Primary Evidence, Guideline, and Policy Sources – Research Worksheet (Updated February 2019)

Topic:

Assigned Staff:

Date:

Instructions:

Staff should use the *Primary Evidence, Guideline, and Policy Sources - Research Worksheet* to guide and document a systematic search of core evidence, guideline, and policy sources.

- When topics are initially identified, staff will use the Research Worksheet to document a preliminary search of the topic for purposes of Benefit Selection and Prioritization (i.e. completing a Benefit Referral form). This preliminary search should focus on a selection of sources, including:
    - Table 1 (general context, current Louisiana Medicaid policy)
    - Table 3 (clinical guideline sources)
    - Table 4 (targeted search: Medicaid.gov or other relevant federal agencies; Medicare coverage database; BCBS)

- If benefits are selected for policy development, staff will use the *Research Worksheet* to complete a full evidence, guideline and policy search. Results from the full search will be used to develop a Benefit Referral Brief and inform the development of a coverage policy.

- Preliminary searches that are more than 2 months old at the time of the full evidence and policy search should be updated.

Search – Guiding Information

Population:

Technology/Service/Intervention:

Comparator: [*fill in as applicable*]

Outcome: [*fill in as applicable*]

Setting: [*fill in as applicable*]

Key Question(s): [*fill in as applicable*]

Inclusion Criteria: [*fill in as needed*]

Exclusion Criteria: [*fill in as needed*]

Table 1. Context

Sources	Search Terms	Results
General Context		
Google		*Search for relevant context, such as news articles, policy summaries and literature, recent policy changes, state and federal initiatives, and stakeholder discussion. This search may also be used to identify state Medicaid policies or programs relevant to a particular topic.*
(*Please add rows for additional sources searched*)		*Search topic-specific sources as applicable*
Current Louisiana Medicaid Policy		
Louisiana Department of Health & Hospitals Provider Manuals		*Search for current Louisiana Medicaid policies*
Louisiana Managed Care Manuals - Aetna - AmeriHealth (clinical policies, clinical practice guidelines) - Healthy Blue - Louisiana Healthcare Connections - UnitedHealthcare Community Plan		*Search as needed*

Louisiana Statutes - Title 28 Mental Health - Title 40 Public Health and Safety - Title 46 Public Welfare and Assistance		*Search for relevant Louisiana statutory requirements. Download relevant code and search pdf. Note whether documents are current - may need to conduct additional research of session laws to confirm current statutory provisions.*
Louisiana Administrative Code - Title 50, Public Health – Medical Assistance		*Search for current Louisiana rules*
Louisiana Medicaid Rulemaking		*Check with policy development support for rules in progress.*
Louisiana Medicaid State Plan		*Search for relevant Louisiana State Plan authority*
Louisiana Medicaid Fee Schedule		*Search for reimbursement rates for relevant procedure code(s)*

Table 2. Evidence Sources

Core Sources	Search Terms	Results *(Please list the references that meet inclusion criteria in APA format)*
[Agency for Healthcare Research and Quality (AHRQ)](#)		
[Cochrane Database for Systematic Reviews (Cochrane Library)](#)		
[Department of Veterans Affairs Evidence-based Synthesis Program (VA ESP)](#)		
[Canadian Agency for Drugs and Technologies in Health (CADTH)](#)		*Use results for context and understanding evidence base. Do not summarize results in policy brief.*
[National Institute for Health and Care Excellence (NICE)](#)		*Use results for context and understanding evidence base. Do not summarize results in policy brief.*
[MED Clearinghouse](#)		
[Oregon Health Evidence Review Commission (OR HERC)](#)		
[Washington Health Technology](#)		

Assessment Program (WA HTA)		
(*Please add rows for additional searches conducted*)		*[search topic-specific sources as applicable]*

Table 3. Clinical Guideline Sources

(Guidelines identified will need additional review for potential conflict of interest and/or funding sources)

Guideline Sources	Search Terms	Results
Trip Medical Database		*Search for all relevant guidelines by using the "guidelines" limit.*
NICE Evidence		*Search for all relevant guidelines by using the "guidelines" limit.*
Relevant professional associations or specialty organizations.[1] Please add rows for additional sources searched.		

Table 4. Policy Sources

Source	Search Terms	Results *(Please include URL links)*
Federal Guidance		
Medicaid.gov - Federal Policy Guidance (CMS)		*Search for CMS policy guidance - contains rule changes, State Medicaid Director Letters, Informational Bulletins, and Frequently Asked Questions*
Substance Abuse and Mental Health Services Administration (SAMHSA)		*Search on applicable topics*
Administration for Children & Families (ACF)		*Search on applicable topics*
Administration for Community Living (ACL)		*Search on applicable topics*
U.S. Food and Drug Administration (FDA) - Manufacturer and User Facility Device Experience (MAUDE) - Medical Device Recalls		*Search on applicable topics*
Code of Federal Regulations (CFR)		*Search for current federal rules. Note: Title 42 (Medicaid)*

Federal Register (FR)		*Search for recent rule changes and background*
Social Security Act (SSA)		*Identify relevant statutory sections. Note: Title XIX (Medicaid) and/or Title XXI (SCHIP)*

State Medicaid Programs		
Arkansas		
Billing Manuals		
Fee Schedules		
Florida		
Service-Specific Policies		
Fee Schedules		
Mississippi		
Mississippi Administrative Code (Title 23)		
Fee Schedule		
Oklahoma		
OHCA FFS Policies and Rules (FFS)		
Provider Resources		
Fee Schedules		

Texas		
Provider Manual		
Fee Schedules		
Federal Payers		
Medicare Coverage Database (National Coverage Determinations and Local Coverage Determinations)		
Other Medicare regulations and guidance (e.g., manuals, provider types)		
Tricare Policy Manual (browse chapters or search) Other Tricare Manuals		
Private Payers		
Aetna Clinical Policy Bulletins		
Cigna Coverage Policies		

[Louisiana Blue Cross Blue Shield](#)		
Other		
(*Please add rows for additional searches conducted*)		

Table 5. Other Sources

Sources	Search Terms	Results
(*Please add rows for additional searches conducted*)		

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[1] Search other professional organizations as appropriate for the topic including but not limited to American College of Radiology (ACR), American College of Physicians (ACP), American Academy of Pediatrics (AAP), American Academy of Family Physicians (AAFP), American College/Congress of Obstetricians and Gynecologists (ACOG), etc.