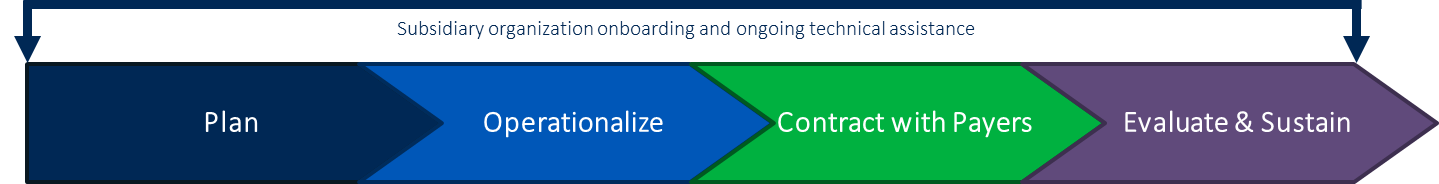
***A hand holding a blue umbrella

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**Onboarding and Engaging Subsidiary Organizations in an Umbrella Hub Arrangement**

**(UHA)**

**Purpose: Onboarding is the process by which umbrella hub organizations (UHOs) work with prospective subsidiary organizations to bring them into the umbrella hub arrangement (UHA). The onboarding process includes, but is not limited to recruiting, obtaining signed legal agreements, and providing an orientation to UHA operations.** The purpose of this resource is to outline the potential workflow between the UHO and subsidiary organizations for successful onboarding to the UHA and to align the workflow with UHA development milestones as demonstrated in Figure 1 below. Following a standardized and streamlined set of steps may increase the efficiency of the onboarding process. While this resource provides guidelines and estimations for the onboarding process, it may not reflect actual timelines or steps taken for every UHA. Subsidiary organizations and UHOs may find it useful to modify this resource during the onboarding process.

Figure 1. Milestones of UHA Development

**Instructions:** This resource is intended for use primarily by UHOs, with input from prospective subsidiary organizations. It is recommended that both UHOs and prospective subsidiary organization(s) review the resource in its entirety prior to completion. It is further recommended that UHOs begin completing the resource prior to the initial meeting with the prospective subsidiary organization(s). Additionally, this resource can be used to document ongoing technical assistance and support provided to the subsidiary organization(s) by the UHO.

While this resource describes the onboarding process for UHOs aggregating Diabetes Prevention Recognition Program (DPRP) data within the UHA, it can be adapted to meet the needs of non-aggregating UHAs. More information on data aggregation options is available in the [CDC UHA Guidance](https://nccdphp.my.salesforce.com/sfc/p/#t0000000TZNF/a/3d000000CgFU/sQcla1GXBr6g5Q8kFQy.lmbWXJrskrQ5BuTHVmIL4jQ). The resource can also be adapted to adjust for various scenarios such as:

* onboarding of the first subsidiary organization vs. subsequent subsidiary organizations,
* accommodating payer contract types and requirements, or
* responding to unique technical assistance requests.

It is estimated the subsidiary organization onboarding process will take between 6–12 weeks. An estimated timeline for each step is provided below.

**Content:**

This resource is divided into two parts. Part 1 covers the first two phases in the Milestones of UHA Development flowchart, Plan and Operationalize. It includes topics for initial discussions and the necessary steps for CDC recognition of a subsidiary organization. Part 2 covers the last two phases, Contract with Payers and Evaluate and Sustain. It includes descriptions of information that may be needed to contract with payers and provide ongoing technical assistance to subsidiary organizations. Links to each section are provided below:

[Part 1: Steps for Planning and Operationalizing the UHA with Prospective Subsidiary Organizations](#_Part_1:_Steps)

1. [Subsidiary Organization Background and Capacity Assessment](#_1._Subsidiary_Organization)
2. [UHA Contracting, Reporting, and Application Submission](#_2._UHA_Contracting)

[Part 2: Contract with Payers, Evaluate, & Sustain](#_Part_2:_Steps)

1. [Subsidiary Organization Training and Technical Assistance](#_3._Subsidiary_Organization)
2. [Payer Contracting, Credentialling, and Claims Submission](#_4._Payer_Contracting,)
3. [Sustaining the UHA](#_5._Sustaining_the)

Each section is divided into four categories:

* **Activity** – this column lists the task or action recommended as part of the onboarding process. Tasks are listed in the order they are expected to occur.
* **Activity Details** – this column provides a description of what information the UHO will need from the subsidiary organization to complete the associated activity. It also describes where in the onboarding process the action should be completed. For example, activities may occur during an initial meeting between the UHO and subsidiary organization, when executing contracts between the UHO and subsidiary organizations, or when submitting the application to become a Medicare Diabetes Prevention Program (MDPP) supplier.
* It includes questions to be answered as well as suggestions for helpful resources to review.
* **Estimated Time to Complete** – this column describes the estimated time to complete each activity. However, this may vary by UHA. Each UHA is unique and will move at its own pace.
* **Additional Notes** – this column can be used as needed by the UHO or subsidiary organization to provide additional context for each action, such as unique observations, delays, or deviations from defined processes.

