

QuickStart Guide

Note: Test data/information is displayed in the screenshots listed in this document

To review a exiting IAD Report/Case, Providers can navigate to <https://qmportal.azahcccs.gov/> to Sign In

New features and changes on the pages will be announced as the notifications that will appear next to the area in question, and need to be dismissed by clicking on the notification. This is not an error; it is just there to draw user attention to the new changes introduced in the new version.

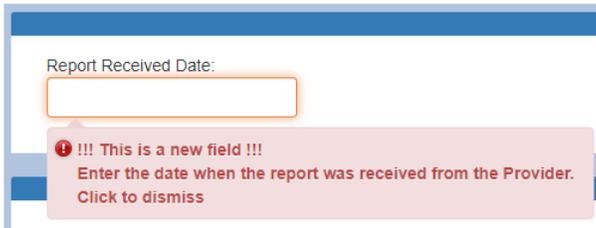


Table of Contents

1. Verify Provider Account	1
2. Search for an Existing Case.....	3
3. Return to Preparer from Report Validation Page	6
4. Verify Clinical Director Account	9
5. Search for an Existing Case.....	9
6. Return to Clinical Director from Report Validation Page.....	11

1. Verify Provider Account

Sign In to review a case with a Clinical Director account that has the "Clinical Director" role.

QuickStart Guide

Incident, Accident and Death Reporting

Return IAD Report as Provider - 2



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.

FAQ

External User Log In	AHCCCS User Log In
<p>User Name <input type="text" value="clinicaldirectorprovider2"/></p> <p>Password <input type="password" value="*****"/></p> <p>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>	<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>

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

Before continuing after login to return an IAD Report/Case, verify the account has a "Clinical Director" role by:
1. Navigate to the "User Admin" link in the upper-left side navigation

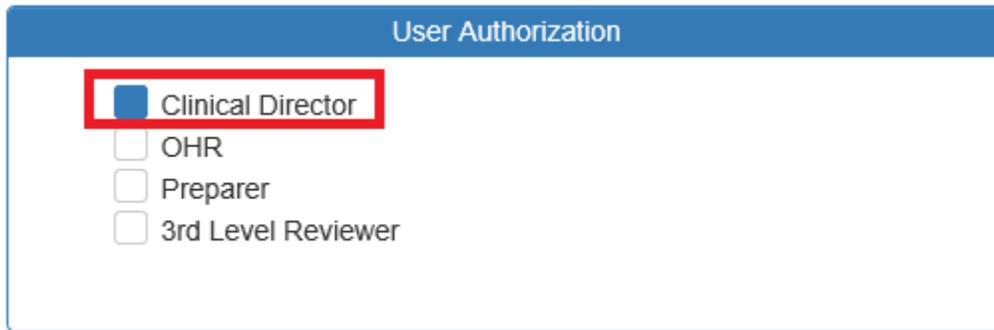


- Home
- User Admin**
- Search
- Create IAD
- FAQ
- Log Out

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

On the User Admin page, verify the "Clinical Director" role is checked in the User Authorization section

QuickStart Guide



The screenshot shows a 'User Authorization' window with a blue header. Below the header, there are four roles listed with checkboxes: 'Clinical Director' (checked and highlighted with a red box), 'OHR' (unchecked), 'Preparer' (unchecked), and '3rd Level Reviewer' (unchecked).

The role of a Clinical Director is to review the existing case prepared by a person registered in the “Preparer” role. The Clinical Director can review all the exiting information by navigating through the IAD Wizard. Since the information had to be validated and signed by a Preparer in the previous step, the Clinical Director needs to add comments and review criteria to the case/report and then sign the case.

2. Search for an Existing Case

To review an existing case, the Clinical Director can first search on cases that are in the Provider affiliations for the account signed-in.

Provider Information associated with a case is populated via the affiliations based on the user account creating the case/report.

For example, for this Clinical Director, clinicaldirectorprovider2, the affiliations are 2 WALGREENS locations. This information is obtained from the “User Admin” link and in the section called “Click to view Provider Affiliations for user”. Affiliations can be updated from a Master Account (note: in this case, the Clinical Director is a sub-account and the save buttons to update affiliations are only provided with a Master Account).

