Qualitrac Training Inpatient Psych

PROVIDER PORTAL USERS - SAN BERNARDINO COUNTY

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Agenda

- Learning Objectives
- Training Topics
- Training
- Q&A
- Feedback Process & Next Steps

Housekeeping

Questions

- Please enter all questions into the chat.
- Any additional time at the end of the training will be used for answering chat questions.
- Any questions not answered from the chat will be posted to the website.

Content Availability

- Content will be posted to the website after the presentation.

Learning Objectives

- By the end of this session, you should be able to:
  - Understand the Provider Portal Registration
  - Access Qualitrac & Learn the System Navigation
  - Perform a Member Search
  - Navigate the Member Hub
  - Add an Authorization Request to a Member
  - Navigate to the Scheduled Tasks Queue
  - Locate and Access a Completed Review (Authorization Request)
  - Complete a Request for Information (RFI) Task
  - Understand Appeals, Denials and Administrative days

Training Topics

- Registration, Security & Accessing the System
- Getting Started: Qualitrac Navigation
- Adding a Request for a Member
  - Member Search
  - Member Hub
  - Submit an Authorization Request
- Accessing Completed Authorization Request(s)
- Request for Information (RFI)
- Viewing the Outcome/Determination
- Submitting a Reconsideration (1st Level Appeal)

Qualitrac Registration & Security

Provider Portal Security

- The Qualitrac Provider Portal is a web application that allows health care providers to submit review requests.
- The Qualitrac Provider Portal utilizes a delegated security model.
  - A delegated security model requires an organizational executive (Provider Executive) to "delegate" administrative rights to one or more individuals within their organization (Authorized Official).
- There should be at least one Authorized Official (AO) per facility.
  The Authorized Official will:
  - Be the point of contact for the organization.
  - Add, remove or edit Provider User accounts.
- Note: HIPAA compliance requires all staff entering reviews or accessing the portal to have their own log-in and password.

Provider Portal Registration

- If you have not been asked to attend the Authorized Official training, you are a Provider Portal User (PPU)

- You need to find the Authorized Official for your organization to make sure your account is set up

- Access to the system will be granted no earlier than 7/29

Accessing Qualitrac

Provider Portal Overview

- The Telligen Provider Portal is a web application that allows healthcare providers to submit review requests.
- Please bookmark the https://californiastatemedicaid.flywheelsites.com/ webpage.
- Use the Log-In link provided to access Qualitrac
- Continue to check the website for information pertaining to the Telligen Provider Portal and the review process.

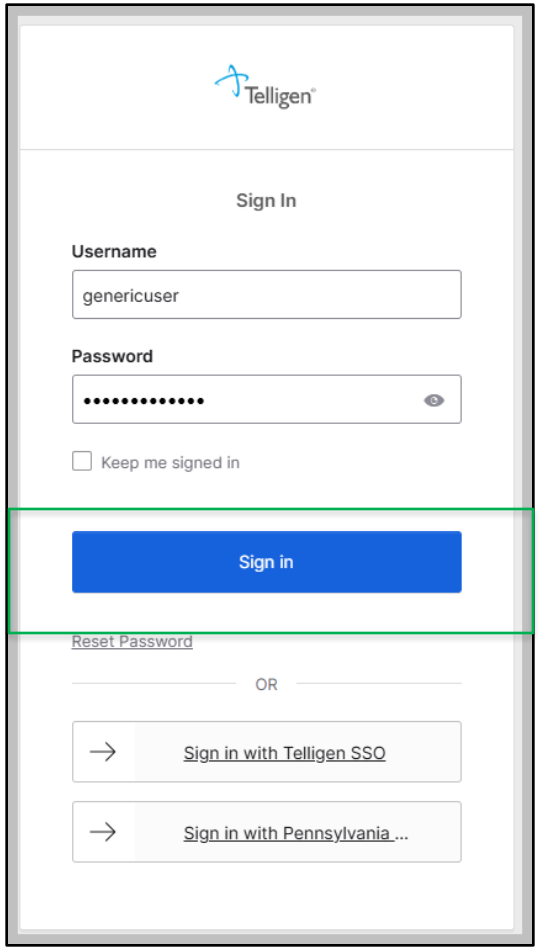
Telligen Landing Page Overview

- Please bookmark https://californiastatemedicaid.flywheelsites.com/

Logging in with Multi-Factor Authentication (MFA)

Welcome to Qualitrac!

- https://myqualitrac.com
- Select the 'Sign In' button



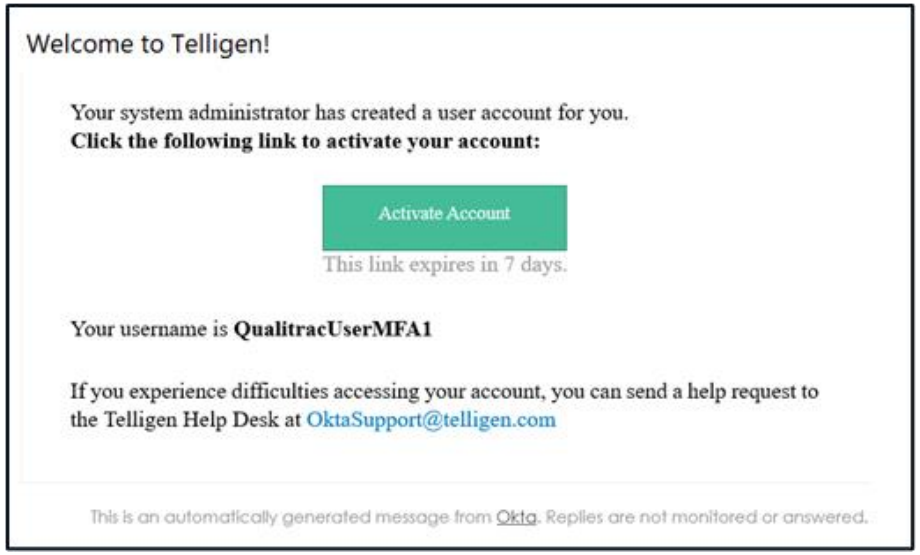
Qualitrac Multi-Factor Authentication

- To Login to Qualitrac a user must have a verification method for Multi-Factor authentication (MFA).
- Qualitrac has multiple methods for Multifactor Authentication: Email (default), an Authenticator App and Phone (Text/Voice).
- We will walk through the email authentication.
- A Tips Sheet is available with step-by-step instructions for the other methods of Authentication and new user authentication.
- Please set up 2 methods of MFA (Email and text) in the event one method fails

Logging in with MFA

Email (default)

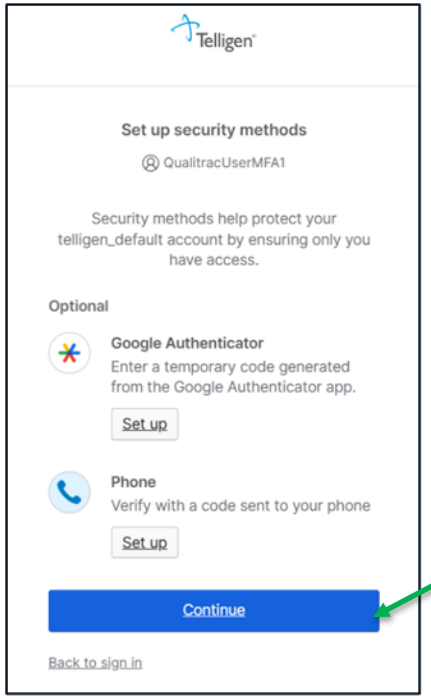
- Newly registered users of Qualitrac will receive a registration email to activate their account and set a password.
- Click the button 'Activate Account.'
- Users will be directed to the Qualitrac Sign In screen to set up security methods. Click 'Set Up' a Password.



Logging in with MFA (cont.)

Email (continued)

- After setting up your password, you will be presented with a screen to set up additional security methods for MFA.



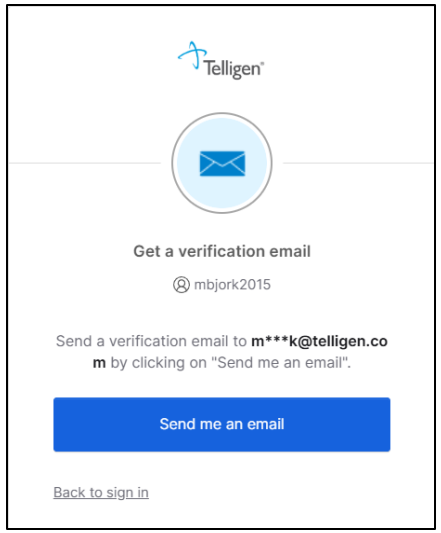
Clicking the 'Continue' button from this screen selects the Email method for authentication.

See the Tip Sheet for set-up instructions on the other methods of authentication

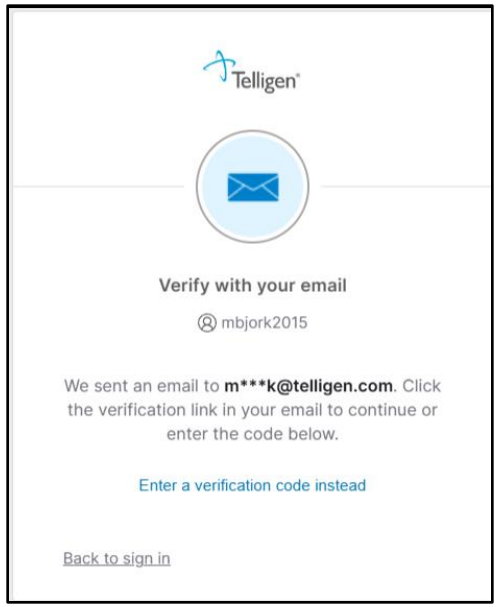
Logging in with MFA: Set up (cont.)

Email

- When the ‘Continue’ button is selected for “Email” the system will display a screen to send verification to an email.
- Click the button ‘Send me an email.’



- The next screen will inform you that an email has been sent to the email associated with the Qualitrac account.



Logging in with MFA(cont.)

Email

- Open your email account and locate the "One-time verification code" email from Telligen. This will contain both a "Sign In" link, which will authenticate directly through the email and a 6-digit code that can be manually entered.

When the link "Sign In" is clicked in the email the user will be authenticated and directed into the Qualitrac system.

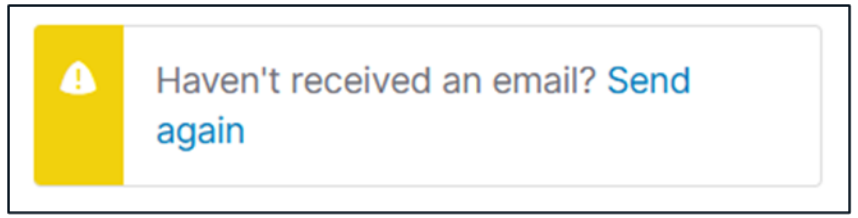


Alternatively, you can copy the 6-digit code and navigate back into the Qualitrac login screen to manually enter the code from the email

Logging in with MFA: Email (cont.)

Re-send Email Option

- Note: If the email wasn't received, the login screen is set to display a system message after a designated time has passed, which will allow you to click "Send again" to send another authentication email.



Need Assistance? Contact 1-833-476-4850 for assistance

Getting Started

Getting Started: Dashboard

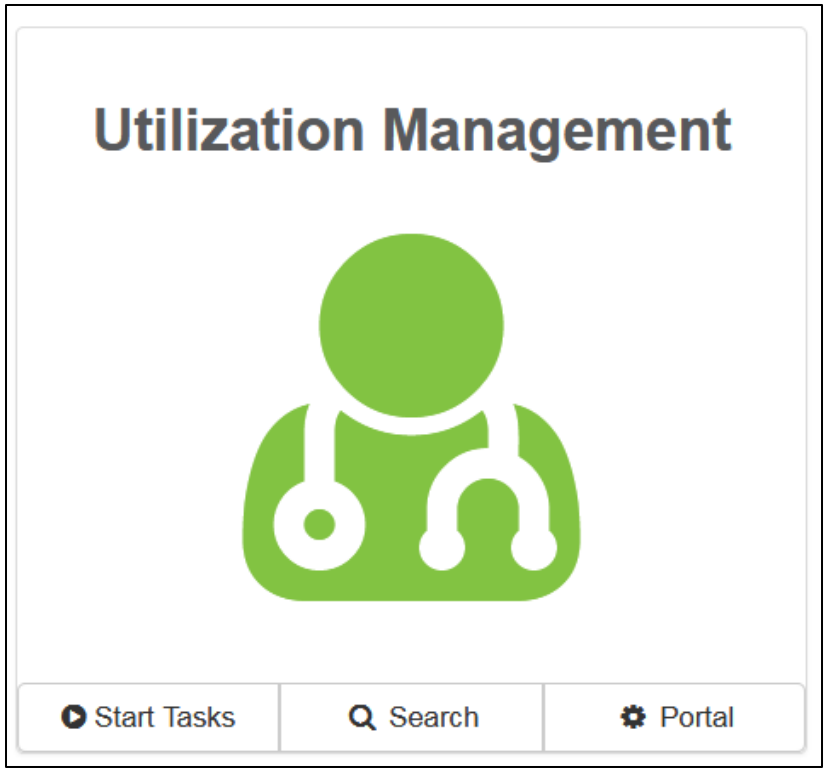
- Upon a successful login, users are taken to a system Dashboard screen.



Dashboard: Utilization Management Module

On the Dashboard there are three option buttons displayed for the Utilization Management Module:

- **Start Tasks:** will take you to the task queue to view any reviews where additional information has been requested.
- **Search:** will take you to the Case/Request/Claim UM search screen. This is the same action as clicking the magnifying glass from the navigation ribbon.
- **Portal:** will take you to the task queue. This is the same action as clicking the 'Task Queue' icon from the navigation ribbon.



Getting Started: Navigation Ribbon

- The main navigation for Qualitrac is displayed at the top of the screen and is referred to as the 'Navigation Ribbon'. The navigation ribbon contains the Qualitrac logo and clickable icons that may vary based on the client/contract and the user's role.
  - The navigation ribbon will be displayed on all Qualitrac screens apart from the Reports section.



Navigation Ribbon Icons

- Click the Qualitrac logo, displayed in the upper left of the navigation ribbon, to return to the System Dashboard (Home) screen. *It's your easy button.*



Getting Started: Navigation Ribbon Icons



UserWay: click this icon to access accessibility options



System Messages: click this icon for any general system messages; a number within the icon displays number of messages



Search: click this icon to search for a member or case



Task Queue: click this icon to access the Scheduled Tasks List



Knowledge Center: click this icon to access this Utilization Management User Guide



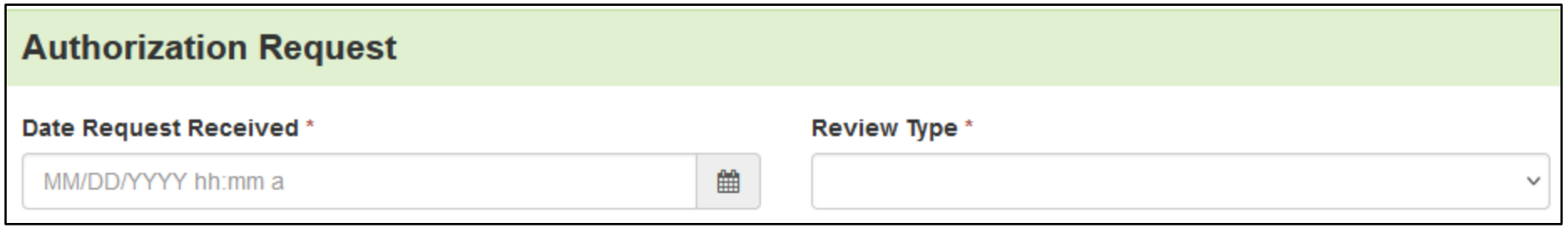
User Profile/Log Out: click this icon to access/edit user profile; log out of application

Navigating Qualitrac: Tips and Tricks

- Browser Tabs – Qualitrac, at times, will open an additional tab in your browser.
  This makes it easy to drag that tab/screen to another monitor for reference.

- Paper and Pen Icon - Indicates the ability to edit. 

- Asterisks (*) - Indicates required fields.



Navigating Qualitrac: Tips and Tricks (cont.)

Qualitrac contains several icons, including:



Action Menu: Clicking the three lines (hamburger menu) will display options/actions.



Action Menu: Clicking the three dots (ellipsis) will display options/actions.



Add Button: Denotes the option to add information to Qualitrac.



Delete: The trash can icon indicates the option to discard/delete content from Qualitrac.



Notes: Conversation bubbles will be attached to certain functions. When the bubble is a solid color, this indicates a note is attached. Click the bubble icon to add, edit and/or view notes.