Version 1 – July 2023

# **Part 1: Steps for Planning and Operationalizing the UHA with Prospective Subsidiary Organizations**

| **I. Subsidiary Organization Background and Capacity Assessment** **During this phase of the onboarding process, the UHO and subsidiary organization should make a preliminary assessment of whether it is feasible for the subsidiary organization to participate in the UHA.** | | | |
| --- | --- | --- | --- |
| **Activity** | **Activity Details** | **Estimated Time to Complete** | **Additional Notes** |
| **a) Learn more about the prospective subsidiary organization** | Date: Click or tap here to enter text.  The goal of this step is for the UHO to learn more about the prospective subsidiary organization. Completing this activity will help the UHO build an understanding of the prospective subsidiary organization’s reach, service offerings, and experience providing the National Diabetes Prevention Program (National DPP) lifestyle change program. Gathering this information will also help the UHO determine what topics to raise in the first outreach or initial meeting. Information can be gathered from various sources which may include the [DPRP registry](https://dprp.cdc.gov/Registry), the prospective subsidiary organization’s website and marketing materials, or previous communications with the organization.   1. Organization name:   Click or tap here to enter text.   1. Organization’s contact information:   Click or tap here to enter text.   1. Description of organization’s existing services:   Click or tap here to enter text.   1. Description of organization’s geographic areas served (including specific populations of focus that are at higher risk for type 2 diabetes – information available via CDC’s [US Diabetes Surveillance System](https://gis.cdc.gov/grasp/diabetes/diabetesatlas-surveillance.html)):   Click or tap here to enter text.   1. Prospective subsidiary organizations with experience delivering the National DPP lifestyle change program may or may not have received CDC recognition to deliver the program. Subsidiary organizations must be CDC-recognized prior to joining the UHA. To verify the organization’s recognition status, confirm if the organization is listed on [CDC’s DPRP National Registry of All Recognized Organizations](https://dprp.cdc.gov/Registry). If the organization is listed on the registry, indicate each delivery modality they offer and the respective recognition status of each modality below.   Yes, organization is listed on the DPRP registry  Delivery mode(s):  In-person (Note: The subsidiary organization must have an in-person organization code (OrgCode) to join the UHA. See section II for more information.)  Pending  Preliminary  Full  Full Plus  N/A or unknown  Online  Pending  Preliminary  Full  Full Plus  N/A or unknown  Distance Learning  Pending  Preliminary  Full  Full Plus  N/A or unknown  Combination  Pending  Preliminary  Full  Full Plus  N/A or unknown  No, organization is not listed on the DPRP registry\*  \*If organization is not CDC-recognized through the DPRP registry, follow steps listed in section II(b) for achieving CDC DPRP recognition. | 1-2 hours | Click or tap here to enter text. |
| **b) Outreach to prospective subsidiary organization** | Date: Click or tap here to enter text.  After gathering preliminary information on the prospective subsidiary organization in section I(a), it is recommended that the UHO perform initial outreach. If the UHO has an existing relationship with the prospective subsidiary organization, initial outreach can focus on introducing the concept of the UHA. Outreach may be conducted via phone call, in person, or email from the UHO or a third party (e.g., the state health department). It is recommended that the initial outreach include general information on the UHO’s organizational mission and vision, information on the UHA, and a UHO point of contact who can be reached for questions and/or to set up a meeting. The [UHA Modifiable Slide Deck](https://www.dropbox.com/s/4mtccx194niek85/UHA%20Modifiable%20Slide%20Deck.pptx?dl=0) is an editable deck with information that can support initial conversations with a prospective subsidiary organization.  