

QuickStart Guide

Note:

- Documents can be redacted at the IAD-IRF case-level or the QOC case-level.
- Test data/information is displayed in the screenshots listed in this document
- If there are any issues redacting a fillable PDF form, a suggestion is to use Windows “Microsoft Print to PDF” or similar feature in other systems. This action will make the entire form read-only and then the document can be saved and redacted. This approach makes all checkboxes and other fillable form fields read-only and any redactions of the form field and/or other sections within the form will not cause any issues.

To redact an IAD or IRF Report/Case, Health Plan and TRBHA contractors or AHCCCS accounts can navigate to <https://qmportal.azahcccs.gov/> to Sign In

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1. Verify Health Plan/TRBHA Account or AHCCCS Account

The QM Portal can be accessed with an external account or an internal account.

External account– Contractor TRBHA or Health Plan account which are managed by Master Accounts and Sub Account users.

Internal account – AHCCCS account. An AHCCCS account can have different levels of access depending upon the Windows Active Directory group membership

For external accounts:

Sign In to create a case with a Health Plan/TRHBA account is in one of the following roles:

- IAD Reviewer

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- Investigator
- Medical Director
- 3rd Level QOC Review



Thank you for visiting QM Portal. In order to use the site, you must have an active account. Please login or register a new account. For questions, please contact our Customer Support Center at (602) 417-4451 or contact ISDCustomerSupport@azahcccs.gov.

External User Log In	AHCCCS User Log In
<p>User Name <input type="text" value="trbhammic"/></p> <p>Password <input type="password" value="*****"/></p> <p>Sign In</p>	<p>If you are an AHCCCS employee</p> <p>AND you are currently logged onto the AHCCCS network</p> <p>AND you are accessing this application from a browser on your workstation</p> <p>Then click the button below to use this application with your network login credentials</p> <p>AHCCCS Sign In</p>
<p>Forgot your Password? Click Here</p> <p>Create new account? Click Here</p> <p>Passwords are case-sensitive. After 3 failed attempts, within 15 minutes, your account will be locked out, and you will either need to contact your Master Account holder to unlock your account or use the Password Recovery feature.</p>	

ⓘ Your web browser must have JavaScript enabled in order to use the QM portal.

Before continuing after login to create an IRF Report/Case, verify the account is in one of the roles by:

1. Navigate to the "User Admin" link in the upper-left side navigation



Home

User Admin

Search

Create IAD

FAQ

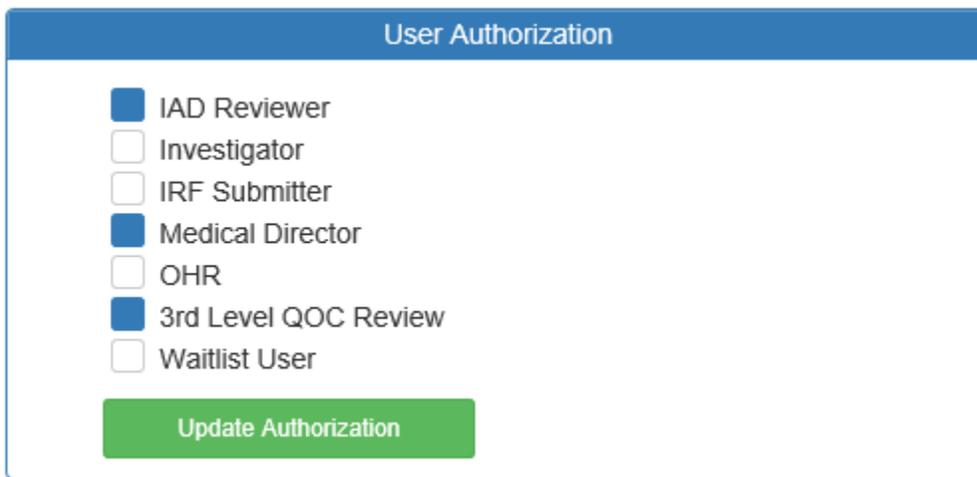
Log Out

The QMS Portal is intended for the use of providers reporting IADs to Contractor/TRBHAs. This system is administered by the AHCCCS Behavioral Health.

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On the User Admin page, verify one or more of the following roles are checked in the User Authorization section

- IAD Reviewer
- Investigator
- Medical Director
- 3rd Level QOC Review



The screenshot shows a 'User Authorization' window with a blue header. Below the header is a list of roles with checkboxes. The roles and their checkbox states are: IAD Reviewer (checked), Investigator (unchecked), IRF Submitter (unchecked), Medical Director (checked), OHR (unchecked), 3rd Level QOC Review (checked), and Waitlist User (unchecked). At the bottom of the window is a green button labeled 'Update Authorization'.