QuickStart Guide

Incident, Accident and Death Reporting

Return IAD Report as Provider - 4

Click to view Provider Affiliations for user

COMM, A WALGREENS PHARMAC STE 136 1830 E BROADWAY BLVD TUCSON AZ 85719	X
WALGREEN #04298 WALGREENS #04298 29200 6 MILE RD LIVONIA MI 48152	X
WALGREEN ADVANCED #2651 2323 E. MAGNOLIA #103 PHOENIX AZ 85034	X
WALGREENS # 04506 8015 INDIAN SCHOOL RD SCOTTSDALE AZ 85251	X
WALGREENS # 00809 8911 N 7TH ST PHOENIX AZ 85020	X
WALGREENS # 00813 15442 N 99TH AVE SUN CITY AZ 85351	X
WALGREENS # 01076 333 E HUNT HWY QUEEN CREEK AZ 85143	X
WALGREENS # 02056	X

Next, the Clinical Director can review existing cases by navigating to the Search link as in the illustration below.



- 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.

Search for a Case

QuickStart Guide

Incident, Accident and Death Reporting

Return IAD Report as Provider - 5

Once on the Search Page, a Clinical Director can search on existing cases by clicking on the “Search for Reports” button. If the search needs to be filtered by Provider, then the lookup choice can be selected from the “Provider” field. Note that the default option here is “Search All” and in this scenario, all cases affiliated with that Provider would be listed in the Search Results.

Note the search criteria:

- Last Name – partial string search
- First Name – partial string search
- Date of Birth – date field
- Case Number – format: IAD-YYYY-123 (e.x. IAD-2018-123)
- Member ID – AHCCCS Id of the member
- Provider – choice list of affiliated providers
- Incident Date – date that the case/report incident occurred
- Status Value – choice list of the case status



QM Portal> Home User Admin Search Create IAD FAQ Log Out

Incident Report Search

Please Enter Search Criteria

Last Name	<input type="text" value="Enter Last Name"/>	First Name	<input type="text" value="Enter 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"/>	Provider	<input type="text" value="Search All"/>
Incident Date	<input type="text" value="Incident Date"/>	Status Value	<input type="text" value="Please make a selection"/>

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No criteria is required on the search. If the “Search for Reports” button is clicked, then all cases associated with the Provider account will be listed in the search results.

Case No.	<input type="text" value="Case No."/>
Provider	<input type="text" value="Search All"/> WALGREEN #04298 WALGREEN ADVANCED #2651
Status Value	<input type="text" value="Please make a selection"/>

QuickStart Guide

Incident, Accident and Death Reporting

Return IAD Report as Provider - 6

The number of records returned is listed in the header of the search results. A specific case can be opened by clicking on the “Select” button listed on the right-side. If the PDF icon is clicked, the current report will be generated in Adobe Acrobat PDF format to download and review.

Also note from the figure below that the cases status is: “Pending E-Signature (Clin Dir)”. Any case that needs to be reviewed by a Clinical Director will have this status.

No. Of Records 262					
Search Results			Export All Results		
IAD-2019-10833		Select			
Member:	SMITH, JOE	Incident Date:	11/05/2019		
DOB:	05/15/1981	AHCCCS ID:	A001234567	Facility:	COMM, A WALGREENS PHARMAC
Gender:	F	Status:	QM / RM Review		
IAD-2019-10832		Select			
Member:	SMITHERS, SALLY	Incident Date:	01/01/1900		
DOB:	01/20/1996	AHCCCS ID:	A007464633	Facility:	COMM, A WALGREENS PHARMAC
Gender:	F	Status:	QM / RM Review		
IAD-2019-10831		Select			
Member:	BOND, JAMES	Incident Date:	01/01/1900		
DOB:	11/25/1969	AHCCCS ID:	A0023874636	Facility:	COMM, A WALGREENS PHARMAC
Gender:	F	Status:	Draft		

3. Return to Preparer from Report Validation Page

Load a case that has the status: “Pending E-Signature (Clin Dir)” See screenshot above of the cases listed.

Once the report/case loads, navigate to the “Report Validation” page.

Click on the “Return to Preparer” button.