It is recommended that the UHO include requests in the initial outreach for the prospective subsidiary organization to review or complete the following:  The [National DPP Coverage Toolkit](https://coveragetoolkit.org/)  The National DPP Coverage Toolkit [UHA pages](https://coveragetoolkit.org/umbrella-hub-arrangements/)  The DPRP Standards and Operating Procedures (last updated May 1, 2021 **–** [English Version](https://nccdphp.my.salesforce.com/sfc/p/#t0000000TZNF/a/t0000001Nky3/umpdt60_FdxVk5H8GqpsUJtNpznbIH4KE7x3M0TJPeA) and [Spanish Version](https://nccdphp.my.salesforce.com/sfc/p/#t0000000TZNF/a/3d000000eOmy/YEJjzf2LA5n78XYONiU5hOfjXYFDQZKw4J.OnoboCi4) available)  The [DPRP Organizational Capacity Assessment Webinar](https://nationaldppcsc.cdc.gov/s/article/DPRP-Organizational-Capacity-Assessment-Webinar)  The [DPRP Capacity Assessment](https://nccdphp.my.salesforce.com/sfc/p/#t0000000TZNF/a/3d000000CBw2/wEGSdCqOXcziZLPGRZtqCV3io.Qyge7kqVAYVYWz9hI)  Date DPRP Capacity Assessment received: Click or tap here to enter text.   1. Date of initial outreach to organization:   Click or tap here to enter text.   1. Date of response received:   Click or tap here to enter text.   1. Organization’s primary point of contact (including title and contact information):   Click or tap here to enter text.   1. Date of initial meeting with organization:   Click or tap here to enter text. | 1 week or less |  |
| **c) Conduct initial meeting with prospective subsidiary organization to assess capacity** | Date: Click or tap here to enter text.  During the initial meeting with the prospective subsidiary organization, it is recommended that the UHO reiterate information about the UHO’s organization mission and vision. The UHO should be prepared to provide additional information on the UHA as needed. It is recommended that the initial meeting occur after the prospective subsidiary organization has reviewed the resources provided in I(b) and returned the DPRP Capacity Assessment. The UHO can then proceed with discussing the following:   1. Is the organization interested in billing and obtaining reimbursement from the Centers for Medicare & Medicaid Services (CMS) for the MDPP or from Medicaid or other payers for delivery of the National DPP lifestyle change program?   Yes – Payers: Click or tap here to enter text.  Yes, but not right away  No   1. Discuss and input the following information regarding the organization’s current National DPP status.   DPRP data submission timeline (Note: *If the current data submission timeline does not align with UHA, review the* [National DPP Guidance Document](https://nccdphp.my.salesforce.com/sfc/p/#t0000000TZNF/a/3d000000CgFU/sQcla1GXBr6g5Q8kFQy.lmbWXJrskrQ5BuTHVmIL4jQ) *and the steps in II(b))*: Click or tap here to enter text.  Start date, the most recent date, and/or the projected start date of the next cohort: Click or tap here to enter text.  Average # of cohorts per year: Click or tap here to enter text.  Average # of participants per cohort: Click or tap here to enter text.  # of Lifestyle Coaches: Click or tap here to enter text.  MDPP supplier status:  Has not applied  Applied (but has not received approval)  Approved  Current Medicaid or managed care organization (MCO) contracts: Click or tap here to enter text.  Language(s) curriculum is taught in at the organization: Click or tap here to enter text.   1. What are the organization’s current processes for\*:   Participant identification and outreach: Click or tap here to enter text.  Obtaining program referrals: Click or tap here to enter text.  Screening for social determinants of health (SDOH) or referral to health-related social needs (HRSN) services: Click or tap here to enter text.  Providing program supports: Click or tap here to enter text.  \*Additional information on these topics is available on the [Coverage Toolkit Health Equity](https://coveragetoolkit.org/health-equity-and-the-national-dpp/) pages   1. What technical assistance or support is the organization interested in receiving through the UHA (such as SDOH screening, participant identification and outreach, program supports, etc.)? Click or tap here to enter text. 2. Is the UHO able to provide support in these area(s)?   Yes  No  No, but plan to build capacity   1. Additional notes regarding organization’s service offerings (i.e., additional evidence-based programs, HRSN): Click or tap here to enter text. 2. Subsidiary organization leadership approval is required for participation in the UHA and completion of business and payer contracts. Has the subsidiary organization obtained leadership approval and sign-off from all necessary partners and leaders?   Yes  No or Pending  It is recommended the UHO close the meeting with a reminder about next steps, and if appropriate, a plan for having another conversation.   1. Based on initial conversations, the UHO and the organization should work together to determine next steps in the subsidiary onboarding process. Will the organization proceed with joining the UHA?   No  Not yet – next steps for connecting: Click or tap here to enter text.  Yes, with contingencies, including: Click or tap here to enter text.  Yes  Undecided | 1-2 weeks | Click or tap here to enter text. |

