



A. INSTRUCTIONS

Overview

The Mental Health and Substance Use Disorder Parity State Summary Template (Template) is intended to standardize and improve States' documentation of parity compliance to CMS, streamline monitoring, and reduce administrative burden for States and CMS. The Template includes worksheets to provide overarching, introductory information about the State's parity oversight and applicable program types (i.e., Medicaid managed care organization (MCO), CHIP, or alternative benefit plan (ABP)). It also includes worksheets for States to document their assessments of Federal parity requirements regarding aggregate lifetime and annual dollar limits (AL-ADLs), financial requirements (FRs), quantitative treatment limitations (QTLs), and nonquantitative treatment limitations (NQTLs). Lastly, it includes worksheets for the State to document any issues it identifies that require discussion with CMS. Many of the Template worksheets are applicable to specific program types (Medicaid MCO, CHIP, ABP). As such, not all worksheets need to be completed for every State submission. Many of the worksheets also include functionality (e.g., data fields that auto-populate based on previous responses) that help ensure the Template is completed accurately, and to reduce the number of data fields that require data entry. For complete instructions on how to complete this template, please consult the Instructional Guide for Mental Health and Substance Use Disorder Parity State Summary Template.

Excel User Tips

1. Always use "Paste Values." Never use the standard paste when copy/pasting data. States may copy and paste information within the Template. However, when doing so, please do so using "Paste Values" option only.

How to copy/paste values or texts only:

- Select the cell(s) and press Ctrl + c or choose the "Copy" option to copy the data.
- Select the destination, then choose one of the three ways below to paste values only.
 - Option 1) Right click on the mouse to choose "Values" option.
 - Option 2) Select "Paste Values" from the "Paste Special."
 - Option 3) Use keyboard shortcut Ctrl + Alt + v to paste values only.

Using standard paste (e.g., using Ctrl + v or using "Paste" option from the Excel's home ribbon) risks impacting the Template's functionality and may cause errors, particularly with the conditional formatting and drop-down menus.

2. Do not drag and drop data into a cell. Use the drop-down menus and copy/paste values when possible. This will prevent any #REF! error messages.

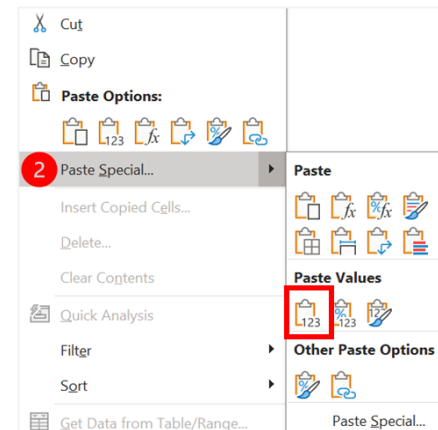
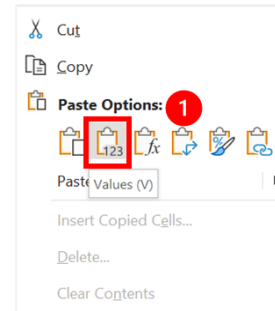


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PRA Statement (Placeholder)