QuickStart Guide

Incident, Accident and Death Reporting

Return IAD Report as Provider - 7

The screenshot shows the 'Incident Report' page in the QM Portal. The page is divided into several sections:

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

Key information displayed includes:

- Case#:** IAD-2018-294
- Provider:** WALGREEN #04298
- Status:** Pending E-Signature (Clin Dir)
- Member:** SMITH, JOE
- Contractor/TRBHA:** MERCY CARE PLAN
- Report:** [Download icon]

Validation Results (all items checked):

- Last Name
- First Name
- DOB
- AHCCCS ID
- Health Plan
- Eligibility Status
- Category
- Court Order Treatment(COT)
- Division of Developmental Disabilities(DDD)
- Comprehensive Dental and Medical Program(CMDP)
- Diagnosis Code(s)

Incident Details (all items checked):

- Incident Type(s)
- Clinical Director
- Location
- Location Description
- Incident Description
- Member Condition Before Incident
- Member Condition After Incident
- Medical Services Received
- Recommended Actions

IAD Date Fields (all items checked):

- Date of Last Clinical Visit
- Date of BHMP
- Date of Last PCP Visit
- Date of Incident
- TimeIncident
- Reported Date to Provider

Change Report Status options:

- Lock Case
- Mark as Withdrawn
- Return to Preparer (highlighted with a red box)

Navigation: --Previous, Save, Next--

Verify the following actions:

1. Verification alert message is displayed



2. Email notification was sent to Clinical Director of the Case
 - a. Check email Inbox for the email address associated with the Clinical Director account
3. Signatures were invalidated
 - a. Check the audit log by navigating to the Report Signatures Page

QuickStart Guide

Incident, Accident and Death Reporting

Return IAD Report as Provider - 8

Electronic Signature Report

There are no data records to display.

Audit Report

Audit Date: 03/25/2018 Audit Activity: User Viewed: ReportValidation	Type: Page View User Name: clinicaldirectorprovider2
Audit Date: 03/25/2018 Audit Activity: User Viewed eSignature precheck page: pass	Type: Page View User Name: clinicaldirectorprovider2
Audit Date: 03/25/2018 Audit Activity: User Viewed eSignature precheck page: pass	Type: Page View User Name: clinicaldirectorprovider2
Audit Date: 03/25/2018 Audit Activity: Clinical Director or Third-level Reviewer has returned report to Preparer	Type: Returned to Preparer User Name: clinicaldirectorprovider2
Audit Date: 03/25/2018 Audit Activity: User Viewed: ReportSig	Type: Page View User Name: clinicaldirectorprovider2
Audit Date: 03/25/2018	Type: Page View

1. **Verify the case status was updated to “Draft”** in the IAD Header Section of the IAD Wizard IF a Provider (Preparer or Clinical Director) reviews the search results (see screenshot above)
2. **Verify the case status was updated to “Return to Provider”** in the IAD Header Section of the IAD Wizard IF a Health Plan / Contractor/TRBHA reviews the search results
 - a. **Note: In order for the account to be searchable on the SAME case, the Health Plan of the case must match the Health Plan/Contractor/TRBHA entity (see below)**

Incident Report

Case#: IAD-2018-294
Member: JOE SMITH

Provider: WALGREEN #04298
Contractor/TRBHA: MERCY CARE PLAN

Status: Returned to Provider
Report:

Member Information

SMITH, JOE
DOB: 01/15/1982 Age at Incident: 36
AHCCCS ID: A12345678

Contractor/TRBHA ★

Info! Member's Healthplans are highlighted with 'light blue' color inside this dropdown box. Please select one to confirm.

010306 - MERCY CARE PLAN

COT ★

Yes

DDD ★

No

CMDP ★

Yes

Eligibility Status ★

Title 19

Category ★

Serious Mental Illness (SMI)

Incident Report

Case#: IAD-2018-294
Member: JOE SMITH

Provider: WALGREEN #04298
Contractor/TRBHA: none assigned

Status: Returned to Provider
Report:

QuickStart Guide

Incident, Accident and Death Reporting

Return IAD Report as Provider - 9

4. Verify Clinical Director Account

Sign In to return a case with a Third-level Reviewer account and verify that account has the "3rd Level Reviewer" role.

User Authorization

- Clinical Director
- OHR
- Preparer
- 3rd Level Reviewer



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.