Role	Checked
IAD Reviewer	Yes
Investigator	No
IRF Submitter	No
Medical Director	Yes
OHR	No
3rd Level QOC Review	Yes
Waitlist User	No

For internal accounts:

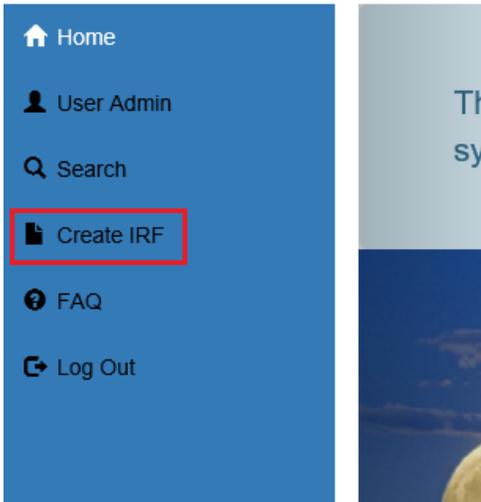
Please consult your manager to determine if you are a member of the IAD and/or QOC Windows Active Directory Group(s).

Now that the role has been verified, navigate to the "Create IRF" in the upper-left side navigation

For external accounts:

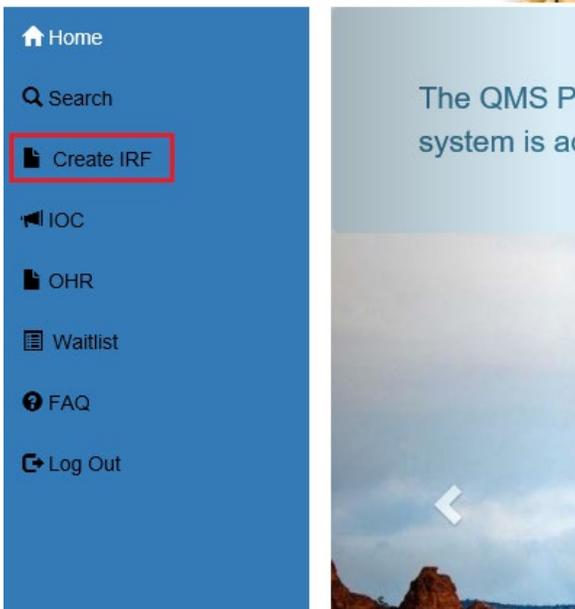
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For internal accounts (no User Admin link):

Please note: depending upon your membership to various groups, there might be less navigation links



2. On the Search Page, access a case that is in a Quality of Care state

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Go to the Search Page and select Status Value of "QOC - In Progress".

Note that other QOC status options can be chosen such as:

- QOC
- QOC – Pending Med Dir E-Sig
- QOC – Returned to Investigator
- QOC – Third Level Review
- QOC or IRF

The screenshot shows the 'Incident Report Search' page. At the top, there is a navigation bar with links for 'QM Portal', 'Home', 'User Admin', 'Search', 'Create IRF', 'FAQ', and 'Log Out'. Below this is a blue header with the text 'Please Enter Search Criteria'. The main search area contains several input fields: 'Last Name', 'Case No.', 'Provider', 'Status Value', 'Allegation', and 'CMDP' on the left; 'First Name', 'Member ID', 'Submitted (From)', 'Category', and 'Assigned To' in the middle; and 'Date of Birth', 'Incident Date', 'Submitted (To)', 'Eligibility', and 'DDD' on the right. A dropdown menu is open for the 'Status Value' field, listing various options. The 'QOC - In Progress' option is highlighted in blue, and 'QOC' is highlighted in red. A 'Search for Reports' button is located at the bottom left of the search area.

Click on the "Search for Reports" button to run the search.

This screenshot shows the same 'Incident Report Search' page, but with the search criteria filled out. The 'Status Value' dropdown is now set to 'QOC - In Progress' and is highlighted with a red box. The 'Search for Reports' button at the bottom left is also highlighted with a red box. All other search criteria fields are empty or set to 'Select All'.

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3. Select a case from the search results by selecting the QOC button

From the Search Results, click on the “QOC” button to open the case details.

No. Of Records 7

Search Results [Export All Results](#)

TREADLESS, TIM DOB: 03/25/1959 AHCCCS ID: A12345678 GENDER: M	Status: QOC - In Progress	Facility: WALGREENS #06026 Submit Date: 1/9/2019 12:00:00 AM	Incident Date: 01/09/2019	Report No.: IAD-2019-23	QOC IAD Allegations: Retaliation for Submitting a Complaint
TREADLESS, TIM DOB: 03/25/1959 AHCCCS ID: A12345678 GENDER: M	Status: QOC - In Progress	Facility: WALGREENS #06026 Submit Date: 12/13/2018 12:00:00 AM	Incident Date: 12/13/2018	Report No.: IAD-2018-607	QOC IAD Allegations: Unauthorized Absence from a Licensed Fac