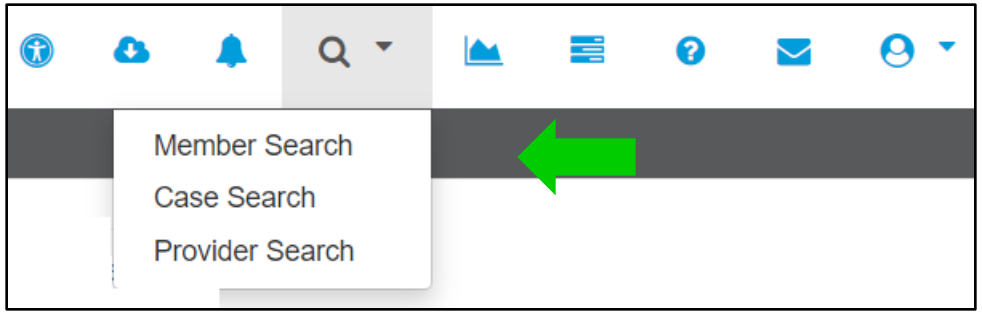
Tooltip/Help: 'Hover to Discover' is available when you hover the mouse over a help icon

Expand/Collapse: Qualitrac has several panels and content areas that can be expanded or collapsed by clicking on them for optimal viewing of screen data

Search for a Member

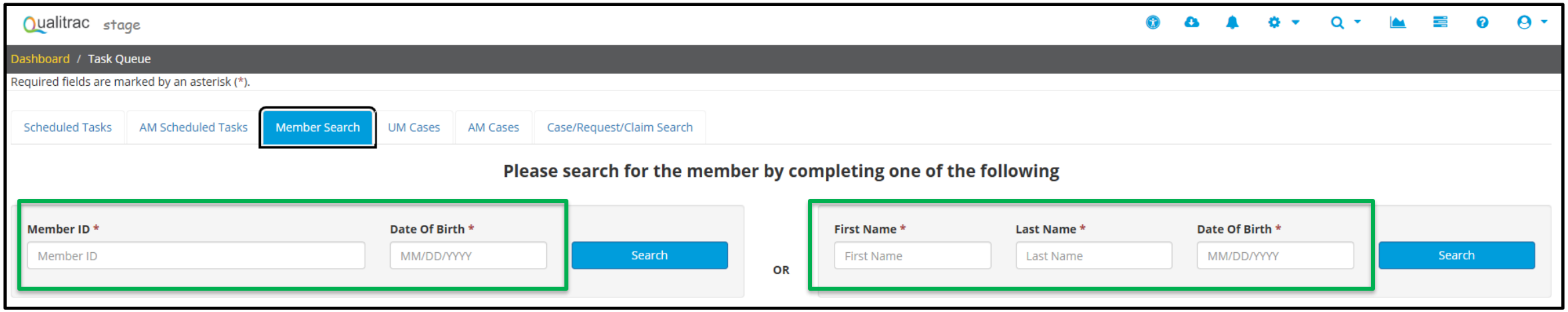
Start a Member Search

- Executing a Search
- Navigation Ribbon
- Click the Search Icon (Magnifying Glass)
- Select ‘Member Search’ from the Menu



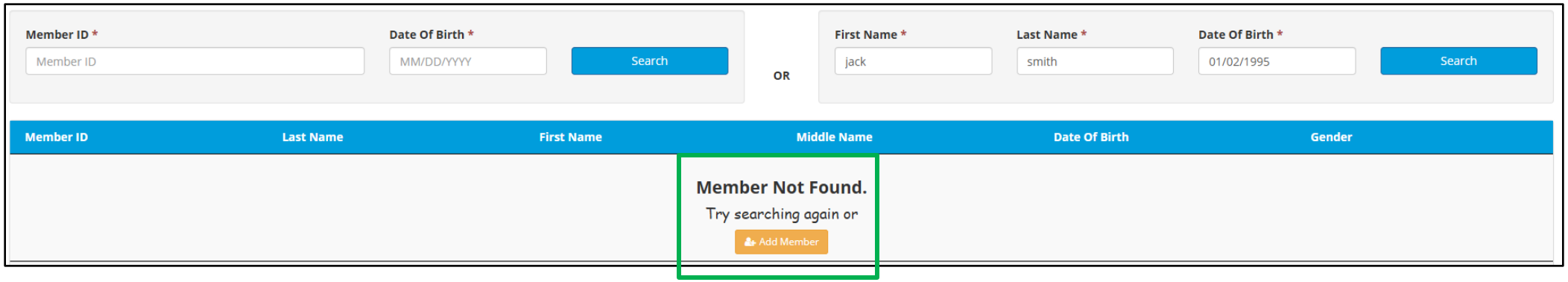
Member Search (cont.)

- Member Search Tab: Enter the Member's information to perform a search.
  - Option 1 is to search by 9-digit Member ID and Date of Birth.
  - Option 2 is to search by First Name, Last name and Date of Birth.



Member Search: No Member Found Results

- If the member being searched does not have information in Qualitrac, the following message will appear:



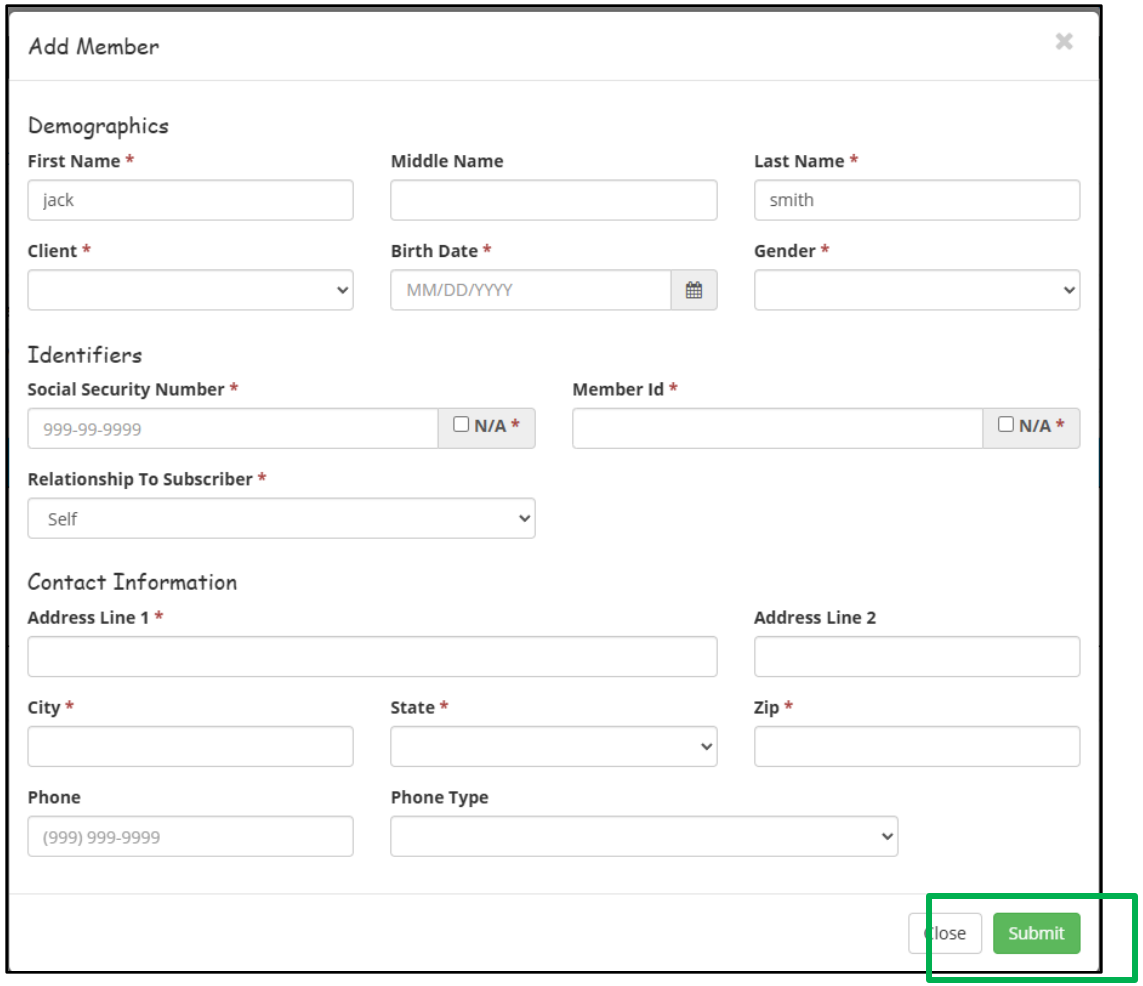
- This message indicates the member is not in the system and you will need to create the member in the system
- To create the member select Add Member

Member Search: No Member Found Cont.

The add member information screen will pop up and you will be required to add:

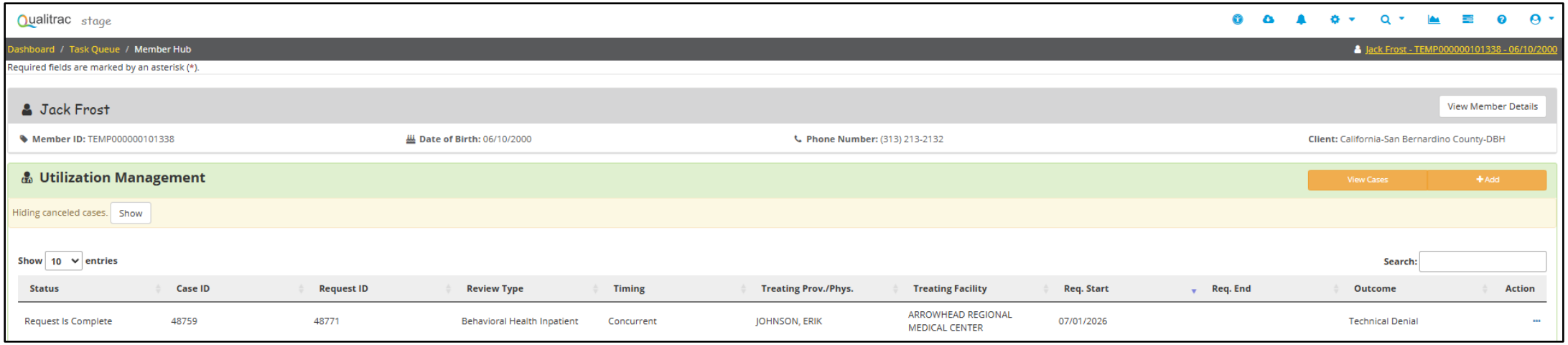
- All fields with an asterisks will need to be completed
- Once all information has been entered, validate it is correct and select submit

NOTE: *Accurate data entry is essential to ensure the reliability and quality of the information collected.*



Member Hub & Member Details

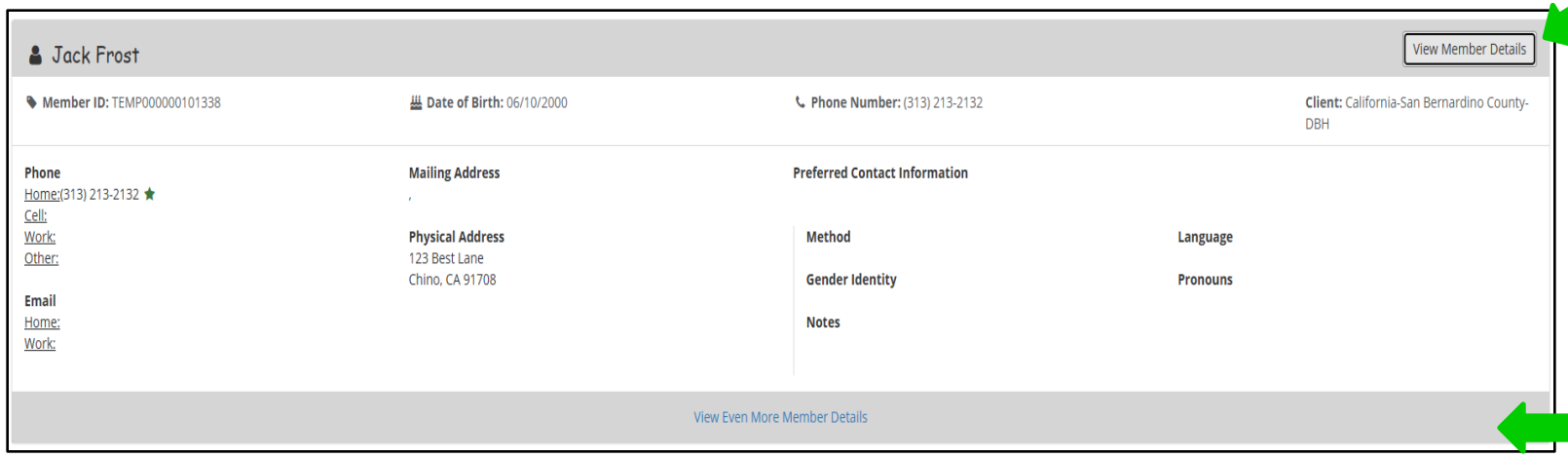
Member Hub



- Telligen's Qualitrac Provider Portal allows you to view information related to a member based on your role in the system.
- You will be able to see their contact information.
- You will be able to see any reviews that have been submitted by you.

Member Hub: View Member Details

- Clicking on the 'View Member Details' button will expand the Beneficiary information panel on the Member Hub.

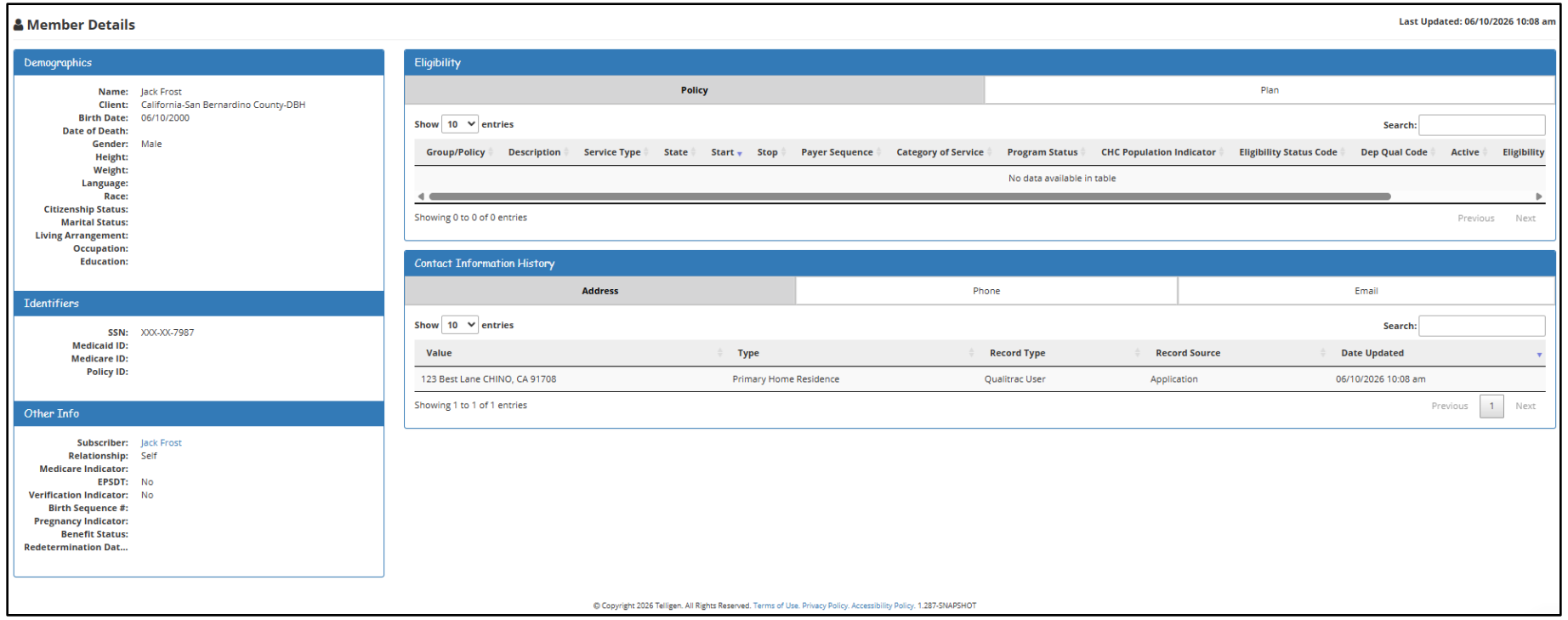


"View Member Details" button will expand and collapse the panel to just see information across the top line.

"View Even More Member Details" link will take the user to view member eligibility.

Member Hub: View Member Details (cont.)

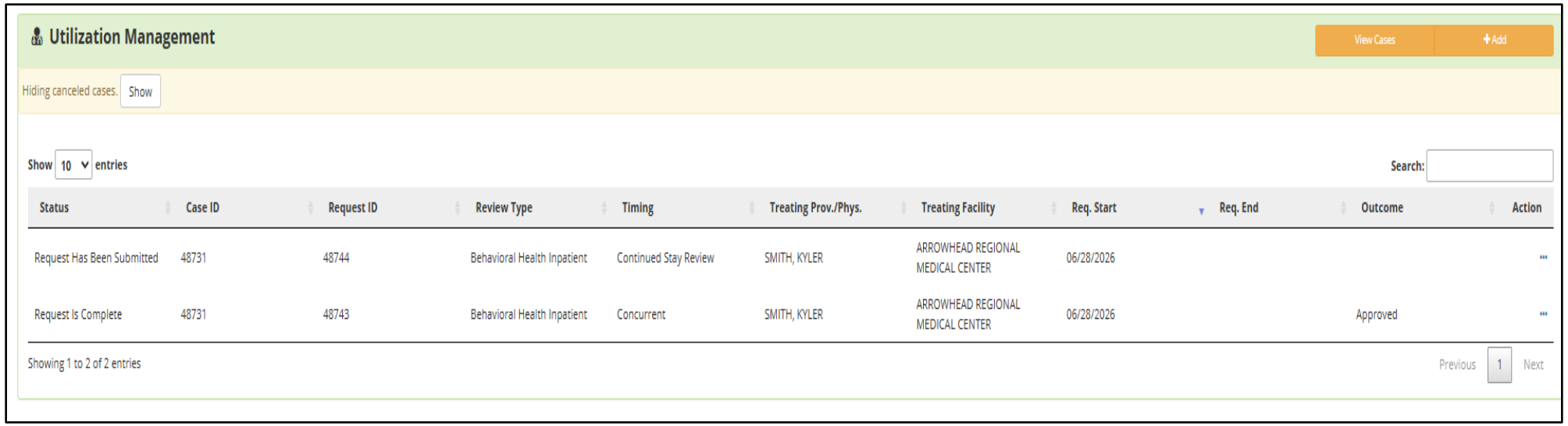
- Clicking on the 'View Even More Member Details' box or the Member Name in the upper right corner, opens a new screen that displays additional member eligibility information supplied by the County.



Member Hub Panels (cont.)

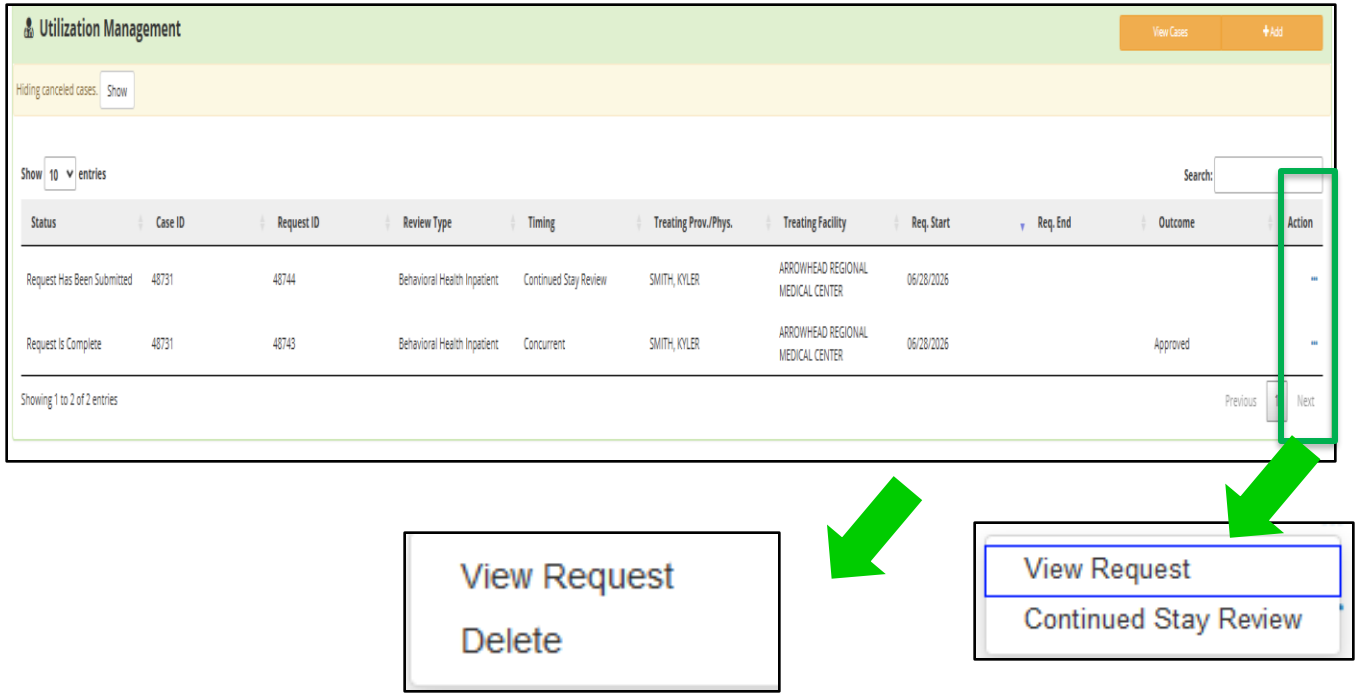
Utilization Management Panel

- The Utilization Management (UM) panel will contain information related to the Authorization Request reviews submitted for the member on behalf of your organization, or reviews that are shared with your organization through the provider visibility panel.



Member Hub Panels: UM (cont.)

Utilization Management Panel (cont.)



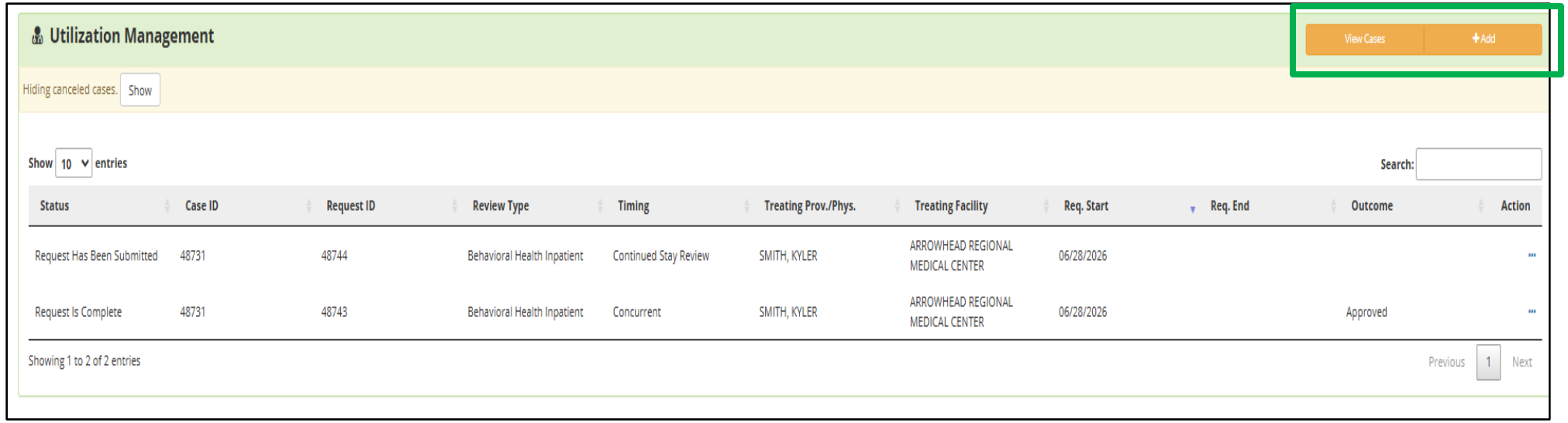
The action menu (ellipsis – 3 dots) may display the following options and will vary based on the review set up, outcome rendered and timing status:

- *View Request*
- *Delete*
- *Admin Days*
- *Continued Stay Review*
- *Reopen*

Submitting Authorization Requests

Member Hub: UM Panel

- The Utilization Management panel will contain all information related to any UM reviews submitted for the Member.
- To start a new Authorization Request, click the 'Add' button on the Utilization Member Panel.



Add a New Authorization Request

- The system will load the Authorization Request screen and is the foundation of building your review.

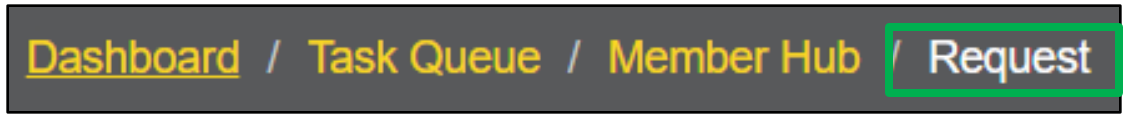


- You will complete the below fields and click the 'Add New Request' button:
  - Review Type: Place of Service – Behavioral Health Inpatient
  - Place of Service: Defaults to Inpatient Psychiatric Facility
  - Type of Service: Defaults to Psychiatric - Inpatient
  - Timing: Concurrent, Retrospective

Note: Date Request received will default to current date and time

Add a New Authorization Request (cont.)

- Once the information is added and saved, the system will display a success message and update the request screen.
- The system will display the text "Request" on the breadcrumb trail.



- Note: The information captured in the Authorization Request panel **cannot** be modified after clicking the 'Add New Request' button.
- The authorization request panel will show the saved information as read-only and display the Case ID and Request ID.
- The page opens to fill in all the remaining information necessary to process the request.

Add a New Authorization Request: Panels

The following panels will be required for your request:

- Authorization Request
- Admission and Discharge - or - Dates of Service
- Coverage (if none is listed)
- Submission Method
- Providers
- Diagnosis
- Procedure Code – This will default to an inpatient code
- Documentation
  (required for all requests)

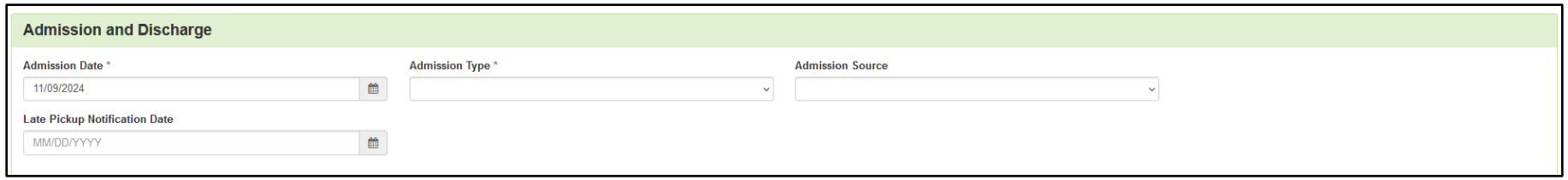
Optional but important:

- Provider Organization Visibility

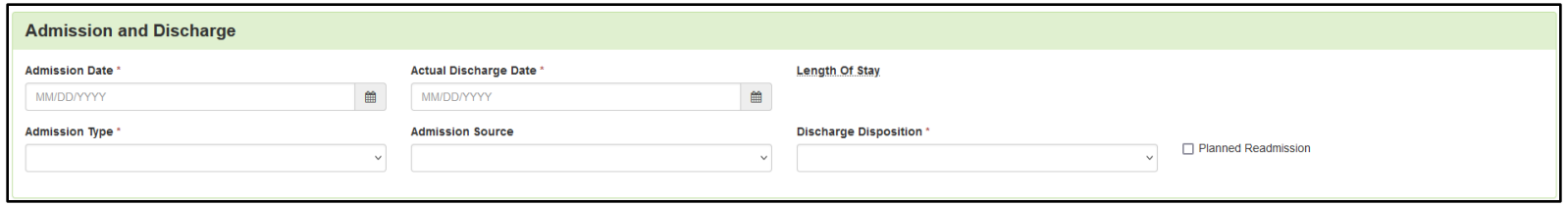
Admission and Discharge Panel

- Once the Authorization Request has been successfully submitted, the Request screen will display the Admission and Discharge panel.
- This panel contains form fields that are dynamically displayed based on the timing for the authorization request and populated as data is entered.

Concurrent requests example:

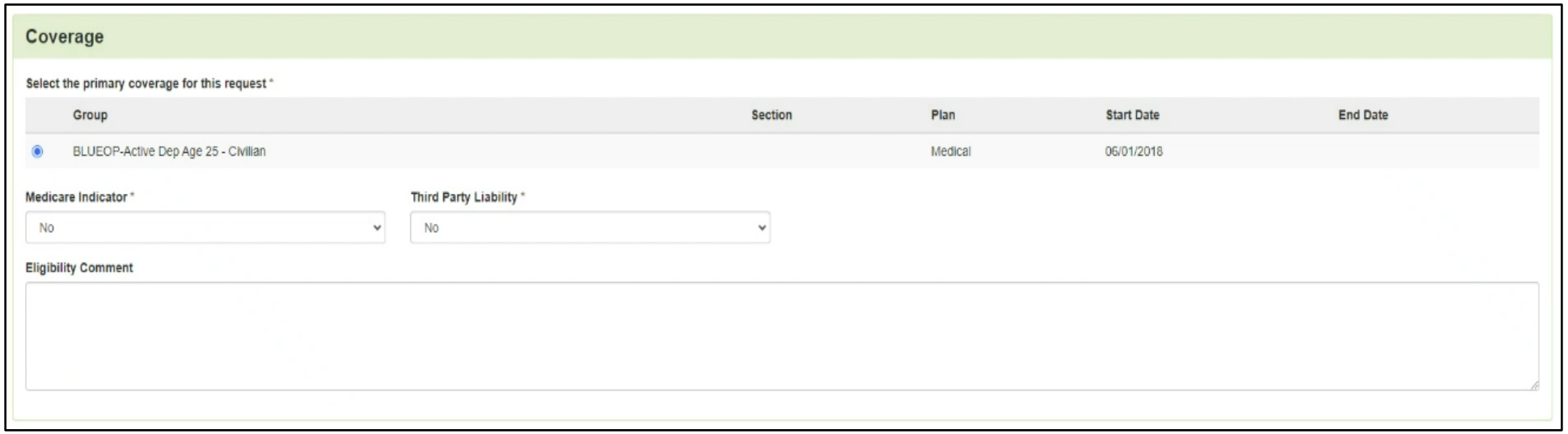


Retrospective requests example:



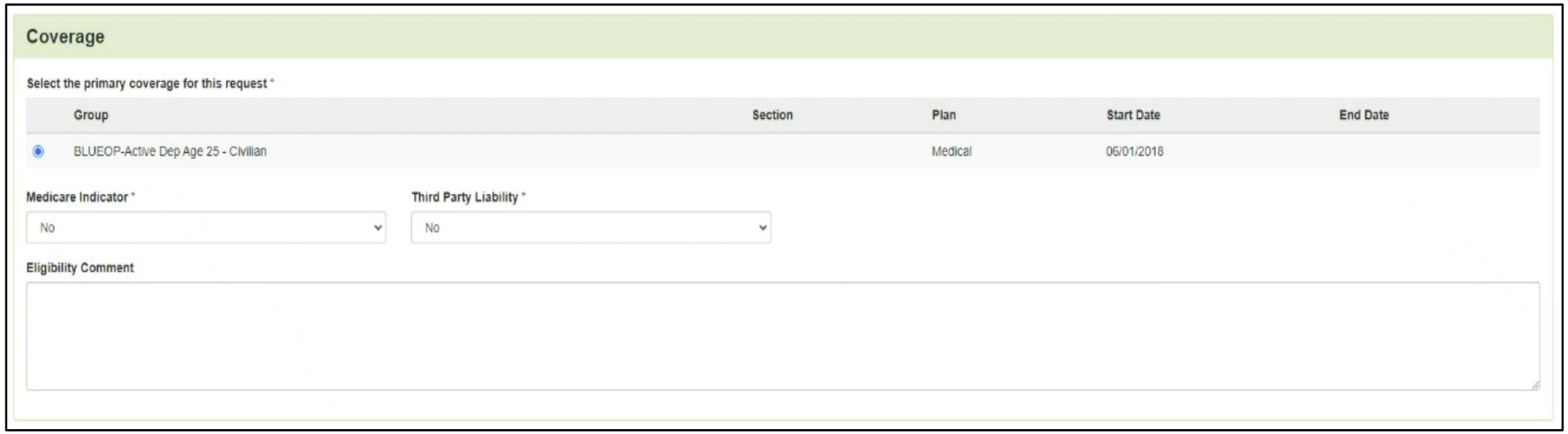
Coverage Panel

- The Coverage Panel will detail information about the Members's eligibility.
- Coverage eligibility is based on the dates of services entered in the request.
- Qualitrac will pull in the member's coverage if it is available
- The 'Medicare Indicator' and 'Third-Party Liability' will default to 'No'.



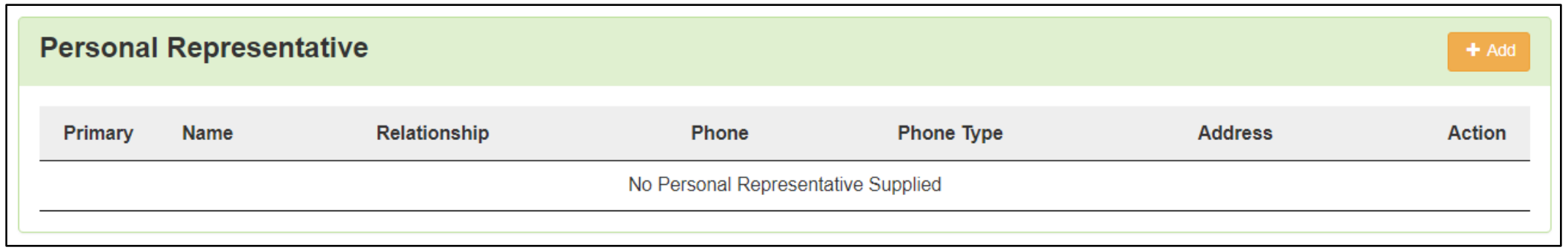
Coverage Panel (cont.)

- There is an 'Eligibility Comment' box where you can enter information related to the Member's eligibility.
- This will also allow the submitter to explain lack of eligibility and submit the review through the system.



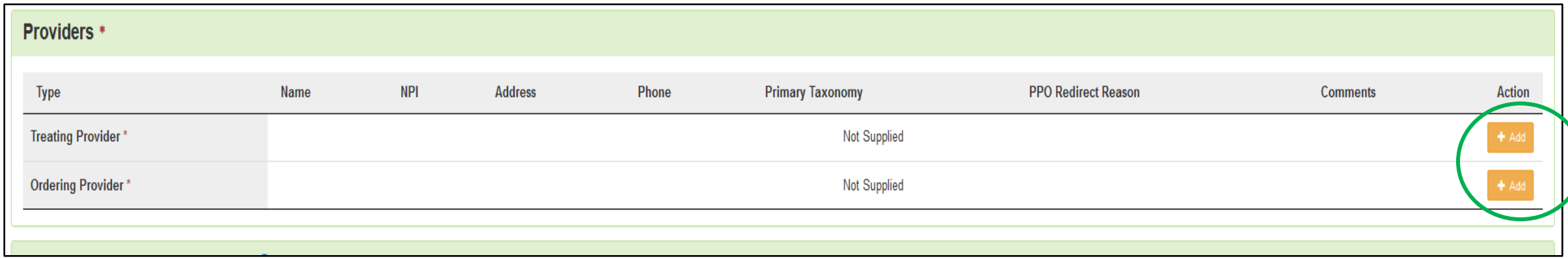
Personal Representative Panel

- A personal representative can be a person with legal authority to make health care decisions on behalf of the individual.
- A personal representative for the member can be entered in the Personal Representative panel.
- Click the ‘Add’ button to display the form fields to enter the personal representative information for the Beneficiary.
- All Minors will require an entry into this panel



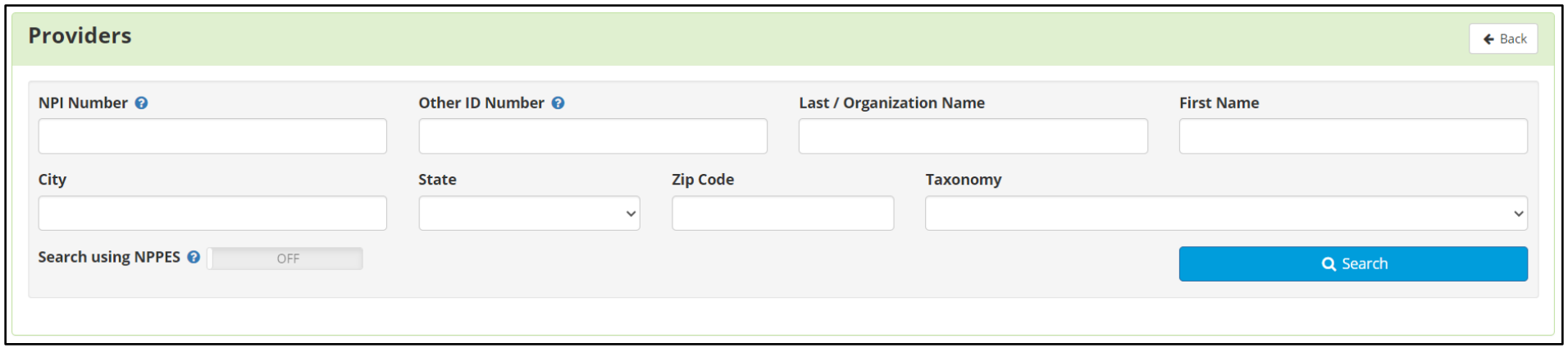
Providers Panel

- Provider Panel is where the providers are selected for the request.
- Click the ‘Add’ button to conduct a search for the desired provider type.
- Qualitrac will search NPPES for providers, please make sure you are selecting the correct Physician and Facility.



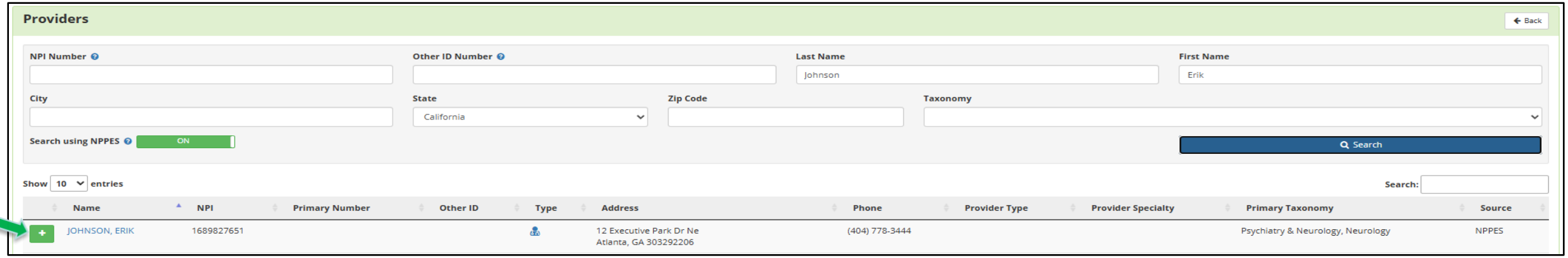
Providers Panel: Search

- Enter pertinent information in any of the fields and click the 'Search' button.
- The system will search NPPES
- Entering the National Provider Identifier (NPI) or MAID number will result in the most accurate match.



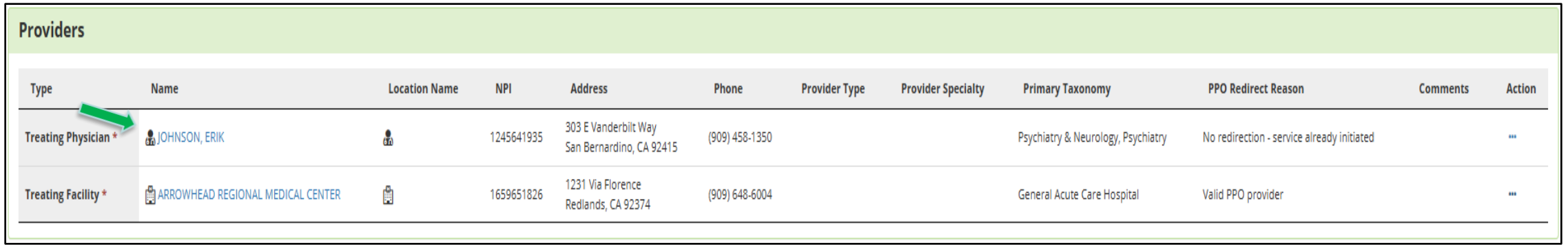
Providers Panel: Search Results

- Locate the correct record in the search results and click the 'Add' button.
- When the 'Add' (green plus sign) button is clicked, the system will update the authorization request screen showing the selected entity in the Providers panel.



Providers Panel: Search Results cont.

- Clicking on the Provider's 'Name', 'Location Name' or 'NPI', links will display the Provider Summary page.

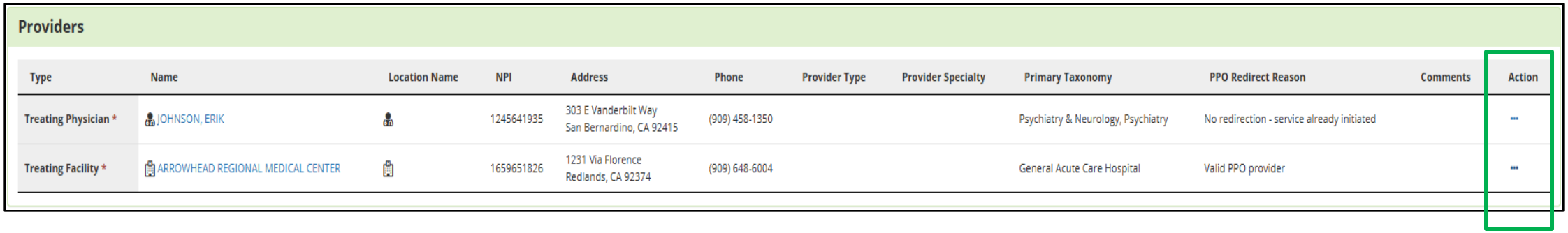


Providers

Type	Name	Location Name	NPI	Address	Phone	Provider Type	Provider Specialty	Primary Taxonomy	PPO Redirect Reason	Comments	Action
Treating Physician *	JOHNSON, ERIK		1245641935	303 E Vanderbilt Way San Bernardino, CA 92415	(909) 458-1350			Psychiatry & Neurology, Psychiatry	No redirection - service already initiated		•••
Treating Facility *	ARROWHEAD REGIONAL MEDICAL CENTER		1659651826	1231 Via Florence Redlands, CA 92374	(909) 648-6004			General Acute Care Hospital	Valid PPO provider		•••

Providers Panel: Additional Features

- A provider listing can be replaced by clicking the ellipsis to display the action menu for the desired record.



Providers

Type	Name	Location Name	NPI	Address	Phone	Provider Type	Provider Specialty	Primary Taxonomy	PPO Redirect Reason	Comments	Action
Treating Physician *	JOHNSON, ERIK		1245641935	303 E Vanderbilt Way San Bernardino, CA 92415	(909) 458-1350			Psychiatry & Neurology, Psychiatry	No redirection - service already initiated		•••
Treating Facility *	ARROWHEAD REGIONAL MEDICAL CENTER		1659651826	1231 Via Florence Redlands, CA 92374	(909) 648-6004			General Acute Care Hospital	Valid PPO provider		•••

Provider Organization Visibility Panel

- This panel is not required, but setting the visibility allows you to share this review with everyone in the organization you are submitting it for.

- If visibility is not provided, the only person who can see the request is the person submitting it.



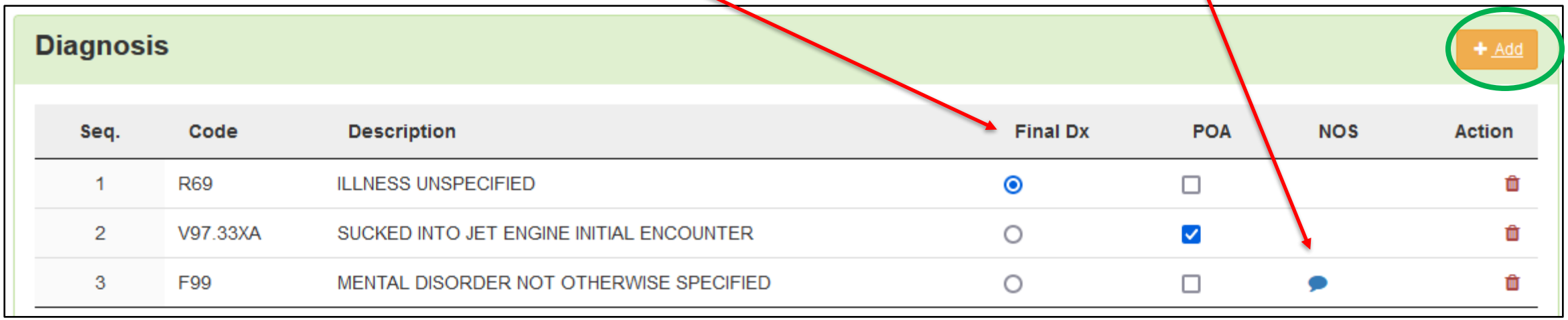
Diagnosis Panel

The Diagnosis panel is where you can enter the diagnosis information related to this review.

User can indicate a Final Diagnosis (Final Dx) and if it was Present on Admission (POA)

NOS - Not Otherwise specified, presents details in a conversation bubble added to the Diagnosis NOS description

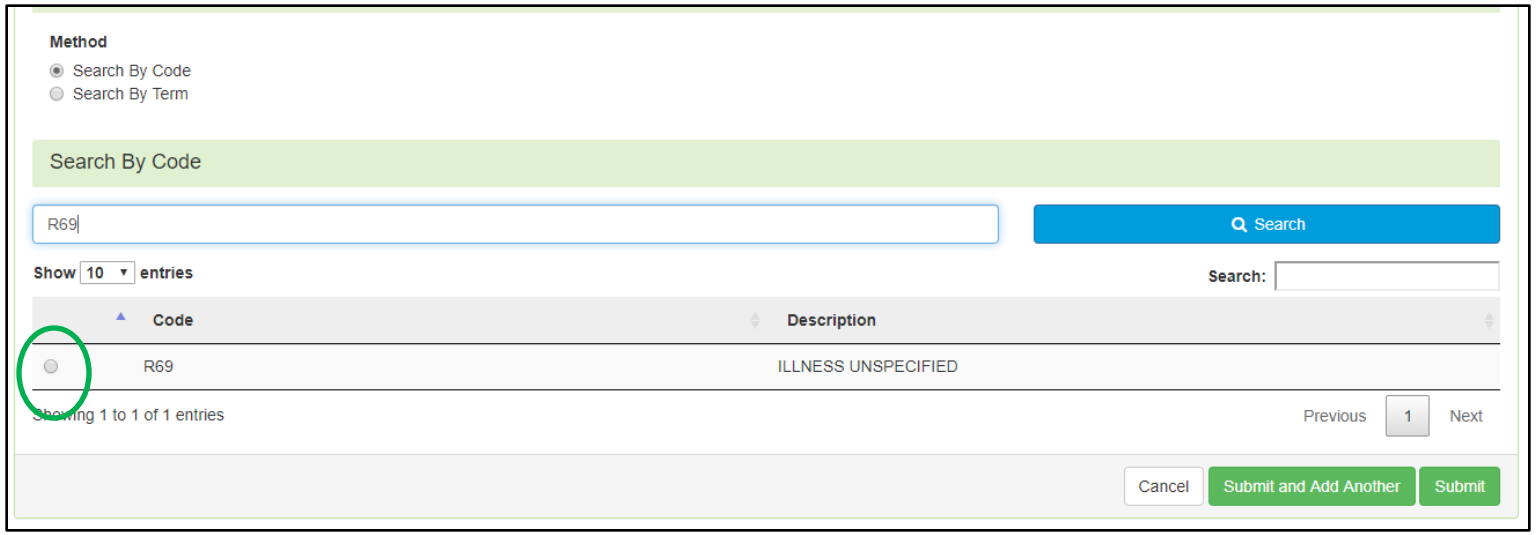
Use the 'Add' button to add a new diagnosis to the panel.



Diagnosis Panel: Search Example

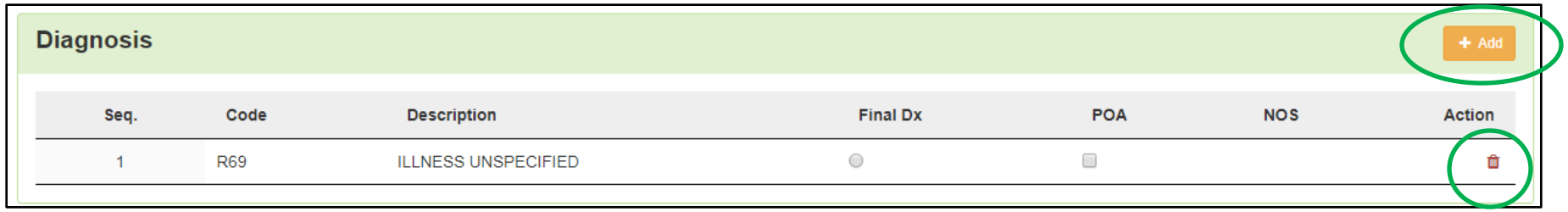
- After entering a code or term to search by and clicking search, the system will provide you a list of results you can select from.

- Select the one that you want added to the review by clicking on the radio button to the left of the code.



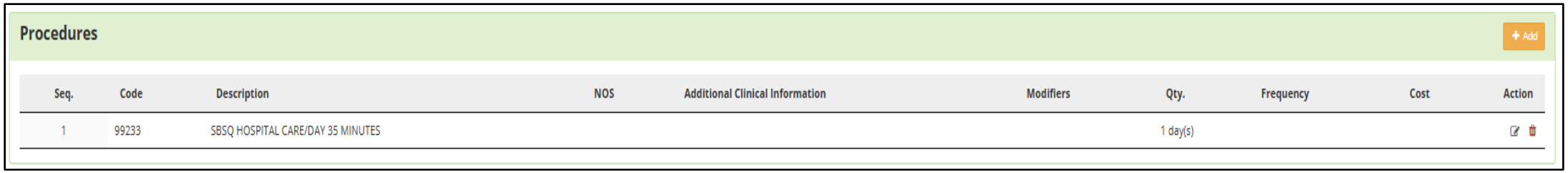
Diagnosis Panel (cont.)

- After selecting the diagnosis you want added to the review, you can click 'Submit' or 'Submit and Add Another.'
- 'Submit' will add the diagnosis to the review.
- 'Submit and Add Another' will allow you to submit the diagnosis to the review and re-open the window where you can search for another diagnosis.
- Make sure the primary diagnosis for the admission is 1st
- You can use the trash can icon on the right side of the diagnosis to delete anything entered incorrectly in this panel.



Procedures Panel

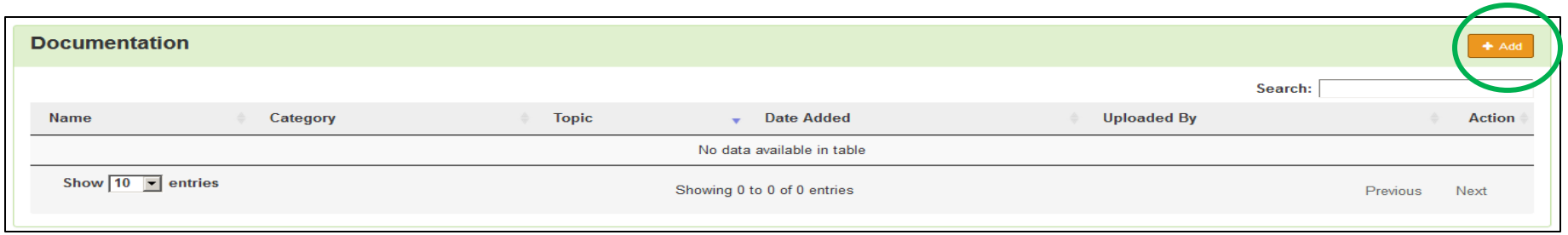
- All requests must have at least one procedure code documented.
- Each review will default to code 99233 for an admission
- No code will need to be entered



- Days will default to one and do not need to be changed
- The review staff will adjust to the number of days approved. We are authorized to allow up to 3 days at a time.

Documentation Panel

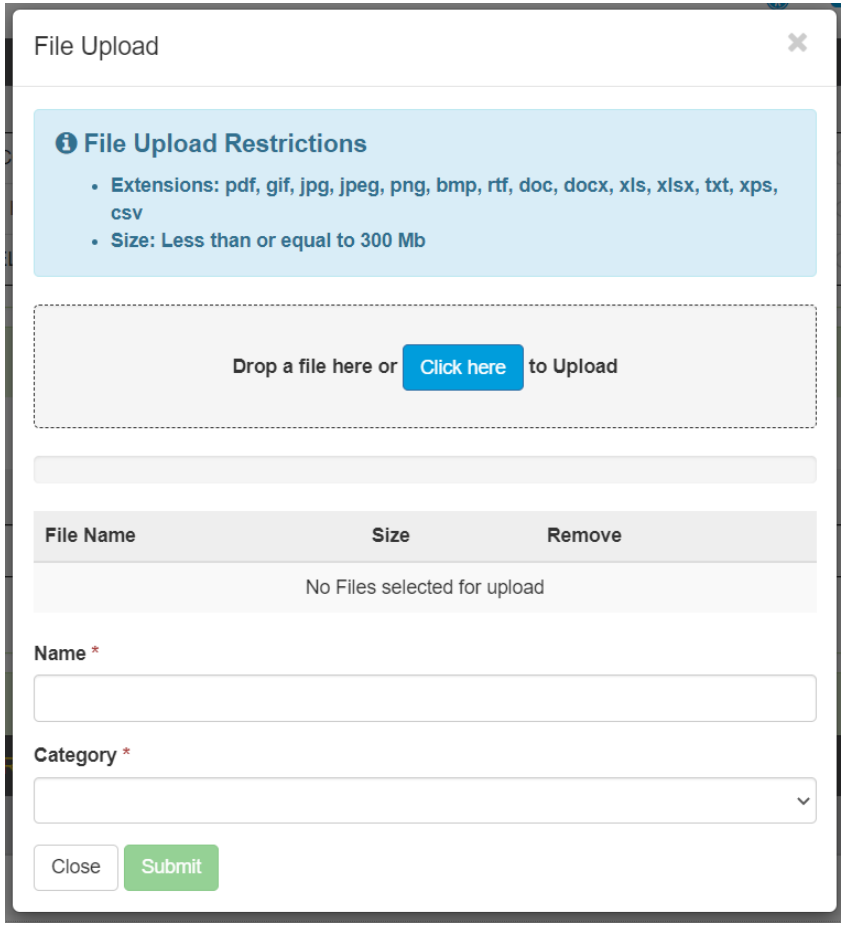
- The Documentation Panel is the final panel to complete. The user will be required to upload any clinical documentation related and necessary for the review to be processed.
  - If the documentation is not submitted here or on the final attestation page, the application will not allow you to submit the request.
- To submit documentation, click the 'Add' button on the Documentation Panel.
- This will display a pop-up window (modal) where you will add documentation to support your request



Attaching Documentation in Qualitrac

File Upload Pop-Up Window (Modal)

- You will drag and drop files to the window or use the 'Click here' button to locate a file to add.
- File upload restrictions are located at the top of the page.
- Users may change the name of the file, if needed.
- Users must select a Category for the document being uploaded.

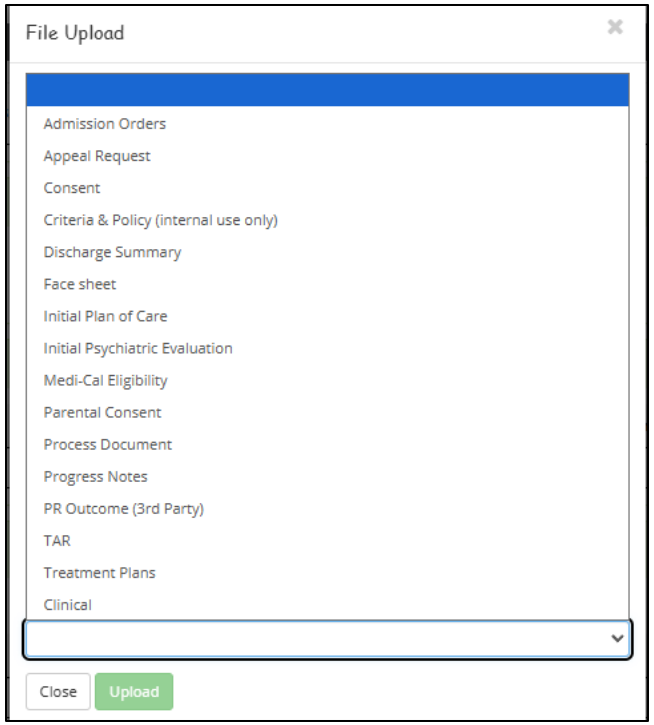


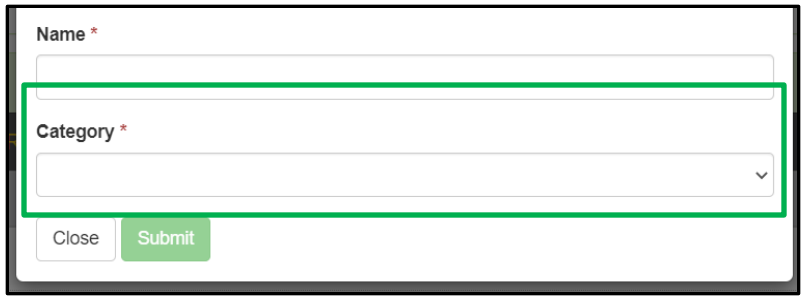
Attaching Documentation: Categories

File Upload Pop-Up Window (Modal)

After attaching documentation the user will need to put the documentation in a category

- Using the clinical category will present a subcategory

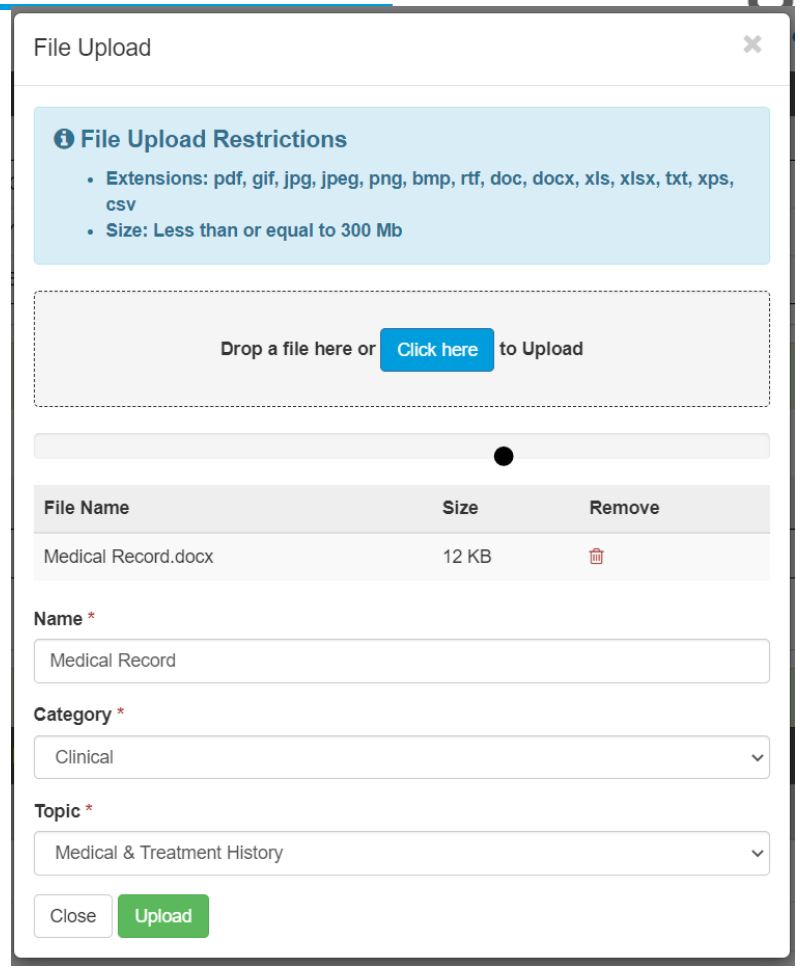




Attaching Documentation (cont.)

File Upload Pop-Up Window (Modal)

- In this example, you can see:
  - Name was not changed from File Name
  - The Category was selected
  - Topic became available and has a selection
- Click 'Upload' to attach the information to the review.
- This can be repeated as many times as necessary to get all documentation added.

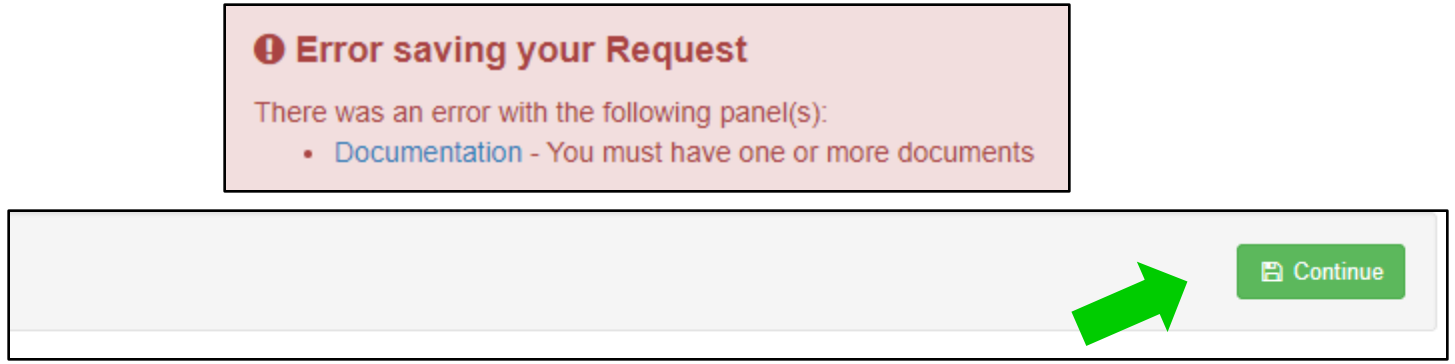


New Authorization Request: Continue Button

- Once all the panels have been filled out, click 'Continue' in the bottom right of the page to complete the review.

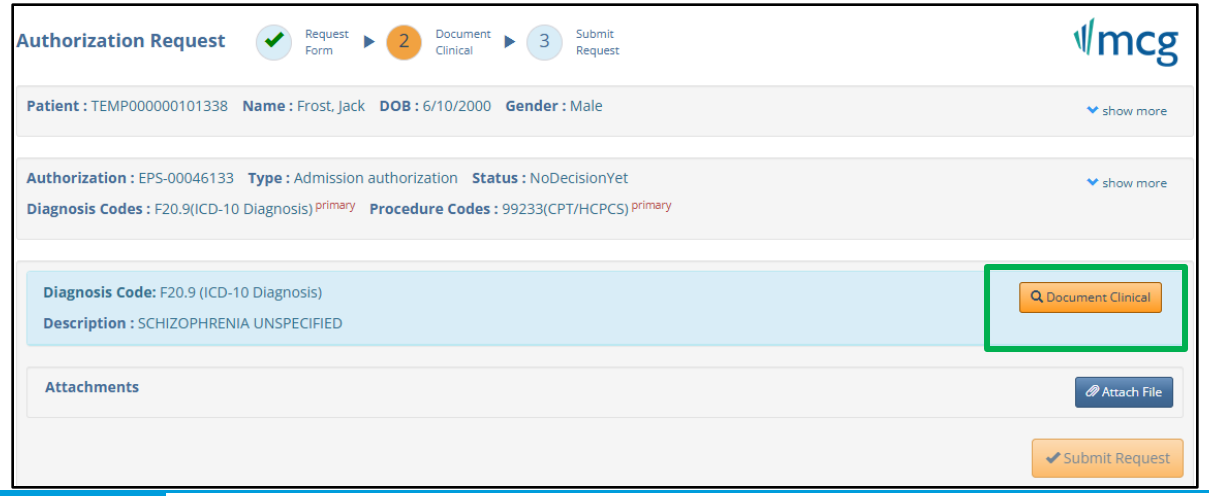
- When the 'Continue' button is clicked, the system will run a validation on the information entered. If there are any issues, error messaging will be displayed.

- All errors will need to be resolved before the system can proceed. If the system finds no errors the user will be directed to the summary screen.



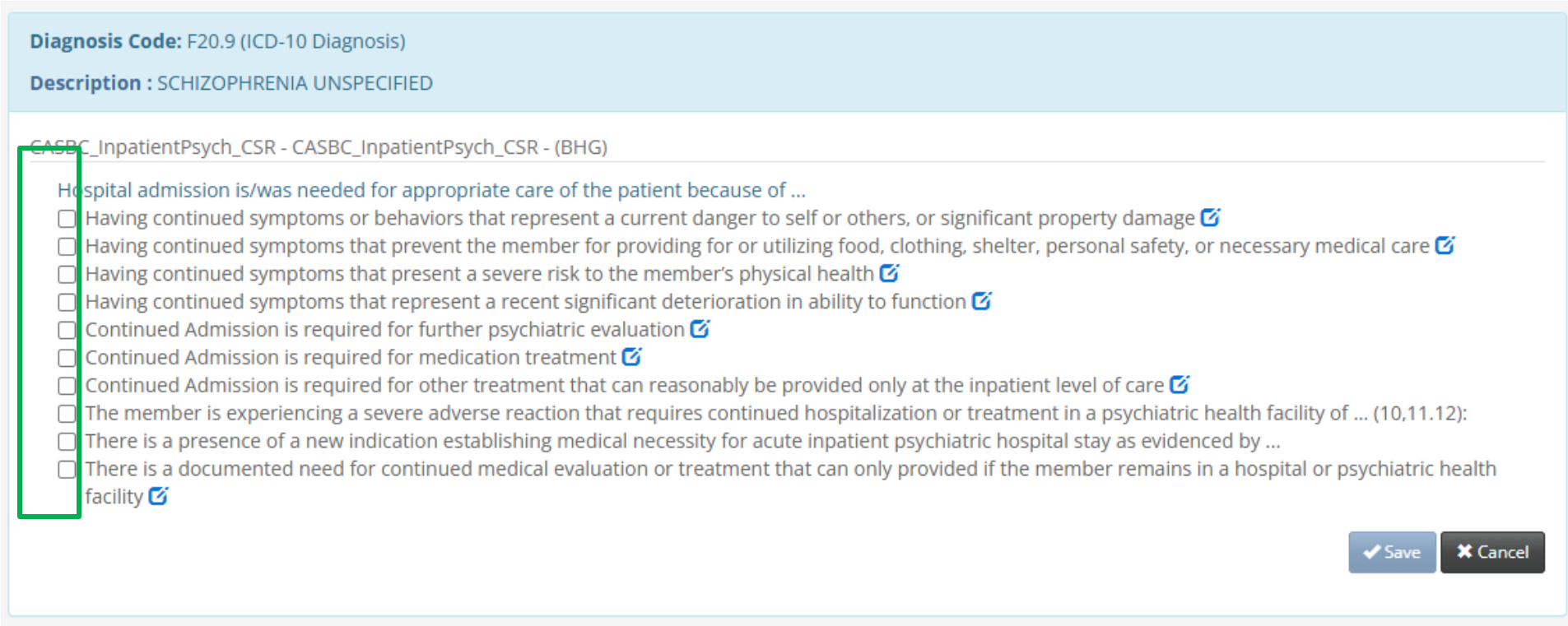
MCG

- The application will redirect the user to MCG, the system will present a set of evidence-based clinical guidelines related to the diagnosis and procedure code that was selected.
- After being directed to the MCG website, MCG will display the current patient information, the type of authorization (diagnosis and procedure codes) and a description of the diagnosis code. Click the 'Document Clinical' button to display the guidelines available for the listed diagnosis.



MCG: Guidelines (cont.)

- Select the appropriate guidelines(s) by checking the box



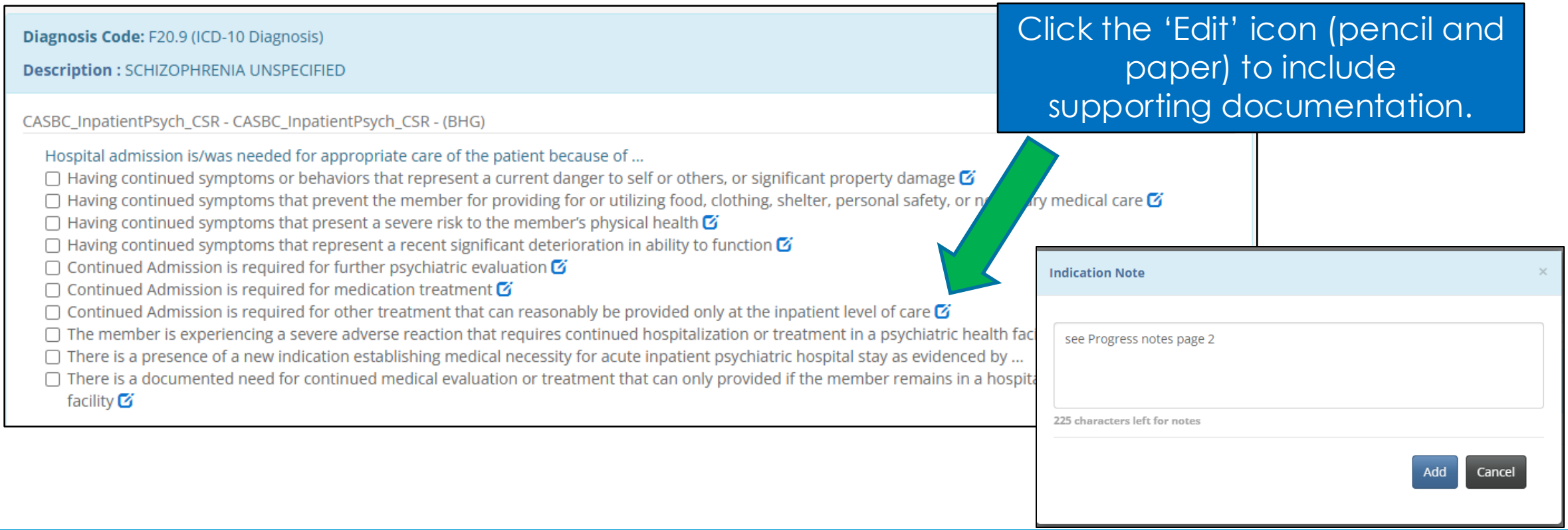
MCG (cont.)

- MCG will display the selected guideline(s).
- If there are no clinical guidelines that apply, a text box will be displayed where clinical information relevant to the review can be entered.
- To make sure any clinical information is saved please click on the 'Save' button.



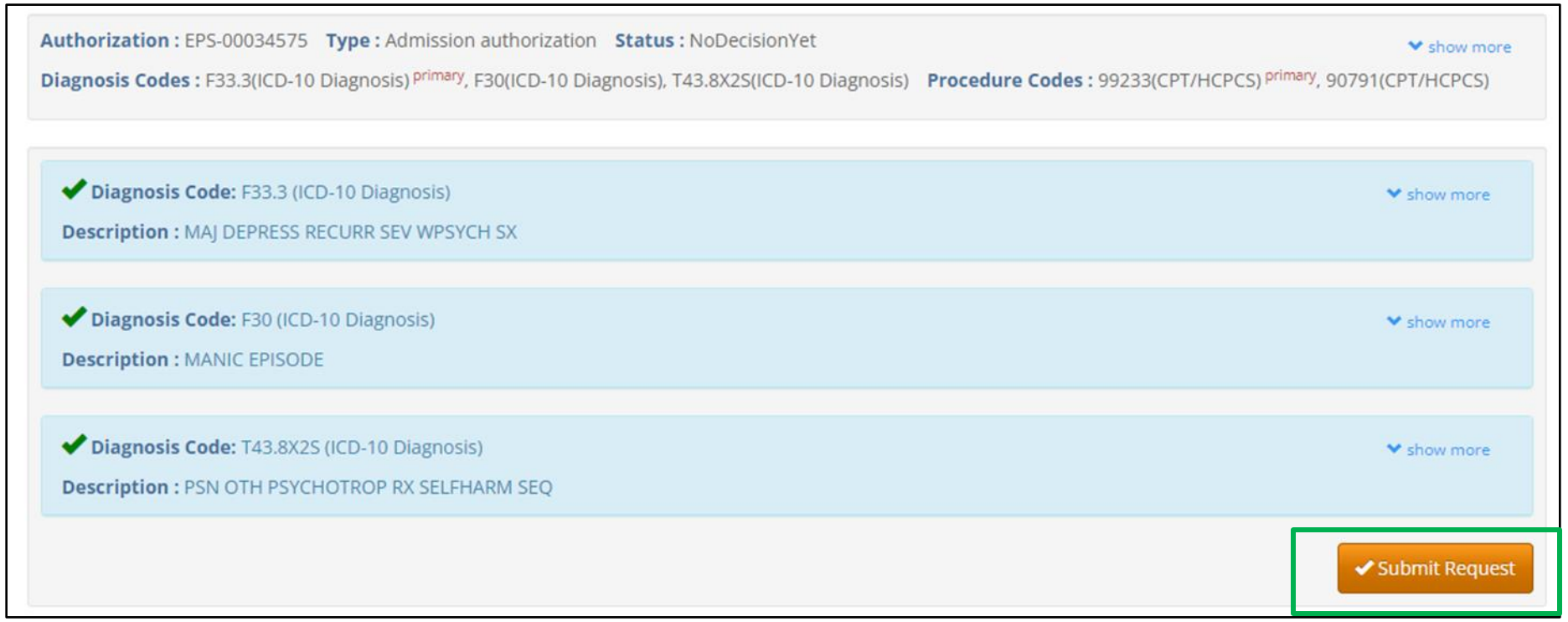
MCG: Additional Details

- If there are additional notes that are needed, click on the paper & Pencil.



MCG: Submitting Request

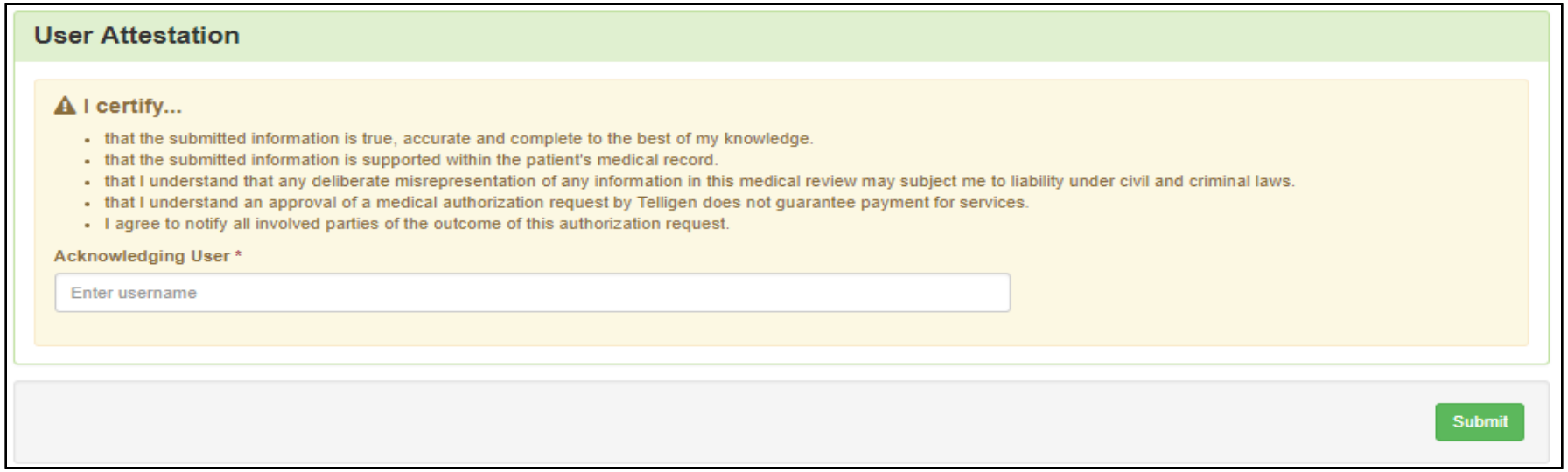
- Click the 'Save' button, and then click the 'Submit Request' button.



- Users will be returned to the Qualitrac screens upon clicking Submit Request.

Authorization Request: Attestation

- Enter ***your Username*** in the attestation section for acknowledgement.



- Click the 'Submit' button to submit the authorization request for review.

Authorization Request: Submission

- Users have the option to add comments to the request before it is sent for review.
- A comments pop-up window (modal) will open, and the user can enter additional information related to the request.
- Comments are not required to submit the request.

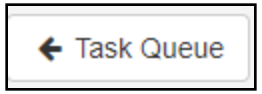


Authorization Request: Summary

- After submitting, the Qualitrac system will display a summary of the review.

- Users will have the option to Edit or Delete via the 'Actions' 

button.
  - Note: The availability of the 'Actions' button and the "Edit" or "Delete" options in the menu depend on the status of the request.

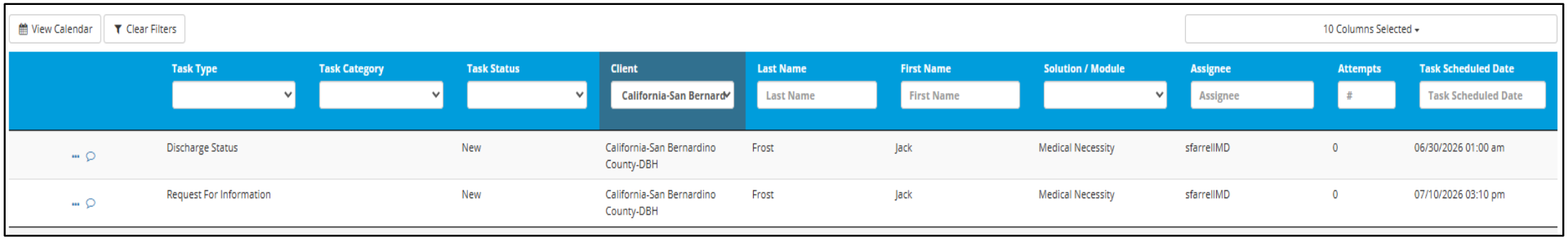
- Click the 'Task Queue' 

button to return to the Scheduled Tasks screen.

Task Queue

Tasks Queue

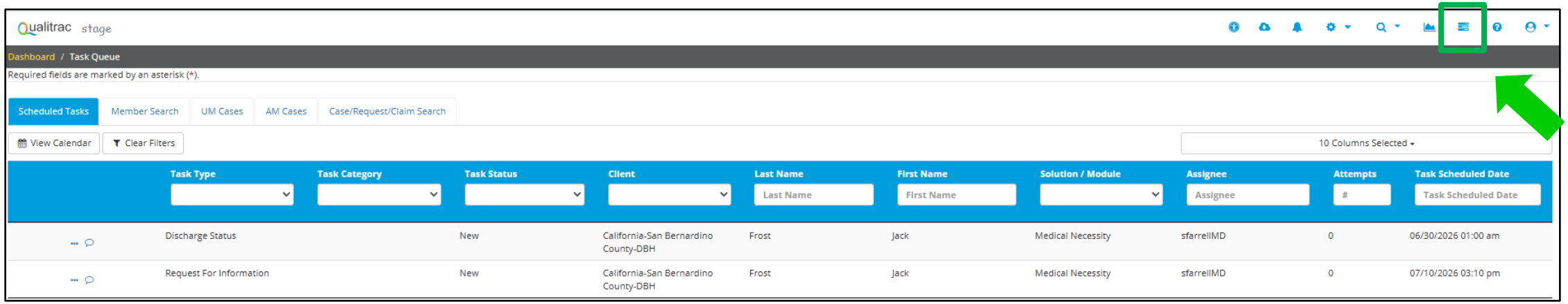
- What is the task queue and its purpose?
  - Qualitrac leverages tasks to facilitate the processes of the review.
  - Tasks are generated by a user to organize work.
  - Tasks are generated by the system to facilitate workflows.



	Task Type	Task Category	Task Status	Client	Last Name	First Name	Solution / Module	Assignee	Attempts	Task Scheduled Date
				California-San Bernard	Last Name	First Name		Assignee	#	Task Scheduled Date
...	Discharge Status		New	California-San Bernardino County-DBH	Frost	Jack	Medical Necessity	sfarrellMD	0	06/30/2026 01:00 am
...	Request For Information		New	California-San Bernardino County-DBH	Frost	Jack	Medical Necessity	sfarrellMD	0	07/10/2026 03:10 pm

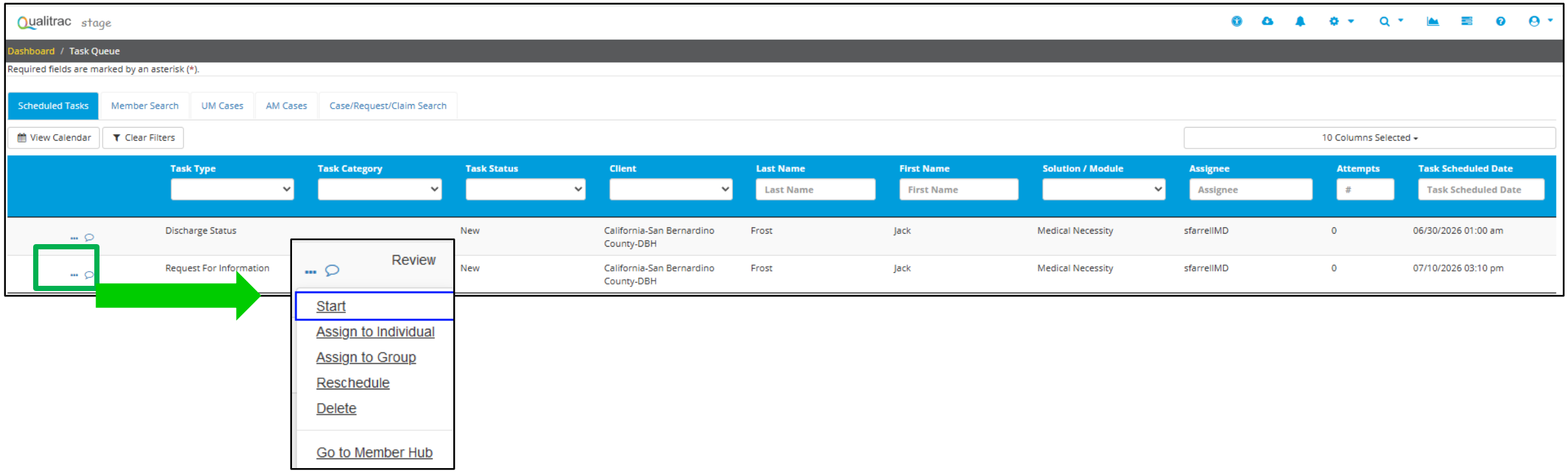
Task Queue

- To access tasks, click the ‘Task Queue’ icon located on the navigation ribbon.
- The system will display the “Scheduled Tasks” screen, by default, with this navigation tab selected.



Scheduled Tasks Queue (cont.)

- Scheduled Tasks Screen Functionality
- Notes (Bubble Icon)
- Action Menu: Start, Assign to Individual, Assign to Group, Reschedule, Delete



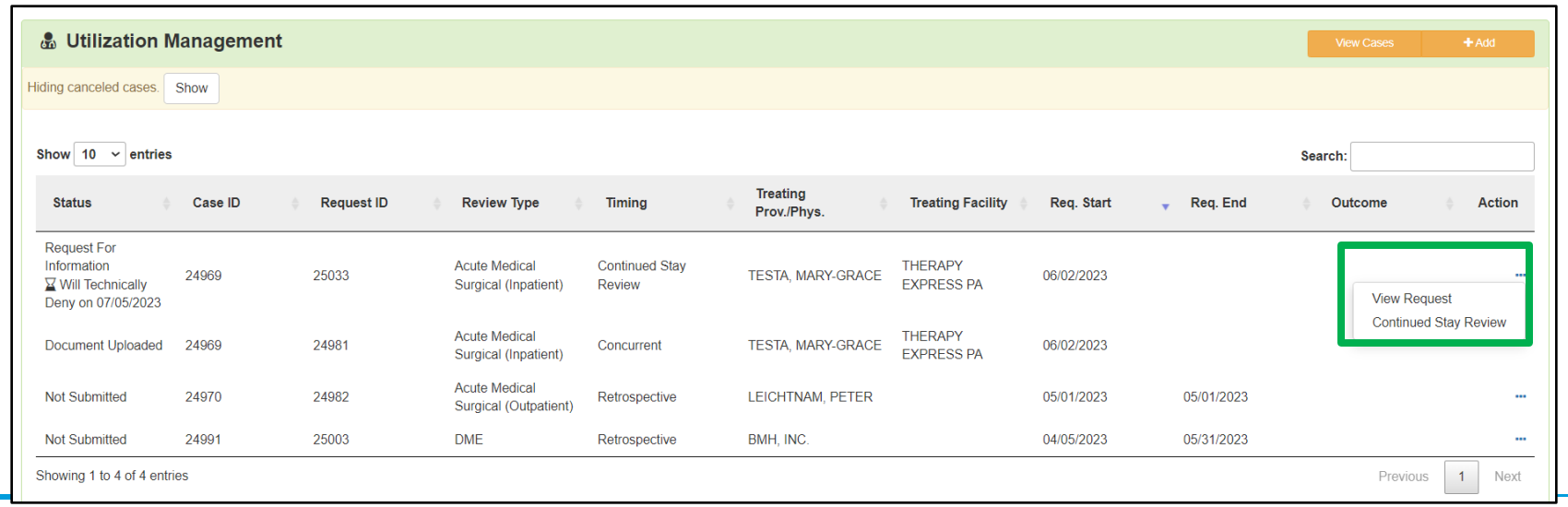
Accessing Completed Authorization Request(s)

Authorization Request: Review

- Once a request has been submitted, it will go through a review process.
- To locate the review record, a user may perform either a Member Search, Cases Search, or Case Request/Claim search.
- You may also find the review in the Member Hub – Utilization Management panel.
- Once you locate a review, a user can take multiple actions on the review such as:
  - View the Review to check for determination and any correspondence.
  - Request Administrative days
  - Submit a Reconsideration which is titled 1st Level Appeal.
  - Delete a review that was submitted incorrectly.

Member Hub: Utilization Management Panel

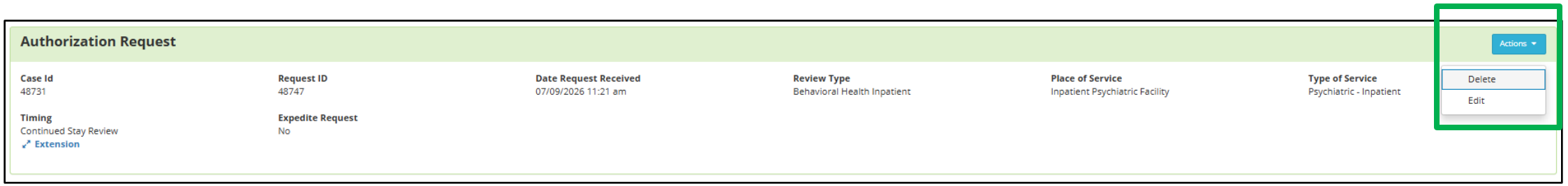
- After performing a Member Search and choosing a record, the system will navigate to the Member Hub.
- To access an authorization request record from the Utilization Management Panel, click the ellipsis to display the action menu. The menu options will vary based on the request type and status of the request.
- This menu will allow you to view the request in more detail, submit an extension (CSR), request Admin days and other options.



Authorization Request Summary Screen

- After choosing a record from a 'Cases Search' or 'Case/Request/Claim Search' the system will navigate to the Authorization Request Summary screen.
- The Authorization Request Summary screen is organized by panels containing the information submitted for the request.

- Users will have the option to Edit or Delete via the 'Actions' button.
  - Note: The availability of the 'Actions' button and the 'Edit' or 'Delete' options in the menu depend on the status of the request.



Request for Information (RFI)

Request for Information (RFI): Notification

- Once an Authorization Request case has been submitted, it will go through a review process where it may be approved, denied, partially denied, or technically denied if requested information is not provided.
- When a reviewer needs additional clinical documentation for the case, the submitter will be notified that additional information is needed. An email will be sent to the user and organization (if the visibility is granted).

Subject: Additional Information Needed

This email is to notify you that the medical authorization request submitted for case id 35223 has been reviewed and it has been determined that additional information is required to complete the review.

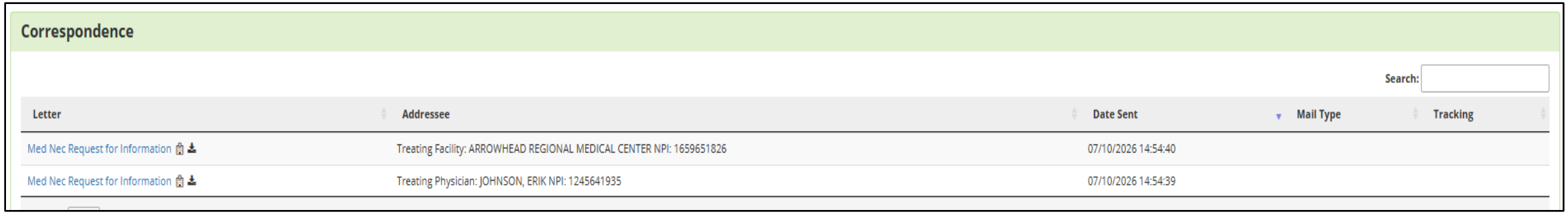
Please log into the portal to review the details of the request.

Sincerely,
Telligen Review Team

Request for Information (RFI): Letters

- On the Authorization Request Summary screen, locate the Correspondence panel.

- Click on the name of the letter (*displayed as a link in blue*) to open the file and see what information is being requested.

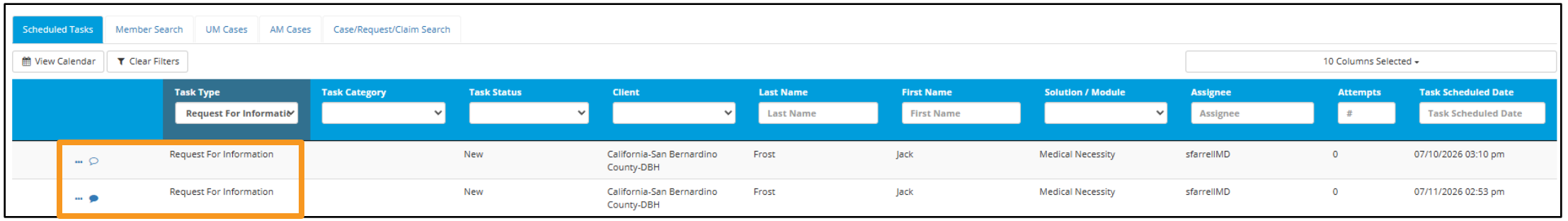


Request for Information (RFI) Task

- The user will be assigned a “Request for Information” task in their Scheduled Tasks Queue.

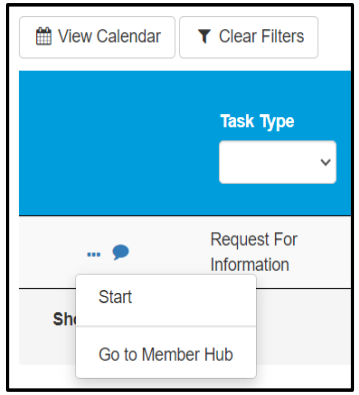
- The task will contain details of what information is needed.

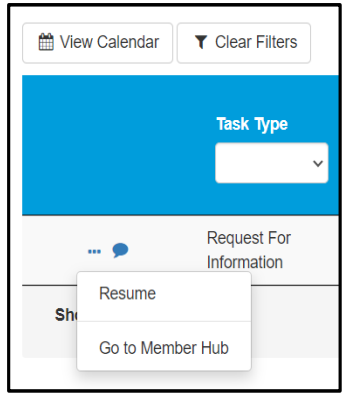
- Users associated with the same organization NPI can view and start scheduled tasks.



Request for Information (RFI) Task (cont.)

- A solid-colored Note bubble icon on the task indicates there are Notes attached to that task. Click the Note icon to display the Notes pop-up window (modal) and determine what documentation is required.
- Clicking on the ellipsis to the left of the task will display the action menu. The action menu will display either 'Start' or 'Resume' and 'Go to Member Hub' options.

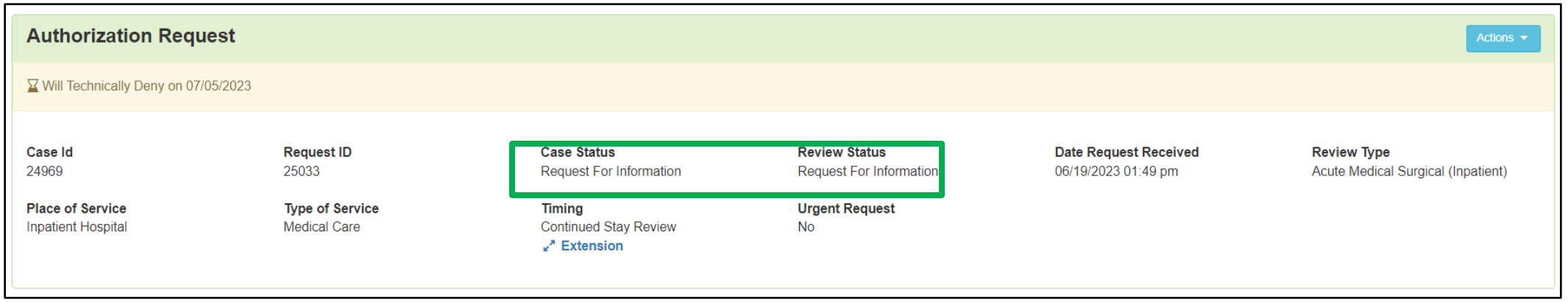




RFI Task: Authorization Request Summary

- If a user has previously selected 'Start' for the Task, but has not completed the task to submit documentation, the system will display the option to 'Resume.' Selecting either option ('Start' or 'Resume') will direct the user to the Authorization Request summary screen.

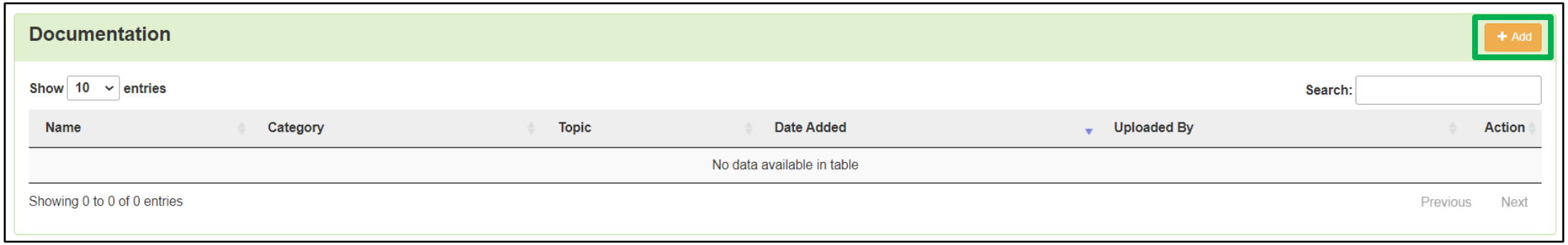
- The summary screen will display 'Request for Information' as the 'Case Status' and the 'Review Status' on the Authorization Request panel.



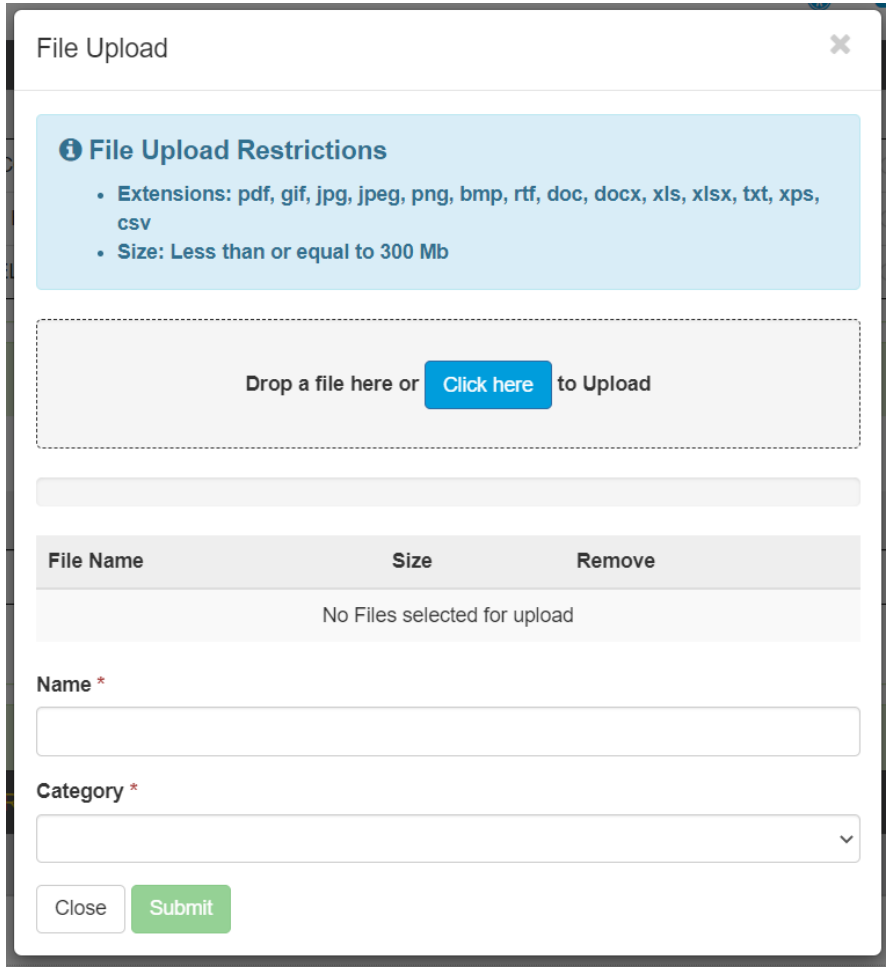
RFI: Authorization Request: Documentation Panel

- To complete the RFI task, locate the Documentation panel and click the 'Add' button to display the file upload pop-up window (modal).

- Upload the requested document(s) and click the 'Submit' button.



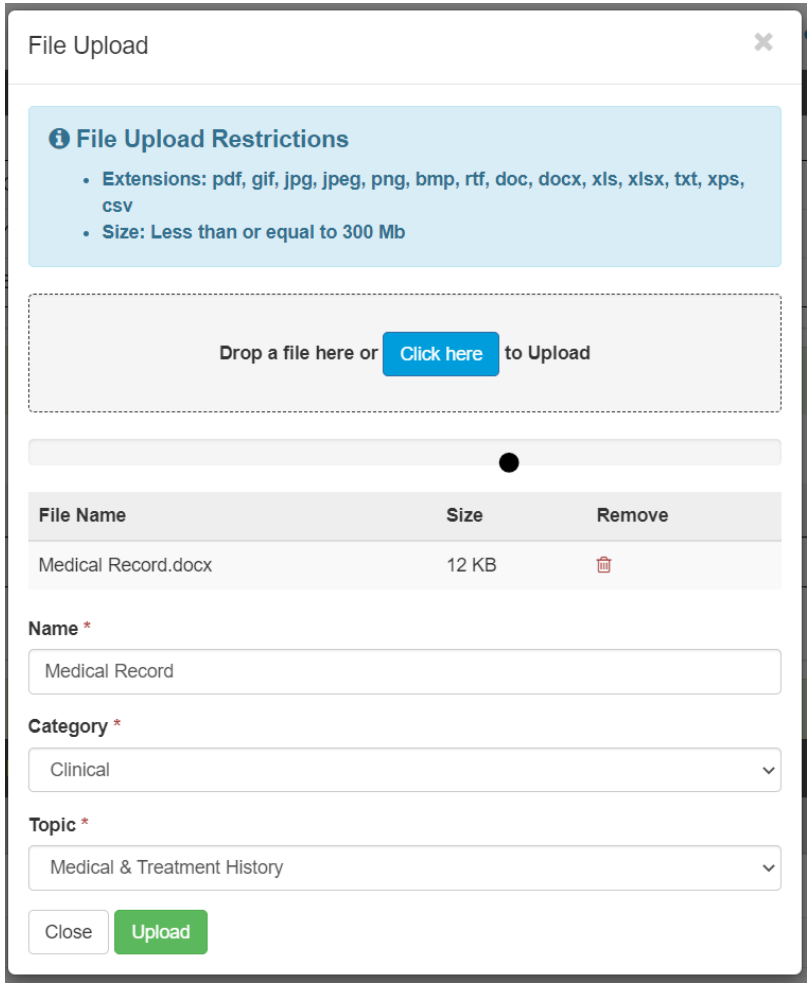
Attaching Documentation



File Upload Pop-Up Window (Modal)

- You will drag and drop files to the window or use the 'Click here' button to locate a file to add.
- File upload restrictions are located at the top of the page.
- Users may change the name of the file, if needed.
- Users must select a Category for the document being uploaded.
- Based on the Category selected, an additional option of Topic may dynamically display.

Attaching Documentation in Qualitrac (cont.)

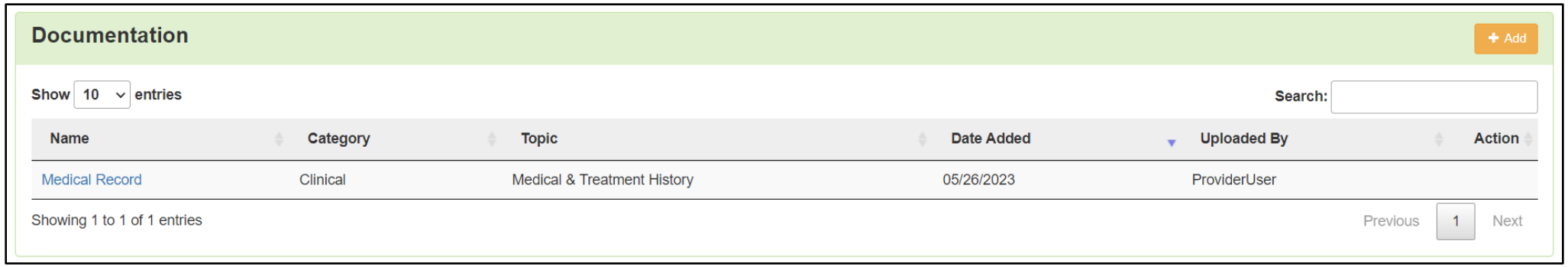


File Upload Pop-Up Window (Modal)

- In this example, you can see:
  - The Name was not changed from File Name.
  - The Category was selected.
    - Topic became available and has a selection.
- If a file is entered in error, click the trash can icon to remove it and start over.
- Once the information is complete, click the 'Upload' button to load the file to Qualitrac and close the window.

Attaching Documentation: Adding Documents

- The Documentation panel will populate with the file that was added.
- Continue to use the 'Add' button until all necessary files have been uploaded.
- Each file is date and time stamped when it is uploaded along with the user that completed the upload.



Completing the Request for Information (RFI) Task

- When all documentation has been uploaded, click the 'Continue' button at the bottom of the screen.



- Clicking the 'Continue' button will finalize the request and send it back to the review coordinator to finish the review.
- Once you click the 'Continue' button, the system will return you to the Scheduled Tasks queue and the task will no longer be visible for the user.
- **<u>**Do NOT start a new review**</u> to submit additional clinical that was requested. This will delay the response. Please follow the steps we just outlined when a Request for Information task is available in the task queue.
- The facility will receive a letter with the outcome details once the review has been completed.

RFI Task (cont.)

- If an Inpatient provider does not respond to the RFI within allotted calendar days, the system will automatically issue a technical denial.

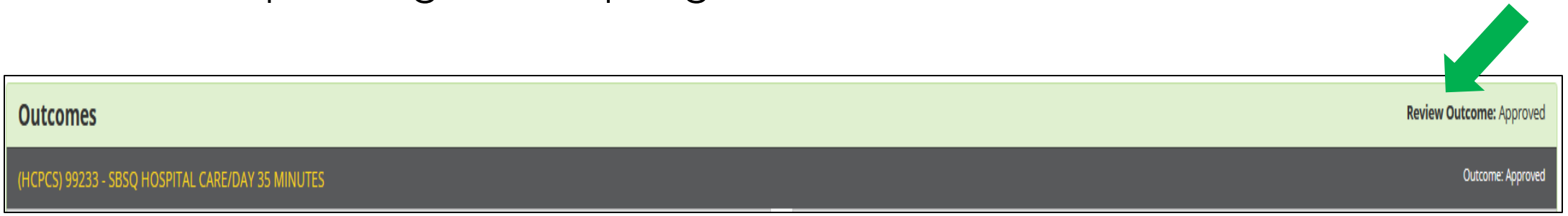
Review	Timeframe
Inpatient Psych	2 Calendar Days

- Providers can request a continued stay on the technical denial, failure to respond to the request for information will result in no reimbursement for those days

Viewing the Outcome/Determination

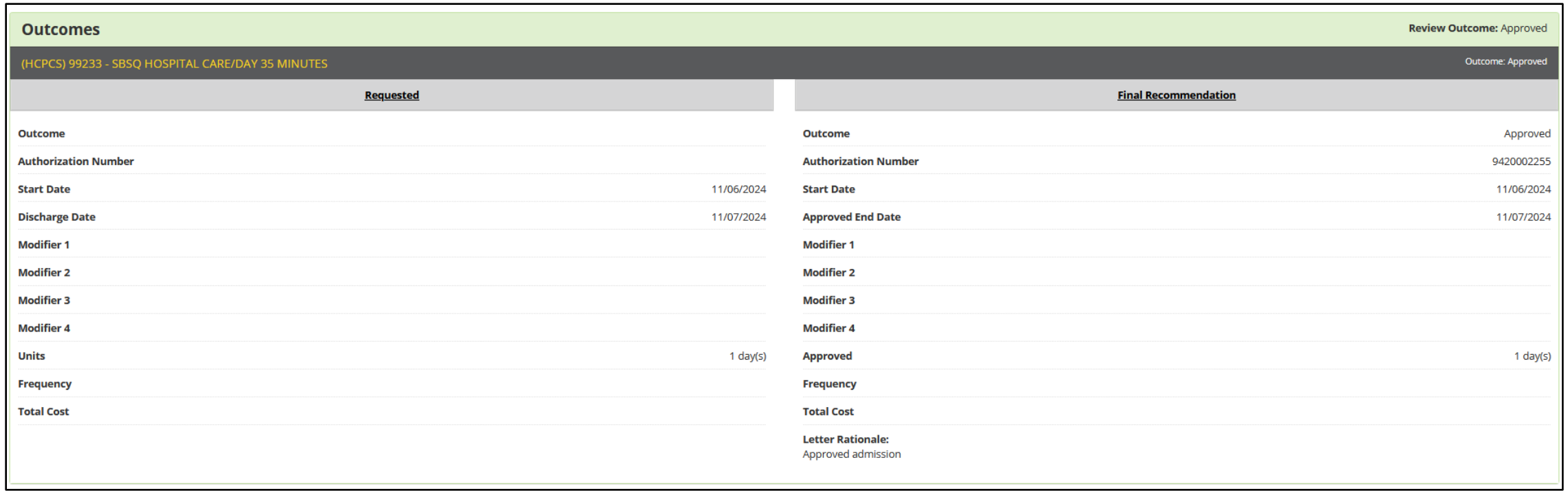
Authorization Request Summary: Outcomes Panel

- As covered in previous slides – a user may perform either a Member Search, Cases Search or Case/Request/Claim Search to locate the review record.
- Once the review is open, locate the Outcomes panel.
- By default, this panel will show a panel title, procedure heading and outcome status. The procedure heading is a clickable bar to toggle between expanding or collapsing the view of information.



Outcomes Panel: View Determination

- When the Outcomes panel procedure bar is expanded, the information requested is in the Authorization Request for review and any information available for the Final Recommendation is displayed.



Outcomes — **Review Outcome:** Approved

(HCPCS) 99233 - SBSQ HOSPITAL CARE/DAY 35 MINUTES — Outcome: Approved

Requested		Final Recommendation	
Outcome		**Outcome**	Approved
Authorization Number		**Authorization Number**	9420002255
Start Date	11/06/2024	**Start Date**	11/06/2024
Discharge Date	11/07/2024	**Approved End Date**	11/07/2024
Modifier 1		**Modifier 1**	
Modifier 2		**Modifier 2**	
Modifier 3		**Modifier 3**	
Modifier 4		**Modifier 4**	
Units	1 day(s)	**Approved**	1 day(s)
Frequency		**Frequency**	
Total Cost		**Total Cost**	
		Letter Rationale: Approved admission	

Completing the Discharge Task

Discharge Task

- Once a member is admitted and the 1st review is complete, a discharge task will be assigned to you and your organization (If visibility was provided)
- The task must be completed at discharge with the TAR form attached
- Telligen will give the TAR form to DBH after validating the accuracy of the form

Discharge Task: Task Queue

- To complete the form, go to your task queue by clicking on the task queue icon on the tool bar 

- In your task queue you will see a task called 'Discharge Status'.

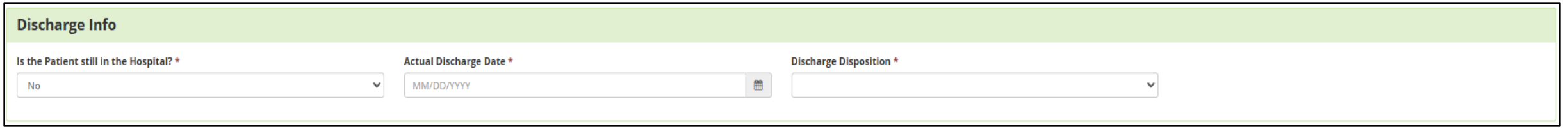


- Click in the ellipsis and click 'start' to begin the task

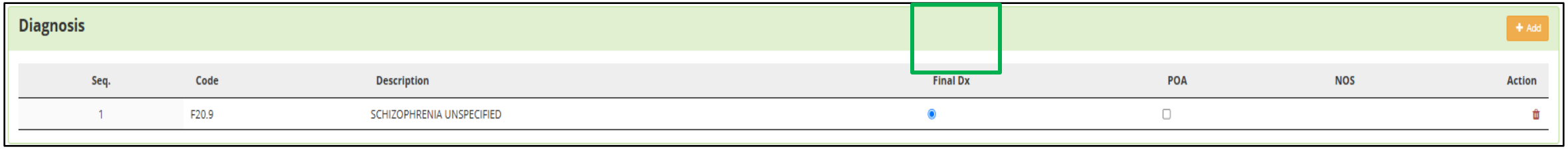
Discharge Task cont.

The following information will need to be completed:

- **Discharge information**: complete the questions about the members disposition:



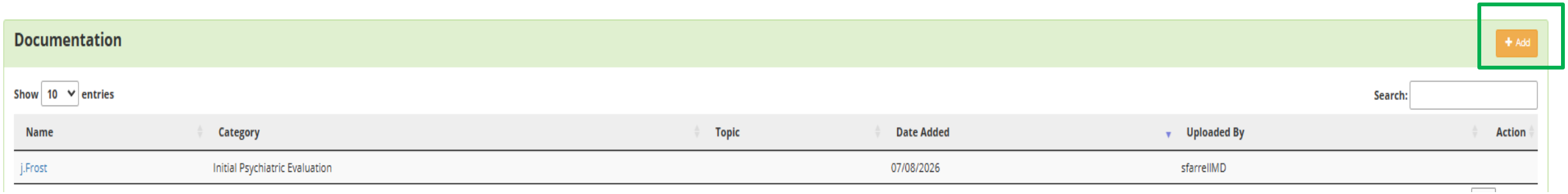
- **Diagnosis**: Mark the appropriate or add the discharge diagnosis and mark the radio button as final diagnosis :



Discharge Task: Documentation

In the documentation section, add the TAR and any additional information about the discharge.

- Select the add button to upload documentation as per previous instruction
- Select the category of TAR



- Select Close Case to complete the workflow



Requesting a Peer to Peer Review

Peer to Peer

- Once an outcome is rendered, and you do not agree with the outcome, as a Provider you can request a Peer to Peer review with Telligen's Medical Director.

- As a provider you have 2 days to request a Peer to Peer from the date of the decision in the NOABD letter.

- To request a Peer to Peer, Call phone number **833-476-4850** or Email: SBPsychReviews@telligen.com

- Once your request is received, a Telligen Review Assistant will reach out to get it scheduled.

Submitting a request for Admin Days

Administrative days

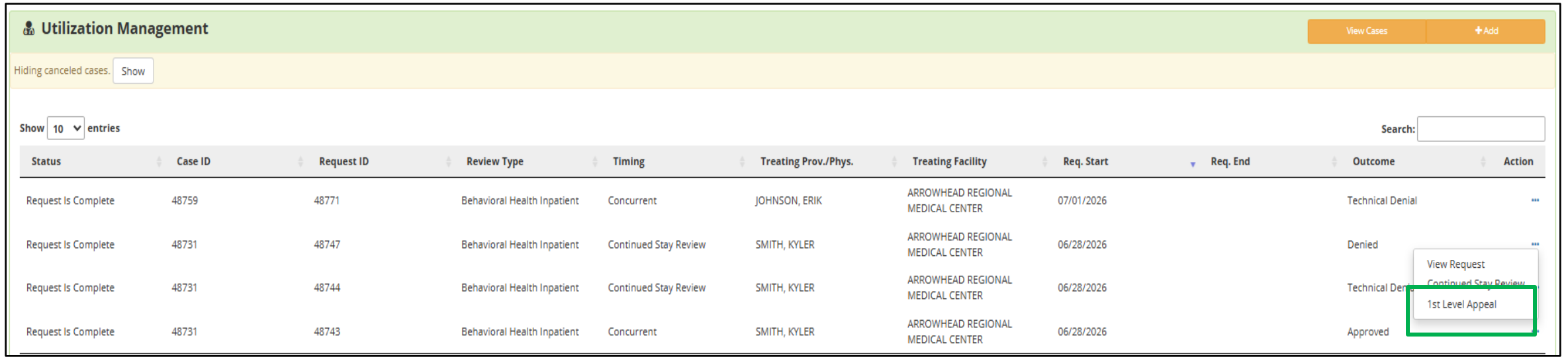
- When a review has units that were denied or partially denied, the user has the option to submit a request for Administrative Days

- To initiate a request for Administrative Days, follow the instructions in the notice of decision received and submit your packet to the appropriate office.

Submitting a Reconsideration (1st Level Appeal)

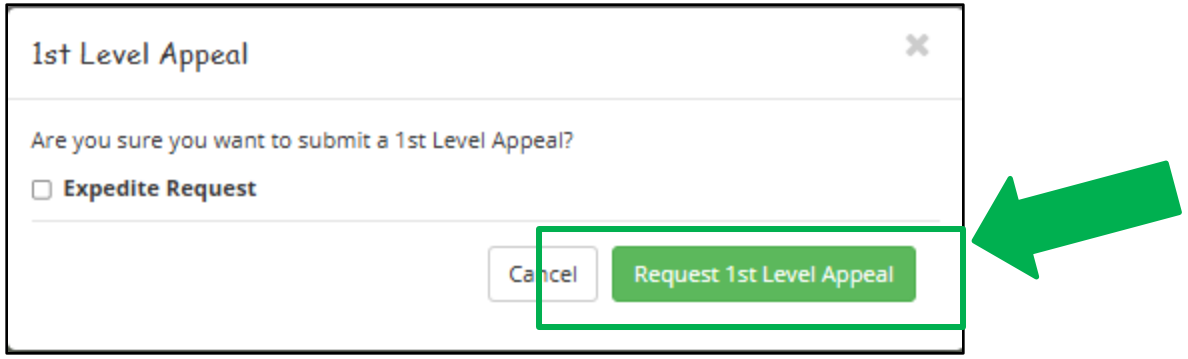
1st Level Appeal

- When a review has units that were denied or partially denied, the user has the option to submit a 1st Level Appeal (reconsideration).
- To initiate a 1st Level Appeal, log into Qulalitrac and locate the case you would like to appeal, Providers have 60 days from determination to appeal.



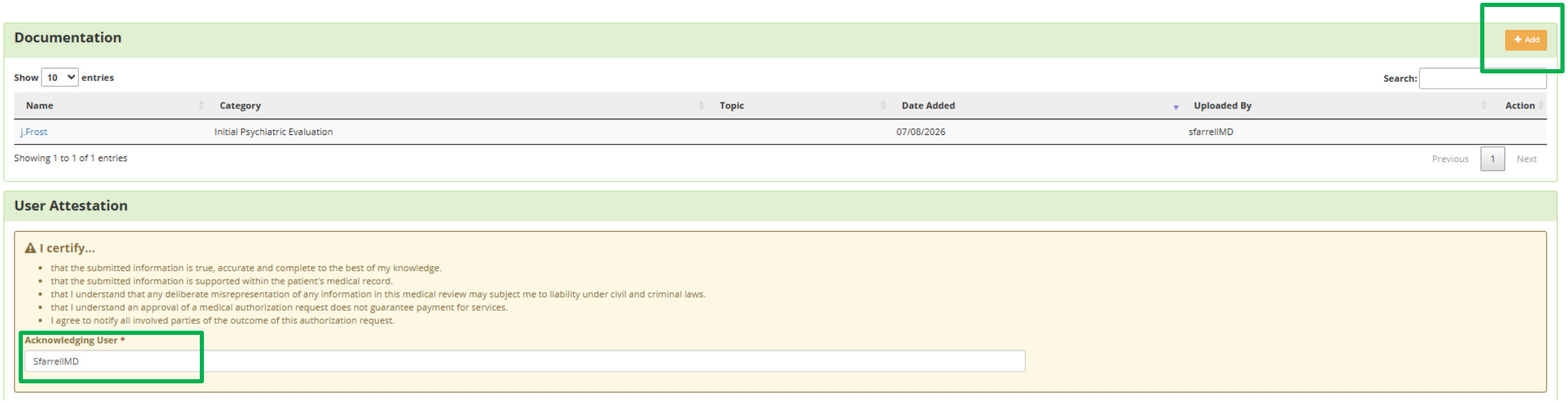
1st Level Appeal Request

- After selecting 1st level appeal, a modal will pop up for the user to confirm they want a 1st level appeal.



- Select 1st level appeal
- Qualitrac provides an option to add supplemental documentation to strengthen and support your appeal request.

1st Level Appeal: Attestation



- Once the provider has added documentation and attests to the request, selecting submit will send your request to the Telligen reviewers.

System Email Notifications

Email Notifications

- Users will receive email notifications when:
  - Reviews are received from the portal:

Subject: Request Submitted

Thank you for submitting your request. This email notification is to confirm that your request has been received and we are in the process of reviewing it. You will receive notification once our review decision has been rendered. The case id for this request is 35223. Please feel free to utilize the portal to check the status of this request at any time.

Sincerely,
Telligen Review Team

Email Notifications (cont.)

- When Reviews are updated/changed in status:

Subject: Review Complete

This email is to notify you that our review decision has been rendered for case id 35223. Please log into the portal to review the details of the request.

Sincerely,
Telligen Review Team

- When a request for information is sent:

Subject: Additional Information Needed

This email is to notify you that the medical authorization request submitted for case id 35223 has been reviewed and it has been determined that additional information is required in order to complete the review. Please log into the portal to review the details of the request.

Sincerely,
Telligen Review Team

Email Notifications: Request Not Submitted

Email notification when a request has not been submitted.

Subject: Action Required in Qualitrac

Dear Qualitrac User,

Re: Case ID **35223**

Our Qualitrac system indicates you started an authorization request but have not yet completed the submission.

Unfortunately, until the submission is completed, our clinical staff cannot conduct the review.

If this request is no longer needed or it is a duplicate authorization request, please delete the request.

If you need to **delete your authorization request**, please follow the instructions listed below. Please contact us if additional assistance is needed.

•Click on this link to go directly to the request

•Click on ***Delete*** in the Case

If you need to **complete your submission**, please follow the instructions listed below. Please contact us if additional assistance is needed.

•Click on this link to go directly to the request

•Click on ***Edit*** in the Case

•***Complete each panel***:

- •Authorization Request
- •Admission and Discharge or Dates of Service
- •Coverage
- •Providers (Ordering and Treating)
- •Diagnosis
- •Procedures
- •Documentation

•Click ***Continue*** at bottom of the page

•***Document clinical*** information as appropriate in MCG

•Complete ***Attestation***

•Click ***Submit***

•Add ***Comments/Note***

•Click ***Submit***

•Click ***Done (key step)***

•The Status will change to ***Request Has Been Submitted***

Sincerely,

Telligen Review Team

Training Session Wrap-Up

Knowledge Check

- By now, you should be able to:
  - Register for the Fee-for-Service Provider Portal
  - Access & Navigate the Qualitrac System
  - Perform a Beneficiary (Member) Search
  - Understand the Member Hub
  - Add an Authorization Request to a Member
  - Navigate to the Scheduled Tasks Queue
  - Locate and Access a Completed Review (Authorization Request)
  - Complete a Request for Information (RFI) Task
  - Understand Appeals & Denials

Questions & Answers



Website & Help Desk Contact Information

Qualitrac: https://myqualitrac.com

Tier I Support Center & Provider Help Desk:

- Phone number 833-476-4850
- Email: SBPsychReviews@telligen.com