

QuickStart Guide

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

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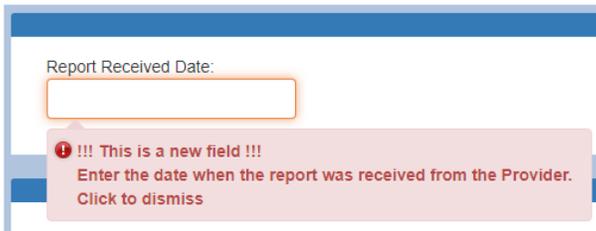
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1. General remarks

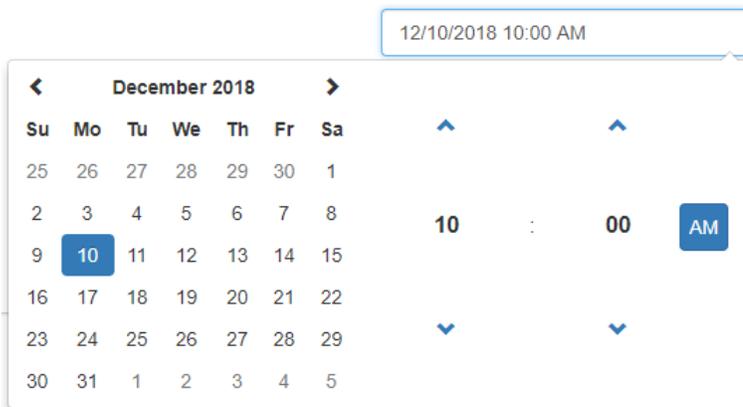
After each action, notification about the outcome with the appropriate message is displayed in the right upper corner of the screen. Successful actions will be in green and unsuccessful in red color. Message will automatically disappear from the screen after 5 seconds.



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.



Almost all Date fields are date-time pickers which functionality is activated by clicking anywhere on the field. "Date of Birth" field is the only exception, and is date picker only.



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2. Waitlist Main Page

Separate portion of QM Portal is used to manage Waitlist information.

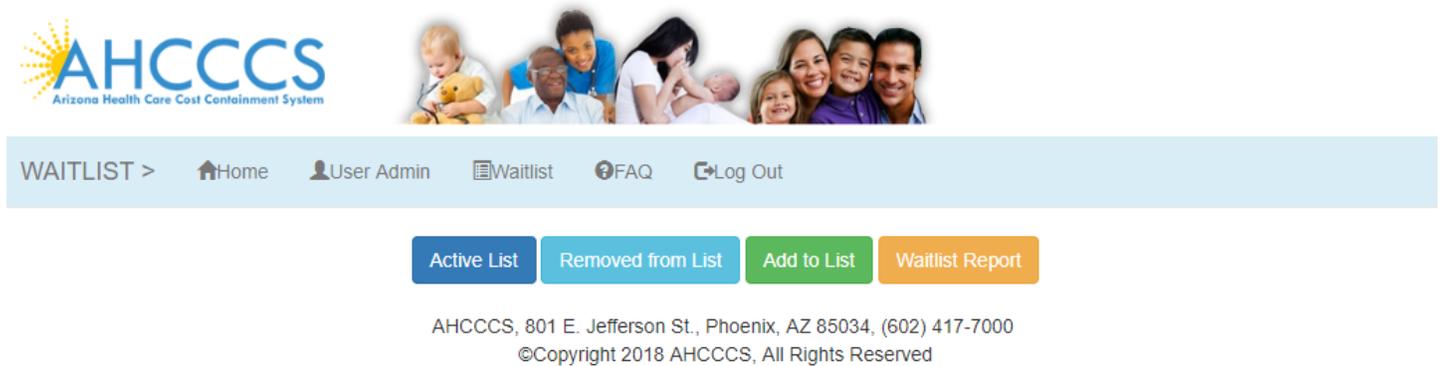
Only QM Portal users who are assigned with the role “Waitlist User” can access Waitlist Page.

Note: Master Account holders for the organization are not able to assign that role. “Waitlist User” role can be assigned only by AHCCCS DHCM. Please contact AHCCCS DHCM office to request access to the Waitlist Application.

After login, for QM Portal users with permission to access Waitlist Page, new link in the Main Menu “Waitlist” will be visible.



Following “Waitlist” link will open new page with the Sub-Menu containing selection of buttons for different actions.



- **Active List** - Opens the page to manage information for the members currently on the Waitlist.
- **Removed from List** - Opens the page to view information for the Waitlist historical records.
- **Add to List** - Start the process to add member on the Waitlist. *Reserved for Provider organization users only.*
- **Waitlist Report** - Opens the page to build and run reports based on the Waitlist information records.

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3. Active List Page

Active List page is used to manage information for the members currently on the Waitlist.

Page contains list section with brief information about members currently on the list. List is limited to information accessible to user organization.