4. Open the tab: Independent Oversight Committee Document Redaction/Release

Click on the header named: “Independent Oversight Committee Document Redaction/Release”

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Quality of Care - Case Manager



Case#: IAD-2019-23
Member: TREADLESS, TIM

Provider: WALGREENS #06026
Contractor/TRBHA: STEWARD HEALTH CHOICE ARIZONA

- Provider Information
- Member Information
- Clinical and Diagnosis
- Treatment Information
- QOC Referral Information
- Information Sources
- Timeline (optional)
- Allegations
- Case Summary
- Attachments
- Amendments
- Electronic Signatures
- QOC Tracking
- Independent Oversight Committee Document Redaction/Release**

5. Redact Documents by selecting documents for redaction

Use the section called “Create New Combined Document for IOC” to select one or more checkboxes. The list is organized by Incident

- Accident Death Report (Default Redaction)
- QOC Resolution (Default Redaction)
- One or more attachments (included from IAD or QOC)

Note: The example below illustrates that there is an attachment called “test1” that can be viewed at the IAD case-level

Check all the checkboxes and then click on the “Redact Documents” button.

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Create New Combined Document for IOC

Please select the documents you would like to release to the IOC:

- Incident, Accident and Death Report (Default Redaction)
- QOC Resolution Report (Default Redaction)
- test1

Download Documents Redact Documents

Upload Document to IOC

Prior to releasing any document or information to the IOC, all PHI must be manually redacted/removed. Do not upload a document here until you have verified that all PHI has been redacted. For more information, [click here](#).

IOC Committee
Arizona State Hospital

6. Determine the IOC Region and Document Name for Redaction

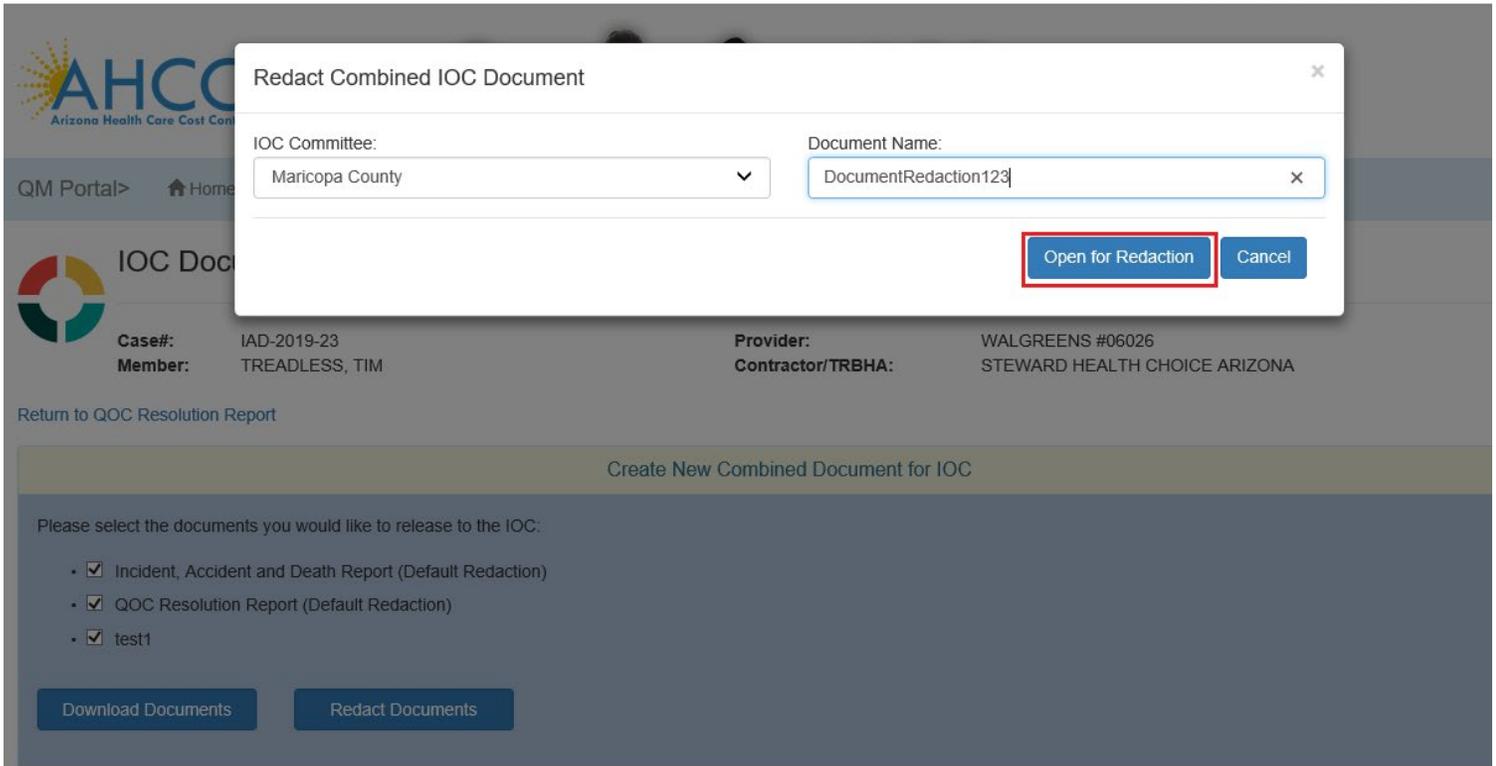
On the modal window: Redact Combined IOC Document,