| **II.** **UHA Contracting, Reporting, and Application Submission** **Once the subsidiary organization has opted to participate in the UHA, the UHO and subsidiary organization will need to work together to initiate business processes including, but not limited to, sharing of information, DPRP data submission, and distribution of reimbursement.** | | | |
| --- | --- | --- | --- |
| **Activity** | **Activity Details** | **Estimated Time to Complete** | **Additional Notes** |
| **a) Obtain National DPP Lifestyle Coach information from the subsidiary organization.** | Date: Click or tap here to enter text.  Various applications in the UHA and National DPP delivery process require that users input information on the Lifestyle Coaches who will be delivering the program. It is recommended that the UHO maintain up-to-date information on all active Lifestyle Coaches within subsidiary organizations. This section is intended to track that the UHO has obtained this information, however, it is important the UHO store personal information about Lifestyle Coaches in **secure, encrypted locations.**  In addition to standard Lifestyle Coach training information, subsidiary organizations interested in obtaining Medicare, Medicaid, and commercial payer reimbursement are also required to obtain a National Provider Identifier (NPI) number via the [National Plan & Provider Enumeration System (NPPES)](https://nppes.cms.hhs.gov/#/).   1. UHO obtains subsidiary organization Lifestyle Coach information (stored in a secure location), including:   Lifestyle Coach names  NPI numbers  Confirmation of the primary training mechanism the organization will use or has used to formally train their Lifestyle Coaches according to the DPRP Standards. (select all that apply)  A training entity on the CDC website  A private organization with national reach  A virtual organization with national reach  A Master Trainer (MT) who completed a MT program  Dates of birth (DOB)  Social Security Numbers (SSN) | 1 week or less | Click or tap here to enter text. |
| **b) Submit or Reapply for DPRP Recognition** | 1. **If the subsidiary organization is not currently a CDC-recognized organization,** the subsidiary organization will need to complete the[DPRP Application](https://dprp.cdc.gov/).   Once approved, the subsidiary organization will receive their unique OrgCode, effective date\*, and data submission timeline\*\*. The subsidiary organization must have an **in-person** organization code (OrgCode) to join the UHA.  Subsidiary organization DPRP OrgCode: Click or tap here to enter text.  \*Note: Subsidiary organization must start a National DPP cohort within 6 (six) months of DPRP application approval date.  \*\*Note: Subsidiary organization submission or reapplication for DPRP recognition should align with submission of the UHA Application in order to align data submission timelines of the UHO and subsidiary organizations. See [UHA Guidance Document](https://nccdphp.my.salesforce.com/sfc/p/#t0000000TZNF/a/3d000000CgFU/sQcla1GXBr6g5Q8kFQy.lmbWXJrskrQ5BuTHVmIL4jQ) for more details.   1. **If the subsidiary organization is currently a CDC-recognized organization, but existing data submission timeline does not align with the data submission timeline of the UHO,** the subsidiary organization will be required to:   Withdraw existing DPRP recognition  “Re-Apply” and enter current OrgCode when resubmitting [DPRP Application](https://dprp.cdc.gov/) during the UHO data submission period  Date of resubmission: Click or tap here to enter text. | 1 hour or less  (Note: The DPRP approval process takes approximately 15 days) | Click or tap here to enter text. |
| **c) Complete UHA Application submission** *(to be completed for initial UHA application)* | Date: Click or tap here to enter text.  The UHA application requires the UHO submit the application with at least one subsidiary organization. The application consists of UHO-specific sections and a subsidiary organization statement of intent. For data aggregation UHAs, subsidiary organization onboarding activities should be completed 2-3 weeks prior to the UHO’s DPRP data submission month to achieve a successful onboarding experience  To complete the UHA Application, the UHO will review and complete the [Information about the Applicant Hub](https://nccdphp.my.salesforce.com/sfc/p/#t0000000TZNF/a/3d000000CgG8/0ZSysNSHTrQZpnlR2jn.GGY34E6DBX0llYqSkuOKvIw) (Part 1 of the UHA Application)  To complete the UHA Application, the subsidiary organization will review and complete the [National DPP Umbrella Hub Arrangement Application Subsidiary Organization’s Statement of Intent](https://nccdphp.my.salesforce.com/sfc/p/#t0000000TZNF/a/3d000000CgG8/0ZSysNSHTrQZpnlR2jn.GGY34E6DBX0llYqSkuOKvIw) (Part 2 of the UHA Application)  Date received: Click or tap here to enter text.  UHO will attach required attachments (located on page 3) to the UHA Application  UHO will submit the UHA Application to the [National Customer Service Center (CSC) portal](https://nationaldppcsc.cdc.gov/s/login/)  UHA Application submission date: Click or tap here to enter text.  UHA application date of approval: Click or tap here to enter text.  Subsidiary organization informed of UHA Application approval: Click or tap here to enter text.  Note: If the UHO is submitting to become a UHA that does **not** aggregate DPRP data, additional contracts may be required with the UHA Application. For more information see the CDC [UHA Guidance Document](https://nccdphp.my.salesforce.com/sfc/p/#t0000000TZNF/a/3d000000CgFU/sQcla1GXBr6g5Q8kFQy.lmbWXJrskrQ5BuTHVmIL4jQ) and the contracting sections in II(d) below. | 1-2 hours | Click or tap here to enter text. |
