

NON-DISCRIMINATION BENEFIT REVIEW TOOL OVERVIEW

Using this Guide

The following characteristics are intended to focus the user to where actions are warranted:

- Items that appear in *italics* are features. (e.g., See the *instructions tab* in the Master Review Tool.)
- Items that are in **bold** are functions. (e.g., **Click “Save.” Click “Import data from Master Review Tool.”**)
- For space considerations, screenshots of Excel worksheets may not include the full data picture.

Loading the Data

Before you can begin the Non-Discrimination Benefits Tool steps, **download** the tool from SERVIS (https://servis.cms.gov/resources/document_detail?doc_detail_id=c2de042d-bf0e-4e2a-46da-53691d3dc025) (states) or CMSzONE (<https://zone.cms.gov/document/2015-qhp-application-review-tools>) (issuers) and complete the **Import all Plan Data** function in the Master Review Tool *Instructions tab*.

If you are using this stand-alone tool, we recommend you review the validation steps in the Master Review Tool *Benefit Cost Sharing tab* to better understand the logic of the tool and where justifications may overcome the tool’s automated results.

1. In the Non-Discrimination Benefits Tool *Instructions tab*, row 7, **click “Populate Input tabs using data from ‘Master Review Tool.’”**
2. At the *Select a file* pop-up window, **select** the Master Review Tool that has all the imported data.
3. Data will load and “All data has finished importing” will appear in a pop-up window.
4. Make sure the *Input tab* is populated with data.
5. **Determine** the outlier multiplier and **type** it into the box in row 10.¹
6. **Determine** whether reviews will be conducted using national outlier thresholds in addition to state-level thresholds and, using the drop down, **click “Yes”** or **“No.”** Please note that national outlier thresholds will not be available until late summer 2014.
7. **Determine** if the state outlier thresholds should be calculated and, using the drop down, **click “Yes”** or **“No.”**
8. **Save** the workbook.
9. **Click “Run Tool”** in row 28.

¹ The outlier multiplier should be $1.0 \leq M \leq 2.0$. See appendix for a detailed description of the outlier methodology (Tukey’s Outlier Test).

10. **Save** the Non-Discrimination Benefits Tool workbook again.

Data Analysis

1. **Open** the QHP Application State Review Tools folder and run the Non-Discrimination Benefits Tool for all the plans you wish to evaluate.
2. **Open** the Master Review Tool and open the *Non-Discrimination Benefit tab* to see the issuer's plans you wish to review. Using the standards provided in the Master Review Tool *Non-Discrimination Benefit tab*, **determine** regulatory compliance of plans analyzed in the Non-Discrimination Benefit Tool.
3. **Go** to the Master Review Tool *Non-Discrimination Benefit tab* and **populate** “Met” or “Not Met” from the drop-down menus at the top of each column in the SELECT REVIEW RESULT row for each issuer.
4. **Open** the Master Review Tool *Review Summary tab* to see the auto-populated results in row 20.
5. **Save** the Master Review Tool after you have completed the non-discrimination benefit review.