Enter the IOC Committee and the Document Name. The IOC Committee section is based on regions:

- Arizona State Hospital
- Maricopa County
- Northern Arizona
- Southern Arizona

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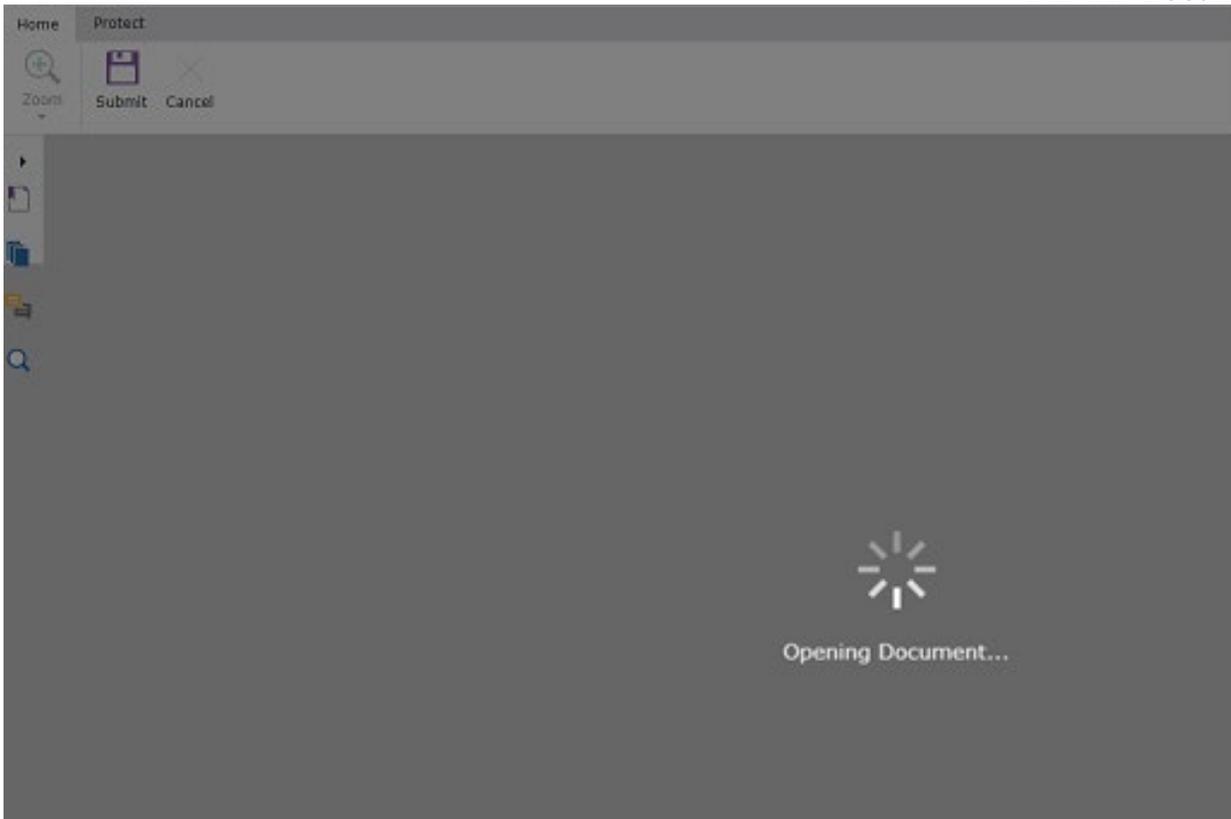