| **d) Complete UHA contracting documents** | Date: Click or tap here to enter text.  The UHA is a legal business entity that is bound together by a series of agreements, which may include a charter/contract, business associate agreement (BAA), memorandum of understanding (MOU), and/or scope of work (SOW).   1. UHO provides the subsidiary organization with a draft of applicable contracting documents, including:   Charter between UHO and subsidiary organization ([Example 1: Sample Charter Between a UHO and Subsidiary](https://coveragetoolkit.org/wp-content/uploads/2021/02/Sample-Charter-Between-a-UHO-and-a-Subsidiary-Example-1.pdf)) ([Example 2: Sample Charter Between a UHO and Subsidiary](https://coveragetoolkit.org/wp-content/uploads/2021/02/Sample-Charter-Between-a-UHO-and-a-Subsidiary-Example-2.pdf))  BAA (*Note: a signed BAA is required for non-aggregating UHAs to complete the CDC UHA Application, below*) ([Example 1: Sample BAA for UHO Subsidiary and Billing Platform](https://coveragetoolkit.org/wp-content/uploads/2021/02/Sample-BAA-for-UHO-Subsidiary-and-Billing-Platform-Example-1.pdf)) ([Example 2: Sample BAA for UHO Subsidiary and Billing Platform](https://coveragetoolkit.org/wp-content/uploads/2021/02/Sample-BAA-for-UHO-Subsidiary-and-Billing-Platform-Example-2.pdf))  MOU (optional)  SOW (optional)   1. Subsidiary organization reviews and provides feedback on contracting documents and returns to UHO.   Subsidiary organization leadership approved contracting documents.  Subsidiary organization leadership did not approve and sent revised contracting documents.  Date of first revision received: Click or tap here to enter text.  Date of second revision received: Click or tap here to enter text.  Date of final revision received: Click or tap here to enter text.   1. UHO provides subsidiary organization with final contracting documents for signature   Charter – Date sent: Click or tap here to enter text.  BAA – Date sent: Click or tap here to enter text.  MOU (optional) – Date sent: Click or tap here to enter text.  SOW (optional) – Date sent: Click or tap here to enter text.   1. Subsidiary organization signs and returns contracting documents for full execution.   Charter – Date fully executed:Click or tap here to enter text.  BAA – Date fully executed: Click or tap here to enter text.  MOU (optional) – Date fully executed: Click or tap here to enter text.  SOW (optional) – Date fully executed: Click or tap here to enter text.  ***If finalizing contracts for the first subsidiary organization in the UHA, proceed to section II(e).***  ***If finalizing contracts for subsequent subsidiary organizations, proceed to section II(f).*** | 2-4 weeks | Click or tap here to enter text. |
| **e) Access the DPRP Data Submission and Administration Portal through Secure Access Management Services (SAMS)** | Date:Click or tap here to enter text.   1. Registration through CDC’s Secure Access Management Services (SAMS) is required to access the [DPRP Data](https://dprpdataportal.cdc.gov/samsinfo) Submission and Administration Portal (DPRP Data Portal). CDC-recognized organizations are required to upload, validate, correct, and submit data files through the DPRP Data Portal. CDC-recognized organizations can also use the portal to update organization and Lifestyle Coach information, and generate participant reports. Does the subsidiary organization have an active SAMS account and access to the DPRP Data Portal?   Yes  No  ***If “no”, complete question II(e)-2.***  ***If “yes”, move to question II(e)-3.***   1. Subsidiary organization should contact the [National DPP Customer Service Center](https://nationaldppcsc.cdc.gov/s/) for support with registering with SAMS.   Date completed: Click or tap here to enter text.   1. Once the UHA Application has been approved, the National CSC will update the subsidiary organization’s profile in the DPRP Data Portal to the “UHO Model”. The subsidiary organization will need to go into the portal and assign a designated individual at the UHO under the “Umbrella Hub Contact” information. This will help the UHO gain access and submit reports on behalf of the subsidiary organization.   Subsidiary organization added to the UHA in the DPRP Data Portal  Subsidiary organization identified an Umbrella Hub Contact  Contact listed as: Click or tap here to enter text. | 1-2 days | Click or tap here to enter text. |
| **f) Complete UHA Application updates** *(additional DPRP UHA Application Subsidiary Organization Statement of Intent to be completed for subsequent subsidiary organizations)* | Date: Click or tap here to enter text.  After the UHA Application has been submitted and approved, subsequent subsidiary organizations that are added to the UHA are only required to submit National DPP Umbrella Hub Arrangement Application Subsidiary Organization’s Statement of Intent (Part 2 of the UHA Application).  Aggregate arrangements may add subsidiary organization/s during the UHO’s data submission months. It is strongly recommended the UHO notify CDC through the [National CSC portal](https://nationaldppcsc.cdc.gov/s/login/) prior to their submission due month of their plans to add additional subsidiary organization(s). Review the CDC UHA Guidance for details on adding subsidiary organizations to a non-aggregate UHA. ([CDC UHA Guidance](https://nccdphp.my.salesforce.com/sfc/p/#t0000000TZNF/a/3d000000CgFU/sQcla1GXBr6g5Q8kFQy.lmbWXJrskrQ5BuTHVmIL4jQ))  To complete the UHA Application, the subsidiary organization will review and complete the [National DPP Umbrella Hub Arrangement Application Subsidiary Organization’s Statement of Intent](https://nccdphp.my.salesforce.com/sfc/p/#t0000000TZNF/a/3d000000CgG8/0ZSysNSHTrQZpnlR2jn.GGY34E6DBX0llYqSkuOKvIw) (Part 2 of the UHA Application)  Date received: Click or tap here to enter text.  UHO will attach required attachments (located on page 3) to the UHA Application  UHO will submit the documents to the [National CSC portal](https://nationaldppcsc.cdc.gov/s/login/) | 1-2 hours | Click or tap here to enter text. |