Active List

	Health Plan	Member Name	Priority Category	Days on Waitlist	Reason
Select	MERCY CARE PLAN	NEF	Other persons who use drugs by injection	2	Facility at capacity
Select	MERCY CARE PLAN	CAM	Pregnant women/teenagers who use drugs by injection	3	Facility at capacity
Select	MERCY CARE PLAN	LOP	None	5	Facility at capacity

Following “Select” link next to the member information on the list, new section with form containing detailed information will be displayed in the bottom of the list. Depending on the user organization some of the fields will be in a read-only state.

Provider:
 Health Plan:

AHCCCS Id:
 First Name:
 Middle name:
 Last Name:

Date of Birth:
 Gender:
 Phone:
 Phone2:

Priority Category:
 Referral Date:
 Level of Care based upon ASAM Criteria assessment:

Justification for Level Of Care:

Provider Contact Log (include date):

Waitlist Date:
 Waitlist Reason:

Staff:

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Clicking on the button “Save” on the bottom of the detailed form will initiate saving changes to the record. Message stating success will be displayed on the top portion of the form, if no errors occurred. If there are any errors during the record saving process, list of all found problems will be displayed in the same portion marked red.

Please select Priority Category!
Please enter Education About HIV And TB completed Date!
Please enter Referral for HIV/TB treatment Date!



Provider:

Health Plan:

Removing member from the list is done only by Provider user by entering information into the “Waitlist Removal Date” and “Waitlist Removal Reason” fields, and saving those changes.

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4. Removed From List Page

Removed from List page is used to view historical information about the members who were once put on the Waitlist. Page contains list section with brief information about members. List is limited to information accessible to user organization. List is separated into pages with each display 5 records at the time. Navigating from page to page is done by using pagination controls on the bottom left corner of the list

[Active List](#)
[Removed from List](#)
[Add to List](#)
[Waitlist Report](#)

Removed List

	Health Plan	Member Name	Priority Category	Days on Waitlist	Reason
Select	STEWARD HEALTH CHOICE ARIZONA	HEL	None	2	Placed in originating facility
Select	STEWARD HEALTH CHOICE ARIZONA	DEL	Substance using women/teenagers with dependent children and their families, including females who are attempting to regain custody of their children	3	Refused treatment
Select	STEWARD HEALTH CHOICE ARIZONA	THO	Other persons who use drugs by injection	0	Placed in originating facility
Select	STEWARD HEALTH CHOICE ARIZONA	HOO	Other persons who use drugs by injection	5	Unable to contact
Select	AZ COMPLETE HEALTH CARE	MCA	None	7	Unable to contact

1234

Following “Select” link next to the member information on the list, new section with form containing detailed information will be displayed in the bottom of the list. All fields will be in a read-only state, except for the field “Comments”.

Additional Information:

Waitlist Removal Date:

Waitlist Removal Reason:

Comments:

[Save](#)

Clicking on the button “Save” on the bottom of the detailed form will initiate saving changes to the record. Message stating success will be displayed on the top portion of the form, if no errors occurred. If there are any errors during the record saving process, list of all found problems will be displayed in the same portion marked red.

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5. Add To List Page

Add to List page is available only for the Provider users, and as its name states is used to add members to a Waitlist. Process of adding member to a Waitlist begins with a modal window used to search for a member.

The screenshot shows a modal window titled "Search for a Member" with a close button (X) in the top right corner. It contains four input fields: "AHCCCS or CIS ID:", "DOB:", "First Name:", and "Last Name:". A blue search button with a magnifying glass icon is to the right of the "Last Name" field. Below the fields is a tip: "Tip: Please enter AHCCCSID and Date Of Birth, or First Name, Last Name, and Date Of Birth of the member you are searching for." The main content area displays "NO RECORDS FOUND". A "Close" button is located in the bottom right corner.

Following sets of criteria may be used to search for the member:

- AHCCCS ID (either Title IX or non-Title XIX) and Date of Birth
- CIS ID and Date of Birth
- First name, Last Name and Date of Birth

Search is initiated by pressing on the magnifying glass button. Search results will be displayed in the bottom part of the window, either as a success with a basic information about the member (so user can confirm that right member is found), or as a failed search in which case results will be displaying message "NO RECORDS FOUND".

The screenshot shows the same "Search for a Member" modal window. The input fields are filled with: "AHCCCS or CIS ID:" (empty), "DOB:" (02/2), "First Name:" (dia), and "Last Name:" (per). The search button is active. The tip is the same. Below the tip is a table with the following data:

AHCCCS ID	FULL NAME	DOB	GENDER	PHONE	ADDRESS	
A00	PE	02/2	F	480	2 EL MESA, AZ 85204	Select

A "Close" button is located in the bottom right corner.

Following "Select" link next to the member information will close search window and open new section with form to enter Waitlist record information. Some of the fields will be prepopulated with the information received from the AHCCCS system of reference. Basic information about the member will always be in a read-only state, as changing that information is not allowed.