7. Open the document in Web Viewer Tool

Allow the document to be loaded into the Web Viewer Tool

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Home Protect

Zoom Submit Cancel



Arizona Health Care Cost Containment System

INCIDENT, ACCIDENT OR DEATH REPORT

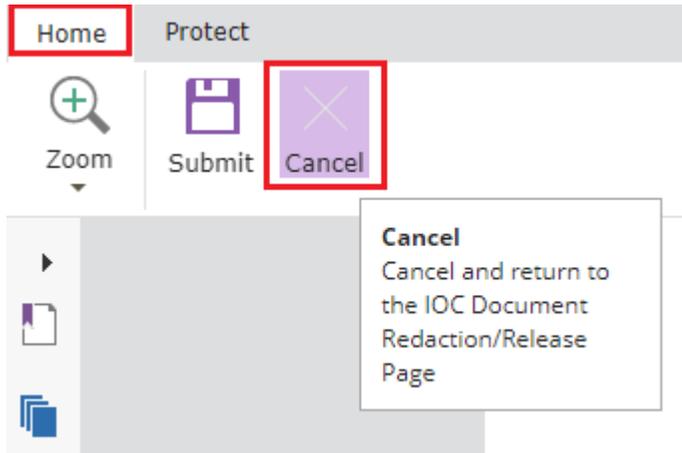
MEMBER INFORMATION			
Member Name			
Address			
City / State / Zip			
Date of Birth	Age	14	
AHCCCS ID	Sex	F	
CIS ID	COT	Yes	
Eligibility Status	Title 19	DDD	Yes
Category	Serious Mental Illness (SMI)	CMDP	Yes

VISIT HISTORY (DATE OF LAST VISIT)		
Clinical Team	BHMP	PCP
05/20/2019	05/20/2019	05/20/2019

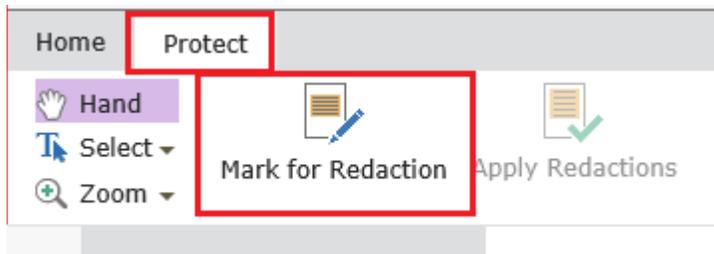
Note: If the document won't be saved, choose the "Cancel" button to return to the IOC Document Redaction /Release Page

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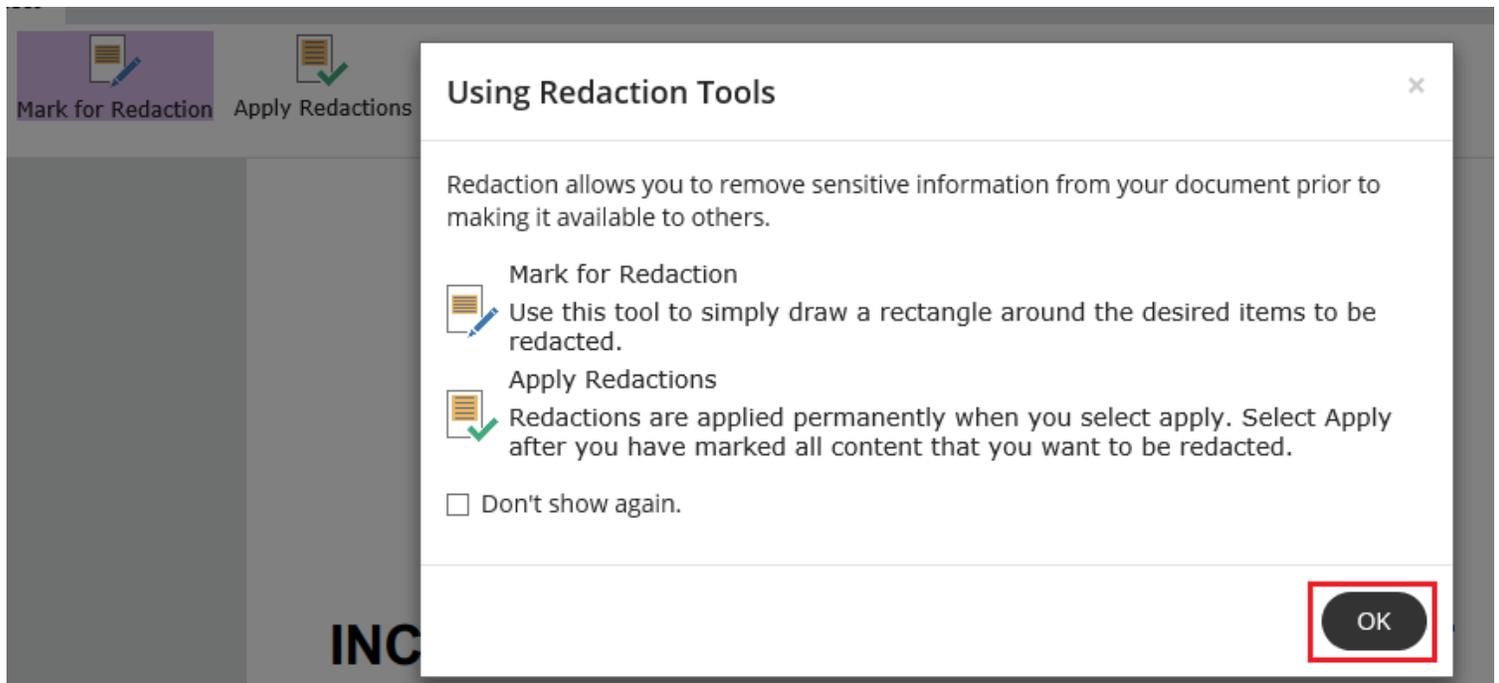
Incident, Accident and Death and Incident Referral Reporting



If the document needs further updating...
Click on the “Protect” tab and then click on the “Mark for Redaction” item.



