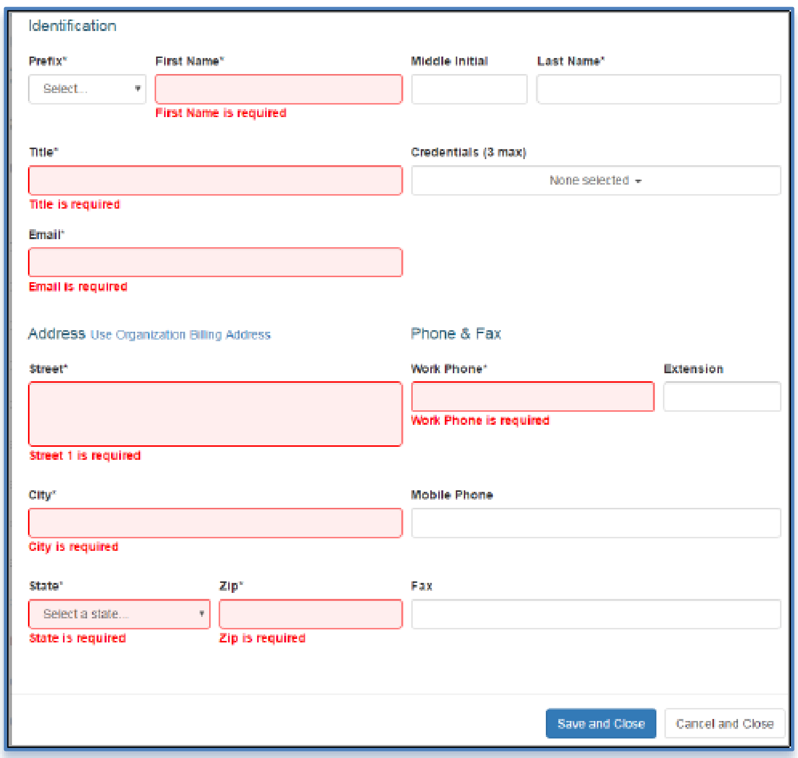
Step 1 Click **Edit** next to the name you want to update.

Fields marked with an asterisk (*) are required; you must enter and save the information. If you leave one required field blank, you cannot save the information.

If you do not have enough information to complete all required fields, click **Cancel and Close**.

If **Some Information is not valid for this contact** displays under an active contact, click **Edit** and update all required fields for the contact.

Step 2 Click **Save and Close**.



How to Add a New Contact

You may add a contact who is not listed under **Active Contacts** or **Inactive Contacts.** Only add people you want to assign a role.

Step 1 Click **New Contact**. Enter the contact information.

Step 2 Click **Save and Close**.

This contact will appear in Active Contacts and can be assigned a role.

How to Assign a Role

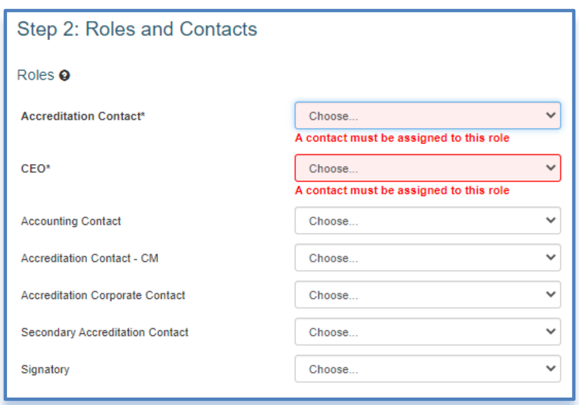
Each active contact must have an assigned role. Active contacts who do not have an assigned role should be inactivated.

Step 1 Click the **Choose…** drop-down list.

Step 2 Select from the list of active contacts to assign roles. You do not need to assign a person to every role.

Roles in bold and marked with an asterisk (*) are required.

Step 3 To deselect a person from a role, click **Choose** from the drop-down list. Click **Save Changes**.

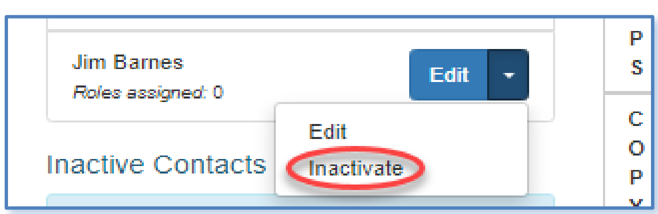


How to Inactivate a Contact

Inactivate a contact who no longer works for your organization or is no longer a contact for your organization's application or survey process.

Step 1 Click the arrow next to the contact name to open the drop-down menu. Click **Inactivate**.

Step 2 Click **Yes** in the pop-up window to move the contact to **Inactive Contacts**.



How to Reactivate a Contact

Step 1 From the **Inactive Contacts** list, click **Activate** next to the contact you want to reactivate. Click **Yes** at the message prompt.

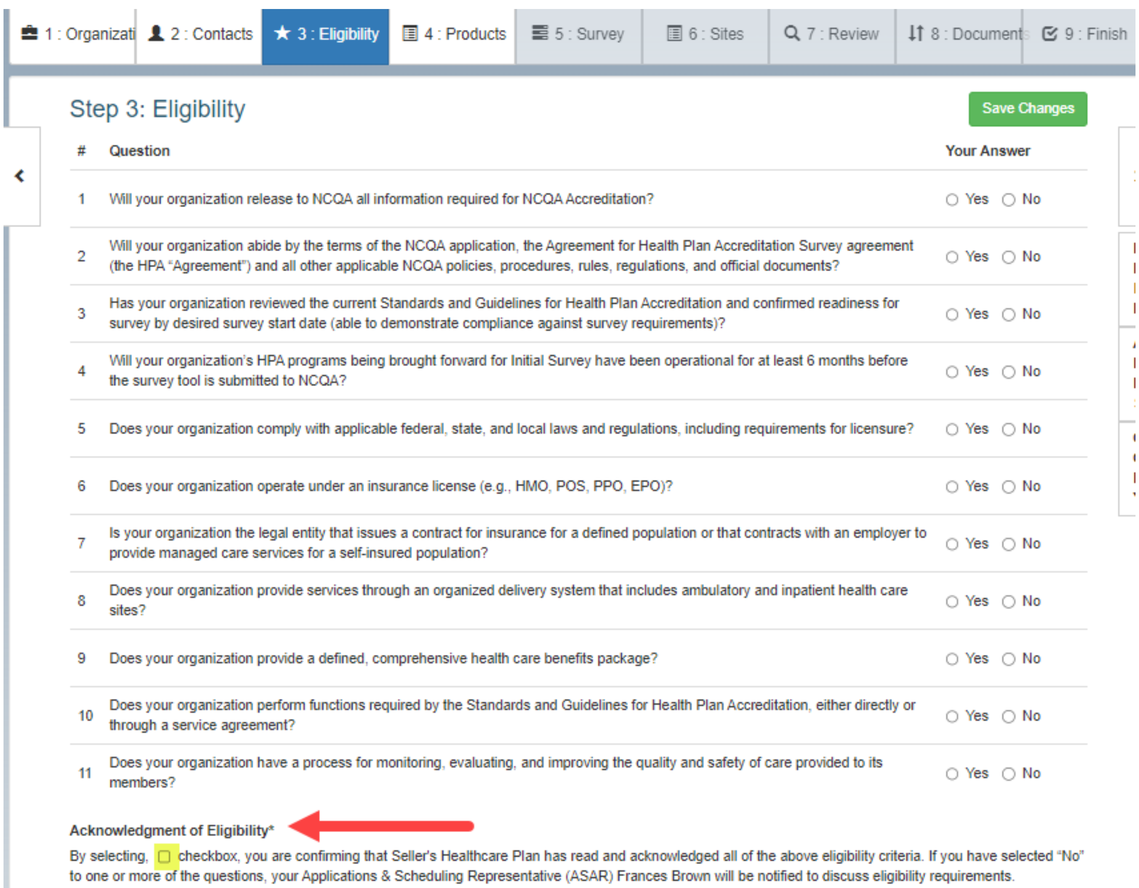
Reactivating a contact does not restore the contact's roles. You must reassign roles to a reactivated contact.

Eligibility

The NCQA Accreditation or Certification application has an "Eligibility" tab. Answer each required question "Yes" or "No" as it relates to the survey product.

You must select the checkbox to acknowledge product eligibility.

If "No" is selected for one or more questions, the ASAR will email you to discuss eligibility requirements.



1 : Organizati | 2 : Contacts | 3 : Eligibility | 4 : Products | 5 : Survey | 6 : Sites | 7 : Review | 8 : Documents | 9 : Finish

Step 3: Eligibility

Save Changes

#	Question	Your Answer
1	Will your organization release to NCQA all information required for NCQA Accreditation?	Yes No
2	Will your organization abide by the terms of the NCQA application, the Agreement for Health Plan Accreditation Survey agreement (the HPA "Agreement") and all other applicable NCQA policies, procedures, rules, regulations, and official documents?	Yes No
3	Has your organization reviewed the current Standards and Guidelines for Health Plan Accreditation and confirmed readiness for survey by desired survey start date (able to demonstrate compliance against survey requirements)?	Yes No
4	Will your organization's HPA programs being brought forward for Initial Survey have been operational for at least 6 months before the survey tool is submitted to NCQA?	Yes No
5	Does your organization comply with applicable federal, state, and local laws and regulations, including requirements for licensure?	Yes No
6	Does your organization operate under an insurance license (e.g., HMO, POS, PPO, EPO)?	Yes No
7	Is your organization the legal entity that issues a contract for insurance for a defined population or that contracts with an employer to provide managed care services for a self-insured population?	Yes No
8	Does your organization provide services through an organized delivery system that includes ambulatory and inpatient health care sites?	Yes No
9	Does your organization provide a defined, comprehensive health care benefits package?	Yes No
10	Does your organization perform functions required by the Standards and Guidelines for Health Plan Accreditation, either directly or through a service agreement?	Yes No
11	Does your organization have a process for monitoring, evaluating, and improving the quality and safety of care provided to its members?	Yes No

Acknowledgment of Eligibility*

By selecting, checkbox, you are confirming that Seller's Healthcare Plan has read and acknowledged all of the above eligibility criteria. If you have selected "No" to one or more of the questions, your Applications & Scheduling Representative (ASAR) Frances Brown will be notified to discuss eligibility requirements.

Products

The *Product* section applies only to the Health Plan Accreditation, MBHO Accreditation and UM-CR-PN Accreditation applications.

The *Inception Date* is the initial date when the organization offered services to members or clients under the product.

Health Plan Accreditation

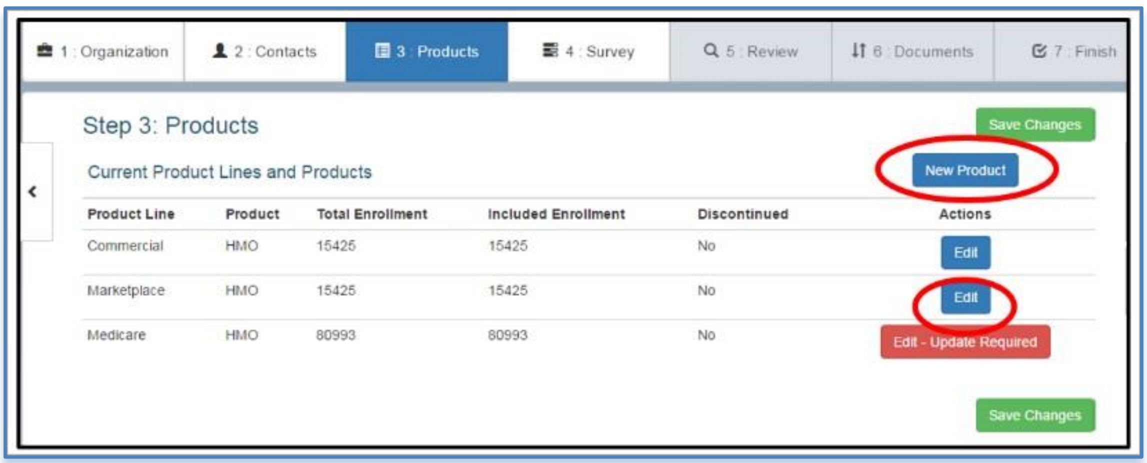
The *Health Plan Accreditation* section shows the product lines (commercial, Medicare, Medicaid, Exchange) and products (HMO, POS, PPO, EPO) currently identified in the NCQA system.

You can review, verify, edit and save information in this section.

How to View/Edit Product Information

Step 1 Click **Edit** to update existing information.

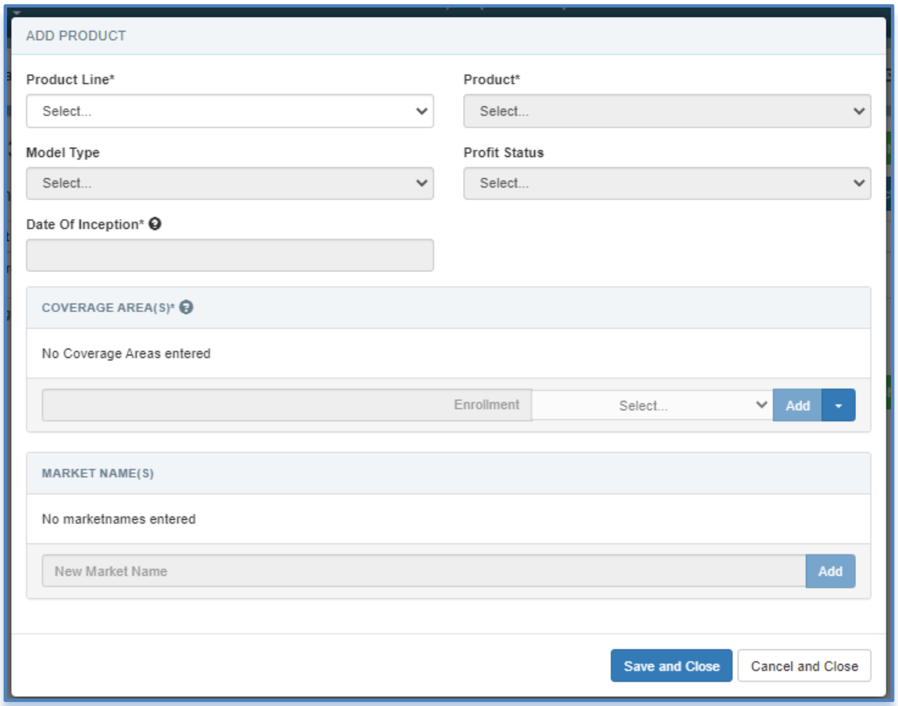
If **Edit - Update Required** displays, click **Edit** next to the product item and update all required fields for the product.



How to Add a New Product

Step 1 Click **New Product** and enter the product information. Click **Save and Close**.

You cannot add a product/product line that already exists in the system.