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Add New

Provider: Health Plan:

AHCCCS Id: First Name: Middle name: Last Name:

Date of Birth: Gender: Phone: Phone2:

Priority Category: Referral Date: Level of Care based upon ASAM Criteria assessment:

Justification for Level Of Care:

Provider Contact Log (include date):

Waitlist Date: Waitlist Reason:

Staff:

Risk Assessment completed:

Education about HIV and Tuberculosis (TB), the risks of needle-sharing, the risks of transmission to sexual partners & infants, and about steps that can be taken to ensure that HIV

Clicking on the button “Save” on the bottom of the form will initiate saving the record and adding member to the Waitlist. Message stating success will be displayed on the top portion of the form, if no errors occurred. If there are any errors during the record saving process, list of all found problems will be displayed in the same portion marked red.

Please select Priority Category!
Please enter Education About HIV And TB completed Date!
Please enter Referral for HIV/TB treatment Date!

Provider: Health Plan:

User will have to make necessary corrections on the form and repeat record saving process by clicking on the “Save” button again.

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6. Waitlist Report Page

Waitlist Report page is used to build and run reports based on the Waitlist information records. Users of all organizations are able to use this tool, but report results are limited to only information accessible to that organization.

Waitlist Report page is separated into two sections. “SETTINGS” section on the top, for managing report setting and filters (criteria), and “OUTPUT” sections on the bottom, where results of the report run will be displayed.

“SETTINGS” section consists of the checkbox list of the columns to be displayed on the report, and report criteria builder to filter and limit returned results. Adding multiple criteria to the report setting is accomplished by clicking on the  image button. Criteria list will have two clickable icons on the far-right side. Use  to change criteria properties, and  to completely remove criteria.

Active List Removed from List Add to List Waitlist Report

Waitlist Report

SETTINGS

Preset Reports: Test Report 23 Save 

Columns to be displayed on the report:	Report criteria:		
<ul style="list-style-type: none"> <input checked="" type="checkbox"/> HEALTHPLAN <input type="checkbox"/> PROVIDER <input checked="" type="checkbox"/> AHCCCS ID <input checked="" type="checkbox"/> MEMBER NAME <input checked="" type="checkbox"/> GENDER <input checked="" type="checkbox"/> BIRTH DATE <input checked="" type="checkbox"/> AGE <input checked="" type="checkbox"/> PHONE <input checked="" type="checkbox"/> PHONE2 <input type="checkbox"/> PRIORITY CATEGORY <input type="checkbox"/> REFERRAL DATE <input type="checkbox"/> ASAM SCORE <input type="checkbox"/> PROVIDER NOTES <input checked="" type="checkbox"/> WAITLIST DATE <input checked="" type="checkbox"/> DAYS ON LIST 	<p>Field: </p> <hr/> <p>MEMBER NAME</p> <p>AGE</p> <p>RISK ASSESSMENT</p>	<p>Is: </p> <hr/> <p>contains</p> <p>greater or equal</p> <p>equal</p>	<p>Value: Add</p> <hr/> <p>young</p> <p>18</p> <p>YES</p>
			Clear selection and criteria

Run Report

OUTPUT

To clear all selection and criteria for the report, use “Clear selection and criteria” button on the lower-right side of the settings section.

Settings for the report can be named and saved for future use, by using top portion of the “SETTINGS” section, where Preset Reports controls are located. Chose option “-- Save New --”, from the dropdown list to initiate process of saving new preset report, or “Save” button, to update currently chosen preset report.

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User runs a report by clicking on the green “Run Report” button. Results will be displayed in the “OUTPUT” section of the page.

Active List Removed from List Add to List Waitlist Report

Waitlist Report

SETTINGS

OUTPUT

HEALTHPLAN	AHCCCS ID	MEMBER NAME	GENDER	BIRTH DATE	AGE	PHONE	PHONE2	DAYS ON LIST	WAITLIST REASON	STAFF	RISK ASSESSMENT	RISK ASSESSMENT DATE	DATE ADDED
STEWARD HEALTH CHOICE ARIZONA	A94	YO SA	F	7/13/1984 12:00:00 AM	35	602	602	1	Facility at capacity	He Qu	YES	3/22/2017 12:03:00 PM	4/18/2017 10:04:00 AM
MERCY CARE PLAN	A37	YO EL	F	9/9/1950 12:00:00 AM	69	602		3	Facility at capacity	Tr	YES	10/6/2016 12:10:00 PM	11/8/2016 8:11:00 AM
UNITEDHEALTHCARE LTC	A00	YO A	F	3/27/1942 12:00:00 AM	77	602	602	0	Facility at capacity	dc sd	YES	11/19/2018 12:00:00 AM	11/19/2018 8:48:55 AM

Export to Table

Report results can be exported to an external table application (e.g. Excel) and saved on the user’s local device by clicking on the “Export to Table” button.

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7. Notifications

All users of the Waitlist application will receive notifications in the form of email, for the members they are associated to, depending on the action and time. Details of the notification system are highlighted in the following matrix:

Priority Category	Initial Notification*	Second Notification	Final Notification
<i>Pregnant women/teenagers</i>	Immediately	24 Hours	48 Hours
<i>Women/teenagers with dependent children</i>	Immediately	24 Hours	48 Hours
<i>Persons who use drugs by injection</i>	Immediately	5 Days	10 Days
<i>Other priority population</i>	Immediately	5 Days	10 Days

* **Initial Notification** is sent immediately after member is added to the Waitlist,