On the informational prompt, optionally check the “Don’t show again” and then click “OK”

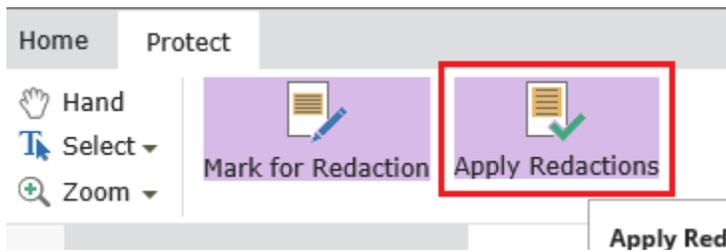


With the mouse, drag and hold (with the left mouse button) over a section to redact and then release the left-button.

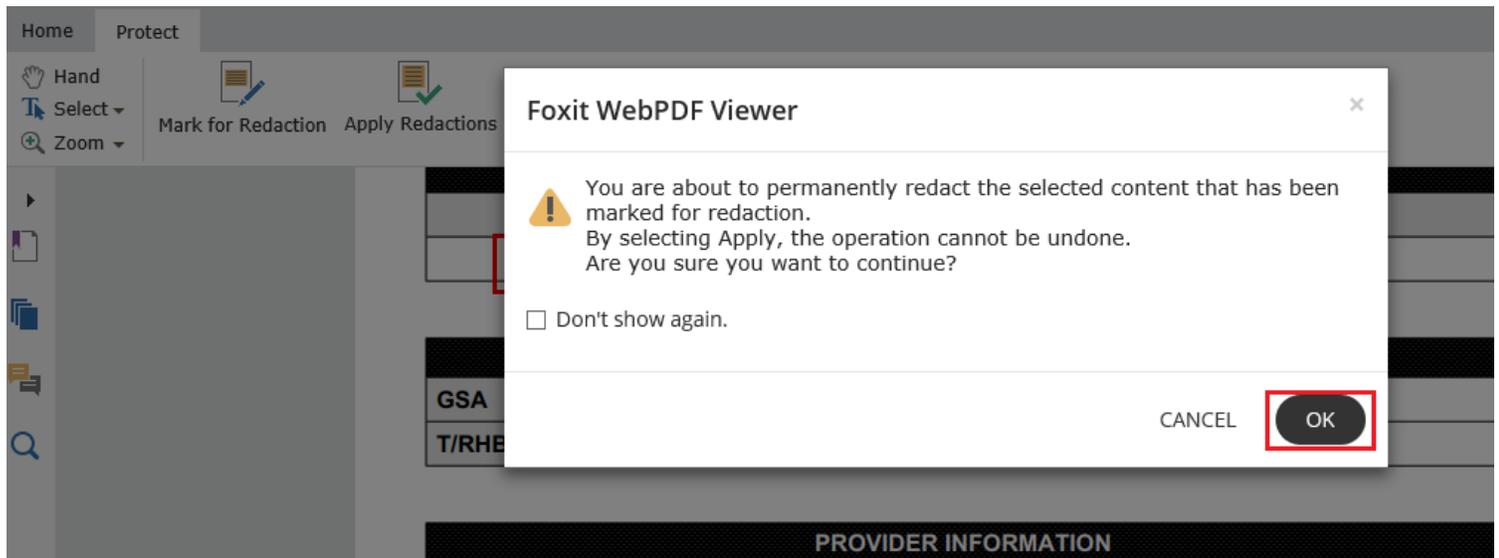
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VISIT HISTORY (DATE OF LAST VISIT)		
Clinical Team	BHMP	PCP
01/09/2019	01/09/2019	01/09/2019

On the menu, choose “Apply Redactions”



