San Bernardino County Authorized Official Users Training

July 2026

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Agenda

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

Learning Objectives

By the end of this session, you should be able to:

- Understand the Provider Portal Registration
- Access Qualitrac
- Navigate the Manage Users Screen

Training Guide Topics

- Introduction to Telligen
- Introduction to Qualitrac
- Setting up MFA
- Authorized Official Registration for Provider Portal Users
- Access Qualitrac
- Navigate Manage User Screens
  - Add & Edit a User
  - Deactivate Users
- Resources for Assistance & Contact Information

Introduction to Telligen

About Telligen

50 years providing expertise and solutions that produce measurable, meaningful results.

More than **600 clinical and technical professionals** supporting clients nationwide.

100-percent employee-owned company. Our employee-owners drive our business, our solutions and share in our success.

*Telligen provides sophisticated analytics, population health management services, and IT solutions to more than **36M** covered lives in the Medicare, Medicaid & commercial markets.*

Introduction to Qualitrac

Qualitrac

Web-based health management system, built and maintained by our team of clinical and technical experts featuring:

- 24/7 Provider Access
- Streamlined review process with all necessary information contained on one-page.
- Secure electronic upload of clinical documentation.
- Provider ability to track progress of submitted requests.

Provider Portal

- California providers will submit review requests using the Qualitrac system via the Provider Portal.
- Your organization must first complete the online registration process and designate one or more individuals within your organization to be an Authorized Official who will manage provider user accounts for individuals within your organization.
- Instructions regarding the online registration process are provided in this training.
- Once registered, you will receive a username and instructions to create a unique password.
- Qualitrac Provider Portal: https://myqualitrac.com
- SBC Provider Registration

Introduction to Authorized Official Registration

Provider Portal Registration Process

Understanding the roles:

1. **The Provider Executive** (i.e., the duly authorized representative permitted to bind your organization) agrees to the terms and conditions of the Provider Portal Agreement.
   The Provider Executive designates one, and up to four, Authorized Officials for your organization.

2. **The Authorized Official(s)** completes the Authorized Official Agreement and Registration Form. This role is responsible for setting up and Managing the users in your organization.

Provider Portal Registration Process (cont.)

Getting your Access:

- All forms are completed online.
- Using DocuSign technology, the documents are routed via email to the appropriate parties for signature.
- When all signatures are completed, both the Provider Executive and the Authorized Official receive a fully executed agreement for their records.
- The Qualitrac Registration team will then complete the registration process and provide instructions to the Authorized Official.
  - *Requests will be processed as soon as possible but can take 5-7 business days.*
- The Authorized Official from your organization will then need to create and manage provider accounts within your organization.

Provider Portal Registration Account

- The Authorized Official will receive two emails once the registration packet is processed.
  - One email from QTRegistration@telligen.com with the username and link to Provider Portal.
  - Another email from the Qualitrac system with a link to activate your account and create your password.

- **Emails to access the system will not be sent until 3 calendar day before go-live.**
  - ***PLEASE NOTE***: The emailed activation link will expire after 7 calendar days.

- Once the Authorized Official is logged in to the system, they can set up accounts for other individuals in the organization to access and use the portal.

Important Notes:

- The AO (Authorized Official) is in charge of maintaining users for the organization
  - If someone leaves the organization or moves to a new department and no longer needs access to Qualitrac they need to be deactivated

- 1 login per user- **NO SHARED ACCOUNTS**
  - This is a security issue
  - This is violation of the agreement
  - If a generic/shared account is found, the account will be deactivated and reported to security

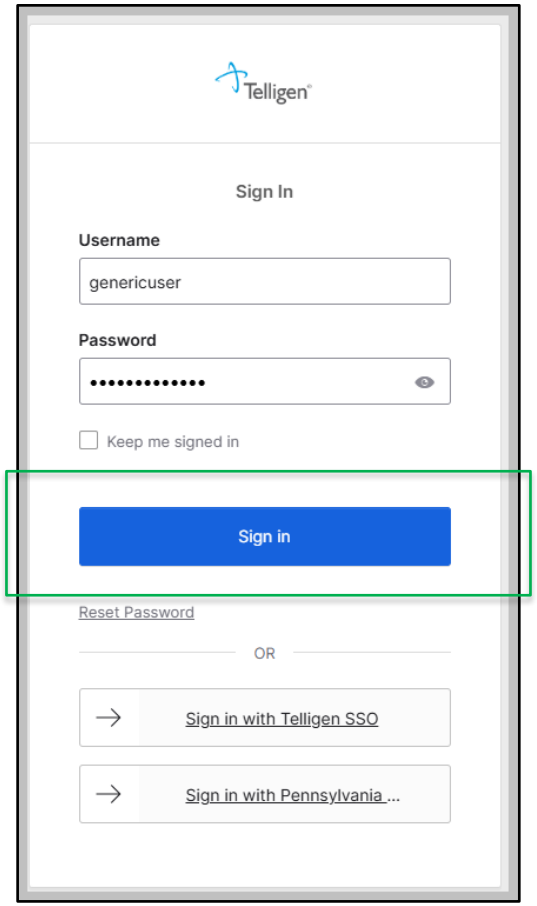
- If you need access to another Organization, you must complete a separate registration package for each or request multiple organizations on your initial registration

Logging in with Multi-Factor Authentication (MFA)

Welcome to Qualitrac!

https://myqualitrac.com

Select the ‘Sign In’ button



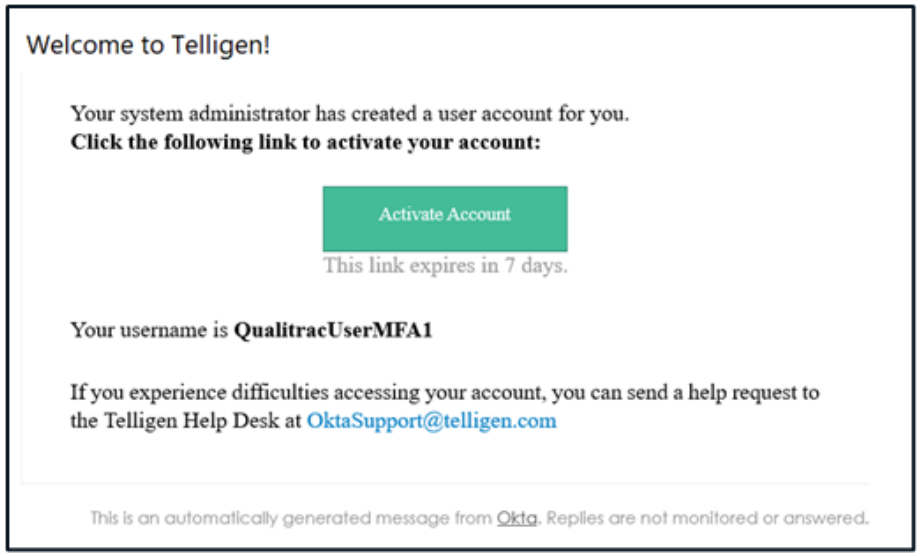
Qualitrac Multi-Factor Authentication (MFA)

- 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.

Logging in with MFA

Email (default)

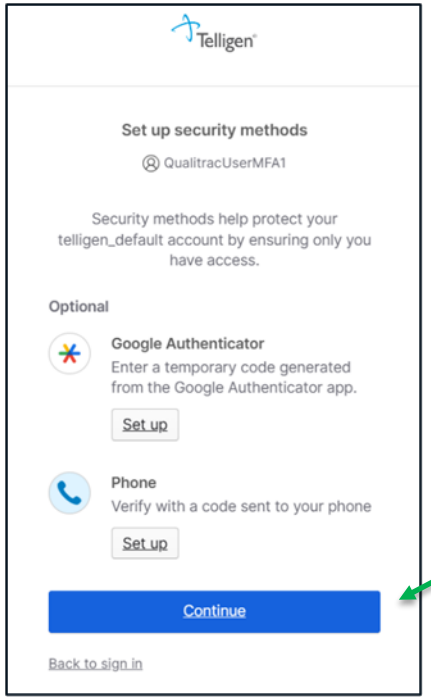
- Newly registered users of Qualitrac will receive a registration email to activate their account and set a password.
- Click the button ‘Activate Account.’
- Users will be directed to the Qualitrac Sign In screen to set up security methods. Click ‘Set Up’ a Password.



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. Please set up 2 methods in the event one is not working.



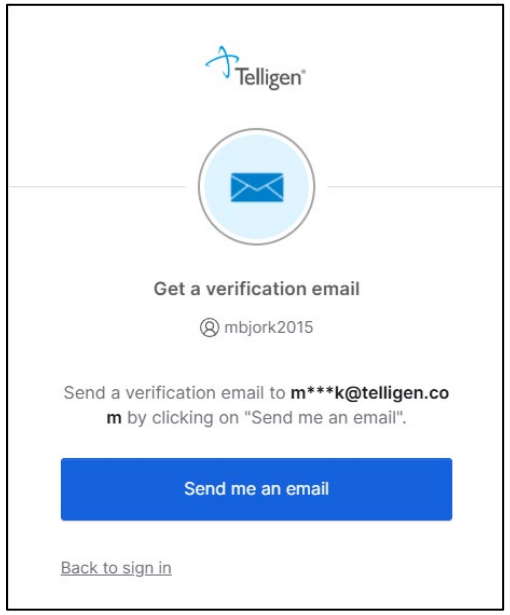
Clicking the 'Continue' button from this screen selects the Email method for authentication.

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

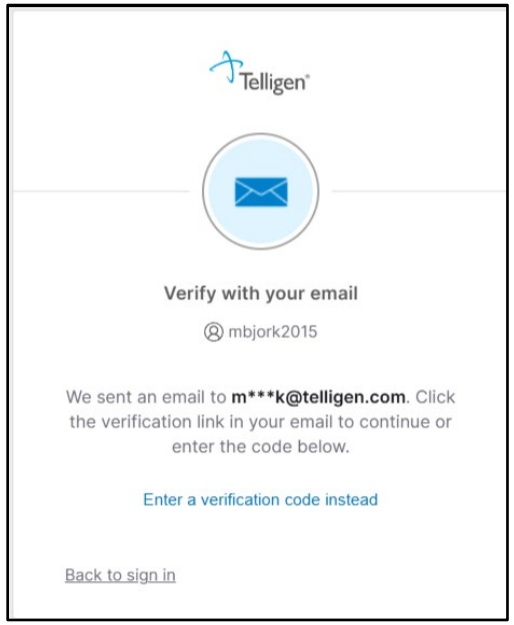
Logging in with MFA: Email Verification (cont.)

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.

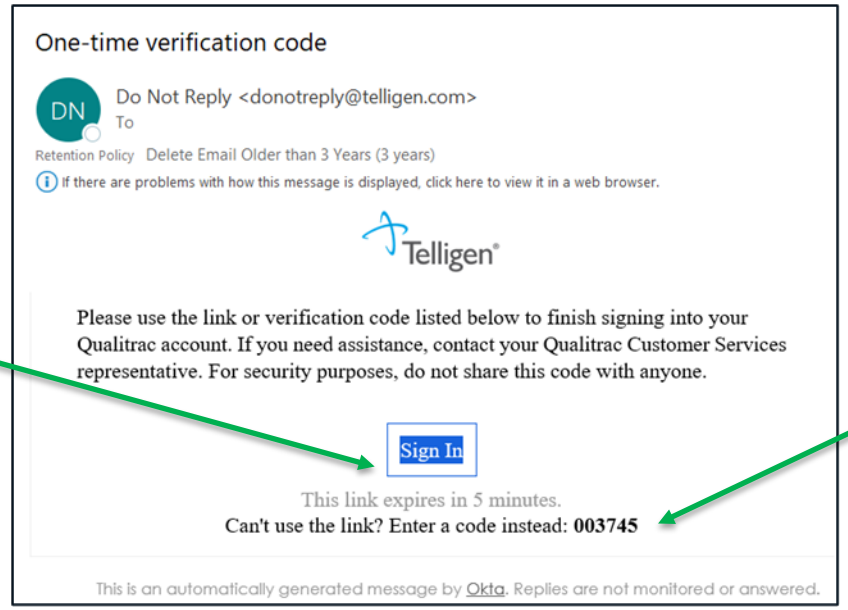


Logging in with MFA: Email (cont.)

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.

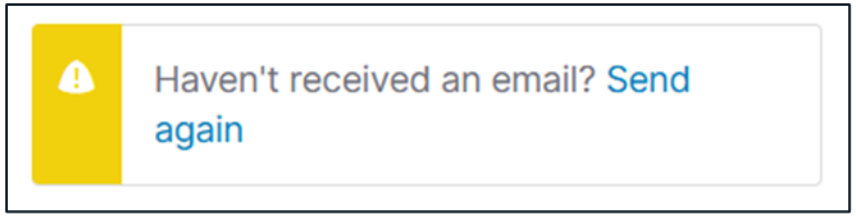


Alternatively, you can copy the 6-digit code and navigate back into the Qualitrac login screen to manually enter the code from the email

Logging in with MFA: Resend 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.



Qualitrac - Admin Tool
Manage Users: Add & Edit

Authorized Official Training: Admin Tool

- The Authorized Official (AO) will be the point of contact for your organization.
- The AO will be able to see all users associated with any organizations/physicians the AO has access to.
- AO's are responsible for managing all users at your organization

Admin Tool: Manage Users

Authorized Officials (AO) can add, edit, or deactivate users in Qualitrac by navigating to the Manage Users screen in the Admin tools section of the system.

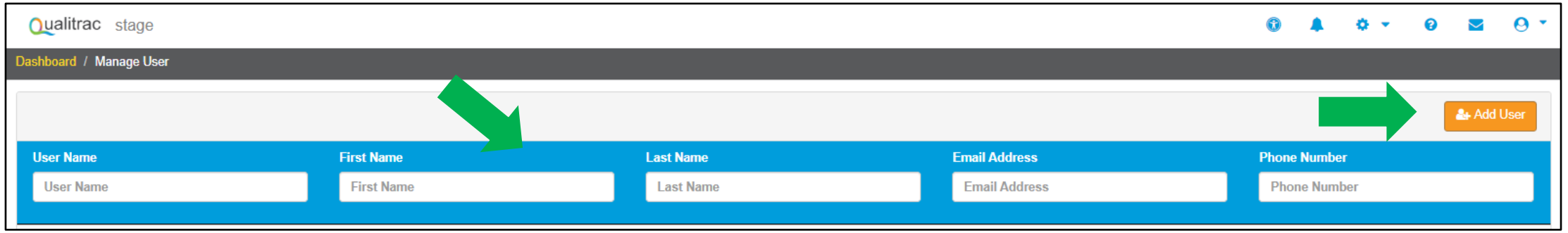
- Locate the Admin icon in the navigation ribbon. Authorized Officials are the only users with access to the Admin tool. Provider Practice users (PPU) will not see this icon.

- Click the Admin icon to display the action menu and select “Manage Users” from the action menu.

Manage Users Screen

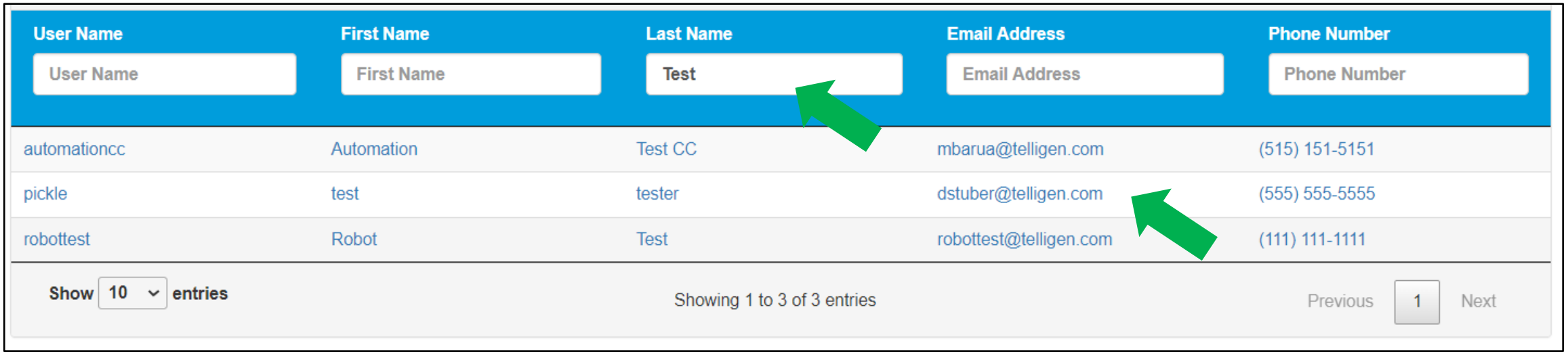
- The Manage Users screen will display all users in the system connected with the organizations/physicians that are associated to the AO's access.

- From this screen, the AO can:
  - Add a New User (Add User Button)
  - Search for a User
  - View Account Details and Edit User Information (*Next Slide*)



Manage Users Screen (cont.)

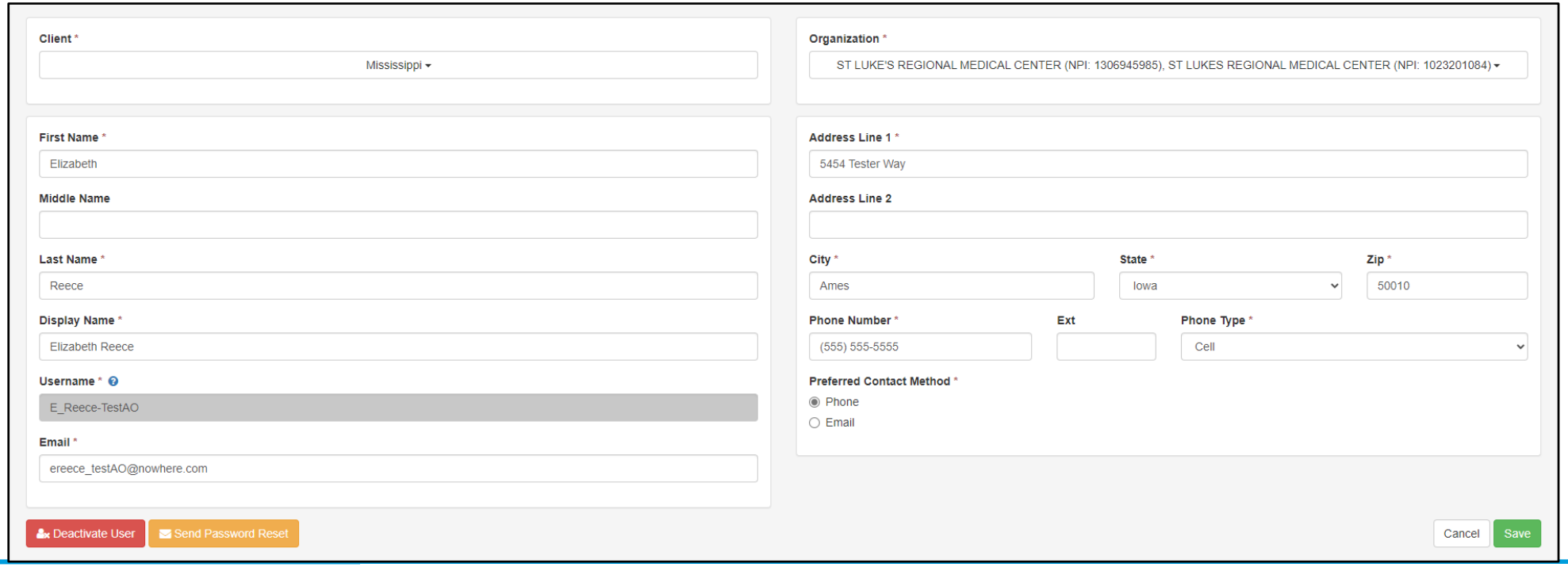
To search for a user record, enter information in any of the search form fields on the Manage Users screen.
Returned search results will display below the search fields in a table. Click on the desired user's record details to navigate to the Edit User screen.



Manage Users: Edit User

When the user's record is clicked on from the Manage Users screen, the system will load the Edit User screen.

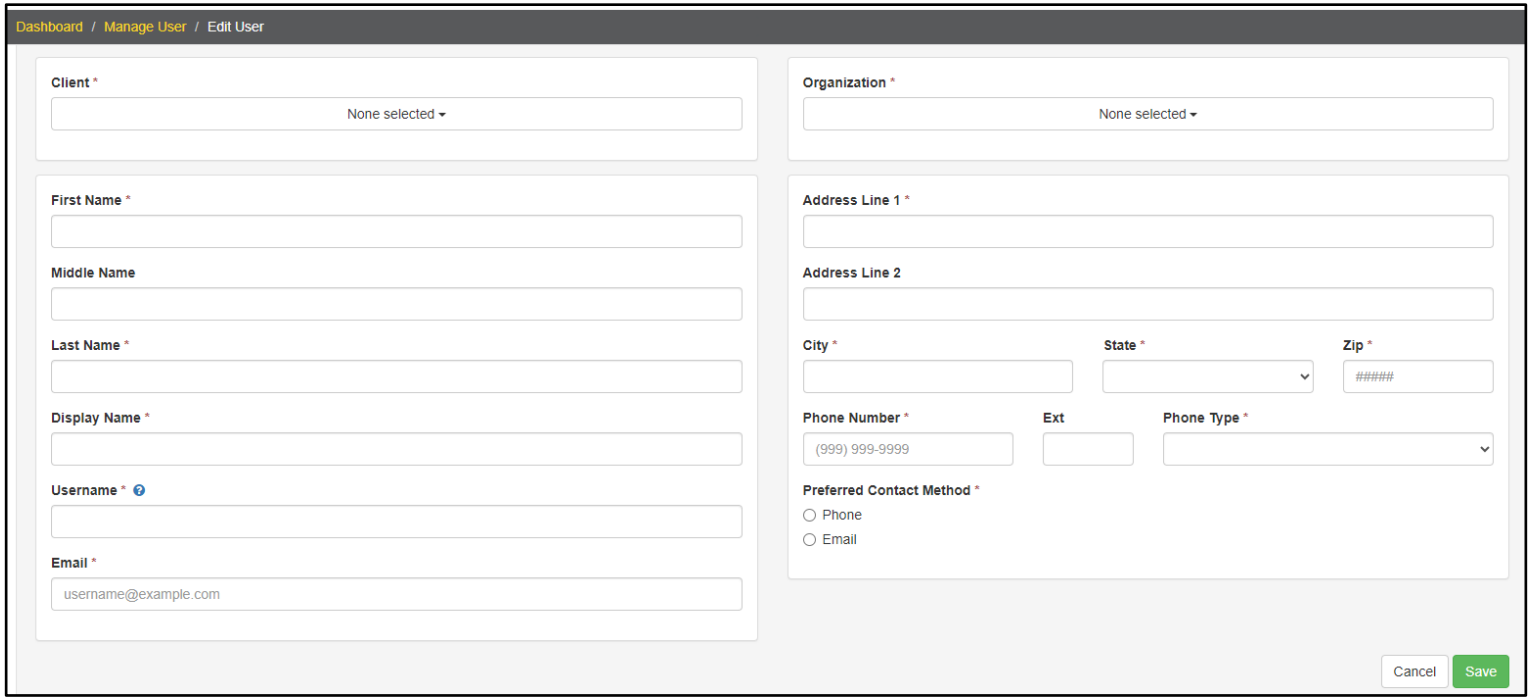
The AO can view and update the users account details on the Edit User screen.



Manage Users: Add a New User

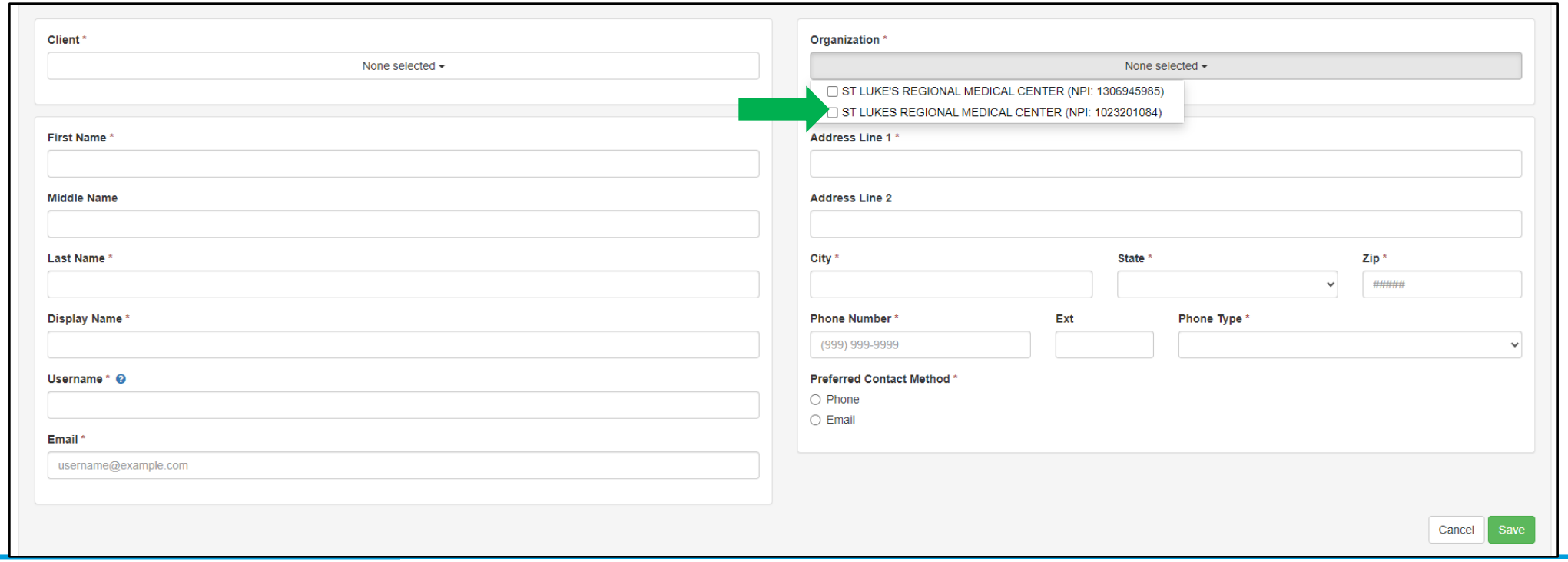
Clicking the ‘Add User’ button from the Manage User screen will display the Edit User screen with a blank form to add a new user in the Qualitrac system.

Required fields are indicated with an asterisk (*).



Add a New User - Organization

Organization: If the field allows a selection, select the drop-down to associate users to the organization(s)/physician group(s) available for the AO to select from. Check the box next to each one to select.



Add a New User – Username

Once a username is created, it cannot be changed or used again. The username would need to be deactivated and a new one established for that user.

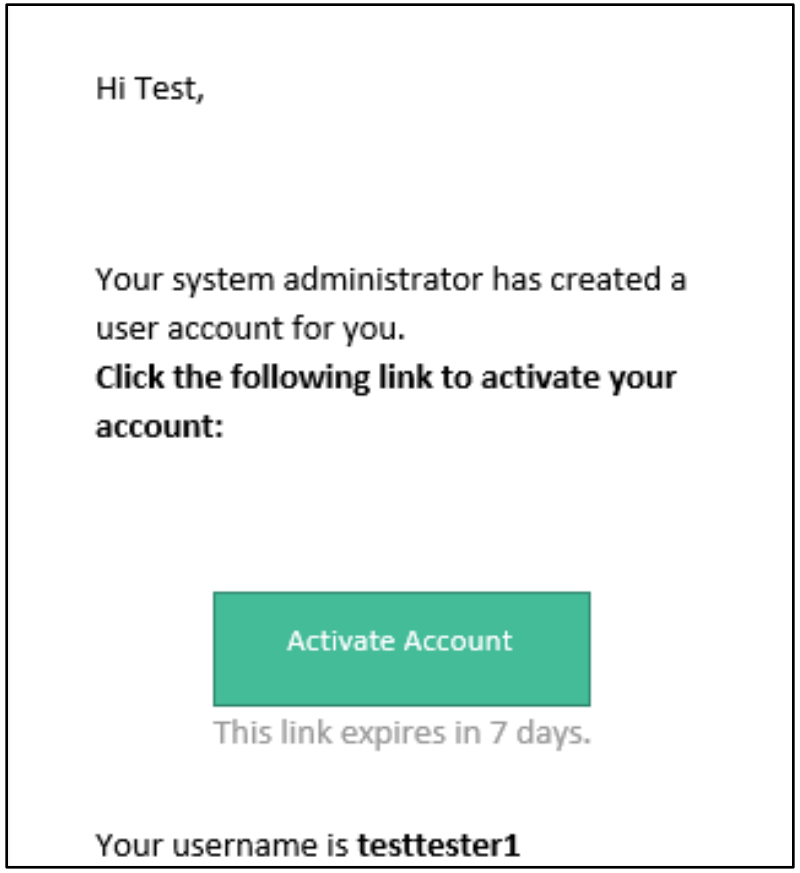
All usernames must be unique within the system. If the username is not unique, the system will alert the AO and an alternate username will need to be established.

When all information has been entered, clicking the ‘Save’ button creates the user in the system and sends the newly added user a notification email.

Add a New User – Activation & Password

After clicking ‘Save’, the system will send a Welcome email to the new user where they will be prompted to Activate their Qualitrac Account.

The user will need to click “Activate Account” to be taken to a screen to set a new password.



Manage Users: Password Reset

Password Reset- AO can reset passwords for the users

Users must Log in every 90 days to maintain their account in Qualitrac

If they have not logged in, the user will get an email the week before their account will be deactivated.

Deactivation Password resets will be managed by Telligen. The User must call the service desk at 1-833-476-4850 for a deactivated password reset.

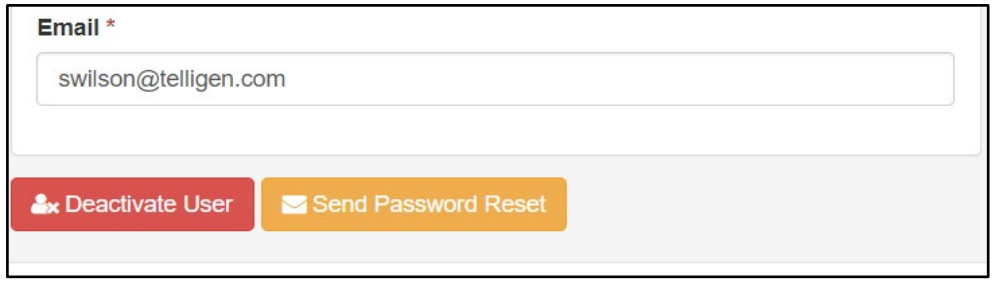
Manage Users: Deactivate User

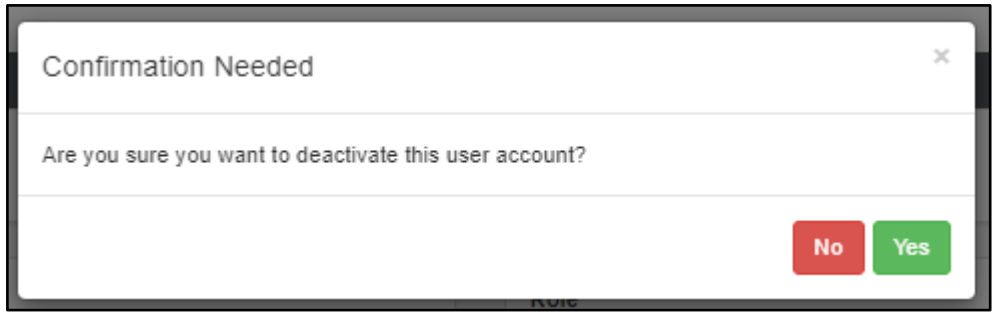
Deactivate User

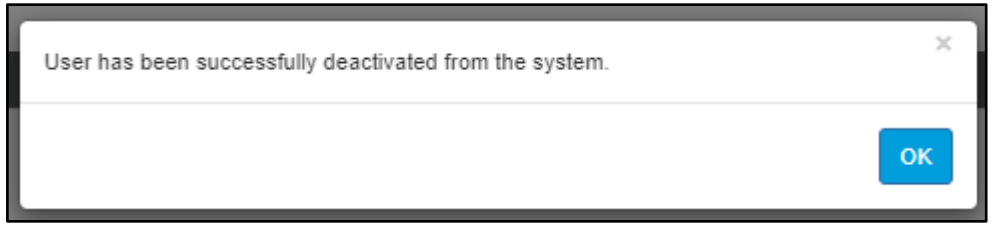
An AO can deactivate a user in Qualitrac.
Clicking the 'Deactivate User' button will display a confirmation message to confirm the change.
When clicking the 'Yes' button to confirm the deactivation, the system will display a success message.

Note:

Users should be deactivated as quickly as possible to prevent any PHI or PII breaches.
Qualitrac administrative staff can reactivate a user deactivated in error.







Training Session Wrap-Up

Knowledge Check

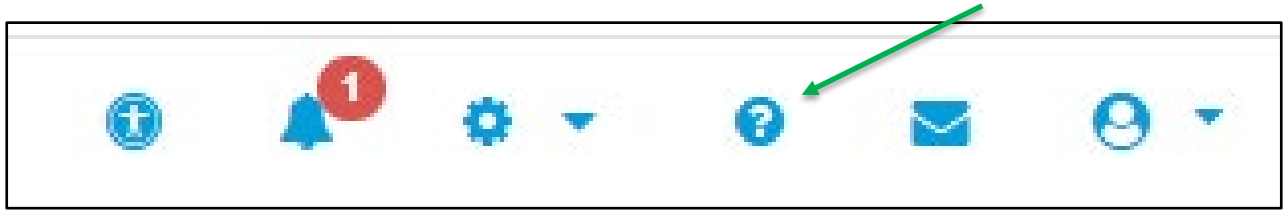
- **By now, you should be able to:**
  - Register for the Provider Portal
  - Access Qualitrac
  - Navigate Manage Users Screen
    - Add & Edit Users
    - Deactivate Users

Questions & Answers

Resources for Assistance & Contact Information

Resources for Assistance

- The *Authorized Official (AO) Training Guide* can be found on: www.myqualitrac.com in the knowledge center which can be found with the question mark in the navigation ribbon on top right-hand side of the page:



- **The user guide provides information on:**
  - Adding Users
  - Viewing User Account Details
  - Deactivating Users

Authorized Official Training Contact Information

If you have any questions or concerns please reach out to our call center

California Call Center & Provider Help Desk:

Email: SBPsychReviews@telligen.com

Toll-Free Phone: (833) 476-4850