# **Part 2: Steps for Contracting with Payers, Evaluating, and Sustaining the UHA with Potential Subsidiary Organizations**

| **III. Subsidiary Organization Training and Technical Assistance** **During this phase of the onboarding process, the UHO and the subsidiary organization will discuss training and technical assistance needs of the subsidiary organization and determine a schedule for meeting these needs.** | | | |
| --- | --- | --- | --- |
| **Activity** | **Activity Details** | **Estimated Time to Complete** | **Additional Notes** |
| **a) Train Subsidiary organization** | Date: Click or tap here to enter text.  Accurate collection and input of participant data is required for timely submission of DPRP data and to streamline billing and reimbursement processes. One of the UHO’s responsibilities is to ensure that the subsidiary organizations are trained in data collection processes. Resources to assist in training subsidiary organizations in collecting National DPP data, such as the [data reporting resources](https://nationaldppcsc.cdc.gov/s/topic/0TOt0000000GwhLGAS/data-reporting-for-the-lifestyle-change-program), the [DPRP Data Entry webinar](https://nationaldppcsc.cdc.gov/s/article/DPRP-Data-Entry-Webinar), and the [Techincal Assistance for Succes](https://nationaldppcsc.cdc.gov/s/article/Technical-Assistance-for-Success)s series are available on the CSC.  These trainings may include, but are not limited to:  Training on using billing platform (if needed)  Date of training: Click or tap here to enter text.  Health Insurance Portability and Accountability Act and other data security trainings  Date of training: Click or tap here to enter text.  Overall UHA expectations (including participant enrollment, communication, and data entry practices)  Date of training: Click or tap here to enter text.  Collecting and inputting participant enrollment information (including health insurance information)  Date of training: Click or tap here to enter text.  Training on other data required for payer claims  Date of training: Click or tap here to enter text.  Collecting and inputting participant DPRP data  Date of training: Click or tap here to enter text.  Performing participant SDOH and/or readiness to change screening and referrals (as applicable)  Date of training: Click or tap here to enter text.  Using participant program supports  Date of training: Click or tap here to enter text.  Best practices in participant recruitment and retention  Date of training: Click or tap here to enter text.  **Note: UHOs will need to ensure that subsidiary organizations are provided with necessary permissions to applicable data input/referral platforms to complete required activities.** | 2-3 weeks for initial trainings;  Additional trainings ongoing | Click or tap here to enter text. |
| **b) Set recurring meetings** | Date: Click or tap here to enter text.  It is recommended that the UHO meets regularly with contracted subsidiary organizations to share updates and discuss implementation successes or challenges. These meetings can also provide an opportunity for the UHO to implement updated trainings on topics relevant to the UHA (see above), to learn from subsidiary organizations, and to discuss sustainability of the UHA.  UHO and subsidiary organization set up recurring meeting  Meeting cadence: | Ongoing | Click or tap here to enter text. |
| **c) Outline National DPP support and technical assistance requests** | Date: Click or tap here to enter text.  In addition to providing reimbursement support, the UHO can also assist subsidiary organizations with [marketing](https://nationaldppcsc.cdc.gov/s/article/Prevent-T2-Adaptable-Promotional-Materials-1525314333471), enrollment and/or retention of participants, referrals, etc. It is important that UHOs and subsidiary organizations discuss what support may be needed and is available.   1. Per initial discussions in sections I(c), what technical assistance or support is the subsidiary organization interested in? Click or tap here to enter text. 2. Is the UHO able to provide support in this area?   Yes  No  No, but building capacity   1. Describe the technical assistance or support provided: Click or tap here to enter text. | Ongoing | Click or tap here to enter text. |