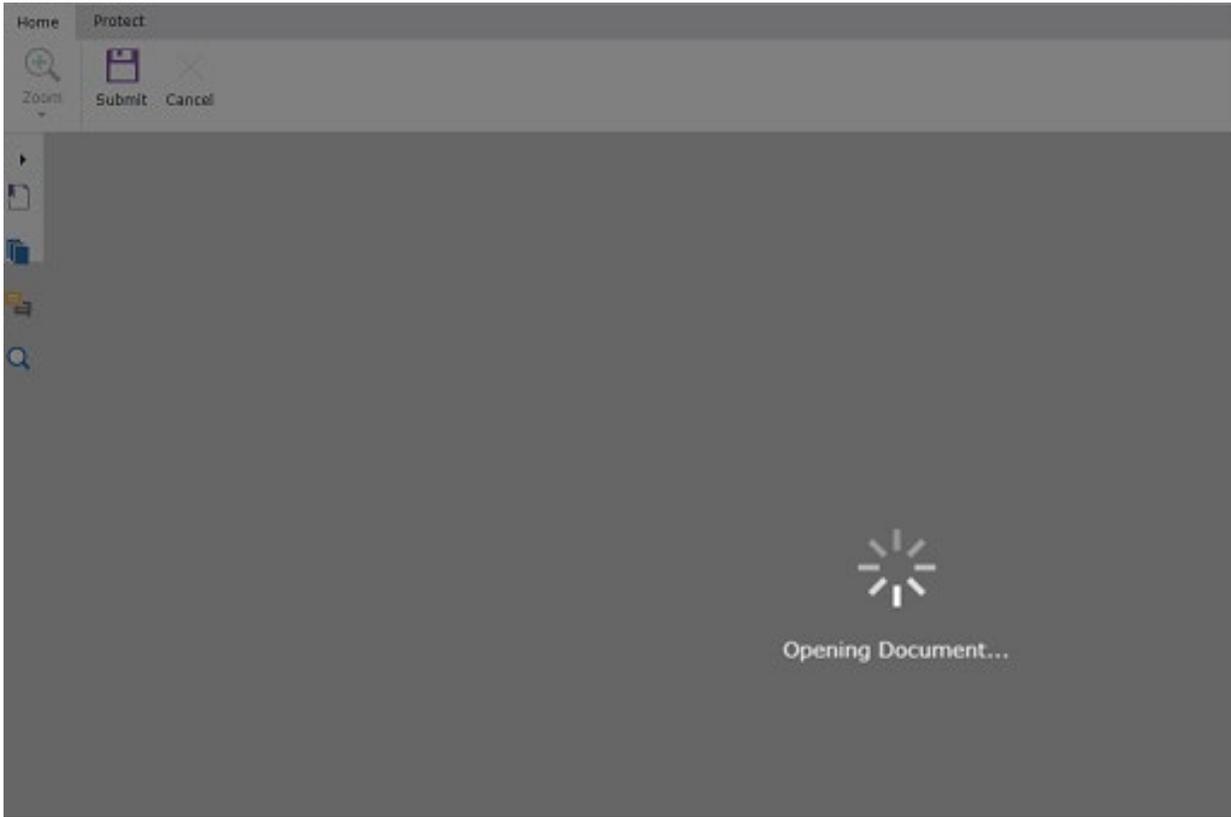
On the informational prompt, optionally check the “Don’t show again” and then click “OK”



Allow the document to reload. Note that you may have to scroll down to the location that was redacted since the document is completely reloaded.

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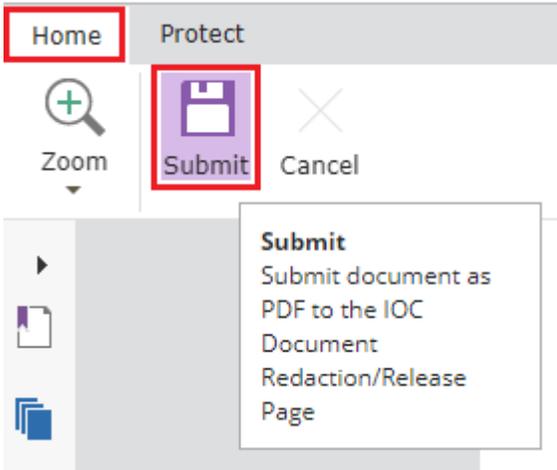
VISIT HISTORY (DATE OF LAST VISIT)			
	Clinical Team	BHMP	PCP

After all the document redaction is complete, click on the Home tab and then choose the “Submit” button

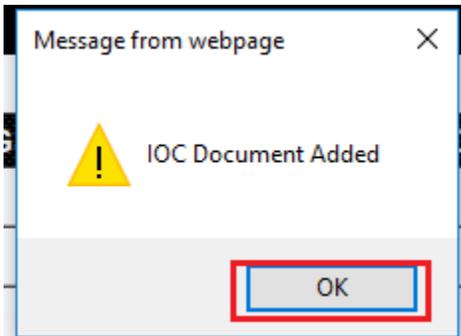
Note: the document doesn't need to have additional redactions made. The document can be submitted as-is with no additional redaction done with the tool. Simply choose the “Submit” button after the document is open to save as-is.