External User Log In	AHCCCS User Log In
<p>User Name: <input type="text" value="3levelreviewerprovider2"/></p> <p>Password: <input type="password" value="*****"/></p> <p style="text-align: center;"><input checked="" type="button" value="Sign In"/></p> <p>Forgot your Password? Click Here</p> <p>Create new account? Click Here</p> <p style="font-size: small;">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>	<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 style="text-align: center;"><input type="button" value="AHCCCS Sign In"/></p>

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

5. Search for an Existing Case

Once on the Search Page, a Third-level Reviewer can search on existing cases by clicking on the “Search for Reports” button. If the search needs to be filtered by Provider, then the lookup choice can be selected from the “Provider” field. Note that the default option here is “Search All” and in this scenario, all cases affiliated with that Provider would be listed in the Search Results.

Note the search criteria:

Last Name – partial string search

QuickStart Guide

Incident, Accident and Death Reporting

- First Name– partial string search
- Date of Birth– date field
- Case Number – format: IAD-YYYY-123 (e.x. IAD-2018-123)
- Member ID – AHCCCS Id of the member
- Provider – choice list of affiliated providers
- Incident Date – date that the case/report incident occurred
- Status Value – choice list of the case status

No criteria is required on the search. If the “Search for Reports” button is clicked, then all cases associated with the Provider account will be listed in the search results.

The number of records returned is listed in the header of the search results. A specific case can be opened by clicking on the “Select” button listed on the right-side. If the PDF icon is clicked, the current report will be generated in Adobe Acrobat PDF format to download and review.

Also note from the figure below that the cases status is: “QM / RM Review Any case that needs to be reviewed by a Third-level Reviewer will have this status.

The screenshot shows a search results interface with the following elements:

- Buttons: "Search for Reports" and "Clear"
- Header: "No. Of Records 12"
- Navigation: "Search Results" and "Export All Results"
- Table of results:

Case ID	Member	DOB	Gender	AHCCCS ID	Status	Incident Date	Facility
IAD-2019-10758	BOND, JAMES	05/15/1969	F	A003646336	Pending E-Signature (Clin Dir)	09/24/2019	WALGREEN #04298
IAD-2019-10756	SMITHERS, SALLY	08/10/1996	F	A001663363	Pending E-Signature (Clin Dir)	09/18/2019	WALGREENS #06026
IAD-2019-10755	SMITH, JOE	01/15/1982	M	A12345678	QM / RM Review	09/18/2019	WALGREENS ADVANCED #02861

When the case loads in the IAD Wizard:

- The “Member Information” Step is initially loaded
- The status is listed in the header: “QM / RM Review
- The menu navigation has switched from left-hand-side navigation, to navigation along the top.
- The information in wizard is “locked” and cannot be updated

QuickStart Guide

QM Portal> Home User Admin Search Create IAD OHR Waitlist FAQ Technical Assistance Log Out

Administrative

- Member Information
- Provider Information

Incident Details

- Basic Incident Information
- Description of the Incident
- Member Condition
- Medical Services
- Witnesses
- Provider Actions
- Notifications
- Attachments

Incident Reviews

- Clinical Director Review
- Contractor/TRBHA Review

Electronic Submission

- Report Validation
- Report Signatures
- Electronically Sign Report
- Report Generation

Incident Report

Case#: IAD-2018-294 Provider: WALGREENS ADVANCED #04298 Status: QM / RM Review

Member: JOE SMITH Contractor/TRBHA: MERCY CARE PLAN Report: [Download]

Member Information

SMITH, JOE
DOB: 01/15/1982 Age at Incident: 36
AHCCCS ID: A12345678

Contractor/TRBHA

Info! Member's Healthplans are highlighted with 'light blue' color inside this dropdown box. Please select one to confirm.
010306 - MERCY CARE PLAN

Eligibility Status

Title 19

COT **DDD** **CMDP**

Yes No Yes

Category

Serious Mental Illness (SMI)

Diagnoses

Info! Please enter at least 3 character Code OR Description and then use Search. The suggestion list will display to choose from & your selection will be saved.

Code Description Search

Code	Description	Remove
D57.811	OTHER SICKLE-CELL DISORDERS WITH ACUTE CHEST SYNDROME	✕

←Previous Save Next→

6. Return to Clinical Director from Report Validation Page

As a Third-level Reviewer, the user can navigate to the Report Validation Step and return the case/report to a Clinical Director for further review.