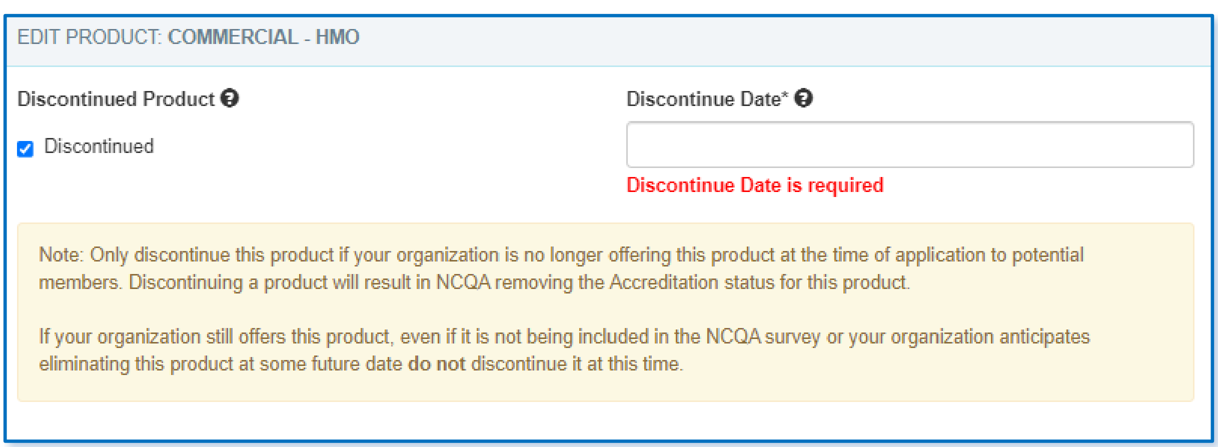


How to Discontinue a Product

Step 1 Click **Edit** next to the product item. Click to check **Discontinued**. Click **Save and Close**.

*A product/product line marked **Discontinued** is removed from the organization's current Accreditation. If your organization will not offer the product/product line in the future (e.g., during the next Open Enrollment season), but it exists at the time of application, **do not mark it Discontinued or it will be considered non-Accredited.***

Step 2 Enter the discontinue date.



How to Reactivate a Discontinued Product

Step 1 Click the **Edit** button to the right of the product line and product name. Click to uncheck **Discontinued**. Click **Save and Close**.

How to Add Coverage Areas

At least one state must be selected under **Coverage Area** for each product.

Step 1 In the *COVERAGE AREA(S)** section, click the drop-down list. Click to select a state.

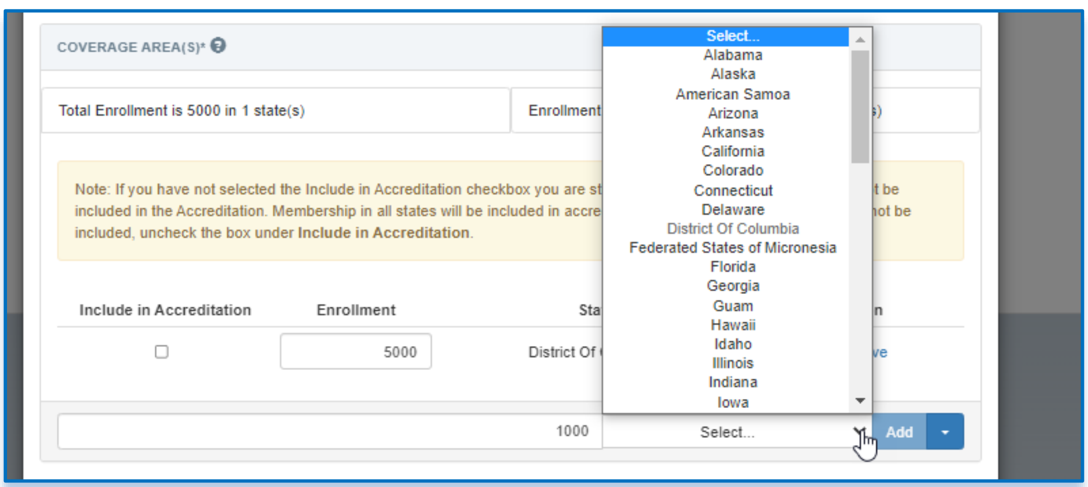
Step 2 Click the **Enrollment** box and enter the number of members in the state.

If the product line is Marketplace/Exchange, enter the HioS ID assigned by CMS to the Marketplace/ Exchange product.

Step 3 After you enter all required criteria, press the Return key and click **Add**. Membership in all states will be included in Accreditation. If a state's membership should not be included, click to uncheck the box under **Included in Accreditation**.

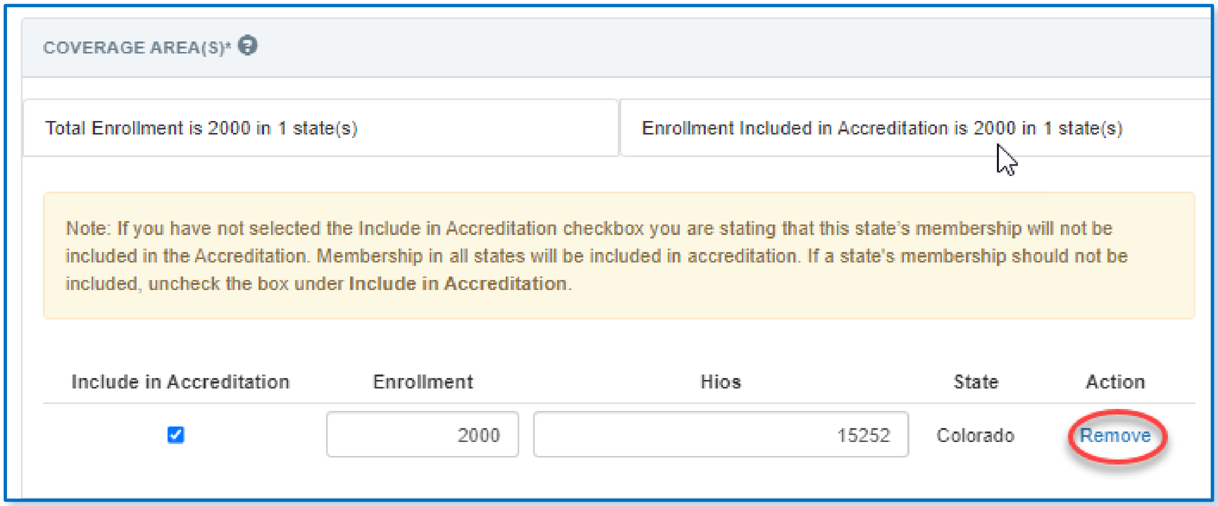
Click **Save and Close**. The state and enrollment number display on the *Product Detail* page.

The total enrollment displayed for each product will be the number of state enrollments entered in *COVERAGE AREA(S)**.



How to Remove a State From the Coverage Area List

Step 1 Click **Edit** next to the product. Click **Remove** next to the state you want to delete from the product.



How to Update Enrollment Numbers

Step 1 On the *Edit Product* page, click the **Enrollment** text box to edit the number.

How to Add a Product Market Name

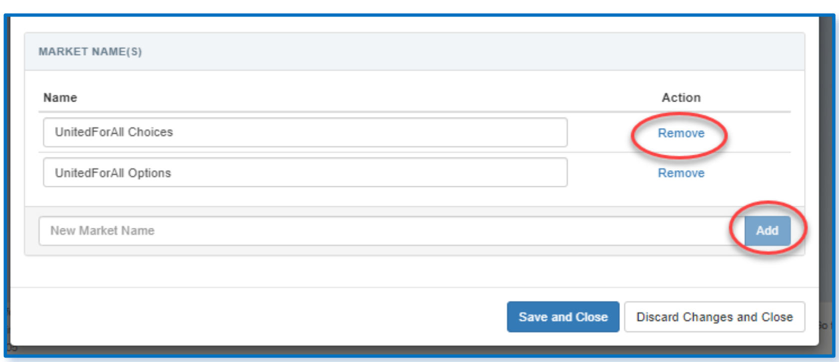
The name under which your product is marketed might be different from your organization's legal name. For a national product, the same product market name can be used for multiple organizations.

If the product is marketed locally under more than one name (for example, if benefit packages are customized for large employer groups), list all names. If you will publicly report HEDIS data in Quality Compass, list both the legal name of your organization and the product's market name.

Step 1 Click **Edit** next to the product.

Step 2 In the **New Market Name** text box, type the name (no more than 100 characters). Click **Add**. The name will be displayed on the list. Click **Save and Close**.

Step 3 To remove names, click **Remove** under **Action**. Click **Save and Close**.



MBHO Accreditation

The *Product* section shows the product lines (commercial, Medicare, Medicaid, Exchange) currently identified in the NCQA system. You can review, verify, edit and save information in this section.

To edit the product information for an MBHO, follow the steps in *How to View/Edit Product Information*.

UM-CR-PN Accreditation

The *Product* section shows the evaluation products (Utilization Management, Credentialing, Provider Network) currently identified in the NCQA system. You can review, verify, edit and save information in this section.

Step 1 Click the **Edit** button to the right of the Evaluation Product.

Step 2 *If your organization is applying for UM Accreditation,* enter the total number of members in your organization and your organization's clients.

Calculate and enter the percentage of members for whom your organization and your organization's clients conduct UM functions directly.

If your organization is applying for CR Accreditation, enter the total number of practitioners in your clients' practitioner networks and in your organization's practitioner networks.

Calculate and enter the percentage of practitioners in your clients' practitioner networks and practitioners in your organization's practitioner networks for whom your organization conducts CR functions directly.

If your organization is applying for PN Accreditation, enter the total number of providers, including the total in your clients' provider network and in your organization's direct provider network.

Calculate and enter the percentage of the number of providers for whom the organization performs PN functions directly.

Fields marked with an asterisk (*) are required; you must enter and save the information.
If you leave one field blank, you cannot save the information.

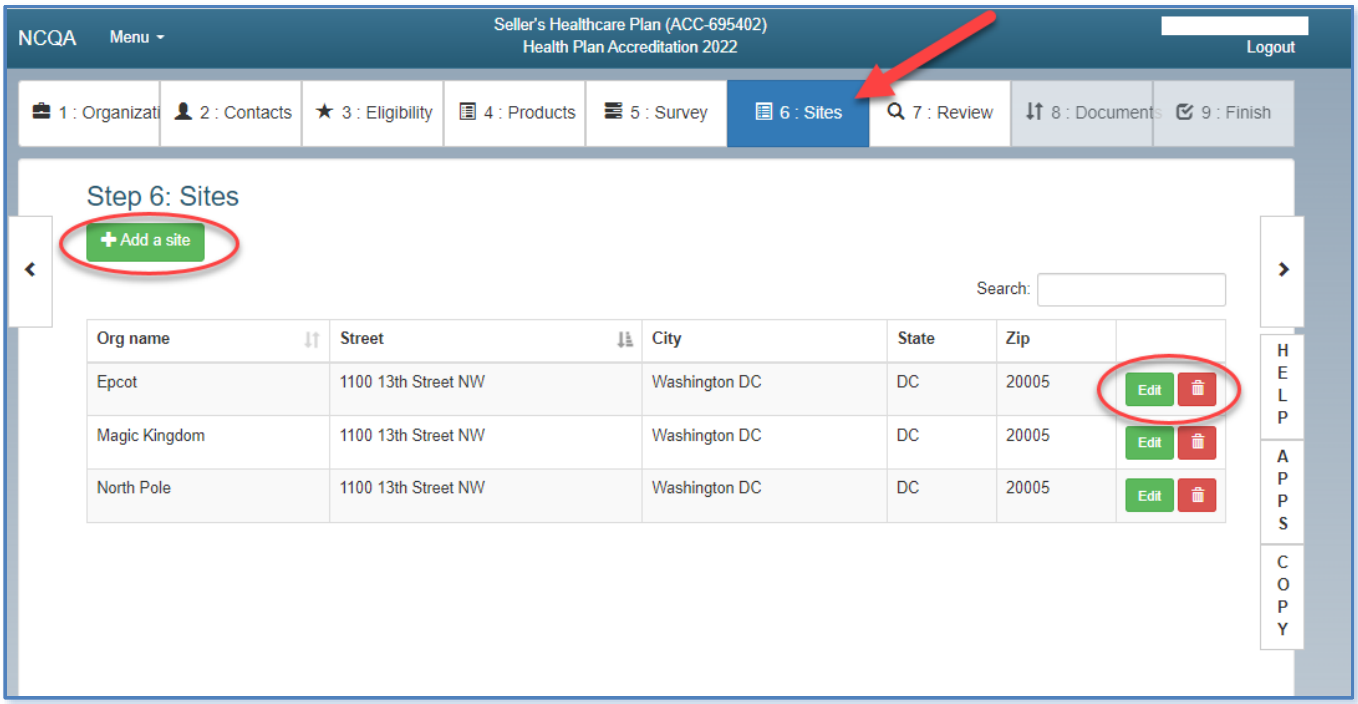
If you do not have enough information to complete all required fields, click **Discard Changes and Close**.

Step 3 When you have entered all the information, click **Save and Close**.

National Survey

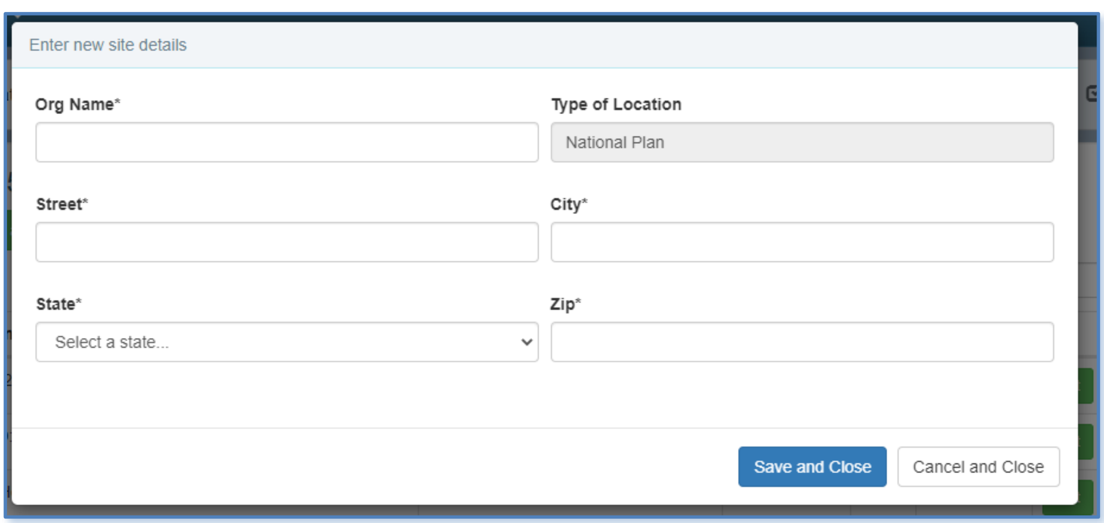
A “Sites” tab is available for large organizations with multiple sites that are applying for a National Survey. You can add, update or remove affiliated accounts.

Organizations have one application, one survey project and one IRT license to complete the survey and generate an Accreditation status. The Accreditation status will map to each separate site.



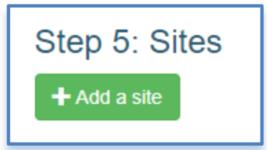
Step 1 Under **Step 5: Sites**, click **Add a site**.

Step 2 Enter the site details in the text boxes. Click **Save and Close**.



How to Add a Specialty Pharmacy Site

Step 1 Under **Step 5: Sites**, click **Add a site**.



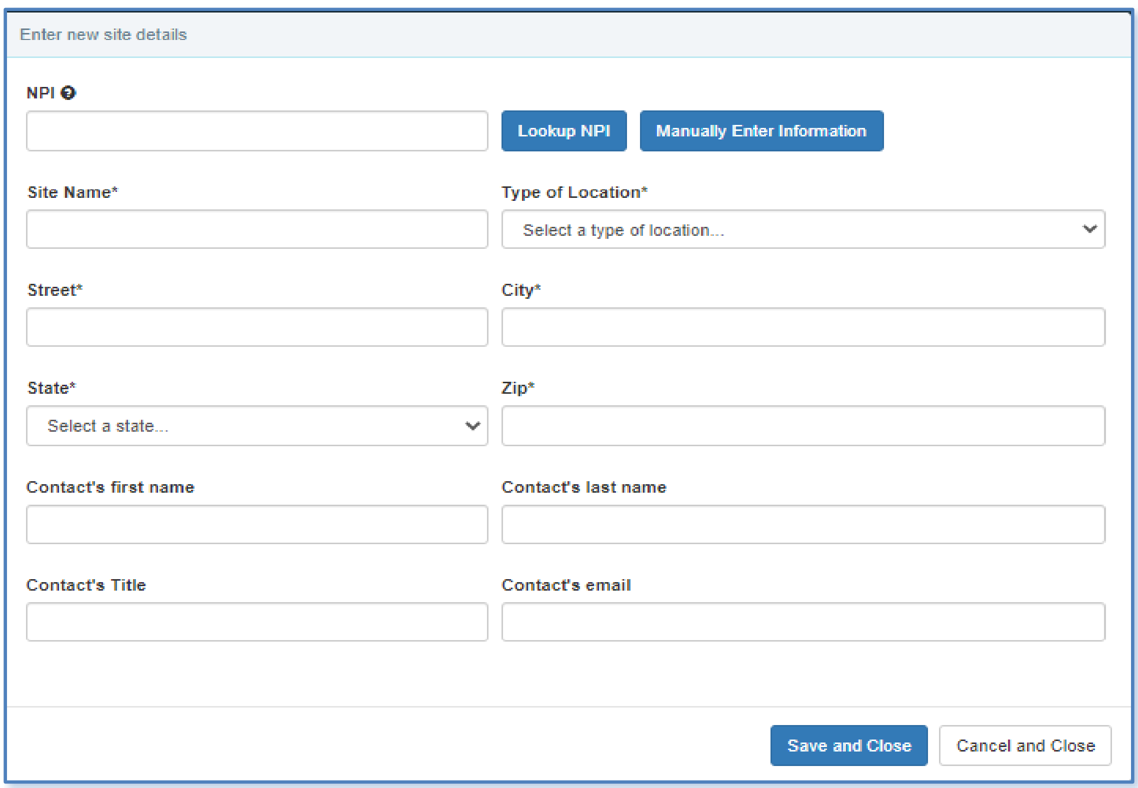
Step 2 ***Add a site by Look Up NPI***

- Insert the **Site NPI Number** in the text box. Click **Lookup NPI**.
- After the NPI number is generated, the rest of the information will automatically populate.
- Complete the remaining fields and click **Save and Close**.

Manually Enter Information *(for sites without an NPI)*

- Enter text in all required (*) fields and click **Save and Close**.

Repeat these steps to add more than one site.



The Survey Section

The *Survey* section allows you to verify the survey category and select the Evaluation Option and product lines and products, if applicable, that your organization wants to include in its survey.

This section also allows you to enter the date when your organization would like to start the survey (**Desired Survey Start Date**), the date to start the onsite review (**Desired Survey Onsite Date**) and the **License Number**.

*If a product is not listed in the Product section, you cannot include it under the Survey section. If the **Survey Category** should be different from the one displayed, contact your ASAR.*

How to Add/Edit Evaluation Products

Evaluation Option indicates the survey option for which your organization wants to apply.

Step 1 ***Evaluation Option: Health Plan Accreditation.*** From the *Health Plan Accreditation Details* section, click **Edit** next to the selected Evaluation Products.

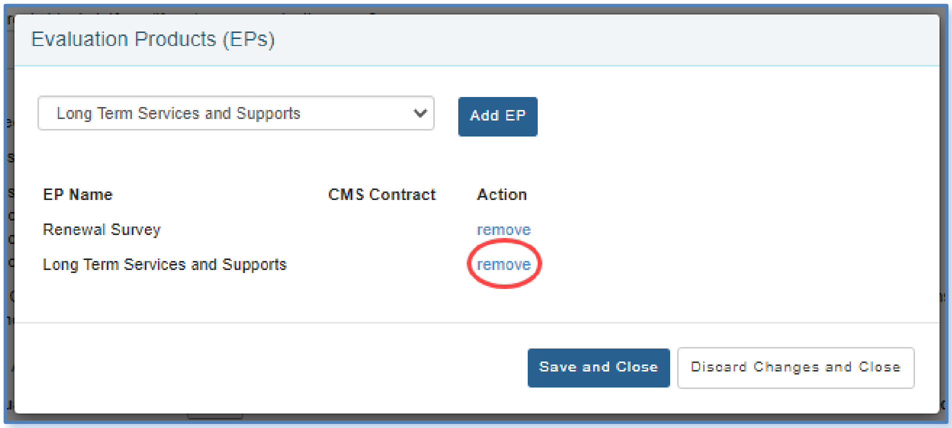
Step 2 Review and select the appropriate Evaluation Option:

- **Interim.** For organizations new to NCQA Accreditation or whose NCQA Accreditation status has been expired for more than 2 years. The survey is limited to a subset of standards focused on policies and procedures. Interim status is effective for 18 months.
- **First.** For organizations new to NCQA Accreditation or whose NCQA Accreditation status has been expired for more than 2 years. The survey covers most standards, and organizations can achieve Full Accreditation status, which is effective for 36 months.
- **Renewal.** For organizations that currently hold an NCQA Health Plan Accreditation status. Organizations can achieve Full Accreditation status, which is effective for 36 months.
- **LTSS Distinction.** Supplemental to NCQA Health Plan Accreditation; based on review of an organization’s LTSS program against the LTSS Distinction standards.
  - The organization has a current NCQA Accreditation status for the specific product and product line under the First or Renewal Evaluation Option, ***or***
  - The organization is including the specific product and product line in the survey for which it is applying under the First or Renewal Evaluation Option.
- **Medicaid.**
  - The organization has a current NCQA Accreditation status for its Medicaid product line under the First or Renewal Evaluation Option, ***or***
  - The organization is seeking Accreditation for its Medicaid product line under an Interim, First or Renewal Evaluation Option.
- **Medicare.** Any Medicare Advantage organization is eligible for an NCQA MA Deeming Survey if it has a SNP product.
  - Enter the CMS contract number (which begins with the letter “H” or the “R”) you want to include in the survey in the text box to the right of **Medicare Advantage** on the list. To include more than one contract number, separate them with a semicolon.

Step 3 From the drop-down menu, click to select **First**, **Interim**, **Renewal** or **LTSS**. Click **Add EP**. Click **Save and Close**.

How to Remove an Evaluation Product

Step 1 Click **Edit**. Next to the Evaluation Product you want to delete, click **remove** under **Action**.



How to Add/Edit Selected Products for Each Evaluation Product

This does not apply to CVO, UM-CR-PN or WHP.

For Health Plan Accreditation, the Unit of Assessment indicates the product/product line combinations to be included in the survey for each Evaluation Product. Users select the product line/reporting product(s) they want to bring through survey for each Evaluation Product separately.

For other programs, the Unit of Assessment indicates the products or programs to be included in the survey. Refer to *How to Add User Defined Programs for Case Management and Population Health Program*.

Step 1 *For Health Plan Accreditation:* Go to **Health Plan Accreditation Details** under **Step 4: Survey Information**. Click **Edit** next to **Selected Evaluation Products (EPs)** at the left side of the screen, and select and save the Evaluation Products you want to include in the survey.

Step 2 At the right side of the screen, click **Edit** next to **Selected Evaluation Product-Product Line/Reporting Product**.

Step 3 At the top of the *Edit* screen, select an Evaluation Product and a corresponding product line/ reporting product to survey. Click **Add UA**.

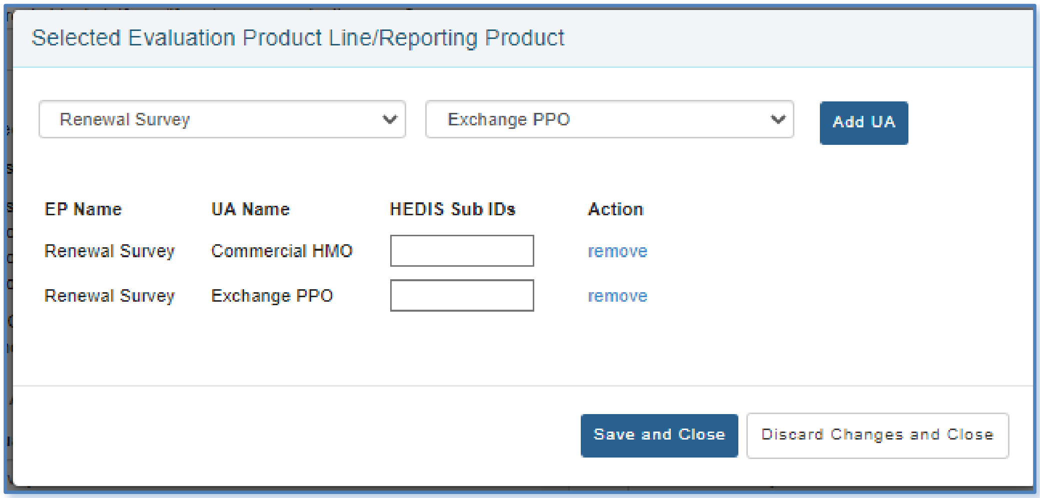
*To select more than one product line/reporting product for the same Evaluation Product, repeat step 3 and click **Add UA**. Each selection will appear in the list below the selection boxes.*

To select product lines/reporting products to survey under other Evaluation Products, repeat steps 2–3.

Step 5 *For products coming through the First or Renewal Evaluation Option:* Click to choose the appropriate scoring option from the drop-down list and enter the HEDIS Sub IDs (if available).

The scoring option for the Interim, LTSS, Medicaid and Medicare Evaluation Options should be Not Applicable.

Step 6 Click **Save and Close**.



How to Add User-Defined Programs for Case Management and Population Health Program

Users can identify the names of programs being brought forward for Case Management and Population Health Program under the **Selected Program** area of the *Survey* section. You can review, verify, edit and save information in this section.

Step 1 Click **Edit** next to **Selected Program**. Enter the program name in the text box next to **Add User UA** and click **Add User UA**.

Step 2 Enter the information for **Date in Operation** and **Number of Patients**. Click **Save and Close**.

How to Remove a Product Line

Step 1 Click **Edit**. Click **remove** under **Action**. Click **Save and Close**.

How to Set, View and Edit Desired Survey Dates

Requested survey dates are assigned on a first-come, first-served basis and must be approved by NCQA.

The **Desired Survey Start Date** is the date when the organization wants to start the survey (the date when it will be ready to submit the completed survey tool). This date should be at least 6 months after the application is submitted. *Surveys always start on a Tuesday,* so the start date should be on the Tuesday of the week of the survey.

The **Desired Survey Onsite Date** is the first day of the onsite portion of the survey. This date is 7 weeks after the survey start date. *Onsite surveys normally start on a Monday,* so the onsite date should be the Monday of the 7th week after the survey start date.

Step 1 Click in the box and navigate to the date you want by using the calendar, or enter the date in MMDDYYY format. Click **Save**.

When Selecting Survey Dates, Remember…
• No surveys start during the week of Thanksgiving or the week after Thanksgiving. • No surveys start during the last 2 weeks of December. • No onsite surveys are scheduled during the week of Thanksgiving, Christmas, New Year's, Easter, Mother's Day or Father's Day. • Onsite survey dates should be adjusted to **8 weeks** for a survey that crosses over Thanksgiving or Christmas. • Onsite survey dates should be adjusted to **9 weeks** for a survey that crosses over Thanksgiving and Christmas. • No surveys or onsite surveys start on any major holiday.

Survey Tool License

You must purchase a survey tool license for the product and standards year for which your organization is applying. Each accreditable entity must have its own license number.

The survey tool should correlate to the standards year for which you will be surveyed. For example, if you plan to undergo a survey submission in the 2022 standards year (July 1, 2022–June 30, 2023), purchase a 2022 license.

For Health Plan Accreditation products, purchase separate licenses for each Evaluation Option if your organization is applying to bring different products/product lines through different Evaluation Options.

You are not required to purchase a survey tool for Add-On Surveys, Introductory Follow-Up Surveys or Resurveys. NCQA will provide the survey tool after the application has been processed.

Organizations applying to add the LTSS Distinction module to a current Accreditation must purchase a license for the survey tool. Organizations applying for LTSS Distinction concurrent with a regular Health Plan Accreditation Survey are not required to purchase a separate license.

Step 1 You must purchase a license for each Accreditation Survey cycle. Go to https://store.ncqa.org/index.php/accreditation.html.

If you have purchased a license, enter the license number (5 digits) for the appropriate product and standards year. Click **Save**.

Contact your ASAR if you have questions about how many survey tools to order.

How to Review Your Application

Step 1 Click the **Review** tab.

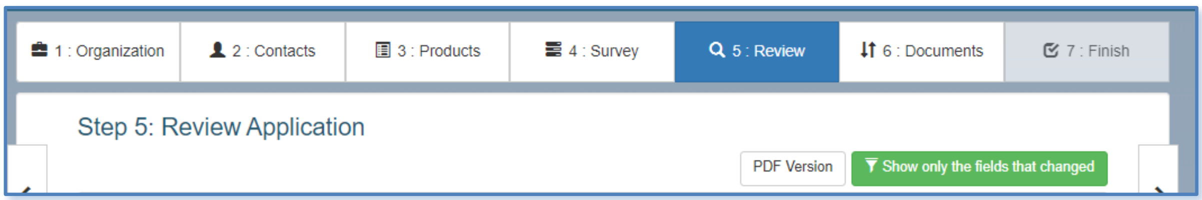
Current Information indicates the information prior to your session.

Application Information displays the current value for each field in your application.

Rows highlighted in green indicate changes found.

Step 2 Review all changes. Click **Edit** to make changes.

Click **Show only the fields that changed** to see all changes at once.



How to Use the *Documents* Section

Step 1 Click the "Documents" tab.

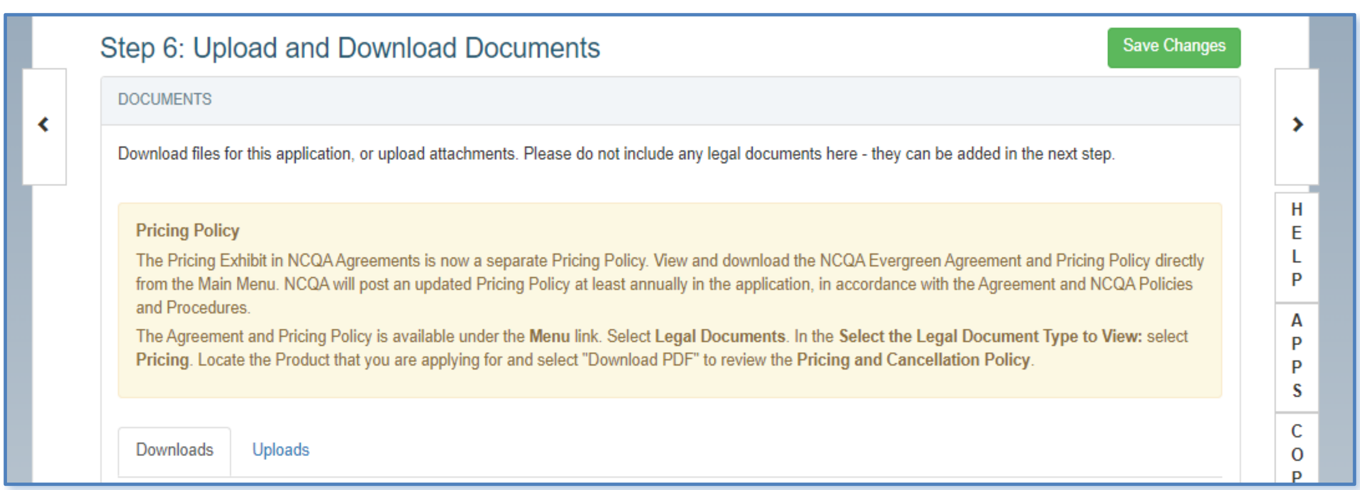
This section lets you upload/download files for the application. You can also enter comments about your application that will help in processing.

Only pdf, doc, docx, xls, xslx or txt files can be uploaded.

If you are applying for a Corporate Survey, a Single Site Multiple Entity, a National or an Add-On Survey, download and complete the appropriate document, then upload it to the application tool.

Unless you are applying for one of the survey types above, you do not need to attach any documents in this section.

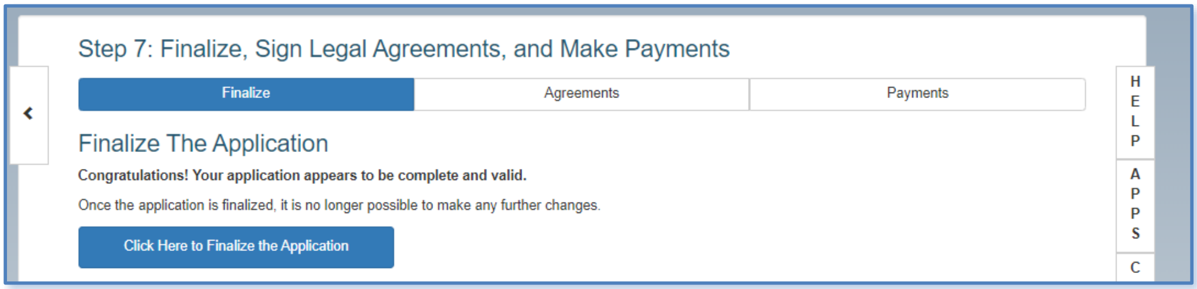
Do not include legal documents here; those can be added in the Finalization step.



How to Finalize Your Application

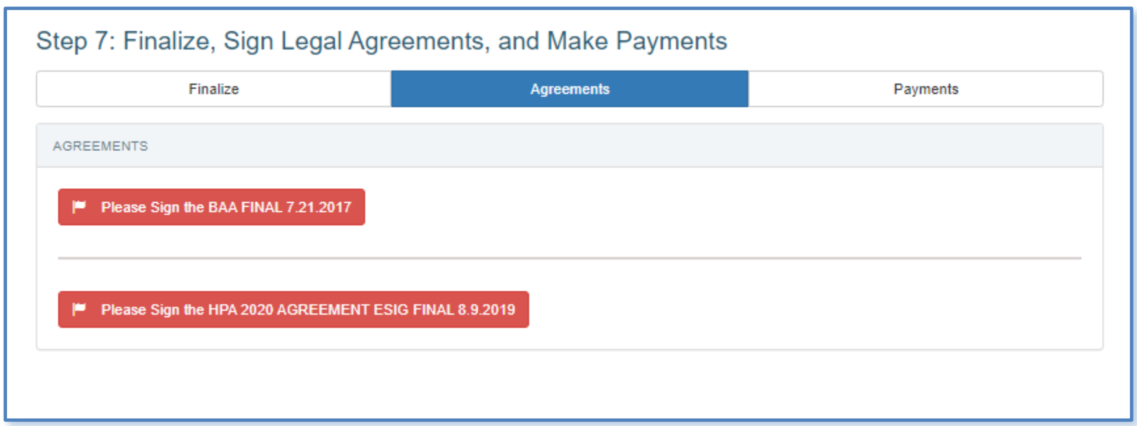
Step 1 Click the **Finish** Tab. Click the **Finalize** button when all changes are confirmed.

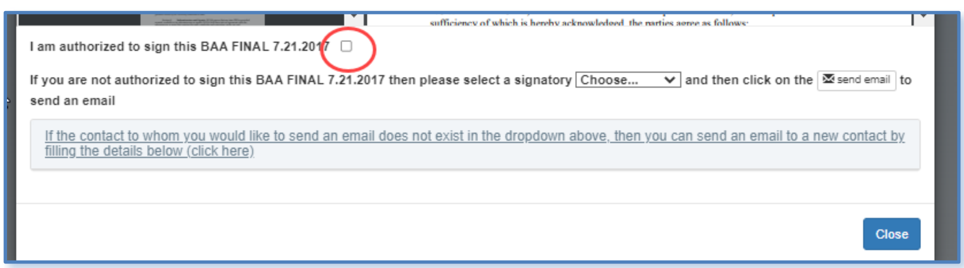
*Do not click **Finalize** unless you are done with the previous sections. After you click **Finalize**, you cannot make changes to previous sections.*



Step 2 After you click **Finalize**, the **Agreements** tab displays. Click the Agreement Document.

If you are an authorized signer, click to **E-sign**.