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At the prompt that the IOC Document has been added, click “OK”



Verify that the IOC Page is returned and the document is now listed



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8. As a Health Plan account from test case#1, go to the Search Page and click Search for Unreviewed Internal Referral (IRF) cases

Incident Report Search

Please Enter Search Criteria

Last Name	<input type="text" value="Last Name"/>	First Name	<input type="text" value="First Name"/>	Date of Birth	<input type="text" value="D.O.B"/>
Case No.	<input type="text" value="Case No."/>	Member ID	<input type="text" value="Member ID"/>	Incident Date	<input type="text" value="Incident date"/>
Provider	<input type="text" value="Provider"/>	Submitted (From)	<input type="text" value="Submitted(From)"/>	Submitted (To)	<input type="text" value="Submitted(To)"/>
Status Value	<input type="text" value="Unreviewed"/>	Category	<input type="text" value="Select All"/>	Eligibility	<input type="text" value="Select All"/>
Allegation	<input type="text" value="Select All"/>	Assigned To	<input type="text" value="Search All"/>	DDD	<input type="text" value="Select All"/>
CMDP	<input type="text" value="Select All"/>				

Search for Reports

9. Select a case from the search results by selecting the IRF button

No. Of Records 3

Search Results Export All Results

ISDDEV, TEST01	Incident Date:	Report No.:	IRF-2018-422	IRF
DOB: 06/18/1954 AHCCCS ID: A04874218	Facility: INTERNAL REFERRAL	Allegations:		
GENDER: F Status: Unreviewed	Submit Date: 1/3/2019 12:00:00 AM			
ISDDEV, TEST01	Incident Date: 05/09/2018	Report No.:	IRF-2018-398	IRF
DOB: 06/18/1954 AHCCCS ID: A04874218	Facility: INTERNAL REFERRAL	Allegations: Suspected or Alleged Criminal Activity		
GENDER: F Status: Unreviewed	Submit Date: 1/3/2019 12:00:00 AM			
ISDDEV, TEST01	Incident Date:	Report No.:	IRF-2018-397	IRF
DOB: 06/18/1954 AHCCCS ID: A04874218	Facility: INTERNAL REFERRAL	Allegations:		
GENDER: F Status: Unreviewed	Submit Date: 1/3/2019 12:00:00 AM			

10. Open the Contractor/TRBHA Review section on the IRF Case Detail

On the IAD case details, navigate to the Contractor/TRBHA Review comments section.

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The screenshot displays a vertical menu of options for incident reporting. The menu is organized into four sections, each with a header icon and text:

- Administrative** (person icon):
 - Member Information
 - Provider Information
- Incident Details** (document icon):
 - Basic Incident Information
 - Description of the Incident
 - Member Condition
 - Medical Services
 - Witnesses
 - Provider Actions
 - Notifications
 - Attachments
- Incident Reviews** (checkmark icon):
 - Clinical Director Review
 - Contractor/TRBHA Review** (highlighted with a red box)
- Electronic Submission** (arrow icon):
 - Report Validation
 - Report Signatures
 - Electronically Sign Report
 - Report Generation

11. Open the page: Independent Oversight Committee Document Redaction/Release

On the Contractor/TRBHA Review comments section, click on the “IOC Documentation” .

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The screenshot displays the 'Internal Referral: Signed' interface. At the top left is a circular logo with red, yellow, and green segments. To its right, the text 'Internal Referral: Signed' is displayed. Below this, case details are listed: 'Case#: IRF-2018-422' and 'Member: TEST01 ISDDEV'. On the right side, provider information is shown: 'Provider: INTERNAL REFERRAL' and 'Contractor/TRBHA: STEWARD HEALTH CHOICE ARIZONA'. Further right, the status is 'Status: Unreviewed' and 'Report:' is accompanied by a red document icon. A blue header bar labeled 'Review Comments' is positioned above a white content area. In this area, a red-bordered box highlights the text 'IOC Documentation'. To the right of this box is a blue link that says 'Add a Review' with a small icon of a document and a plus sign. A vertical scrollbar is visible on the right edge of the content area.

The IOC Document Redaction Release page will be displayed similar to previously accessed steps with the QOC case process.

Note: At this stage the redaction process is the same as the QOC process mentioned above

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IOC Document Redaction / Release

Case#: IRF-2018-422
Member: ISDDEV, TEST01

Provider: INTERNAL REFERRAL
Contractor/TRBHA: STEWARD HEALTH CHOICE ARIZONA

[Return to IAD](#)

Create New Combined Document for IOC

Please select the documents you would like to release to the IOC:

Internal Referral

[Download Documents](#)

[Redact Documents](#)

Upload Document to IOC

Prior to releasing any document or information to the IOC, all PHI must be manually redacted/removed. Do not upload a document here until you have verified that all PHI has been redacted. For more information, [click here](#).

IOC Committee

Arizona State Hospital

File to Upload

Document Name

[Upload Attachment](#)

IOC Documents