| **IV. Payer Contracting, Credentialling, and Claims Submission** **During this phase of the onboarding process the UHO will gather information from subsidiary organizations necessary to obtain reimbursement from payers, including Medicare, Medicaid, and commercial payers, as applicable.** | | | |
| --- | --- | --- | --- |
| **Activity** | **Activity Details** | **Estimated Time to Complete** | **Additional Notes** |
| **a) Complete MDPP supplier enrollment application** (CMS form number 20134) | Date: Click or tap here to enter text.  The UHO will maintain responsibility for completing the MDPP supplier application and submitting MDPP claims on behalf of the subsidiary organization. The UHO will communicate with the subsidiary organization about the submission and approval of the MDPP supplier application.   1. Is UHO an approved MDPP supplier?   Yes (Proceed to next question)  No (Complete the MDPP supplier application\*)  \*For more information on the MDPP supplier application, the UHO and/or the subsidiary organization can review [MDPP Implementation Resources](https://coveragetoolkit.org/medicare/mdpp-implementation-resources/), [the Coverage Toolkit MDPP pages](https://coveragetoolkit.org/medicare/), and the [Umbrella Hub Organization Medicare Diabetes Prevention Program Supplier Enrollment Guide](chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/https:/coveragetoolkit.org/wp-content/uploads/2022/10/UHO-MDPP-Supplier-Enrollment-Guide.pdf).   1. Per initial discussions in sections I(c), is the subsidiary organization interested in billing and obtaining reimbursement for the MDPP?   Yes  Yes, but not right away  No  ***If “no”, or “Yes, but not right away” move to section IV(b).***  ***If “yes”, continue with the completion of IV(a).***  UHO submitted the initial MDPP supplier application  Submission Date: Click or tap here to enter text.  MDPP Supplier Approval Date: Click or tap here to enter text.  Date subsidiary organization notified: Click or tap here to enter text.  UHO submitted MDPP supplier application to add subsidiary organization as either a new “community setting” or as a new ”administrative location” and to add Lifestyle Coach(es) to coach roster (any changes to the MDPP Application need to be made within 30 days of the change occurring)  Submission Date: Click or tap here to enter text.  UHO received approval of MDPP supplier application  Effective date: Click or tap here to enter text.  Date subsidiary organization notified: Click or tap here to enter text.  Note: Medicare Administrative Contractors (MACs) typically require approximately 80-90 days to review and approve MDPP supplier applications. UHOs can contact the MAC to check the status of the application. Submitting MDPP fee-for-service (FFS) claims prior to receiving confirmation of approval from MAC will result in denied claims. UHOs that are MDPP suppliers must allow CMS or its agents to conduct onsite inspections or recordkeeping reviews in order to ascertain the MDPP supplier’s compliance with standards and must adhere to MDPP documentation requirements outlined in 42 C.F.R 424.205(g). UHOs may not be notified prior to onsite visit.  Site visit date: Click or tap here to enter text.  Following approval, the UHO will need to ensure the subsidiary organization is trained on [MDPP Eligibility Requirements](https://www.cms.gov/Medicare/Prevention/PrevntionGenInfo/medicare-preventive-services/MPS-QuickReferenceChart-1.html#MDPP) and enrollment protocols.  UHO provides MDPP training to subsidiary organization  Date of training: Click or tap here to enter text.  Note: The UHO will be responsible for registering and submitting the MDPP Quarterly Crosswalks. To complete the Crosswalk, the UHO will need information on Medicare fee-for-service and Medicare Advantage National DPP participants. UHOs can understand information required for each participant by reviewing registration details via the [CMS Guidance to Maintain the MDPP Crosswalk File](https://innovation.cms.gov/files/x/mdpp-crosswalk-guidance.pdf). MDPP Crosswalk reports are due 6 months after 1st MDPP service is provided. | 60-90 days | Click or tap here to enter text. |
| **b) Complete Medicaid enrollment for fee-for-service Medicaid** | Date: Click or tap here to enter text.   1. Per initial discussions in sections 1c and 1d, is the subsidiary organization interested in billing and obtaining reimbursement from Medicaid?   Yes  No  Not applicable (i.e., there is no Medicaid coverage of the National DPP lifestyle change program in the state).  ***If “no”, or “Not applicable” move to section IV(c).***  ***If “yes”, continue with completion of IV(b).***  For states that have coverage of the National DPP through Medicaid (see the [Participating Payers](https://coveragetoolkit.org/participating-payers/) page of the Coverage Toolkit for a comprehensive list of covered states), Medicaid enrollment requirements for both delivery (subsidiary) organizations and participants may vary. The UHO will need to ensure that the subsidiary organization is aware of any requirements they may have for enrolling in Medicaid reimbursement or enrollment prerequisites for participants (such as a physician referral or blood glucose test).  UHO provides subsidiary organization with training on Medicaid enrollment requirements for delivery organizations  Requirements: Click or tap here to enter text.  Date provided: Click or tap here to enter text.  UHO provides subsidiary organization with training on Medicaid beneficiary participant enrollment requirements  Requirements: Click or tap here to enter text.  Date provided: Click or tap here to enter text. | Varies depending on state requirements | Click or tap here to enter text. |
| **c) Partner with additional payers (e.g., MCO, Medicare Advantage, commercial payers, employers, etc.)** | Date: Click or tap here to enter text.  Additional payers providing reimbursement to the UHA for delivery of the National DPP lifestyle change program may have specific enrollment, contracting, or credentialing requirements for both the UHO as the billing provider and subsidiary organization/Lifestyle Coaches as the service provider. The UHO should contact each payer to verify their specific requirements. For example, CMS has [a Medicare Advantage fact sheet](https://innovation.cms.gov/files/fact-sheet/mdpp-ma-fs.pdf) which details how to work with Medicare Advantage to obtain reimbursement. Additional information is also available on the [Medicare](https://coveragetoolkit.org/medicare/) pages of the National DPP Coverage Toolkit. After enrolling, executing contracts or credentialing processes, the UHO will need to ensure that the subsidiary organization is aware of any payer requirements.   1. Is the UHO planning to contract or enroll with additional payers?   Yes (complete remainder of section IV(c))  No (skip to section V)  Payer: Click or tap here to enter text.  UHO contacts health payer to discuss contracting requirements.  Requirements: Click or tap here to enter text.  Date provided: Click or tap here to enter text.  UHO submits contracting requirements established by the health payer.  Date submitted: Click or tap here to enter text.  Approval date: Click or tap here to enter text. | Varies depending on payer requirements | Click or tap here to enter text. |

| **V. Sustaining the UHA** **During this phase in the onboarding process, the UHO and subsidiary organizations will work together to plan for the growth and sustainability of the UHA.** | | | |
| --- | --- | --- | --- |
| **Activity** | **Activity Details** | **Estimated Time to Complete** | **Additional Notes** |
| **a) Assess current offerings and develop sustainability plans** | Date: Click or tap here to enter text.  The subsidiary organization is a critical partner in ensuring UHA sustainability and growth. Discussing the subsidiary organization’s roles and responsibilities will help partners manage expectations and maximize efficiency. Each of the questions below is optional for participation in the UHA and can be adjusted to meet the unique partnership the UHO and subsidiary organization have developed.  **Referral sources**   1. Per initial conversations in sections I(c), what referral sources is the UHA currently using? Click or tap here to enter text. 2. Does the subsidiary organization have capacity to assist in expanding referral sources?   Yes  No   1. If “Yes”, describe the subsidiary organization plan for expanding referral sources: Click or tap here to enter text.   **Participant identification and outreach**   1. Per initial conversations in sections I(c), how is the UHA currently conducting participant identification and outreach? Click or tap here to enter text. 2. Does the subsidiary organization have capacity to assist in expanding participant identification and outreach efforts?   Yes  No   1. If “Yes”, describe the subsidiary organization plan for participant identification and outreach: Click or tap here to enter text.   **Lifestyle Coach training**   1. Does the subsidiary organization have a process for hiring, replacing, and/or training Lifestyle Coaches as needed?   Yes  Description of process: Click or tap here to enter text.  No   1. Does the UHO assist with standard Lifestyle Coach, Advanced Coach, or Master Trainer training?   Yes  No  The CDC CSC provides [resources](https://nationaldppcsc.cdc.gov/s/article/Training-for-your-Lifestyle-Coaches) related to Lifestyle Coach training, including information on certified training entities.  **Incorporate additional evidence-based programs, screening for SDOH, or providing HRSN referrals or program supports** (for additional information on this topic, visit the [Coverage Toolkit Health Equity](https://coveragetoolkit.org/health-equity-and-the-national-dpp/) pages)   1. Does the subsidiary organization offer any additional evidence-based programs?   Yes  No   1. If “Yes”, describe the additional programs: Click or tap here to enter text. 2. If “Yes”, does the subsidiary organization provide referrals to these programs to eligible National DPP participants?   Yes  No   1. If “No”, is the subsidiary organization interested in obtaining certification to offer additional evidence-based programs?   Yes  No   1. Does the subsidiary organization conduct SDOH screening?   Yes  No   1. Does the subsidiary organization provide or refer participants to appropriate HRSN services?   Yes  No   1. Does the subsidiary organization provide any program supports?   Yes  No   * 1. If “Yes”, what supports are provided? Click or tap here to enter text.   2. If “No”, is the UHO able to assist in providing program supports?   Yes  No | Varies depending on tasks included | Click or tap here to enter text. |
| Input additional sections as needed to support subsidiary onboarding efforts. | | | |

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*The “Building the Delivery Infrastructure for the National DPP Through Strategic Partner Convenings” project is supported by the Centers for Disease Control and Prevention of the U.S. Department of Health and Human Services (HHS) as part of a financial assistance award totaling $1,864,281.00 with 100 percent funded by CDC/HHS. The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by CDC/HHS, or the U.S. Government.*

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