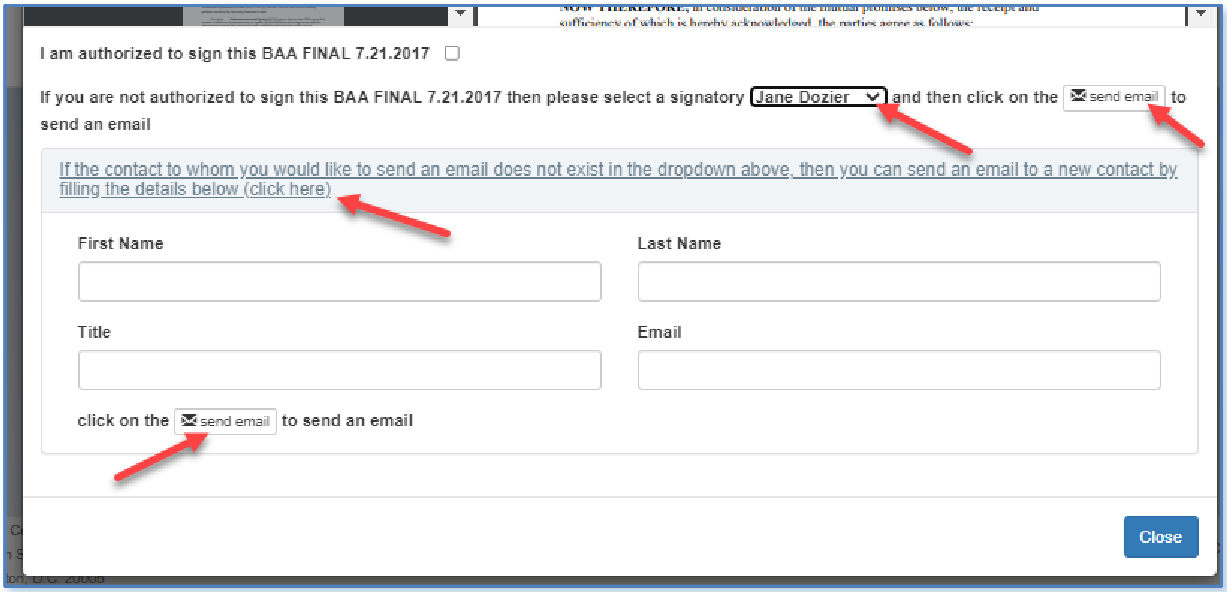




Step 3 If you are not an authorized signer, follow the steps in *Signatory Role: Sign-Off*.

Signatory Role: Sign-Off.

Step 1 Click to select a signatory from the **Choose…** drop-down list. Click **send email**.



When you receive an email with a link to the application tool, follow the steps below.

Step 2 Click the link in the email. Log in or create a new account, if necessary.

The signatory must be registered on My NCQA using the same email address in the application and must log in using the same email address in the application, or they will not be able to sign the Agreements.

Step 3 The *Pending Agreements* section will display and list all Agreements for which you are assigned as signatory. Click **View Agreements** or click the drop-down arrow to open and view the application.

Step 4 Click the Agreement and click to check **I am authorized to sign** checkbox.

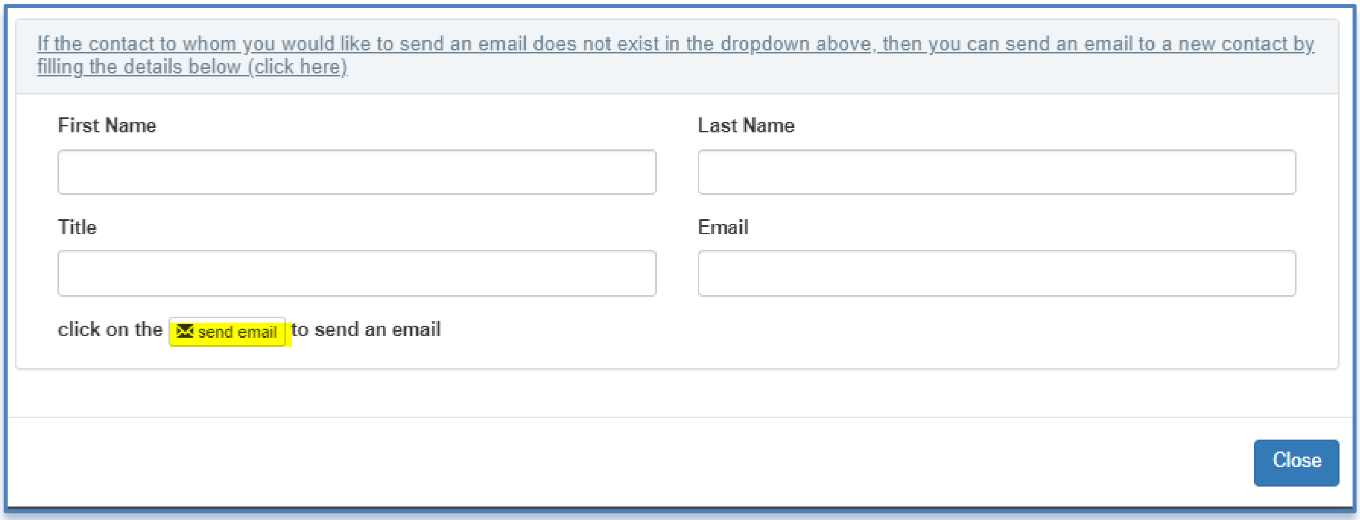
Click to e-sign the Agreement. The Accreditation/Certification contact will receive an email that the Agreement has been signed.

If the signer does not have a signatory role, follow the steps in How to Assign a Signatory Role.

How to Assign a Signatory Role

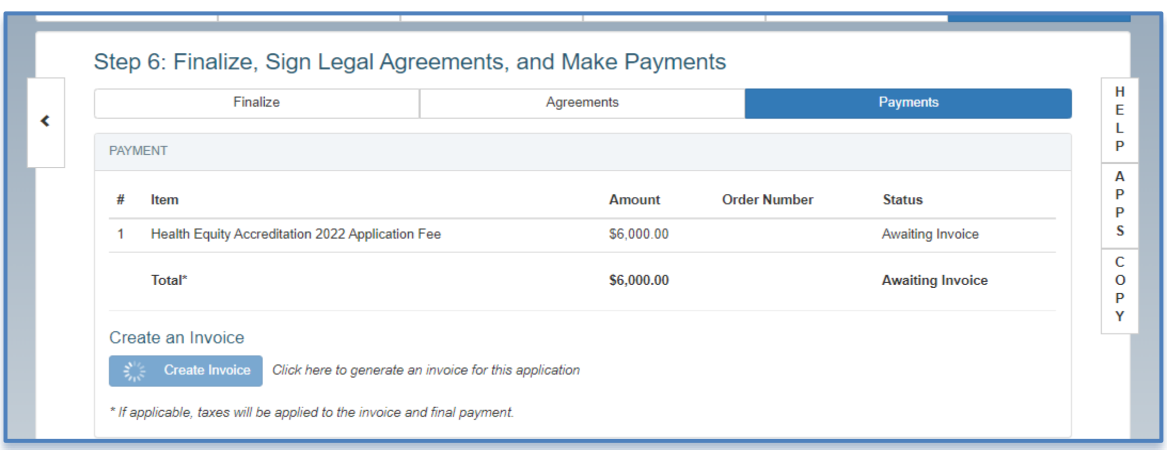
Step 1 If the signatory is not on the contact list, the following message will display. Click the link.

Step 2 Fill out the contact information and click **send email**. The signatory should follow steps 2–4 above.



How to Complete Payment and Submit

Step 1 After the Agreements have been signed, the *Payments* section will display the application fees.



Step 2 Click **Create Invoice** to generate an application fee. The invoice will also be emailed to the main point of contact (Accreditation/Certification contact).

If the application fee is "$0," no fee is due and the application will submit automatically when you click **Create Invoice**.

If you are paying by credit card, click **Pay Application Fee** and follow the instructions.

If you are paying by check, click the **Order Number** to generate a purchase order for the application fee. Download and forward the invoice and check information form to your Accounting area to fulfill the payment and send the check to NCQA. Include the invoice number when submitting the check payment.

When NCQA receives and records your payment, your application will automatically be submitted. Your organization's point of contact will receive a confirmation email that the application was submitted successfully.

How to Access the Application and Agreements After Submission

Step 1 Go to the submitted application on the main *Application* screen and click **Downloads**.

Step 2 Click **Download PDF** to view and download a copy of the application.

Step 3 Click **Agreements/Payments** to view and download copies of the Agreements and Application Fee Order.