

# NCQA Corrections, Clarifications and Policy Changes to the 2023 Health Equity Standards and Guidelines

July 31, 2023

This document includes the corrections, clarifications and policy changes to the 2023 Health Equity standards and guidelines. NCQA has identified the appropriate page number in the publication the standard/element head and subhead for each update. Updates have been incorporated into the Interactive Review Tool (IRT). NCQA operational definitions for correction, clarification and policy changes are as follows:

- A **correction (CO)** is a change made to rectify an error in the standards and guidelines.
- A **clarification (CL)** is additional information that explains an existing requirement.
- A **policy change (PC)** is a modification of an existing requirement.

An organization undergoing a survey under the 2023 standards and guidelines must implement corrections and policy changes within 90 calendar days of the IRT release date, unless otherwise specified. The 90-calendar-day advance notice does not apply to clarifications or FAQs, because they are not changes to existing requirements.

Page	Standard/Element	Head/Subhead	Update	Type of Update	IRT Release Date
72	HE 2, Element G	Explanation—Disclosure to Individuals	Replace the first paragraph in this section with the following: The organization communicates to individuals its policies for use and protection of individuals' race/ethnicity, language, gender identity and sexual orientation information, including whether such information will be shared with practitioners and providers. The communication does not have to include the organization's full policies and procedures. The organization may summarize in communication how it operationalizes factors 1–3. At a minimum, communication must be made when data are collected directly, and the information may be provided in additional communications the organization deems appropriate.	CL	7/31/23
73	HE 2, Element G	Explanation—Factors 2, 3: Permissible and impermissible use	Add the following as a new second paragraph: The organization is not required to address underwriting for the Medicaid product line.	CL	7/31/23
75	HE 3, Element A	Explanation	Move the following sentence under the factor 1 explanation to be the fifth paragraph of the Explanation: Use of contracted translation services is not considered delegation.	CL	7/31/23
2-2	Appendix 2—Delegation and Automatic Credit Guidelines	Structural requirements	Add the following reference: <sup>2</sup> Elements or factors may be eligible for automatic credit. Refer to Table 2.	CO	7/31/23

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PREVIOUSLY POSTED UPDATES					
Page	Standard/Element	Head/Subhead	Update	Type of Update	IRT Release Date
14	Policies and Procedures—Section 1: Eligibility and the Application Process	Application Request	Revise the first two sentences in the first paragraph under “Application Request” to read: The application process is online at <a href="https://my.ncqa.org">https://my.ncqa.org</a> . Organizations with a current status in MHC Distinction may apply for an Initial Survey. Organizations with a current status in Health Equity Accreditation may apply for a Renewal Survey.	CO	3/27/23
60	HE 2, Element C	Look-back period	Revise the look-back period for Renewal Surveys to read: <i>For Renewal Surveys:</i> 24 months for factors 1 and 5; at least once during the prior 36 months for factors 2, 3 and 4.	CO	3/27/23
64	HE 2, Element D	Documentation	Revise the second bullet under “Documentation” in the scope of review to read: <ul style="list-style-type: none"> <li>For factors 2–4: NCQA reviews reports or materials for evidence that the organization's data collection methods follow its documented process.</li> </ul>	CO	3/27/23
85	HE 4, Element B	Scope of review	Revise the third bullet in the scope of review to read: <ul style="list-style-type: none"> <li><i>For factor 4:</i> NCQA reviews the organization's documented process, reports or materials as evidence of a plan or adjustments to the network to meet identified individuals' needs.</li> </ul>	CL	3/27/23
89	HE 5, Element A	Explanation	Revise the second paragraph of the explanation to read: The program description may be a single comprehensive document or a set of interconnected documents that describes, in plain language, the CLAS program's governance, scope, goals, measurable objectives, structure and responsibilities. The description is organized and written so staff can understand the program's structure, purpose and commitment.	CO	3/27/23