Click on the “Report Validation” in the left-hand-side navigation menu.

Click on the “Return to Preparer” button.

QuickStart Guide

Incident, Accident and Death Reporting

Return IAD Report as Provider - 12

The screenshot displays the 'Incident Report' interface. On the left is a navigation menu with tabs for 'Administrative', 'Incident Details', 'Incident Reviews', and 'Electronic Submission'. The 'Electronic Submission' tab is active, showing options like 'Report Validation' (highlighted with a red box), 'Report Signatures', 'Electronically Sign Report', and 'Report Generation'. The main content area shows 'Member Information' with a list of validation results (all checked), 'Incident Details' with a list of incident information (all checked), 'IAD Date Fields' with a list of dates (all checked), and 'Change Report Status' with buttons for 'Unlock Case', 'Mark as Withdrawn', 'Return to Clinical Director' (highlighted with a red box), and 'Submit Contractor/TRBHA'. At the bottom are navigation buttons: '←Previous', 'Save', and 'Next→'.

Verify the following actions:

4. Verification alert message is displayed

✔ The Case Number: IAD-2018-292 status has been updated as returned to Clinical Director. Clinical Director can further review the case.



5. Email notification was sent to Clinical Director of the Case
 - a. Check email Inbox for the email address associated with the Clinical Director account
6. Signatures were invalidated
 - a. Check the audit log by navigating to the Report Signatures Page

QuickStart Guide

Incident Report

Case#: IAD-2018-294 Provider: WALGREEN #04298 Status: Pending E-Signature (Clin Dir)

Member: SMITH, JOE Contractor/TRBHA: MERCY CARE PLAN Report: [Download Icon]

Electronic Signature Report

There are no data records to display.

Audit Report

Audit Activity: User Viewed: ReportValidation	User Name: 3levelrevieworprovider2
Audit Date: 03/25/2018	Type: Page View
Audit Activity: User Viewed eSignature precheck page: pass	User Name: 3levelrevieworprovider2
Audit Date: 03/25/2018	Type: Page View
Audit Activity: User Viewed eSignature precheck page: pass	User Name: 3levelrevieworprovider2
Audit Date: 03/25/2018	Type: Returned to Clinical Director
Audit Activity: Third-level Reviewer has returned report to Clinical Director	User Name: 3levelrevieworprovider2
Audit Date: 03/25/2018	Type: Page View
Audit Activity: User Viewed: ReportSig	User Name: 3levelrevieworprovider2
Audit Date: 03/25/2018	Type: Page View
Audit Activity: User Viewed: ProviderInfo	User Name: 3levelrevieworprovider2

3. **Verify the case status was updated to “Pending E-Signature (Clin Dir)”** in the IAD Header Section of the IAD Wizard IF a Provider (Preparer or Clinical Director) reviews the search results (see screenshot above)
4. **Verify the case status was updated to “Return to Provider”** in the IAD Header Section of the IAD Wizard IF a Health Plan / Contractor/TRBHA reviews the search results
 - a. **Note: In order for the account to be searchable on the SAME case, the Health Plan of the case must match the Health Plan/Contractor/TRBHA entity (see below)**

QuickStart Guide

Incident, Accident and Death Reporting

Return IAD Report as Provider - 14

Incident Report

Case#: IAD-2018-525
Member: SMITH, JOE

Provider: WALGREEN #04298
Contractor/TRBHA: MERCY CARE PLAN

Status: Returned to Provider
Report:

Member Information

SMITH, JOE
DOB: 01/15/1982 Age at Incident: 36
AHCCCS ID: A12345678

Contractor/TRBHA

Info! Member's Healthplans are highlighted with 'light blue' color inside this dropdown box. Please select one to confirm.

010306 - MERCY CARE PLAN

Eligibility Status

Title 21

COT

No

DDD

Yes

CMDP

Yes

Category

Serious Mental Illness (SMI)

Diagnoses

Info! Please enter at least 3 character Code OR Description and then use Search. The suggestion list will display to choose from & your selection will be saved.

Code	Description	Remove
F22	DELUSIONAL DISORDERS	✕

Incident Report

Case#: IAD-2018-525
Member: SMITH, JOE

Provider: WALGREEN #04298
Contractor/TRBHA: MERCY CARE PLAN

Status: Returned to Provider
Report: