Arizona Health Care Cost Containment System

QuickStart Guide
Incident, Accident and Death Reporting

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.
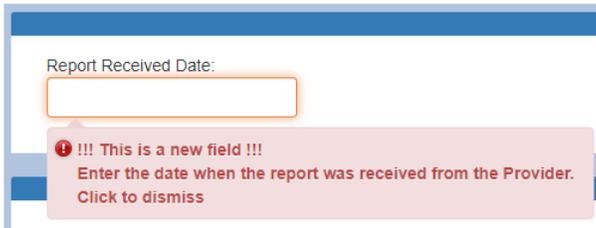
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1. Verify Provider Account

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

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

On the User Admin page, verify the "Clinical Director" role is checked in the User Authorization section
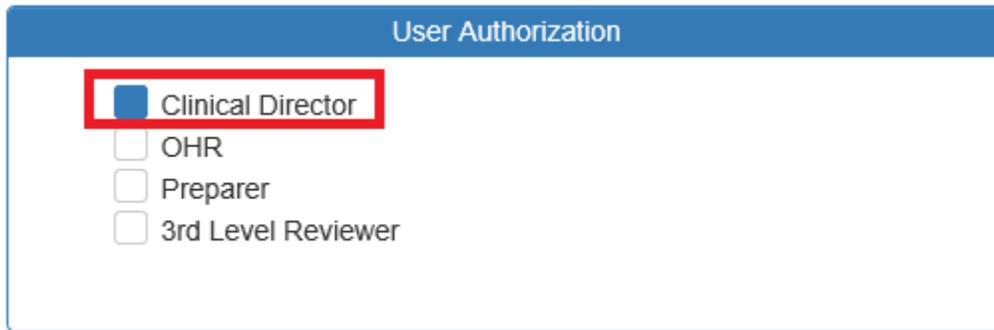
The role of a Clinical Director is to review the existing case prepared by a person registered in the "Preparer" role. The Clinical Director can review all the exiting information by navigating through the IAD Wizard. Since the information had to be validated and signed by a Preparer in the previous 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).

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

Search for a Case

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

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: "Pending E-Signature (Clin Dir)". Any case that needs to be reviewed by a Clinical Director will have this status.

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.

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

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)***

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.

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

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.

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

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.

Verify the following actions:

4. Verification alert message is displayed

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

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)***

Incident Report

Case#: IAD-2018-525 Provider: WALGREEN #04298 Status: Returned to Provider
Member: SMITH, JOE Contractor/TRBHA: MERCY CARE PLAN 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 ☆	DDD ☆	CMDP ☆	Category ☆
No ▼	Yes ▼	Yes ▼	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 selction will be saved.

Code | Description | Search

Code	Description	Remove
F22	DELUSIONAL DISORDERS	✖

Incident Report

Case#: IAD-2018-525 Provider: WALGREEN #04298 Status: Returned to Provider
Member: SMITH, JOE Contractor/TRBHA: MERCY CARE PLAN Report: