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Qualis Health Provider Portal

Integrated Care Management Software

Provider Portal

User Guide

1/20/2016

Revised 8/25/2016

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Statement of Confidentiality

In order to ensure the integrity, security and confidentiality of information maintained within the Qualis Health Provider Portal, and, to limit disclosure and use of this data to only that which is permitted by law, I agree to abide by all provisions set forth in my Provider Portal Administrator or Provider Portal You Agreement with Qualis Health. I hereby acknowledge having received notice of the potential criminal, administrative and/or civil penalties for violating any terms of my Agreement. If I have questions about my obligations regarding the terms of my Agreement, I understand that I may seek clarification from my organization's Provider Portal Administrator.

General Information

- Qualis Health Provider Portal is a browser-based product that gives healthcare providers a two-way link using the Internet to exchange care management data with Qualis Health.
- Qualis Health Provider Portal allows for an increase in efficiency by decreasing the amount of time to process a request.
- All Member and Provider names included in this manual are fictitious.

Security

- Registration is required for an Executive, a Qualis Health Provider Portal Administrator and all Users in each provider group.
- Qualis Health will validate your accounts on a regular basis.
- You are uniquely identified by the combination of the User ID and the individual password.
- You will automatically be logged off after sixty minutes inactivity.

Internet Access

You must use Internet Explorer or Mozilla Firefox to access this program correctly. Use of other browsers may result in loss of some functionality. Use of IE 9, 10 or 11 may require adding zeomega.com to the Compatibility View Settings in the Tools drop-down of Internet Explorer.

Qualis Health Support

- Qualis Health Alaska Behavioral Health Phone: **1-877-200-9046,** *akbehavioralhealth@qualishealth.org*
- Qualis Health Alaska Medicaid Phone: **1-888-240-0437**
- Qualis Health DC Medicaid Phone: **1-800-251-8890,** *dcmedicaid@qualishealth.org*
- Qualis Health New Mexico Medicaid Phone: **1-866-962-2180,** *nmtpa@qualishealth.org*
- Qualis Health State of Washington Medicaid Phone: **1-888-213-7513,** *WAGovtProviders@qualishealth.org*
- Qualis Health State of Washington Labor & Industries Phone: **1-800-541-2894,** *WAGovtProviders@qualishealth.org*
- Qualis Health Wyoming Medicaid Phone: **1-800-783-8606**

Objectives

The main objectives of this User Guide are to familiarize you with:

- How to register for the Qualis Health Provider Portal
- How to access the Qualis Health Provider Portal
- Commonly used functions within the Qualis Health Provider Portal
- How to properly complete an inpatient or outpatient utilization review request
- How to obtain help.

The Qualis Health Provider Portal is a web-based interface, enabling providers to access member information by granting Provider Portal log-in rights.

Accessing the Qualis Health Provider Portal

Accessing the Qualis Health Provider Portal is a secure operation. Providers who access the portal need a valid User ID and password. Access is available:

1. Through One Health Port (WA Medicaid & WA Labor & Industries accounts)
2. Through completion of a Qualis Health Provider Portal Registration Packet (AK, DC, NM & WY Medicaid accounts)

The following steps are involved in accessing the Qualis Health Provider Portal through completion of a Qualis Health Provider Portal Registration Packet (AK, DC, NM & WY Medicaid accounts):

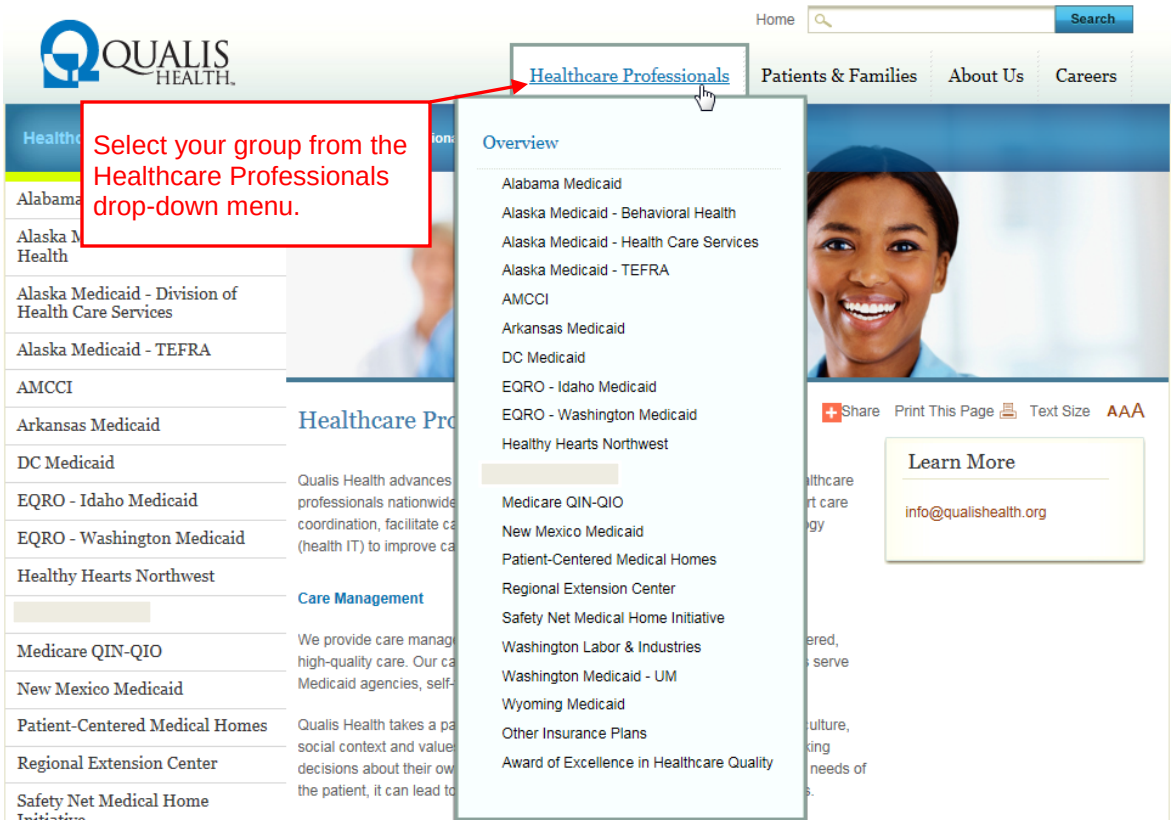
- From the Qualis Health website at *www.qualishealth.org*, go to the Healthcare Professionals drop-down menu, choose the appropriate group page and select the Provider Resources page. On the Provider Resources page, find the *Qualis Health Provider Portal Registration Packet*, complete the registration packet and email or fax it back to Qualis Health. *Note: Registration packet is the same for all groups.*
- Receive completed Qualis Health Provider Portal account information from Qualis Health.
- Login to the Qualis Health Provider Portal.

Qualis Health Provider Portal Registration

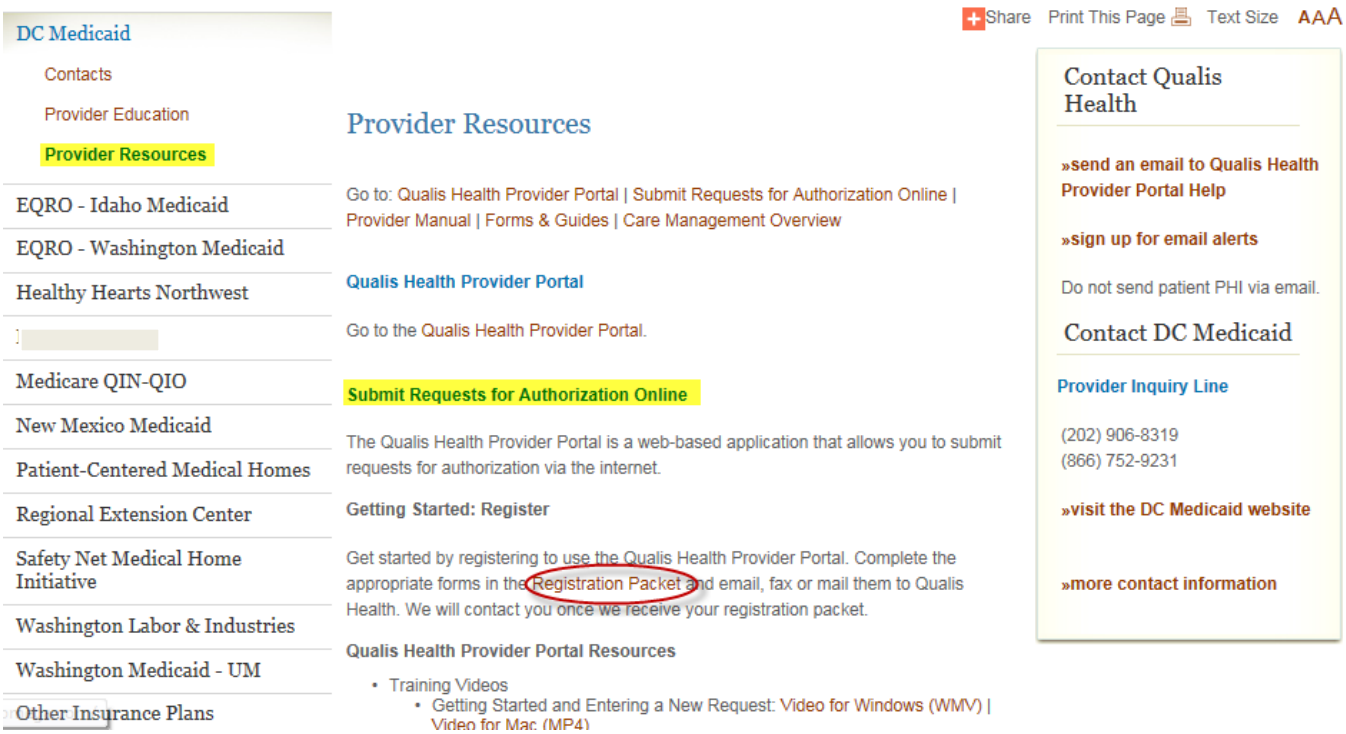
All Qualis Health Provider Portal user groups except for One Health Port users must fill out and send in a registration form. Go to the Qualis Health website (*www.qualishealth.org*) and download the *registration packet*. The registration packet can be filled out digitally and emailed to us, or it can be printed, filled out, and faxed to us. Email and fax information are listed in the registration packet.

Once you have submitted the registration information, we will set up your new account and email you your new account information. *If you are the Qualis Health Provider Portal account Administrator, once you receive your account information you will need to set up individual accounts for those staff who will be using the Qualis Health Provider Portal.* For more information on setting up accounts as a Qualis Health Provider Portal Administrator, go to *Provider Portal Administrator Tasks*.

In the Qualis Health website at *www.qualishealth.org*, go to the *Healthcare Professionals* drop-down and select your group. Your group's subpages will be listed in the left navigation panel.



Choose the *Provider Resources* subpage, where you will find downloadable copies of the Qualis Health Provider Portal Registration Packet, the Provider Portal User Guide and Provider Portal videos.

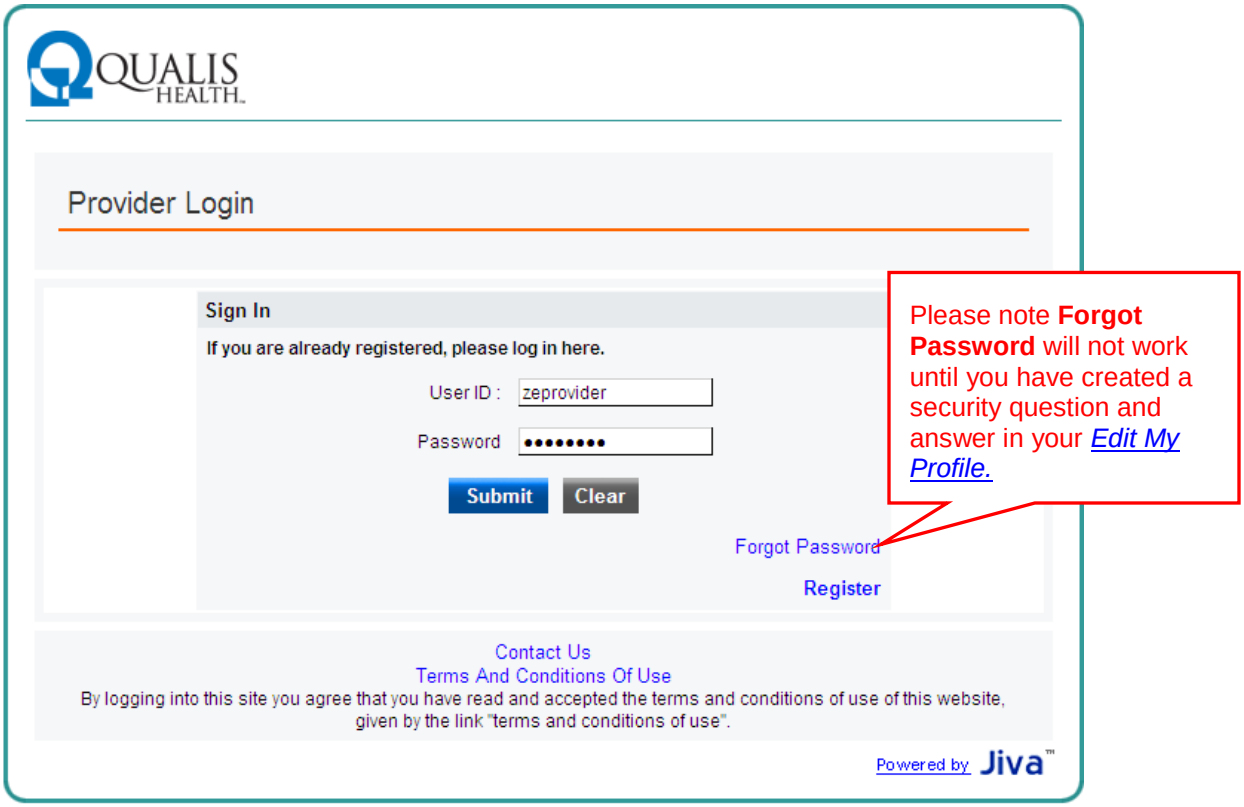


Qualis Health Provider Portal Login

Upon receipt of a completed registration packet, Qualis Health staff will create and activate your group's new account and email the Provider Portal Administrator with their account login information when it is complete.

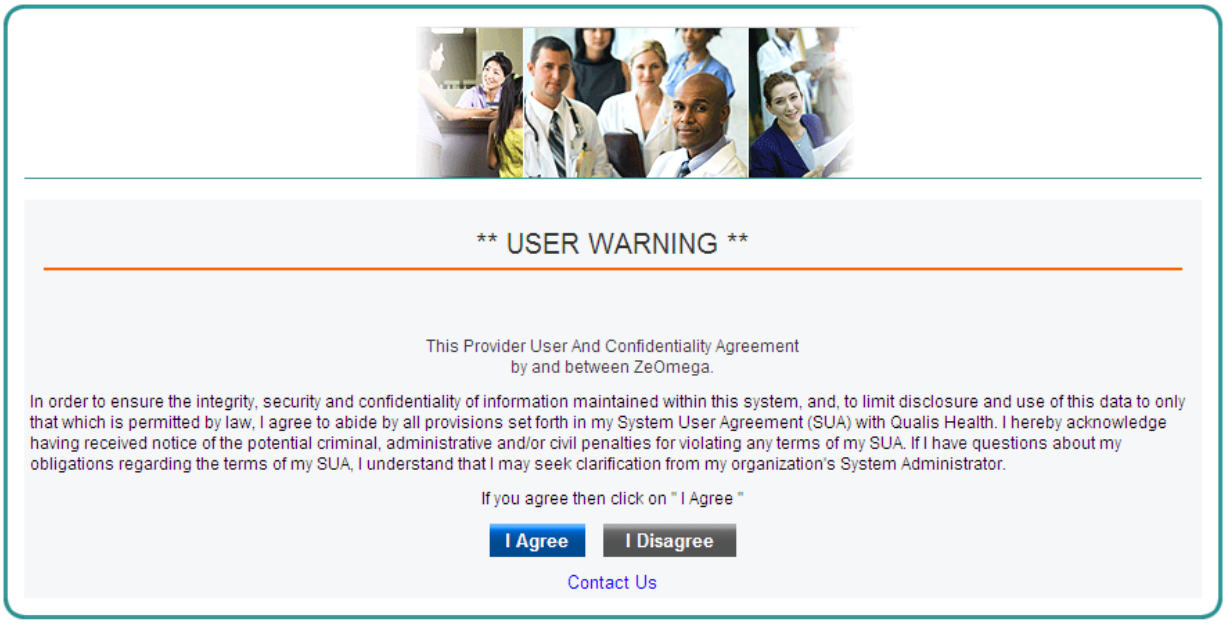
- *For One Health Port groups (WA Medicaid & WA Labor & Industries) please see* Logging in via One Health Port *(p.10).*

Once you have your Provider Portal login information, launch the Qualis Health Provider Portal from the Qualis Health website.



- Enter your User ID in User ID field.
- Enter the password in the Password field.
- Click **Submit**.

This displays your Acceptance screen.



After reviewing the agreement, click **I Agree** to log into the Provider Portal, or click **I Disagree** to go back to the Provider Login page.

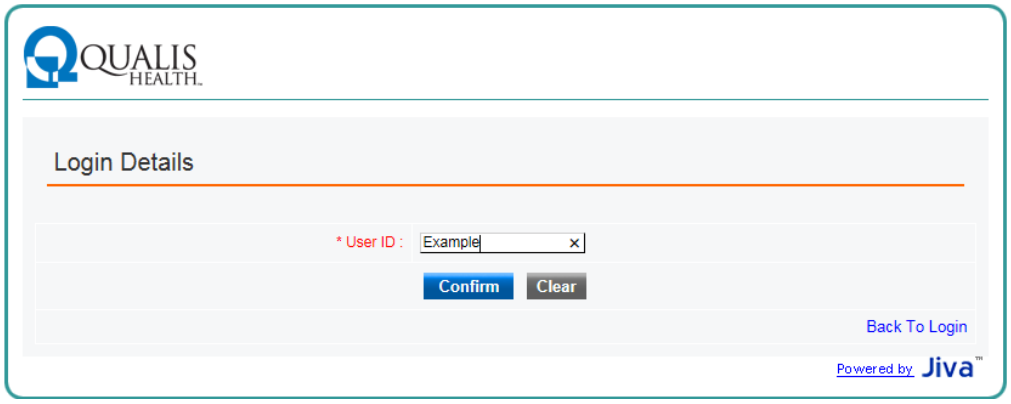
Lost Password

Qualis Health Provider Portal enables you to reset your password by answering a predefined password reset question. This password reset question is created in *Edit My Profile*. If you have not created a password reset question and answer in your Profile page, you will not be able to generate a new password. In this case, you will need to ask your Provider Portal Administrator to reset your password for you. If you are the Provider Portal Administrator and you need your password reset, you will need to contact Qualis Health (*see Qualis Health Support*) to reset it.

If you have a locked or deactivated account, you will need to contact Qualis Health (*see Qualis Health Support*) to reset it.

In the case of lost password or to reset your password, in the Qualis Health Provider Login screen, click the Forgot Password link.

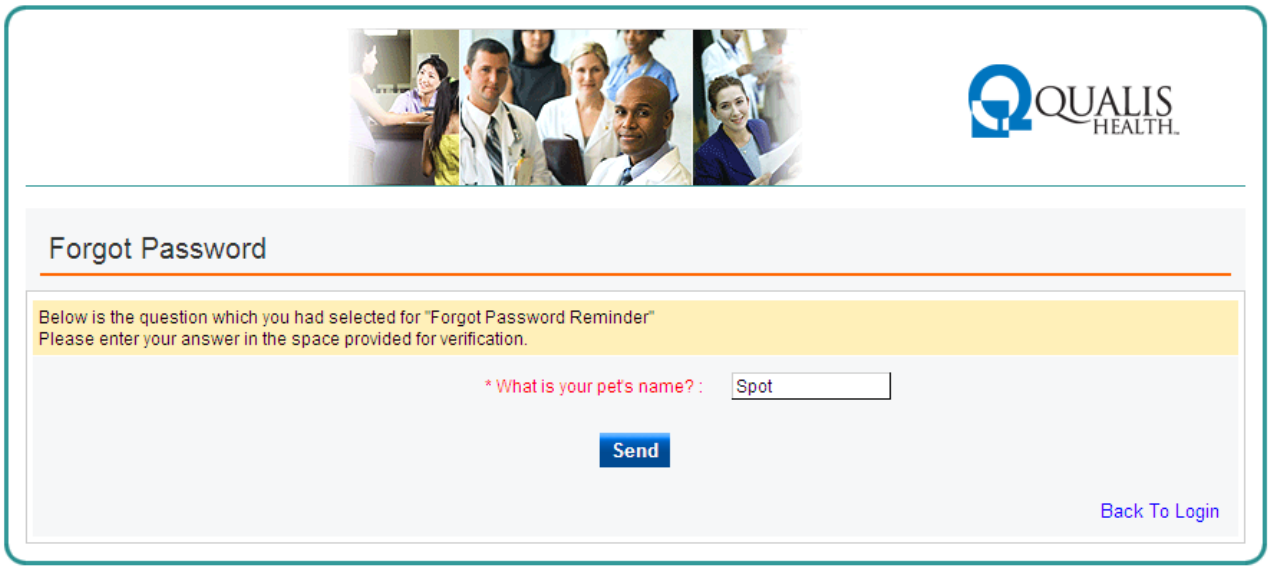
- This displays the Login Details screen (see Login Details Screen below).



- Enter your User ID in User ID field.
- Click **Confirm**.

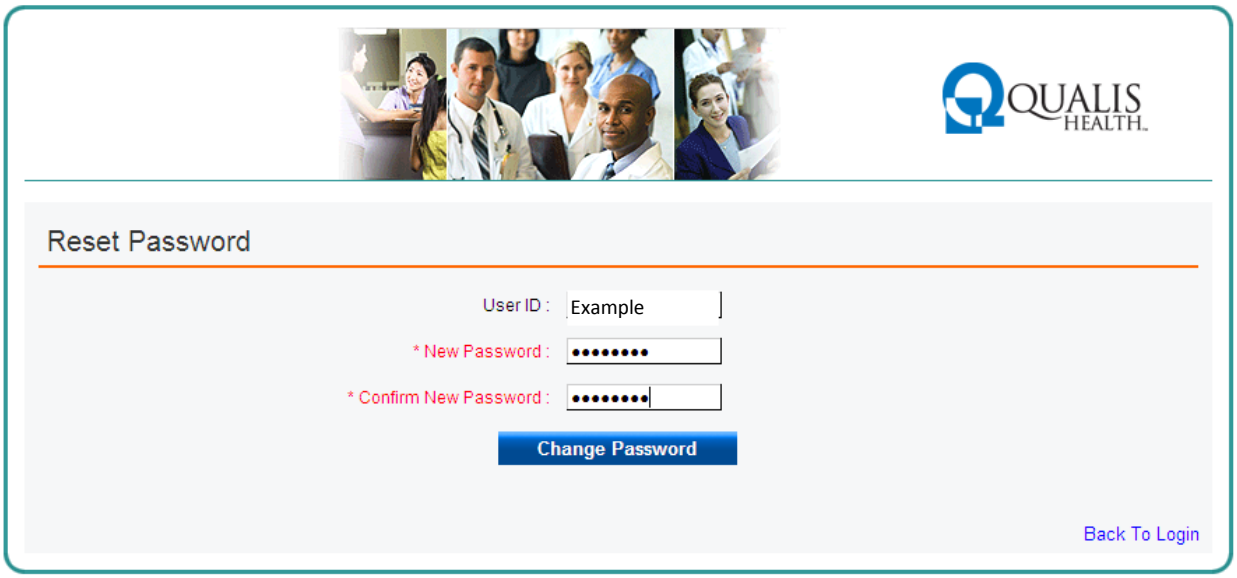
This displays the Forgot Password screen.

➢ *The password question will not be available for enrolled users on the first login.* If you have not created a password reset question and answer in your *Edit My Profile* page, you will not be able to generate a new password.

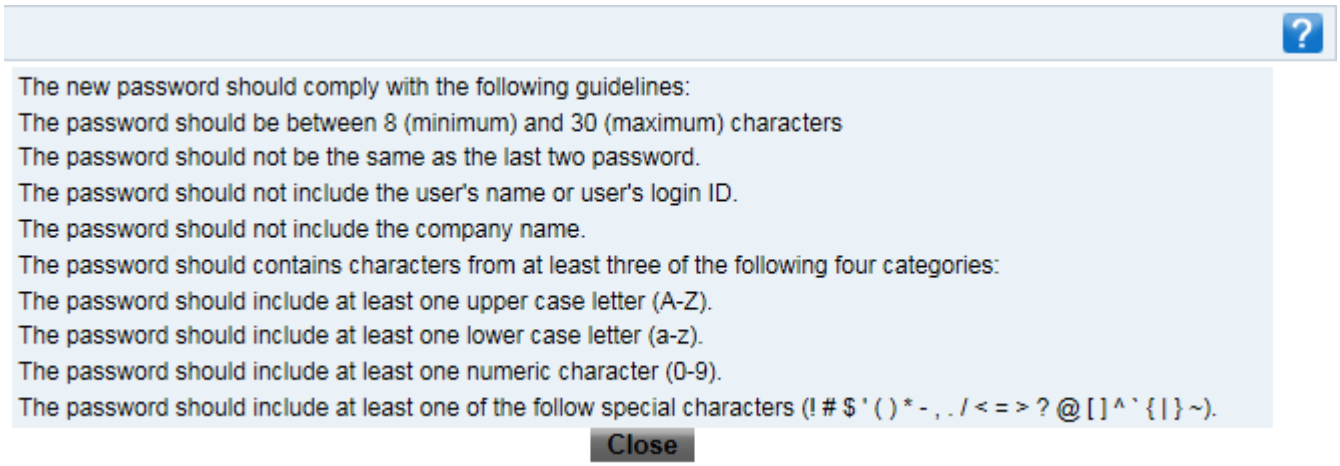


- Enter the appropriate answer to the question in the text field provided.
- Click **Send** to submit the answer.

This displays the Reset Password screen that enables you to reset the password. See below.



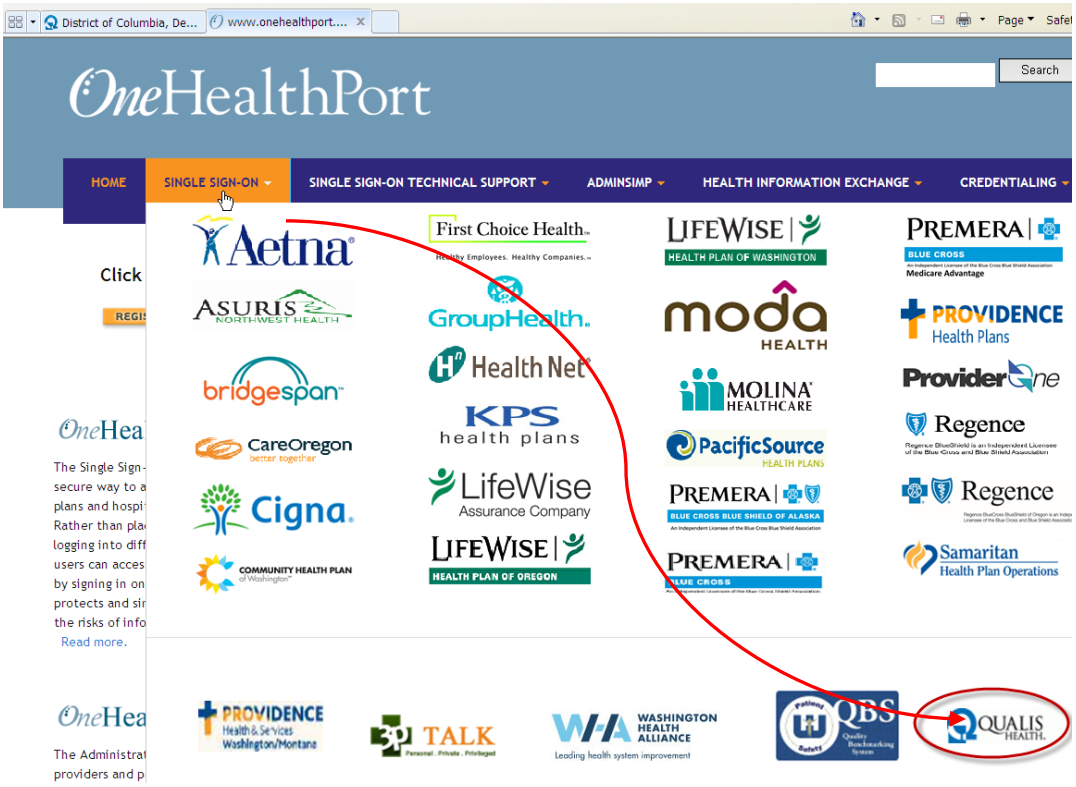
- Enter a new password in the New Password field. Password guidelines can be viewed below.



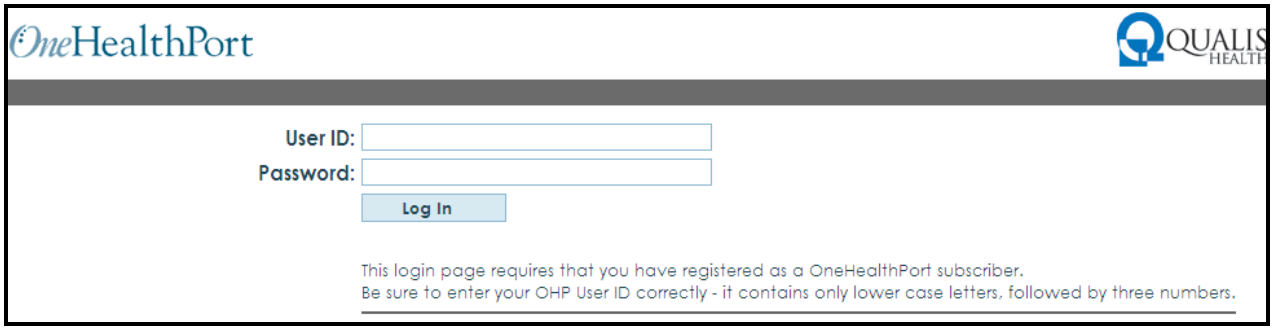
- Re-enter the password in the Confirm New Password field.
- Click **Change Password** to save the new password. This displays the message: *Your password has been reset successfully*.
- Click the **Back to Login** link to log into the Provider Portal.

Logging in via One Health Port

Washington groups will log in via the One Health Port portal with their One Health Port User ID and password. To log into the Qualis Health Provider Portal via One Health Port, go to the One Health Port homepage at *http://www.onehealthport.com/*. From the Single Sign-on drop-down, choose Qualis Health.

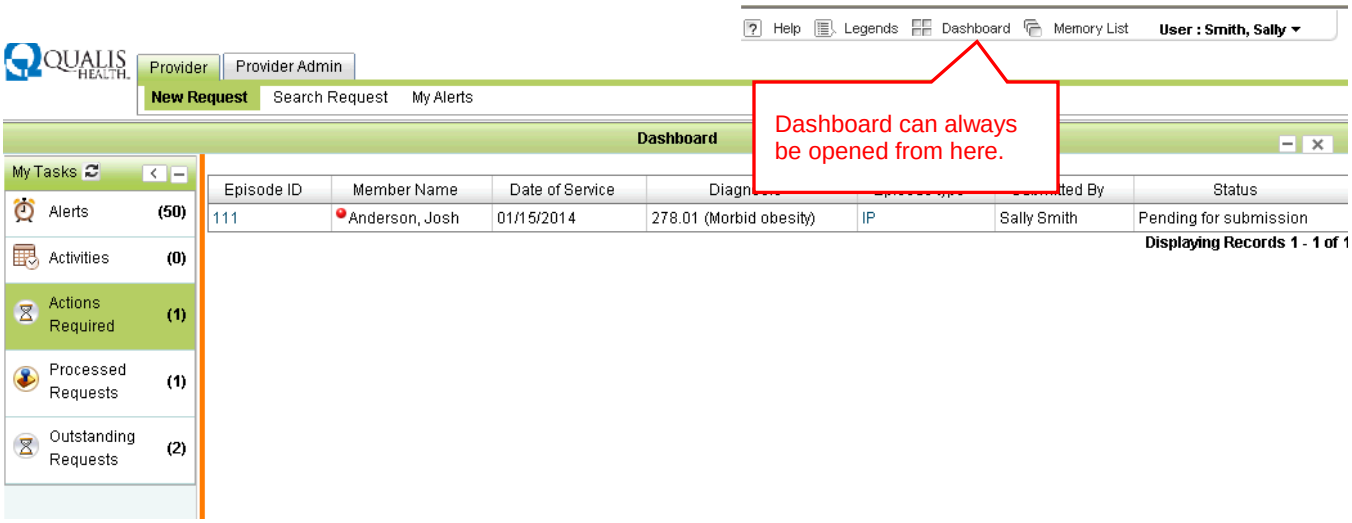


This will bring up One Health Port's Qualis Health page. From here, click the orange **Log In** button and enter your One Health Port User ID and password to access the Qualis Health Provider Portal.



Dashboard

The Dashboard is what you will see each time you log into Qualis Health Provider Portal. It can also be accessed by choosing Dashboard from the list of choices at the top of your screen. These choices are always at the top of every Provider Portal screen.



You can choose from:

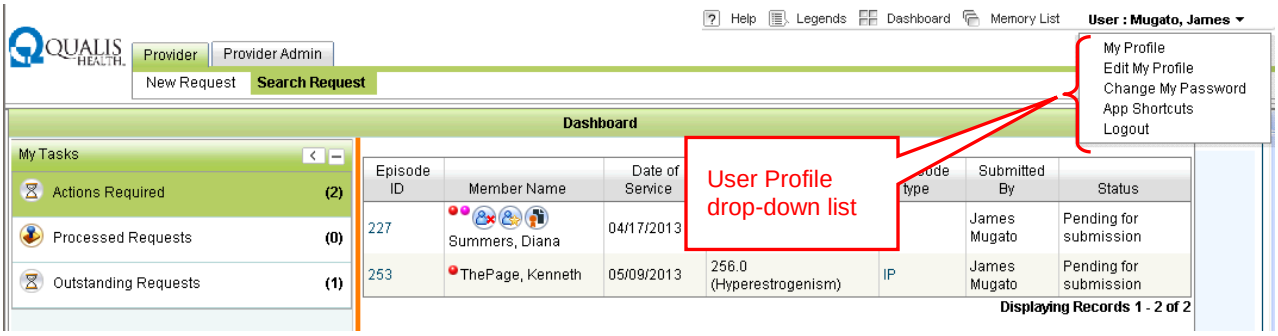
- Help
- Legends
- Dashboard
- Memory List
- You Profile

User Profile

The Provider Portal Administrator configures your profile when creating your account. However, the Provider Portal enables you to change your profile setting using the drop-down list under your name in the upper-right corner. See below.

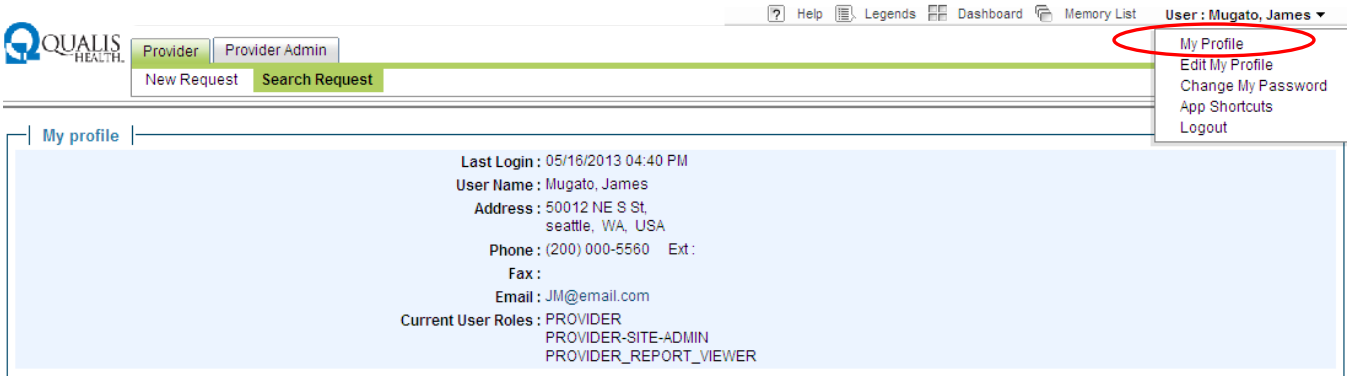
User Profile drop-down list includes the following links:

- My Profile
- Edit My Profile (One Health Port users do not have)
- Change My Password (One Health Port users do not have)
- App Shortcuts
- Logout



My Profile

The My Profile link under User Profile drop-down list displays your portal profile, contact details, roles assigned within the portal, and more. The My Profile screen is a view-only screen.



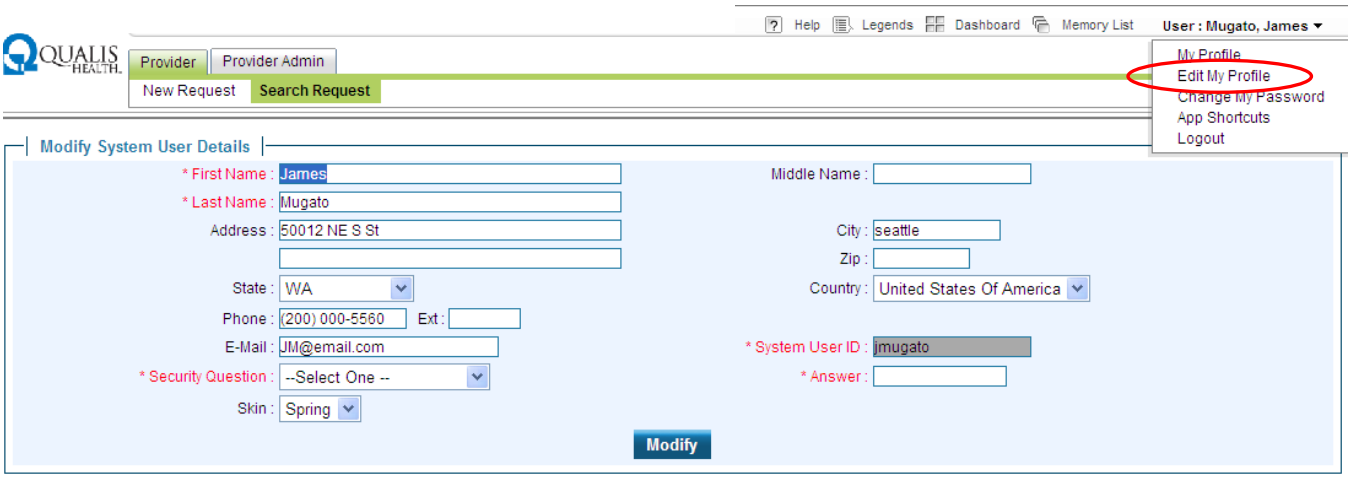
- *The Qualis Health Provider Portal Provider Portal Administrator configures your roles.*

Edit My Profile

Edit My Profile enables you to modify your profile. You can also modify the visual appearance of the Provider Portal.

To edit the profile:

- Click the Edit My Profile link in you drop-down list. This displays the Modify System User Details screen.



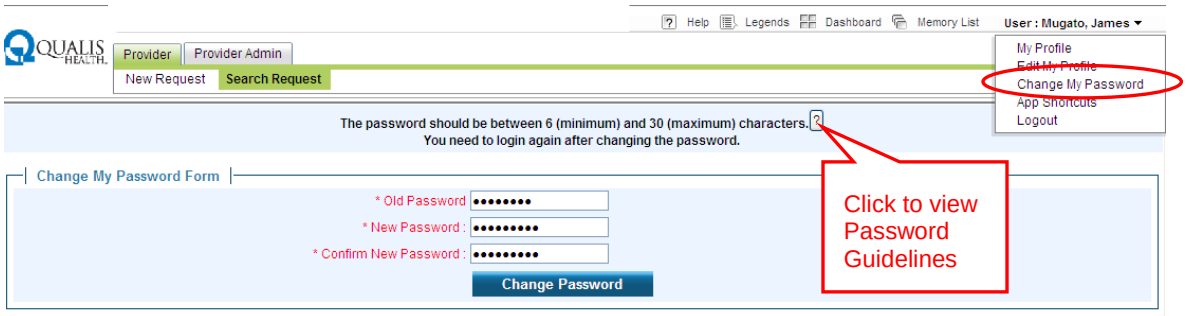
- Modify the required details in the corresponding fields. Please be sure to fill out the *Security Question* and *Answer* fields. This will enable the "Forgot Password" link on the login page.
- Click **Modify** to save the modifications.

➢ *The System User ID field cannot be modified.*

Change My Password

You can change your Provider Portal login through Change My Password in the User Profile drop-down. To change the password:

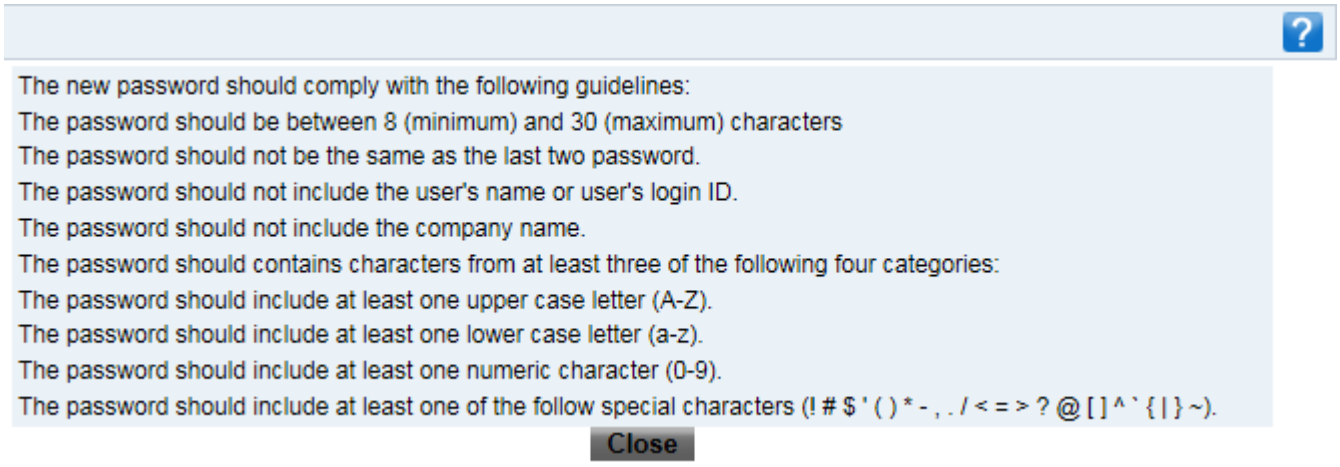
- Click Change My Password in your User Profile drop-down list. This displays the Change My Password Form.



- Enter the current password in the Old Password field.
- Enter the new password in the New Password field.

➢ *The new password must comply with the password guidelines (as shown below).*

- Re-enter the new password in the Confirm New Password field.
- Click **Change Password** to change the password.

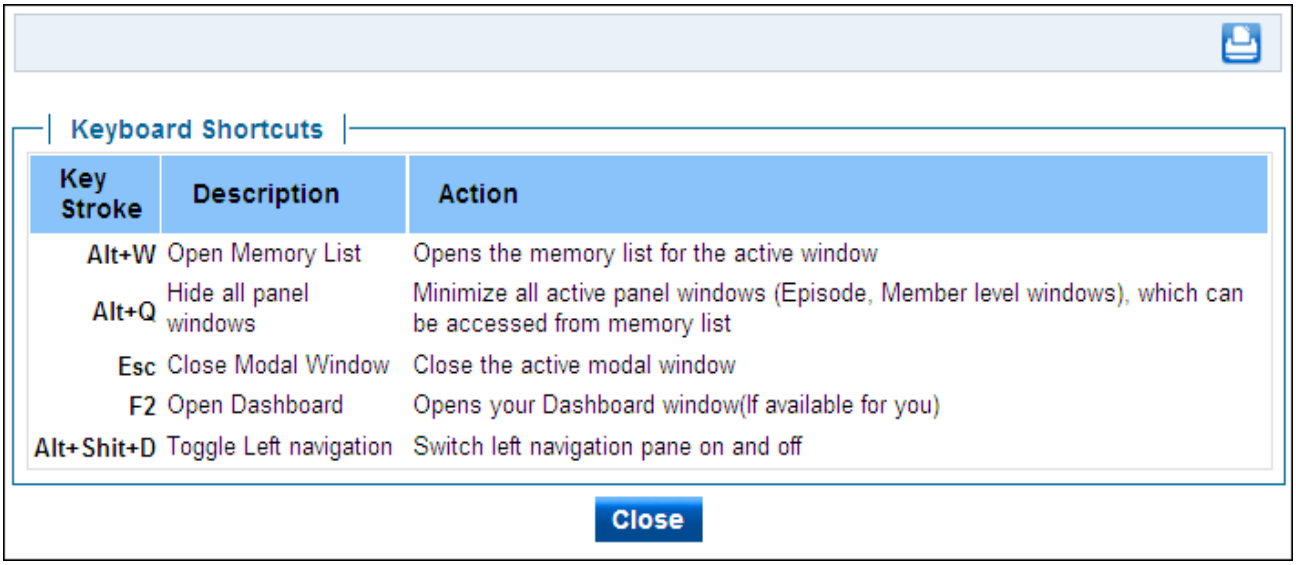


➢ *After changing the password, you will be prompted to login again to the Provider Portal using the new password.*

➢ *Passwords are case-sensitive.*

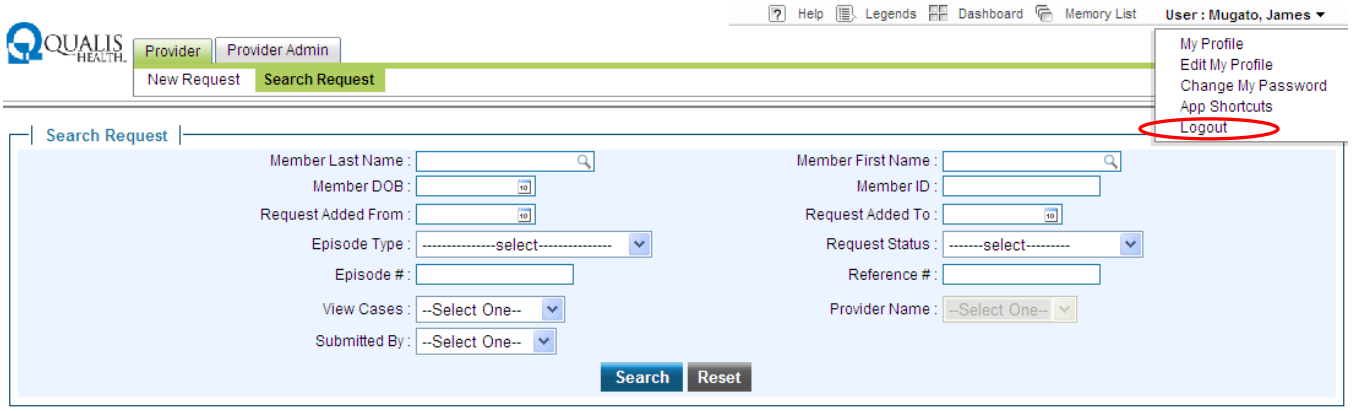
Application Shortcuts

App Shortcuts in your User Profile drop-down list displays the keyboard shortcuts.



Logout

To logout of Qualis Health Provider Portal, select Logout under your User Profile drop-down list.



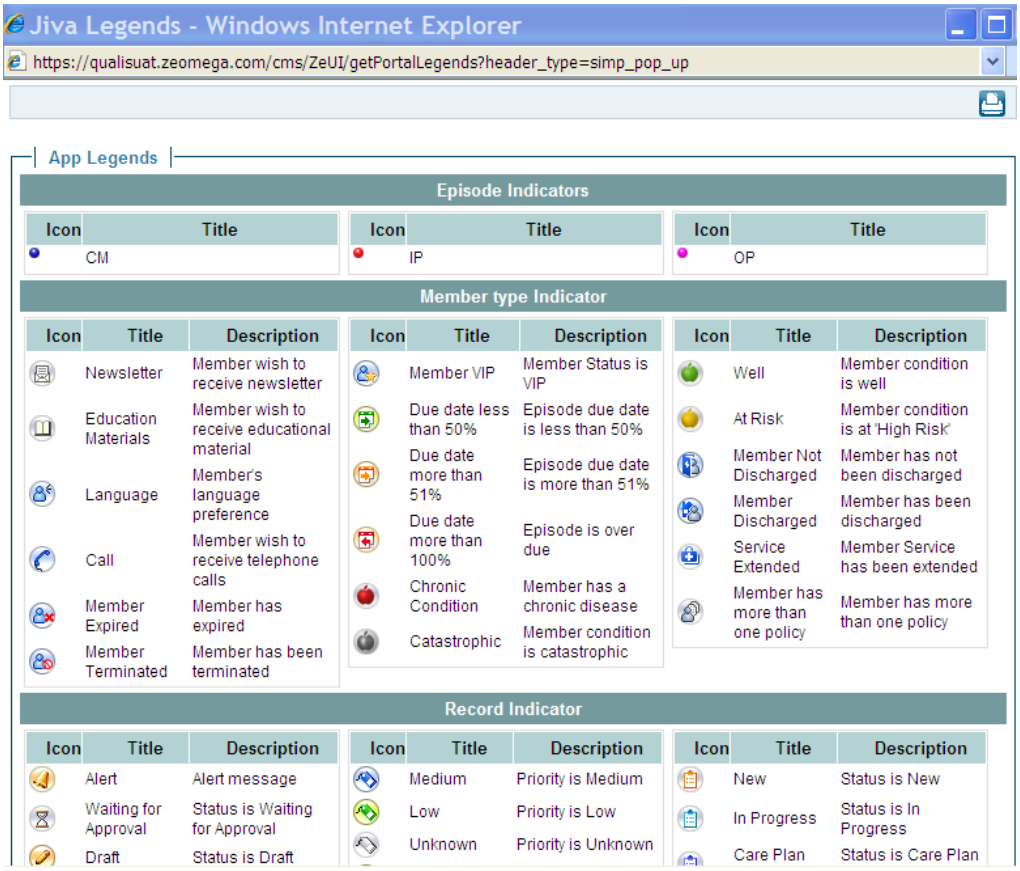
This displays the message: *Do you want to logout from this session?*

- Click **OK** to logout from the Provider Portal or click **Cancel** to discard the message.

➢ *The program also has a timeout period. If the program does not detect any activity (such as switching screens or clicking on buttons) for 60 minutes, you will be automatically logged out of the program.*

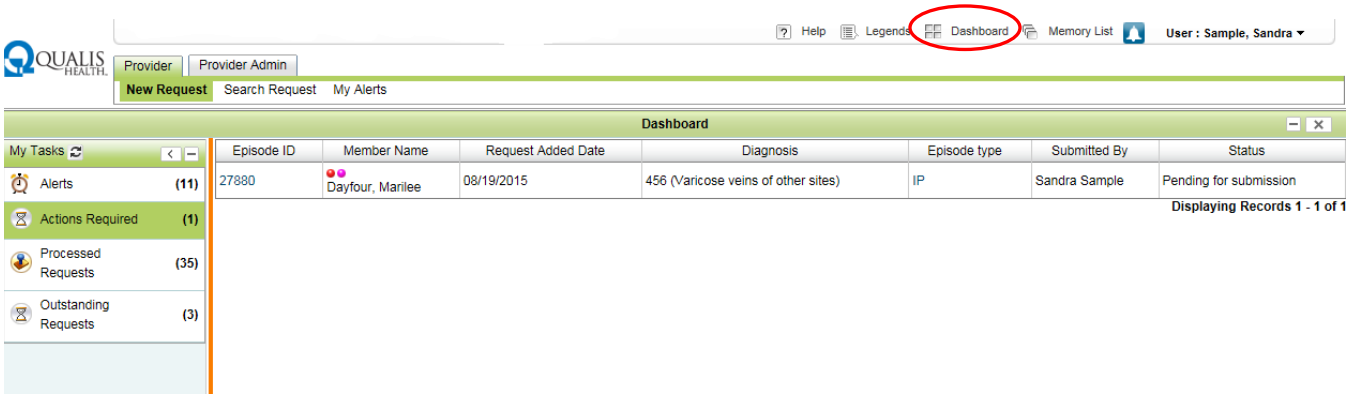
Legends

The Application Legend describes the meaning of the icons (know as widgets), used within the application.

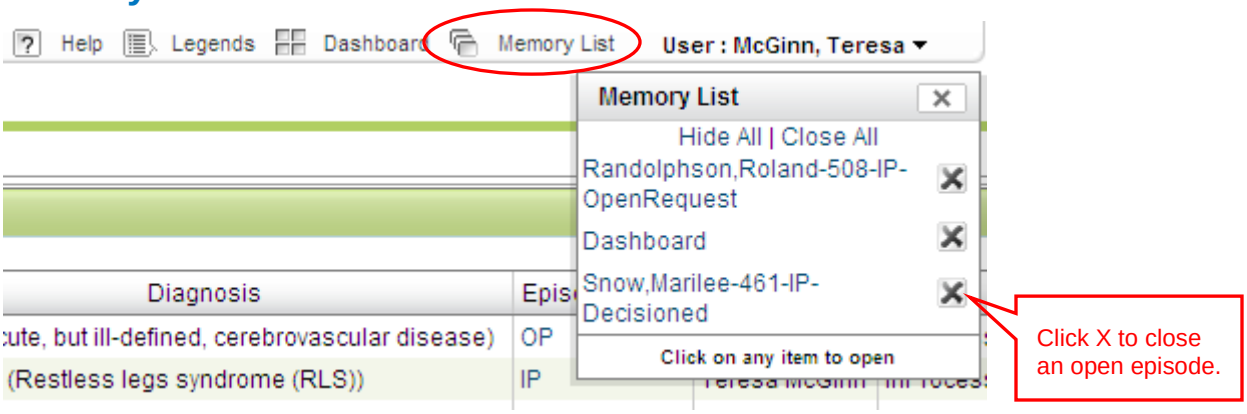


Dashboard

Clicking on the Dashboard link at the top of each page will always take you back to your opening Dashboard page.



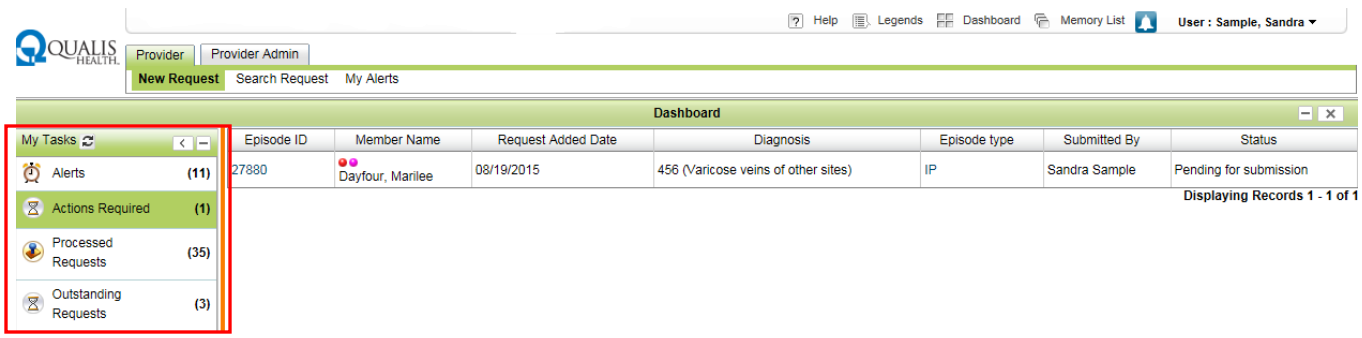
Memory List



- The Memory List acts as a minimized window.
- ➢ *Please note: Only requests that have been submitted to Qualis Health will be listed on the Memory List. To see requests that are in process but not yet submitted, go to the Dashboard and select Actions Required from the My Tasks left navigation panel.*
- You may leave episode work windows open while moving on to another member or window and use the Memory List to jump back to where you left off in the previous episode(s) by selecting the desired item.
- The Memory List does not track the historical path of all episodes touched, but only reflects those records that have been left open. Once a record is closed it will no longer appear on the Memory List.
- The Memory List is deleted when you log off or when you are timed out.
- You can close a member episode by either selecting the X by the episode or by using the member link to enter the record and close the window once you have verified work is complete.
- You can close all open records by selecting the **Close All** link that appears in the Memory List.
- By default, the Memory List displays a maximum of ten open records.
- The Memory List window must be manually closed; there is no auto-closure.

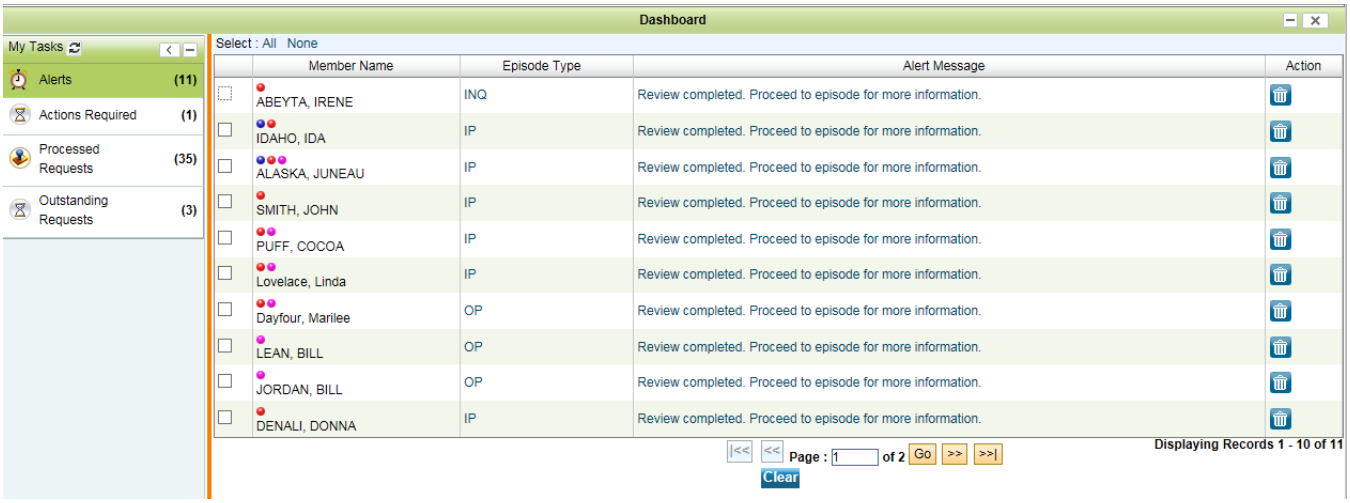
My Tasks

There are four areas in My Tasks: Alerts, Actions Required, Processed Requests and Outstanding Requests, each of which is described below. Please note: With the exception of Alerts, you will only see the requests that *you* entered on your Dashboard.



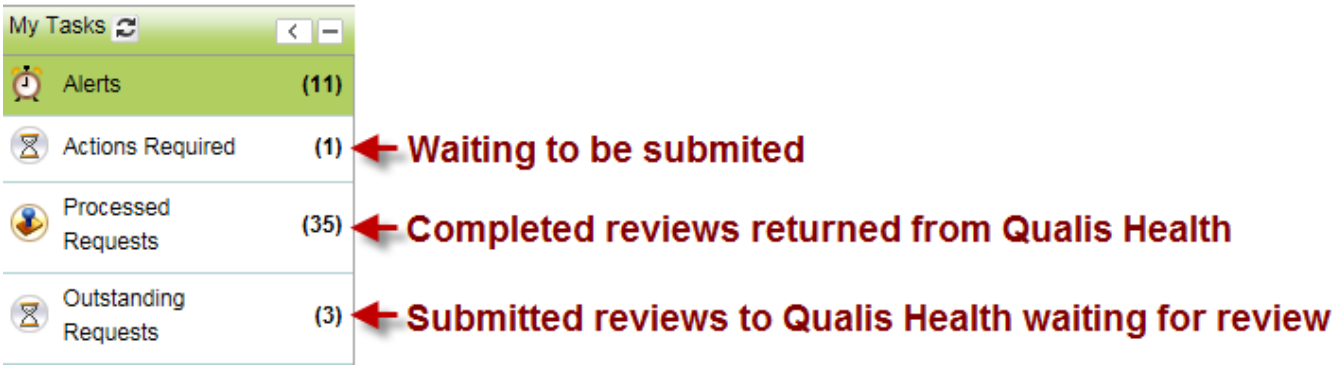
Alerts

The Alerts tab notifies you of episodes that have been updated by Qualis Health. The Alerts tab shows alerts for all episodes for your group/facility. You can open any episode from your alerts list by selecting the Episode Type. To delete an alert, select the trash can icon on the right-hand side. To delete multiple alerts, select the alert checkboxes and click the **clear** button. Alerts can also be accessed from the **My Alerts** tab at the top of the page.



Display of Your Requests

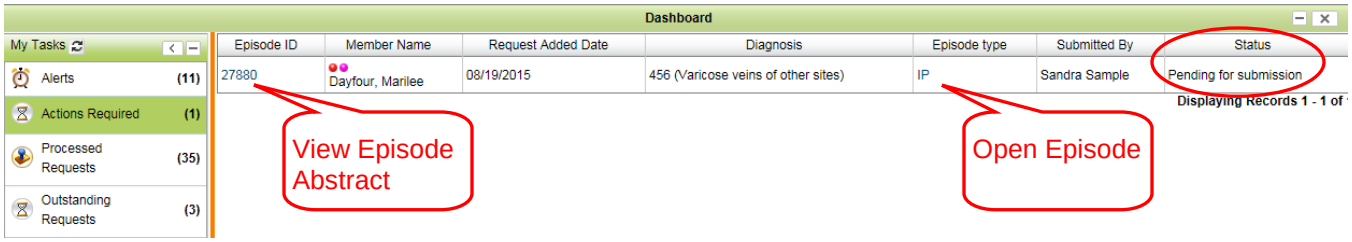
Requests that *you personally* have started and/or submitted to Qualis Health will be displayed in the Actions Required, Outstanding Requests or Processed Requests tabs. A new request that has not yet been submitted will be displayed in the Actions Required tab. When you have submitted a request, it will move to the Outstanding Requests tab. Once Qualis Health receives the request and completes the review, the request will move to the Processed Requests tab. Closed and Voided requests will fall off the Processed Requests list after 30 days.



For additional information on each of these tabs, see next page.

Actions Required

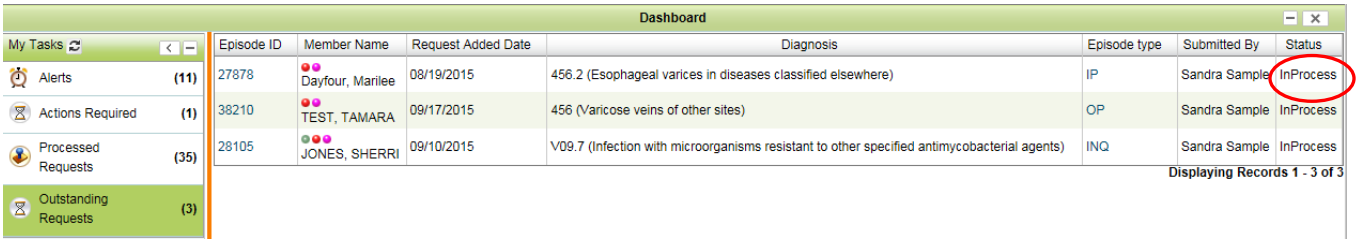
The Actions Required tab displays episodes created by you that have not yet been submitted to Qualis Health. The requests are saved and kept in *Pending for Submission* status.



- The Episode ID column of the Actions Required screen shows the episode number generated by the program when you create an episode for a member. You can use the link of the Episode ID to view the Episode Abstract.
- If the member has existing episodes associated to them a color coded icon will display above the Member Name. Hovering over or clicking on the icons will provide a pop up explanation of the Episode type.
- The Request Added Date column indicates the date the episode was created.
- The Diagnosis column displays the diagnosis description along with the diagnosis code.
- The Episode Type column displays the type of episode as a link. Clicking this link will open the episode. You can then complete the process for the incomplete episode and submit the request.
- The Submitted By column displays the name of the person who created the request.
- The Status column displays a message that the episode is *Pending for submission*.

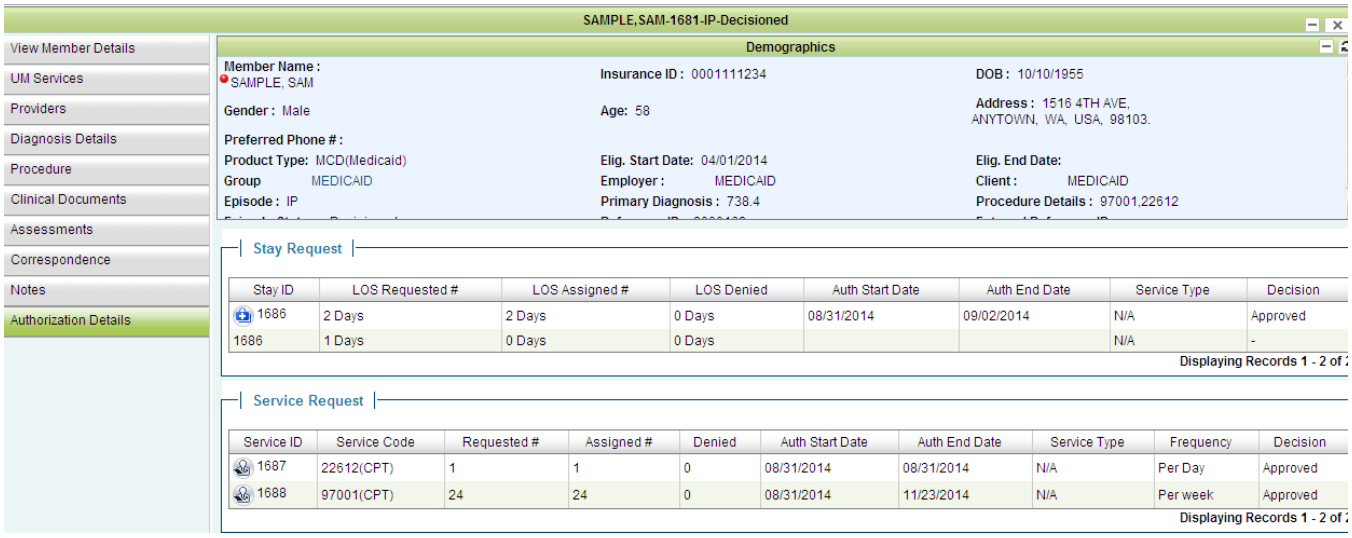
Outstanding Requests

The Outstanding Requests tab displays completed episodes submitted by you to Qualis Health for review. The *InProcess* status indicates that Qualis Health is still working on the episode.



- The Episode ID column displays the episode number generated by the program when you created an episode for a member. You can click the episode number to view the Episode Abstract.
- If the member has existing episodes associated to them a color coded icon will display above the Member Name. Hovering over or clicking on the icons will provide a pop up explanation of the Episode type.
- The Request Added Date column indicates the date the episode was created.

- The Diagnosis column displays the description of the diagnosis with the diagnosis code.
- The Episode Type column displays the type of episode as a link. Clicking this link will open the episode.
- The Submitted By column displays the name of the person who created the request.
- The Status column displays a message that the episode is in process and being worked upon by Qualis Health.
- Clicking on the Episode Type will open up the episode window (shown below).



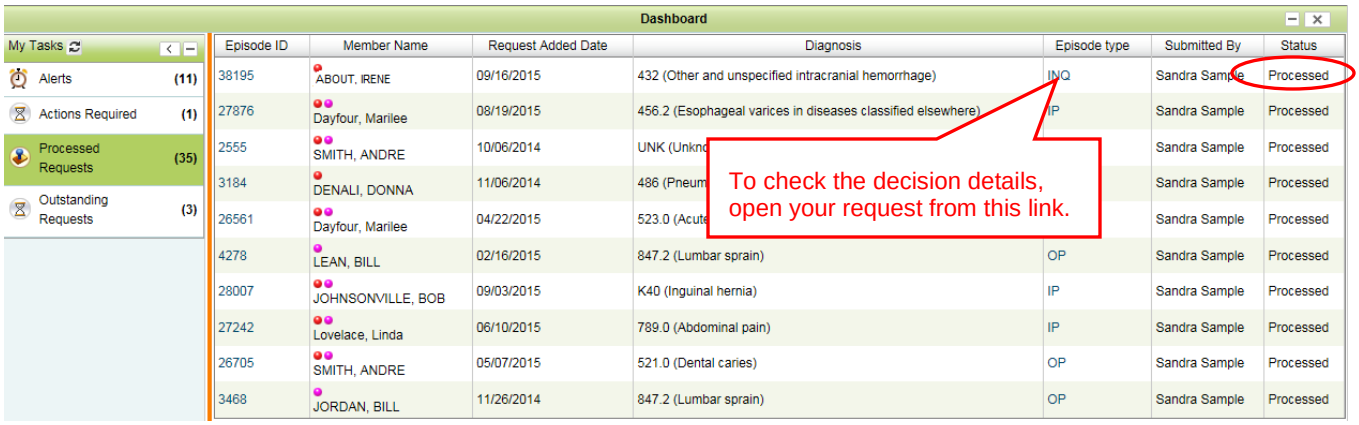
Processed Requests

Once a review has been submitted by you and Qualis Health completes the review, it displays in the Processed Requests tab and triggers an alert notification in My Alerts.

Please note, requests for date extension and continued stay reviews can only be submitted for processed requests.

To check the decision review details, navigate to the Authorization Details tab by opening the episode from within the Processed Requests tab.

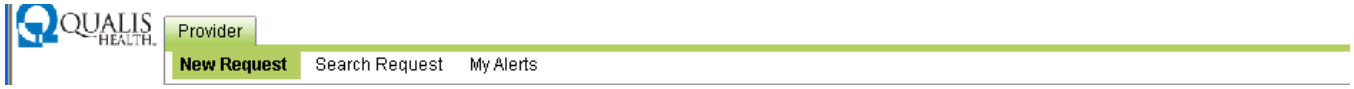
- *Closed and voided cases will drop off the Processed Requests after 30 days.*



- The Episode ID column displays the episode number generated by the program when the provider created an episode for a member. Click on the episode number to view the Episode Abstract.
- If the member has existing episodes associated to them a color coded icon will display above the Member Name. Hovering over or clicking on the icons will provide a pop up explanation of the Episode type.
- The Request Added Date column indicates the date the episode was created.
- The Diagnosis column displays the diagnosis description with the diagnosis code.
- The Episode Type column displays the type of episode as a link. This link can be used to open the episode, which displays the status of the episode.
- The Submitted By column displays the name of the person who created the request.
- The Status column displays a message that the episode has been *processed* (completed) by Qualis Health.

Provider Tab

The Provider tab on the horizontal menu bar enables offers the following options from the sub-tabs:



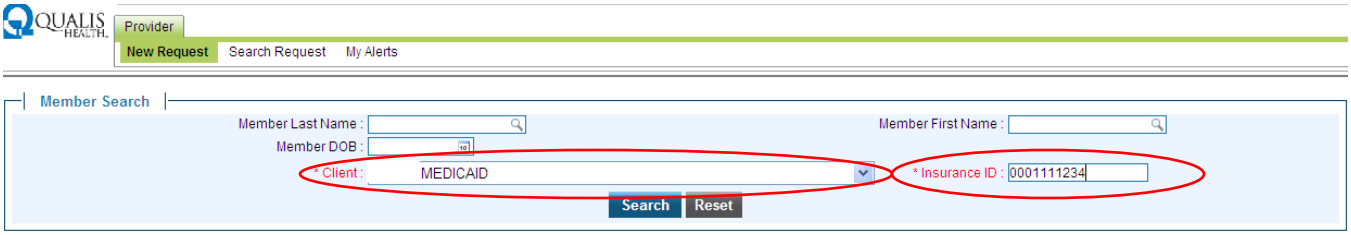
- **New Request**
  - Search for an existing member.
  - Add a new member.
    - Create a new IP/OP Episode.
- **Search Request**
  - Search for existing Episode.
  - Submit a LOS/CSR, Service Extension.
- **My Alerts**
  - Alert notifications for completed or pended reviews

New Request

The New Request tab opens a screen that enables you to create a request for the member.

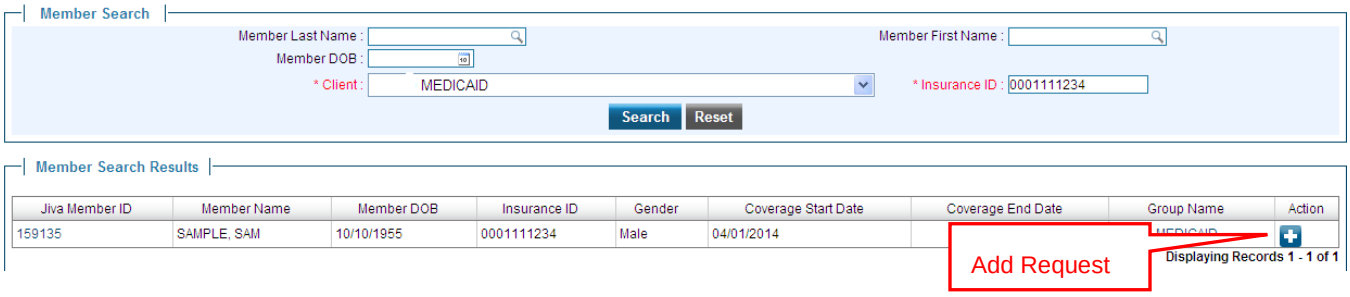
To create a new request:

- Go to the Provider tab and choose New Request. This opens the Member Search screen.

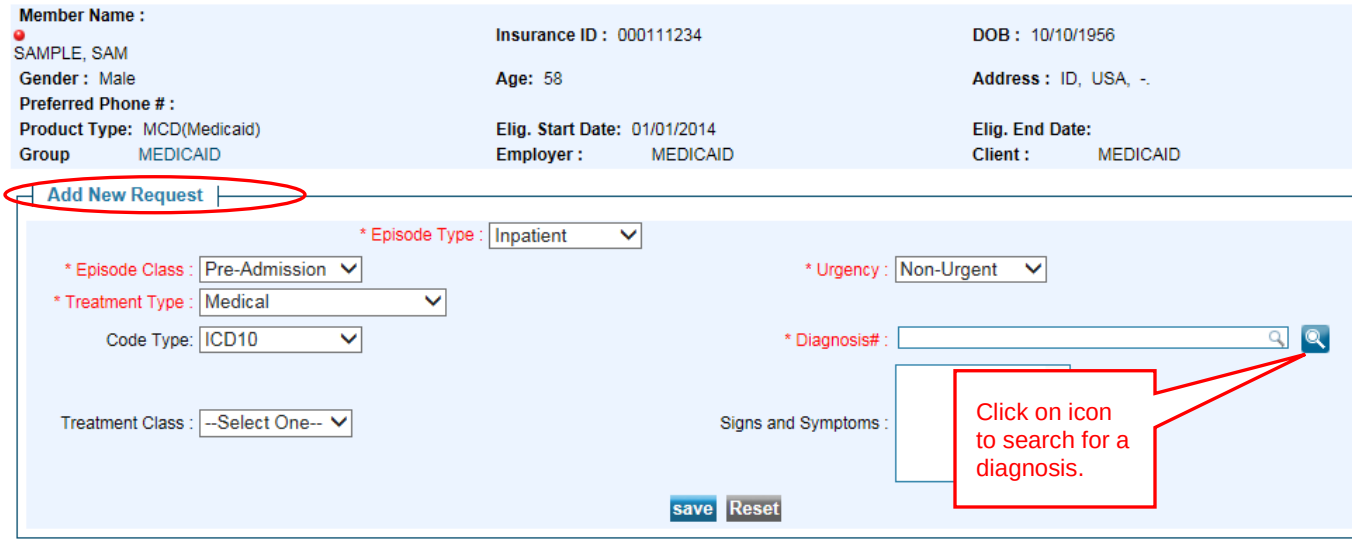


- Select the client (group) name and the member's insurance ID in order to search for the member.
- When the member pulls up (see below), click on the ➕ in the Action column to start a new request.

- *If the member does not pull up, you will get an **Add Member** button to add a new member. Some contracts will require that Qualis Health add any new members.*



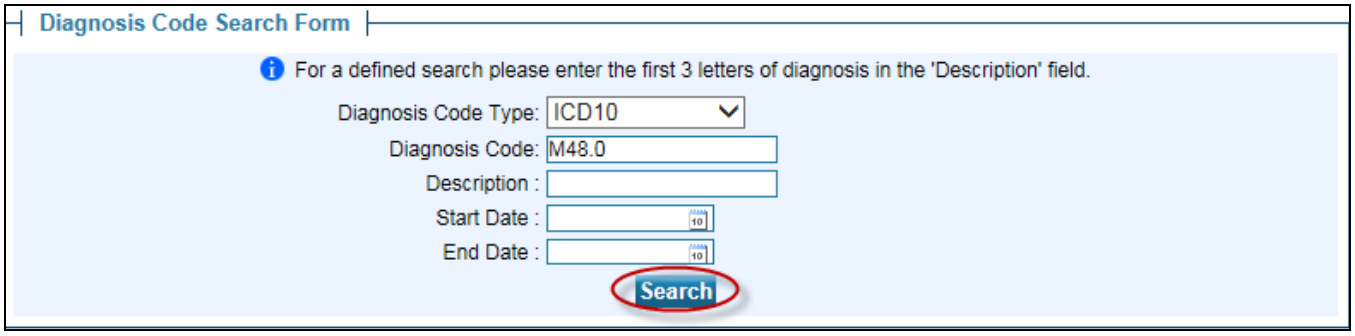
Choose the Episode Type and the **Add New Request** screen will open.



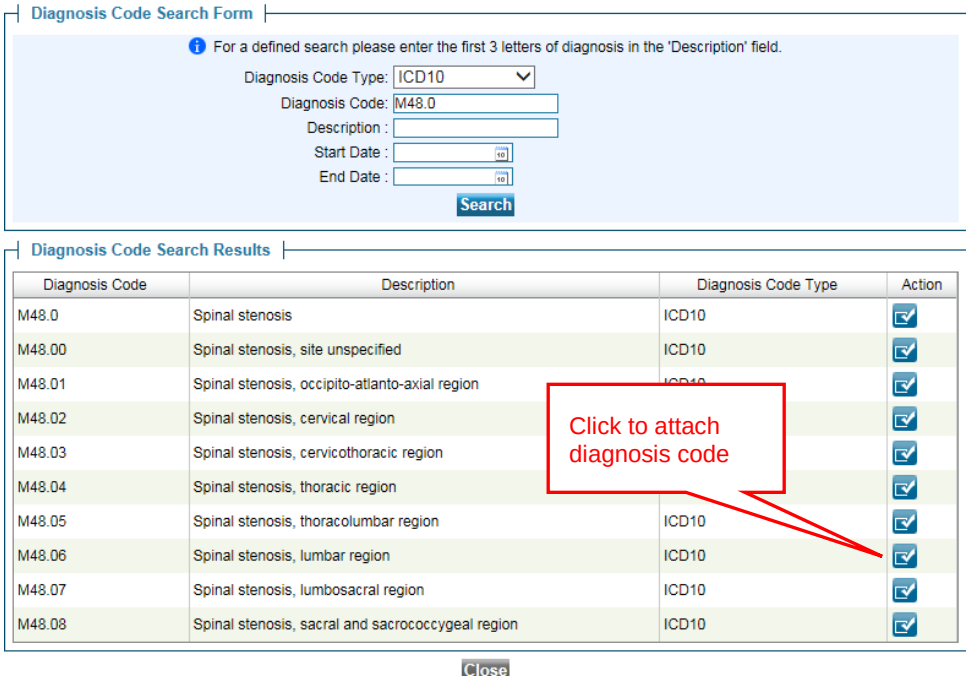
- *Based on the episode type selected, the options of the additional fields change.*

Enter the details as described below.

- Select the episode class from the Episode Class drop-down list.
- Select the urgency of the new request from the Urgency drop-down list.
- Select the treatment type for the new request from the Treatment Type drop-down list. *Note: you must select a correct combination of Episode Class and Treatment Type to continue. Please contact your Qualis Health Support System number for information on combinations.*
- As of 10/1/15 the Code Type defaults to ICD10. ICD9 Code Type will still be available in the drop-down for your use if needed.
- Enter the primary diagnosis code in the Diagnosis# field or:
  - Click  to open the Diagnosis Code Search Form (below).
  - Enter any of the search criteria.
  - Click **Search**.

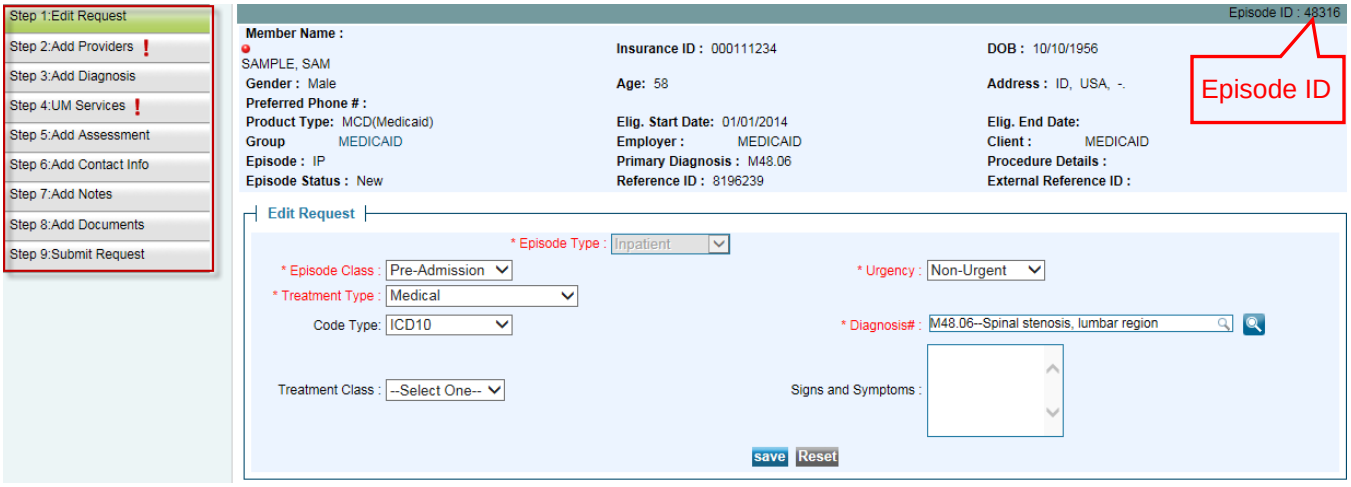


- This displays the search results in the same screen (see below).
- Click  corresponding to the code that needs to be attached. This displays the selected code in the Diagnosis# field.



- Do not use the *Treatment Class* and *Signs and Symptoms* fields.
- Click **Save**.
  - In the event an invalid *Episode Class* and *Treatment Type* combination is selected users will receive an error message "Incorrect product selection". If you need help selecting a correct combination, please contact your *Qualis Health support number*.

When the episode has been saved correctly, the new Episode ID displays in the top right corner and the left-hand navigation panel shows with multiple steps to guide you through the process of submitting a request.



The steps that appear on the Left Navigation Panel are described in detail below.

- ***We recommend that you follow the steps in order.***

Step 1: Edit Request

This displays the Edit Request screen where the request can be modified or edited if needed.

- Update fields as needed.
- Click **Save**.
  - A request **cannot** be edited once it has been submitted.

Step 2: Add Providers

This opens the Providers screen. Each episode must have three Provider types attached.

- *You will need a Requesting, Admitting and Treating provider for each request.*

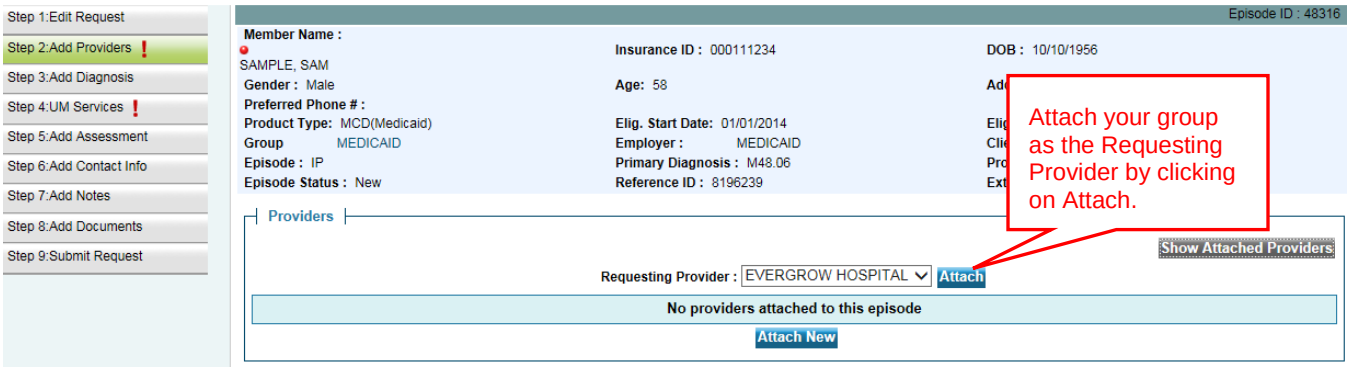
Organization / Requesting – This is how your Group, Practice or Facility is registered with the Qualis Health Provider Portal and how your office is associated to the Episode. If this provider Type/Role is not attached to the episode your group will **not** be able to view the Episode.

Admitting / Facility - Hospitals, facilities, clinics and vendors are identified with a Provider Role of "Admitting". This is for both Inpatient and Outpatient based settings.

Treating / Individual – The ordering or treating provider is identified with a Provider Role of "Treating". This is for both Inpatient and Outpatient based settings.

Step A - Add your Group, Practice or Facility as the Requesting Provider

- Click the **Attach** button.
  - Do not change the Provider Role.



Step B - Add Admitting and Treating Provider Roles

- Click the **Attach New** button. This opens the Provider Search screen, with the **Historical Servicing Providers** button at top right.

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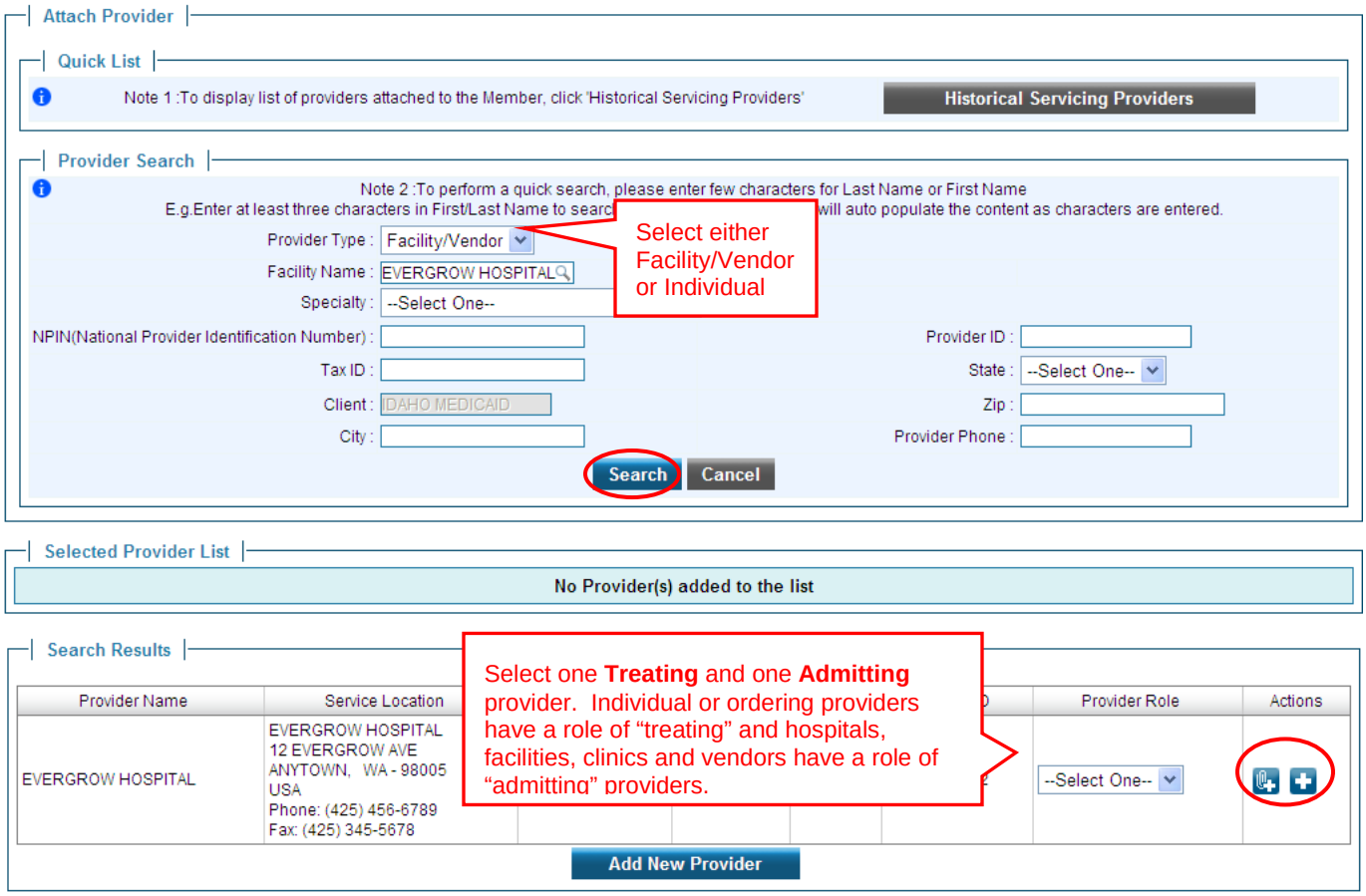


Clicking on the **Historical Servicing Providers** button in the Quick List will display a list of providers in the Search Results who have been associated to previous Episodes for the member. You can add providers in this list to the episode (or to the Selected Provider List) without searching for the providers individually (as described below).

In the Provider Search section, you will see multiple fields that you can search on. However, try to search with the *minimum information possible* and the *fewest possible fields* to get your result. If you enter too many parameters into your search, your results may be poor.

We recommend using the *Provider Type and the Provider Name*, or the *Provider ID* for your search, leaving all other fields empty.

- In the Provider Search section select your Provider Type (Facility/Vendor or Individual) and enter the provider name.
- Click **Search** to display the search results (see below).

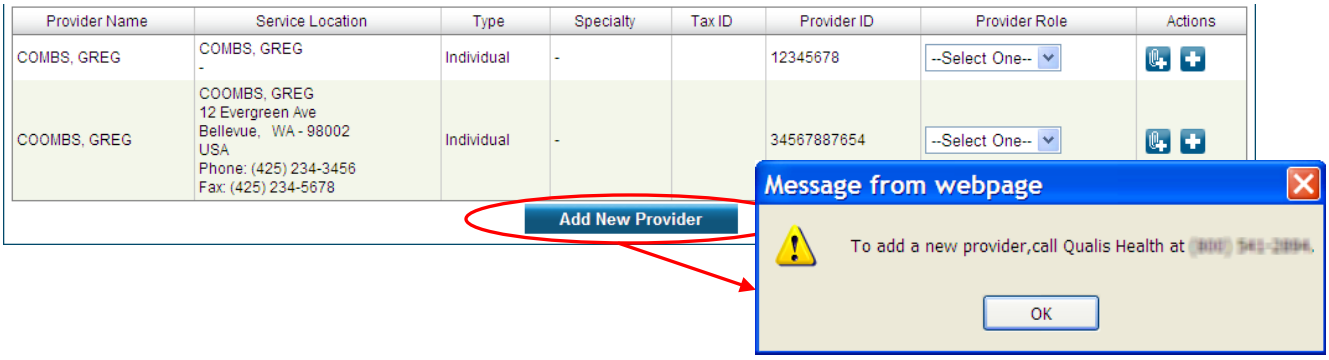


In the Search Results find the provider that needs to be attached and select the Provider Role from the corresponding drop-down lists.

- *Individual or ordering doctors/clinicians have a role of "treating" providers.*
- *Hospitals, facilities, clinics and vendors have a role of "admitting" providers.*

Click  to attach the provider to the request, or  to select multiple providers (see next page).

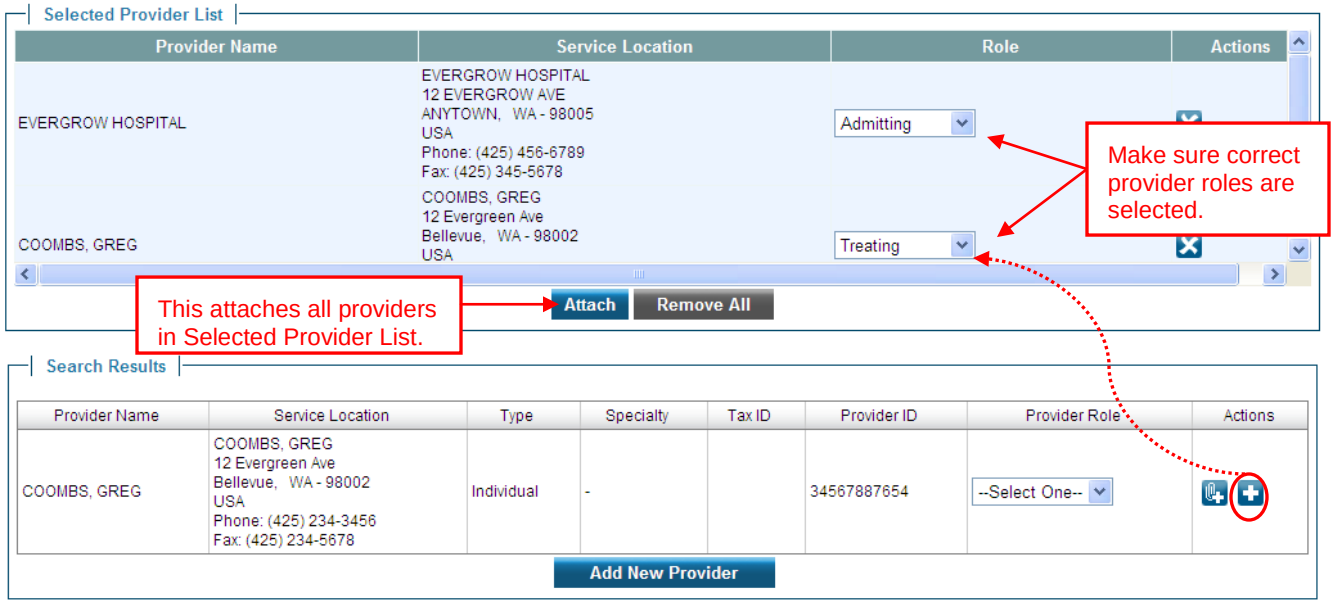
- *You must select a treating provider and an admitting provider.*
- *If you cannot find the provider in the provider search, choosing the **Add New Provider** button at the bottom of the provider screen will show you how to contact Qualis Health to have your provider added.*



Adding Multiple Providers without leaving the Search Screen

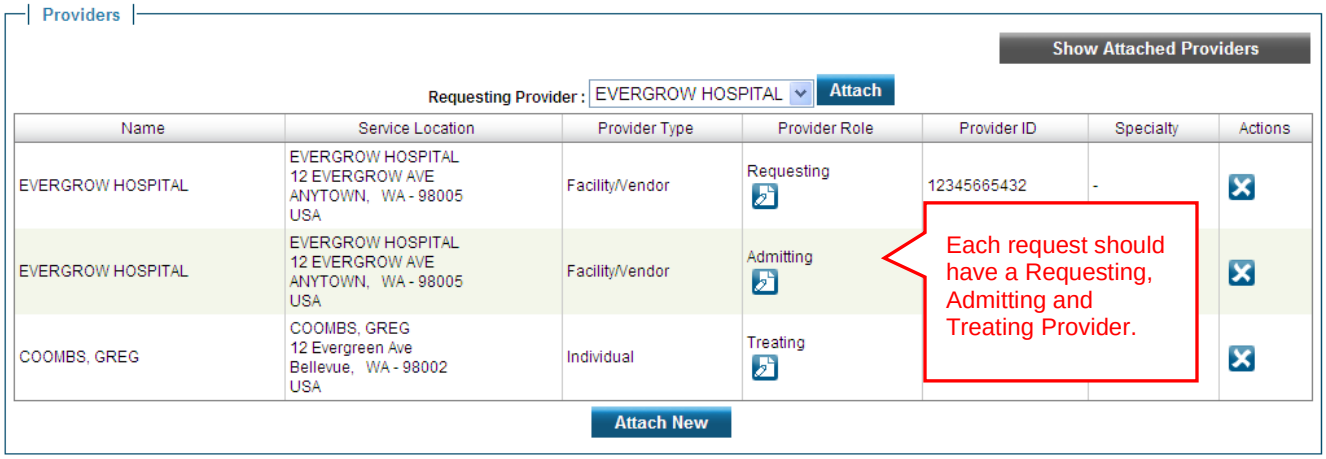
Using the icon allows you to select multiple providers. The Provider Search below shows two providers added to the **Selected Provider List**.

Once you have selected your providers, go to the Provider Role drop-down and make sure the individual doctor is listed as Treating and that the place of service is listed as Admitting. Then click on the **Attach** button.



The screen will display the attached providers. Each request should have a Requesting, Admitting and Treating Provider.

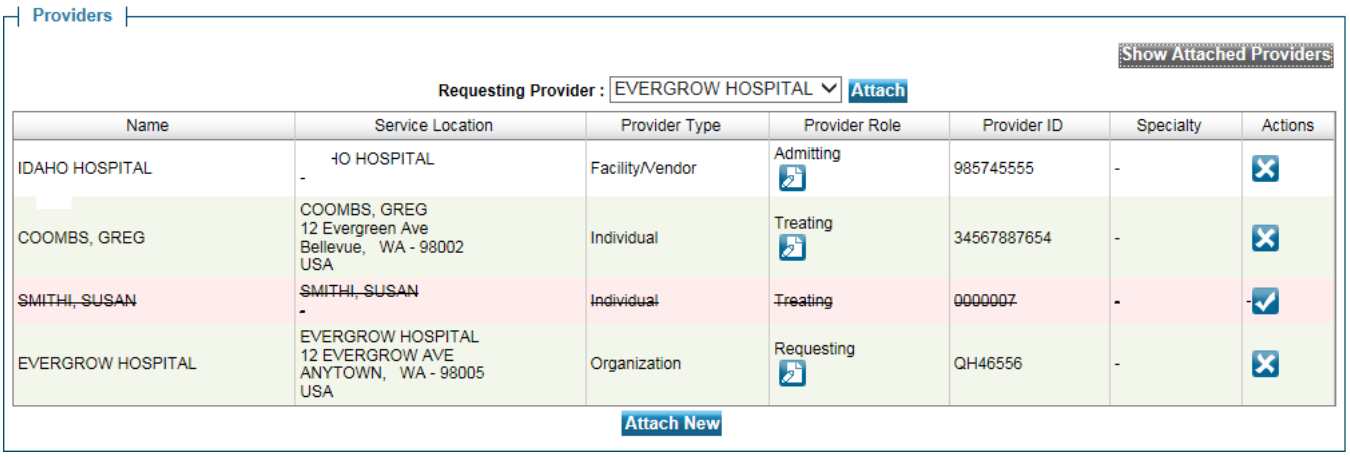
Note: Provider Role selections must be valid or an error message, *Invalid Provider Role for select Provider Type*, will fire and you will not be able to submit the request until you select a correct Provider Role/Provider Type.



- *In some cases the Requesting and Admitting provider or the Requesting and Treating provider may be the same name.*

Removing Providers

If you wish to remove a provider, click to deactivate the provider selected for the request. Click the activate icon to reactivate a provider.

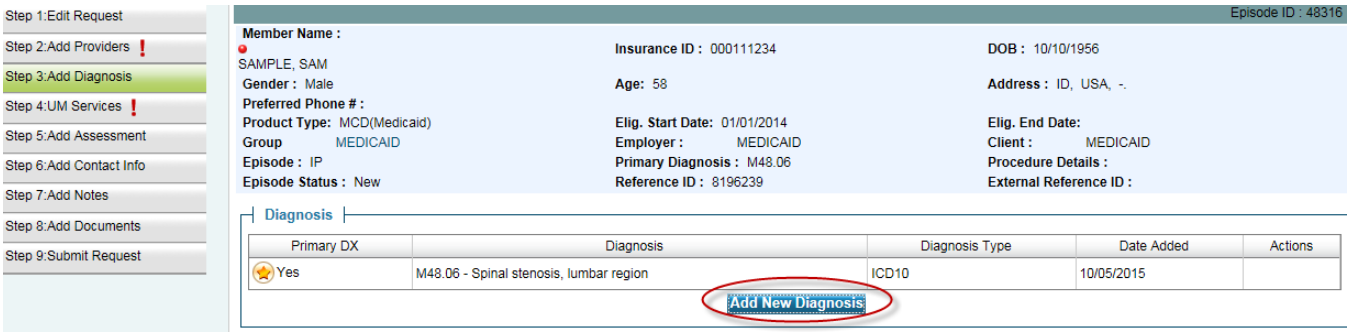


Step 3: Add Diagnosis

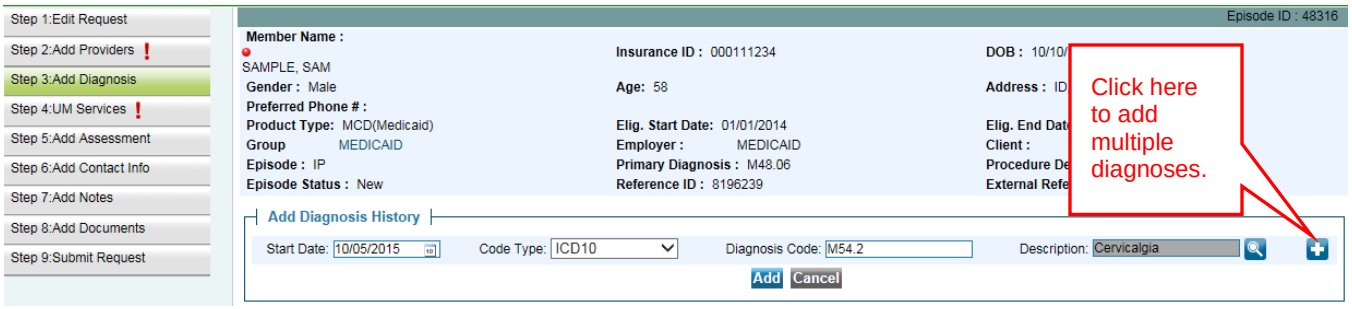
This screen allows you to add an additional diagnosis to the request.

- *The Add Diagnosis tab is not mandatory as the primary diagnosis is pre-populated from the initial request screen.*

- To attach a new diagnosis, click the **Add New Diagnosis** button.



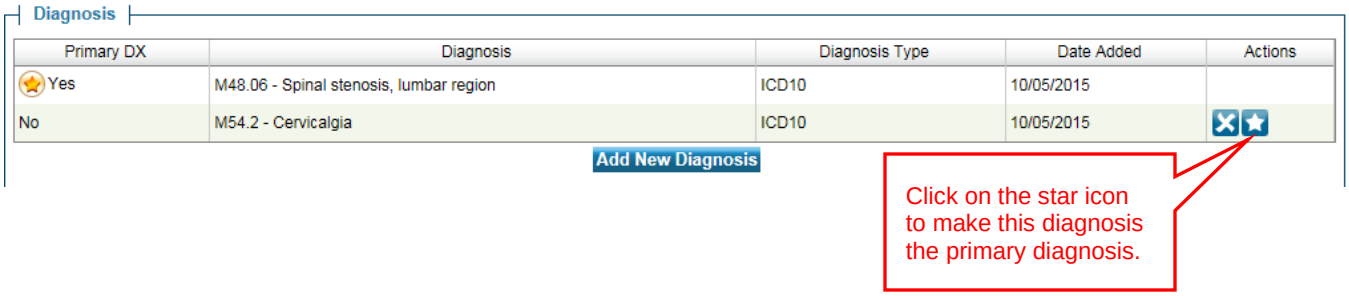
This displays the Add Diagnosis History screen.



- Enter today's date in the diagnosis Start Date field.
- Starting 10/1/15 the Code Type defaults to ICD10. ICD9 and DSM Code Types will still be available in the drop-down for your use if needed.
- Enter the diagnosis code in the Diagnosis Code field or click to open the Diagnosis Code Search Form.
    - In the Diagnosis Code Search Form, enter any of the search criteria.
    - Click **Search**. This displays the search results in the same screen.
    - Click corresponding to the Diagnosis Code that needs to be attached. This displays the selected Diagnosis Code and the Diagnosis Description in the corresponding fields.
    - Click **Add** to save the diagnosis details.

➢ A maximum of 13 diagnoses can be added from the Add Diagnosis History screen.

➢ You can also select which diagnosis will be the primary diagnosis.



Step 4: UM Services

From this screen you can add Stay and Service requests. The screen displays two sections:

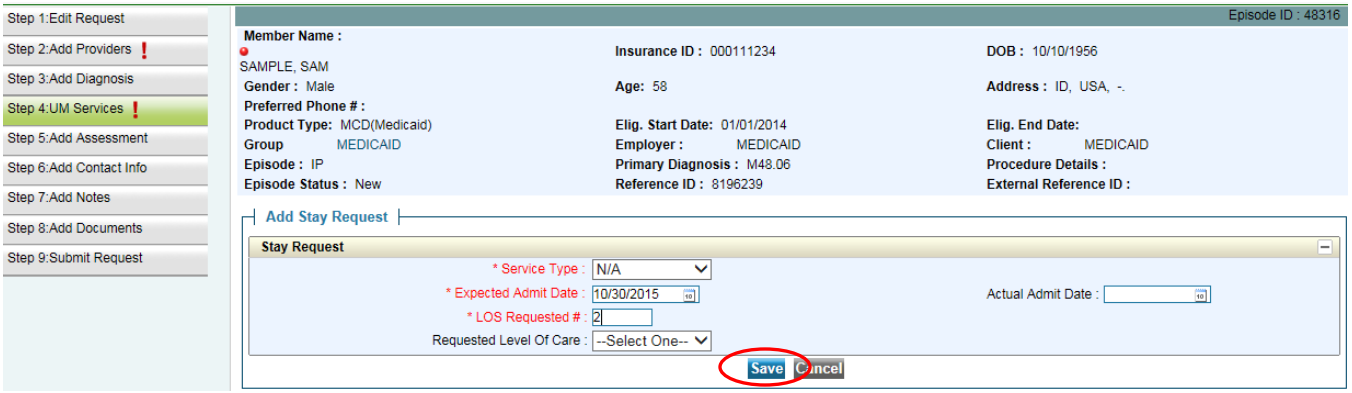
- Stay Request
- Service Request

➢ *In outpatient episodes, only the Service Request section appears.*



To add an inpatient stay:

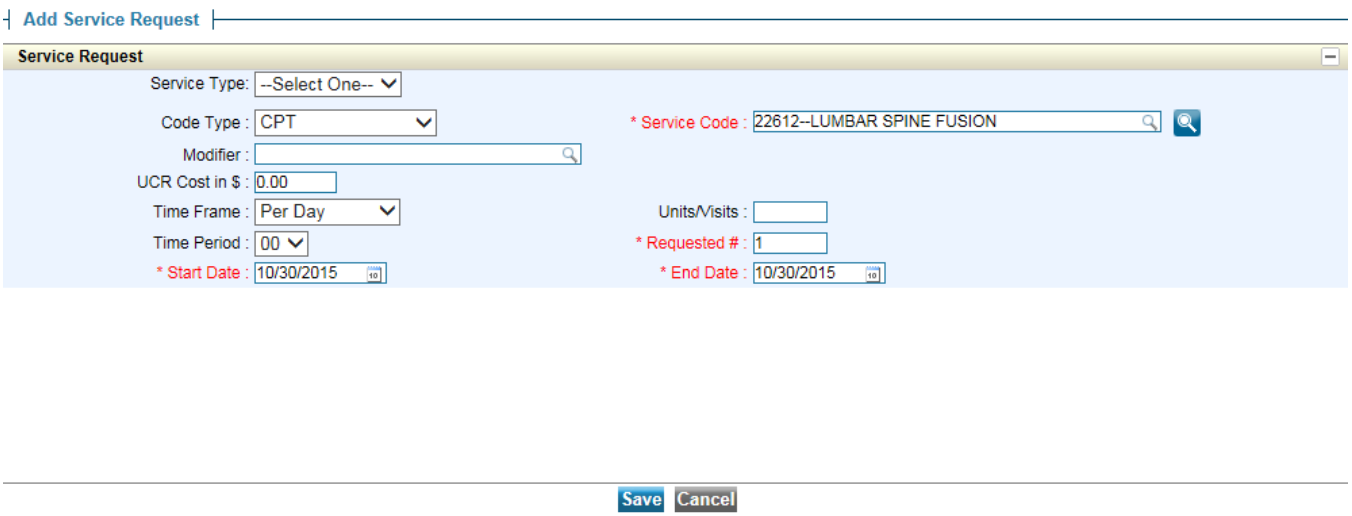
- In the Stay Request section (as shown above), click **Add Stay**.
- This displays the Add Stay Request section in the same screen (below).



- Select NA as the Service Type.
- Click on the Expected Admit Date field to view the calendar and select an admission date.
- If the patient has already admitted, complete the Actual Admit Date field as well. Otherwise, leave blank.
- Enter the length of stay requested in the LOS Requested # field.
- Leave Requested Level of Care blank.
- Click **Save**.

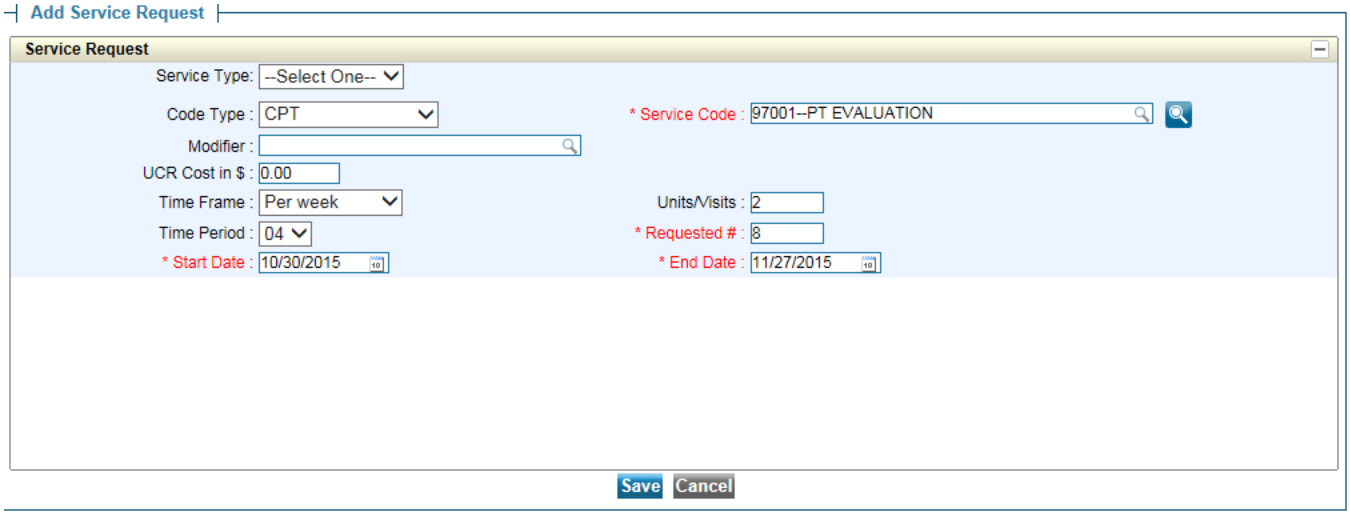
To add a service for outpatient and/or surgical admits:

- In the Service Request section of UM Services screen click **Add Service**. This displays the Service Request section in the same screen.



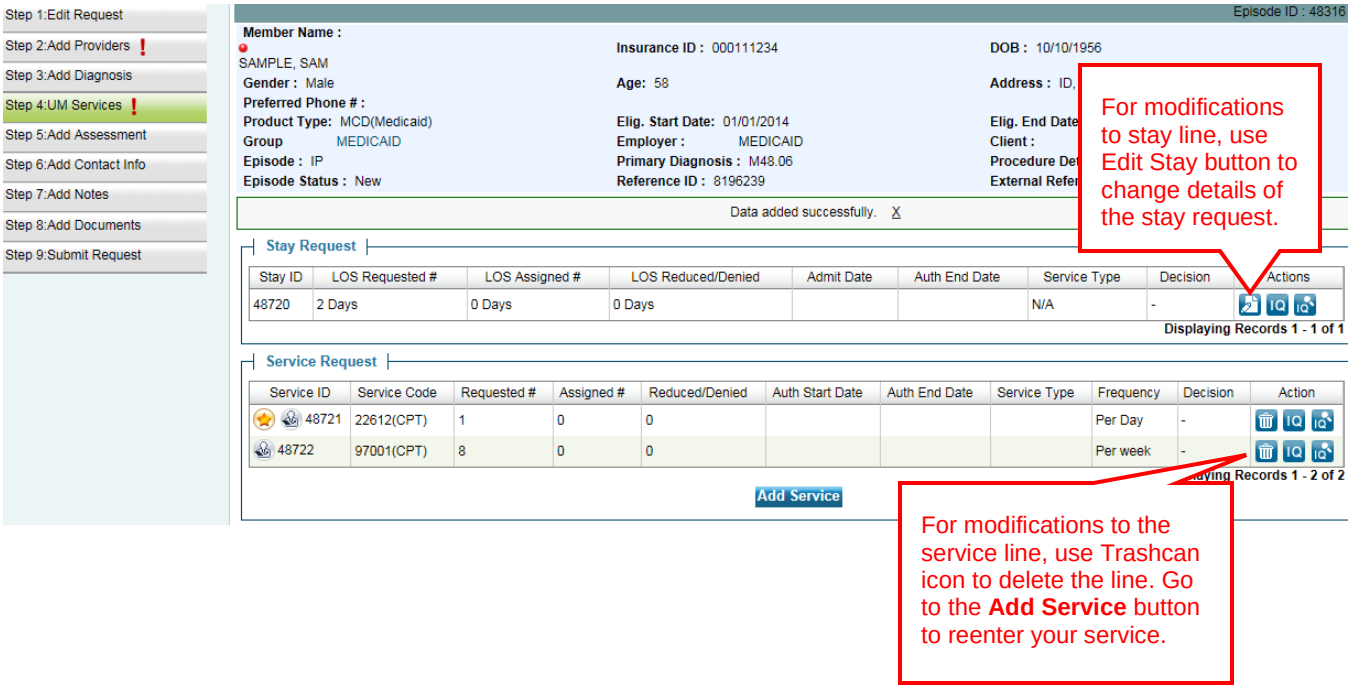
- Enter the service code in the Service Code field or click  to open the Service Code Search window.
    - Enter any of the search criteria.
    - Click **Search**.
    - The search results are displayed on the same screen.
    - Click  corresponding to the code that the needs to be attached. This automatically displays the code in the Service Code field.
- The Code Type will auto-populate based on the service code you select.
- If needed, add a modifier. Typing a letter or number with an underscore (wild card) will give you a drop-down list of modifiers and modifier descriptions that start with that combination. If you cannot add the modifier here, add it in the Notes field (Step 7: Add Notes).
- Select the requested number of services (Requested #). Requested # reflects the individual service (e.g., the provider is doing one lumbar spine fusion).
    - *Note: Time Frame, Units/Visits and Time Period are only used for requests with duration like PT/OT, Home Health visits, DME/HME rentals, etc. Time Frame, Time Period and Units/Visits are inter-dependent - when values are entered in these fields the requested number of units is auto-populated. See the example below for details.*
        - Select the timeframe (how often or frequency) for which the service is ordered. Example: PT is requested 2 times per week for 4 weeks = 8 visits.
            - Time frame = Per Week
            - Units/Visits = 2
            - Time period = 4
            - Requested # = auto-populates to 8
        - In the Units/Visits field, enter the number of visits/units of service (how many) for the time frame selected (e.g. 2 visits per week).
        - Select the Time Period from the corresponding drop-down list. Select the time period (how long) for the length of service requested (e.g. 4 weeks).

- The Requested # of services is auto-populated based on the Time Period selected.



- Click on Start Date to view a calendar and select the start date.
- End Date is auto-generated based on the Start Date and Requested #.
  - *If you need to enter a date range that is not reflected in the auto-populated End Date, please enter that range manually.*
- Click **Save**.

This displays the newly added service in the Service Request section of the screen. For additional service codes, click **Add Service** and repeat the process.



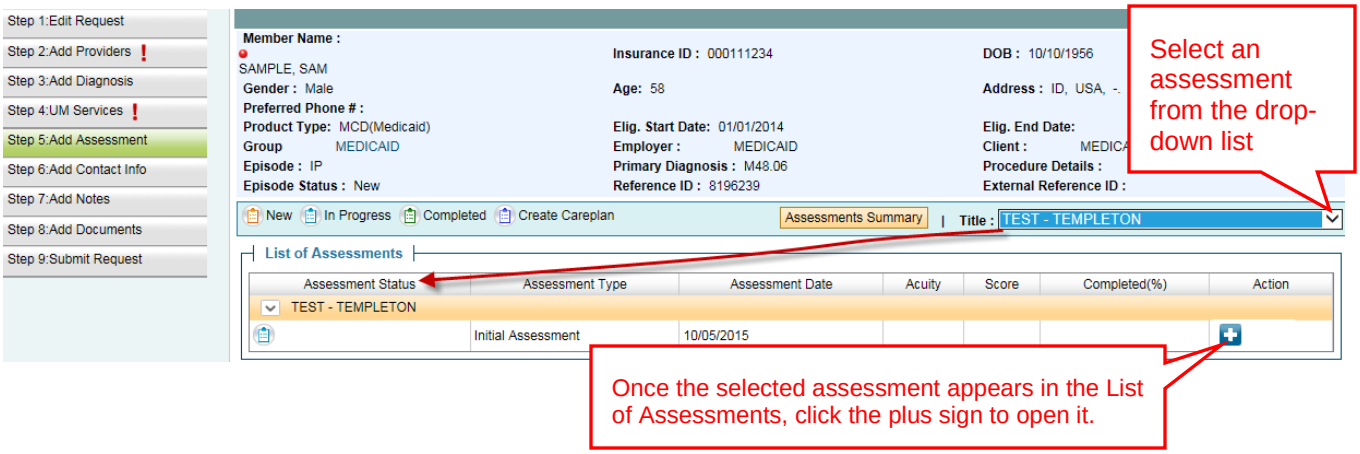
Step 5: Add Assessment

An assessment can be added from this screen if needed.

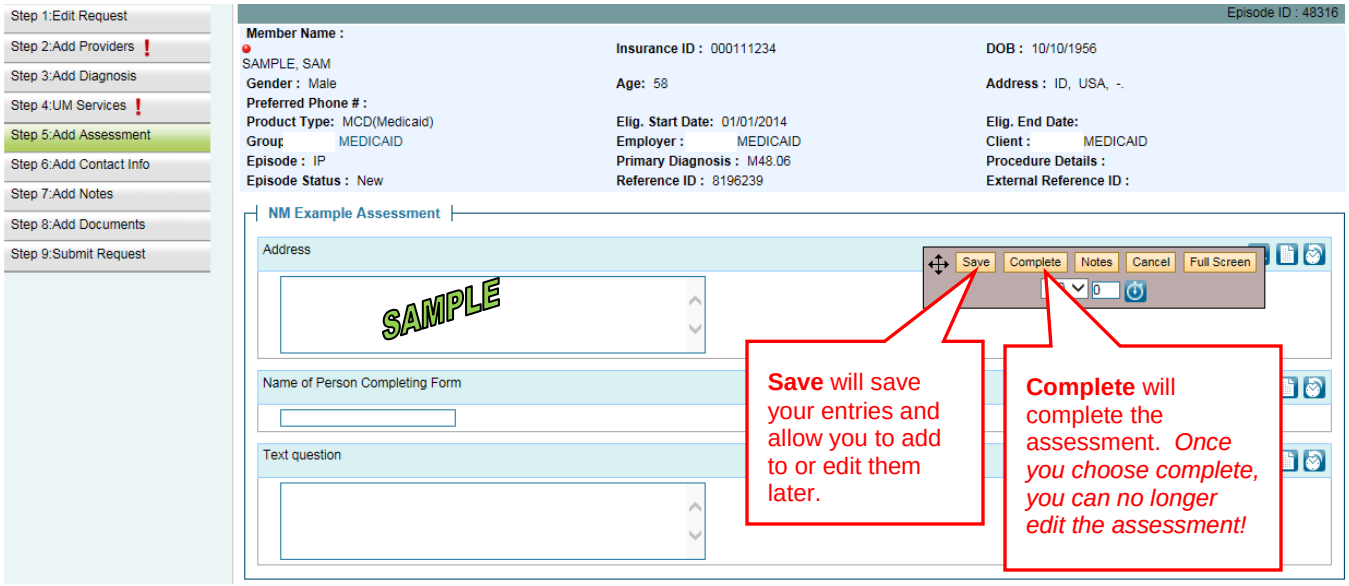
- *The Add Assessment tab is not mandatory as there may not be an assessment for a given service.*

To add an assessment:

- Select an assessment from the Title drop-down list. This displays the selected assessment in the List of Assessments Screen (below).



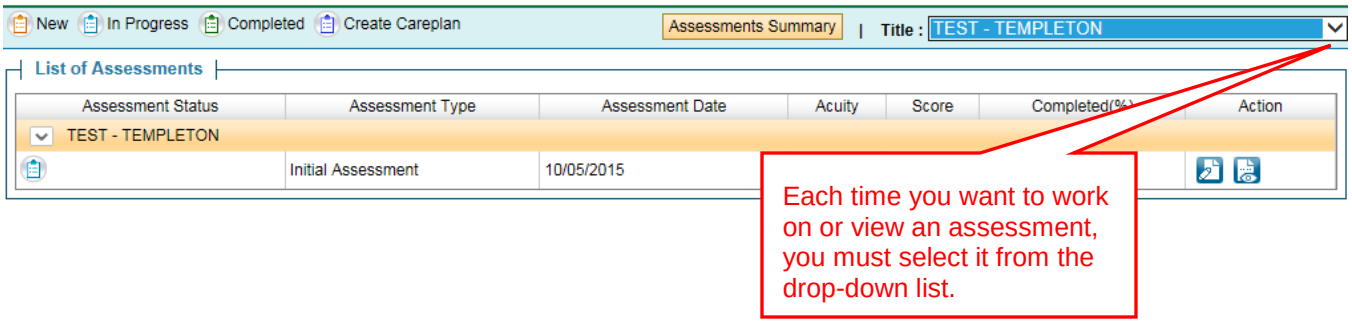
- Click the plus icon to the right of the assessment. This opens the corresponding Assessment.



- Enter the answers to the questions based on the member's medical record.
- After entering the details in the Assessment screen, you can:
  - Click **Save** to save the details entered (incomplete assessment).

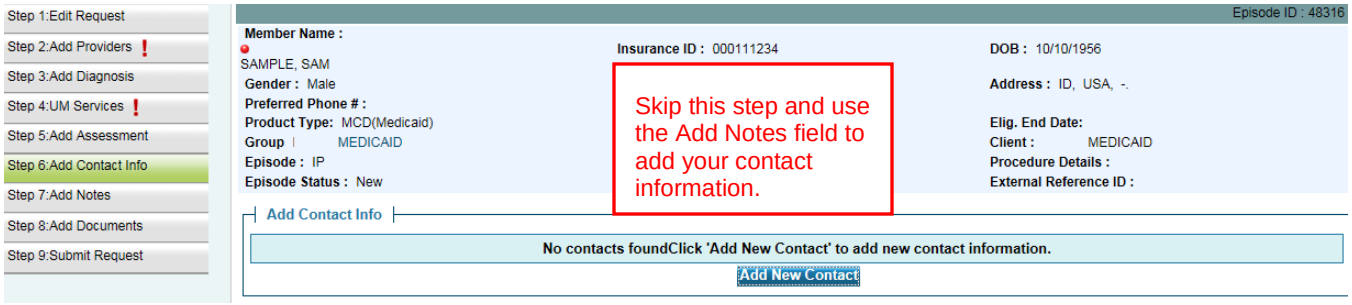
- Click **Complete** to save the details entered and complete the assessment. *Once you choose complete, you can no longer edit the assessment.*
- Click **Notes** to enter brief description on the assessment.
- Click **Cancel** to close the assessment without saving the details entered.
- Click **Full Screen** to view the assessment in full screen mode.
- Click **Normal** to return to normal view mode.

- In the List of Assessments screen, reselect your assessment from the drop down list and click to edit the assessment or to view the assessment summary.



Step 6: Add Contact Info

We are not using this screen at this time. Your contact information is added in the next step, Step 7: Add Notes.



Step 7: Add Notes

Notes related to the review are added on this screen. Enter your name, phone and fax as the person submitting the request, along with any pertinent clinical information. When Qualis Health has information about your request, or needs additional information, they will request it in this Notes field. An Alert will be sent to inform you of new notes sent by Qualis Health.

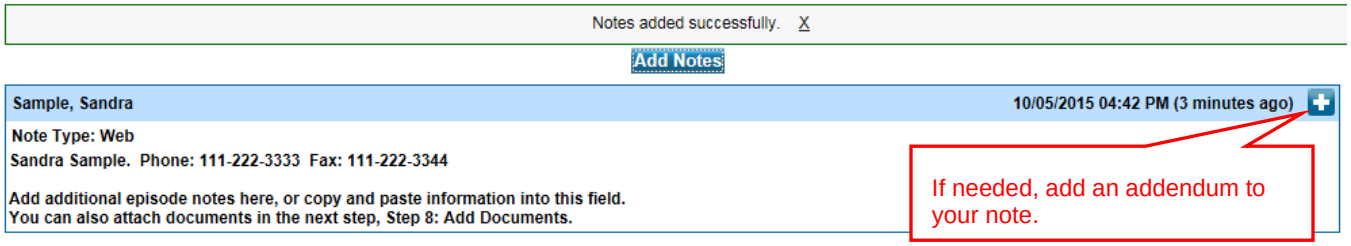


To add a note:

1. Click **Add Notes**.
2. Enter pertinent information.
3. Click **Save**.



This displays the newly added episode notes in the Episode Notes screen.



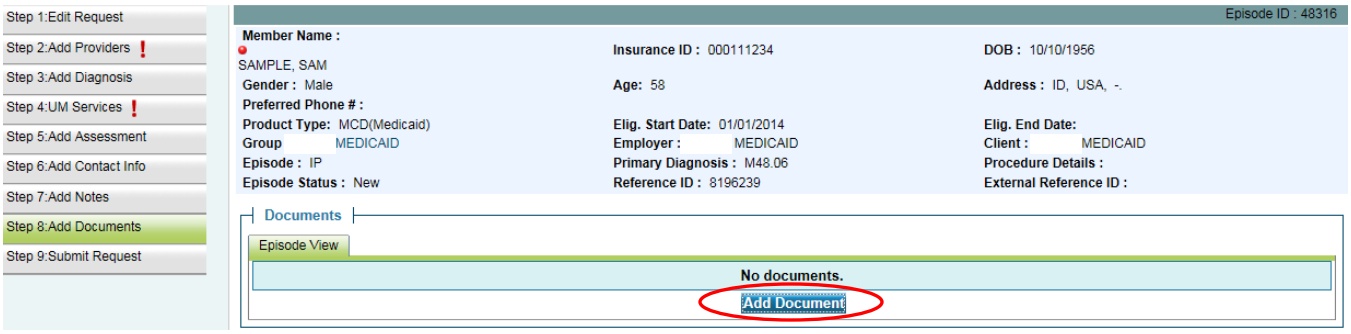
Addendum: In addition to the initial note, an addendum can be added using the plus icon in the Episode Notes' section. Addendums are supplementary or additional notes added to the initial notes.

Step 8: Add Documents

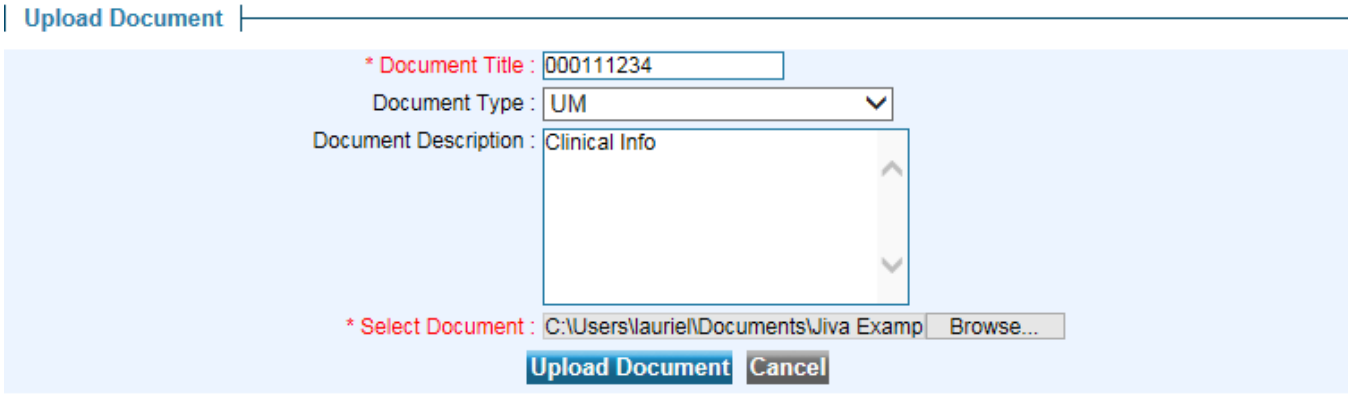
Clinical documents relevant to the episode can be uploaded here.

To upload a document:

- Click the Add Documents tab on the Left Navigation Panel. This displays the Documents screen with the **Add Document** button.

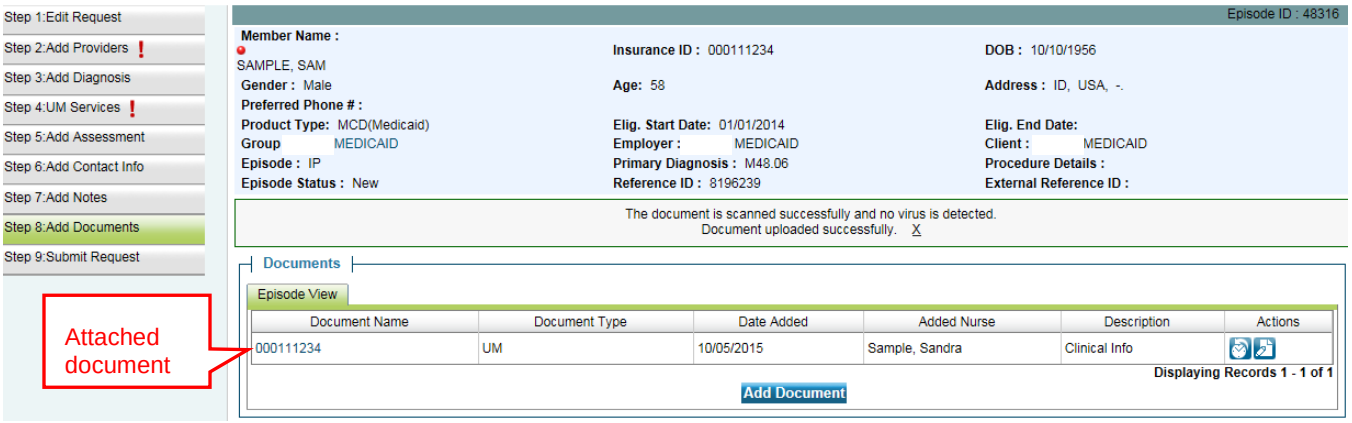


- Click **Add Document**. This displays the Add Document screen (below).



- Enter the title of the document to upload in the Document Title field. **Please use the Member ID for the document title.**
- Select the type of document from the Document Type drop-down list.
- Enter a brief description for the document, if any, in the Document Description text box.
- Click **Browse** to navigate to the location of the document and select it.
- Click **Upload Document** to upload the document. This displays the uploaded document in the Documents screen.

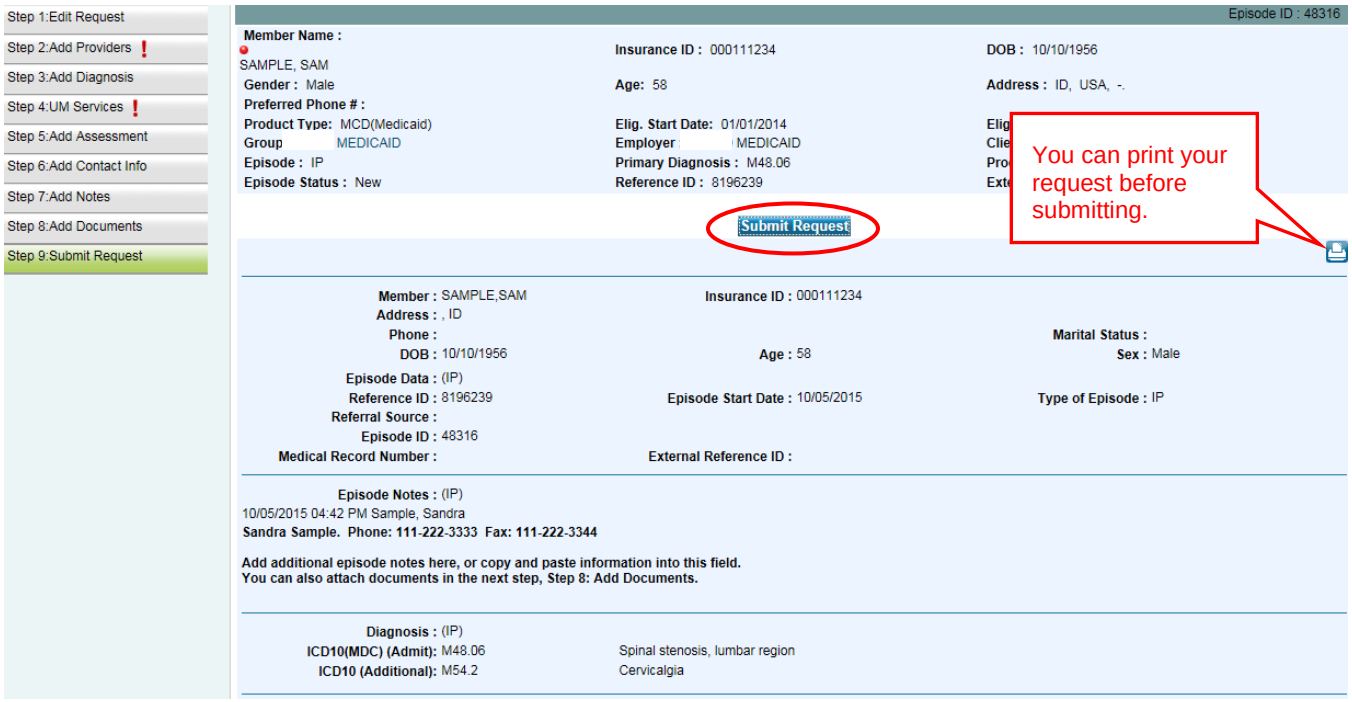
➢ *Uploaded documents can include image files (.jpg, .png, .bmp, etc.) for radiology images.*



Step 9: Submit Request

This tab will display your entire request to this point. Review your request and add or edit as needed. Once you are done, click **Submit Request** to submit the request to Qualis Health.

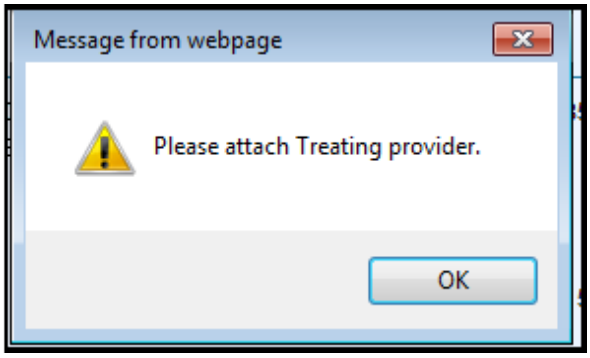
- This displays the message: *Do you want to submit this Request?*
- Click **OK** to submit the request.



Missing Information (prior to submission**)**

If required information is missing from the Episode you'll receive a pop-up message indicating what's required, or which Step needs to be completed.

Update the required information, and submit request.



Once a review was submitted successfully, a confirmation message will display providing the Member Name, Reference ID and Authorization Type.

Once Qualis Health has completed the review and changed the episode status, the request will move from your Outstanding Requests to Processed Requests on your Dashboard. If a request has been pended for additional information, you should receive an alert in My Tasks under Alerts.

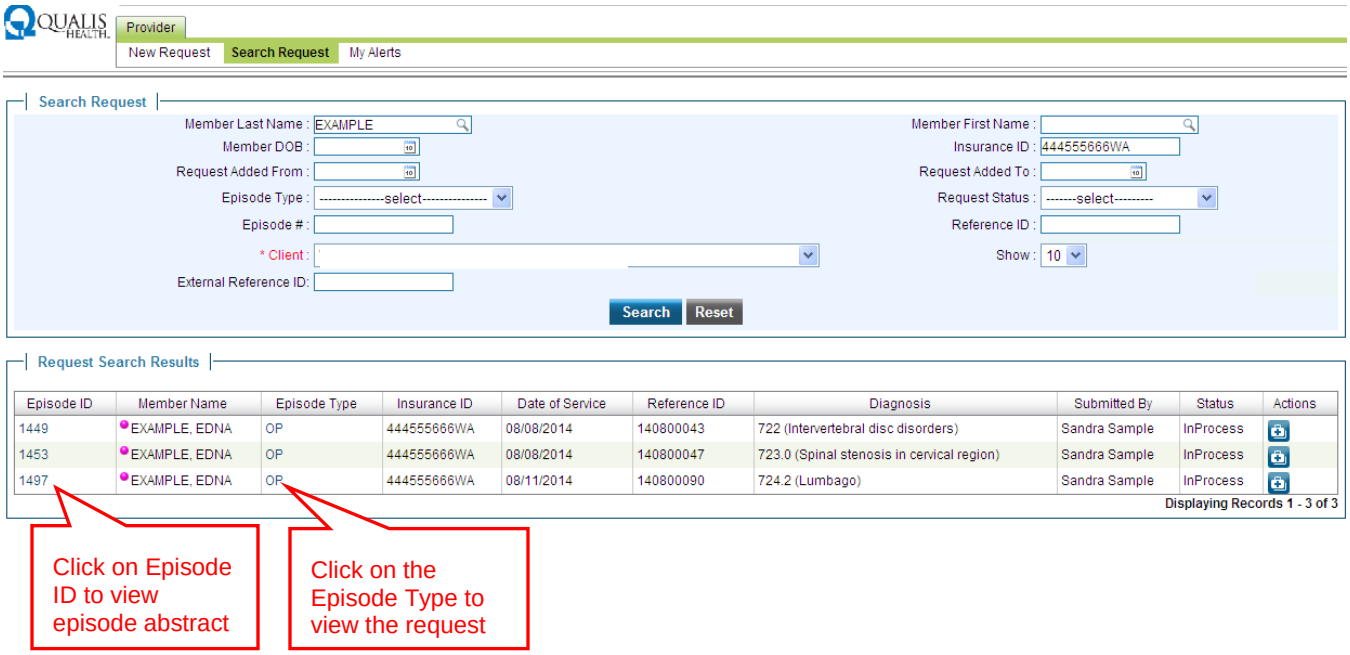
Search Request Tab

Qualis Health Provider Portal enables providers to search for an existing request using the Provider>Search Request tab.

The Search Request screen has multiple fields that you can search on. Try to search with the *minimum information possible* and the *fewest possible fields* to get your result. If you enter too many parameters into your search, your results may be poor.

To search for an existing request:

- Click the Search Request tab to display the Search Request screen.
- Select the client from the Client drop-down.
- You must enter a value for at least *one* of these search fields:
    - Insurance ID *or*
    - Reference ID *or*
    - External Reference ID *or*
    - Requested Added From & Request Added To
- Once you have entered your search parameters, click **Search**. This displays the search results on the same screen.



The search results display the status of each request submitted by the provider. Refer to the Authorization Request Statuses table (next page) for different statuses and their description.

- *The request status will change based on the episode status and not with the decision of the episode.*

In the Request Search Results screen:

- Click the Episode ID link to view the episode abstract.
- Click Episode Type link to view or work on a request.

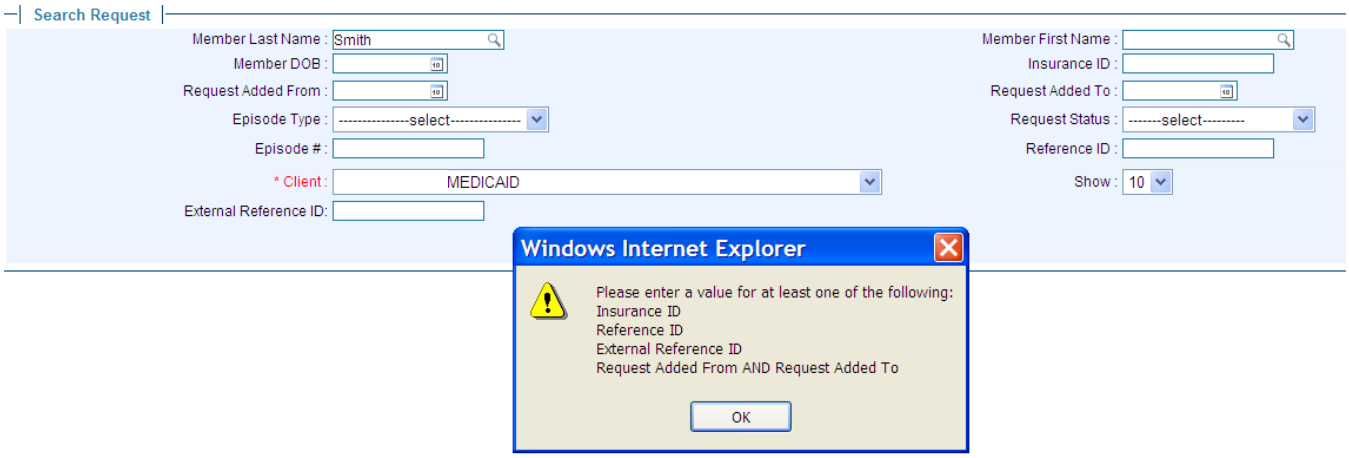
When starting a new search, use the **Reset** button to erase any information you entered in the search fields from your last search, unless you want to retain that information for your new search.

The Authorization Request Statuses table describes the different statuses of requests submitted for authorization:

Table: Authorization Request Statuses

Status	Description
Pending for submission	The request has not yet been submitted for authorization by the provider.
InProcess	The request has already been submitted to Qualis Health by the provider.
Processed	The request has been decisioned or closed by Qualis Health.

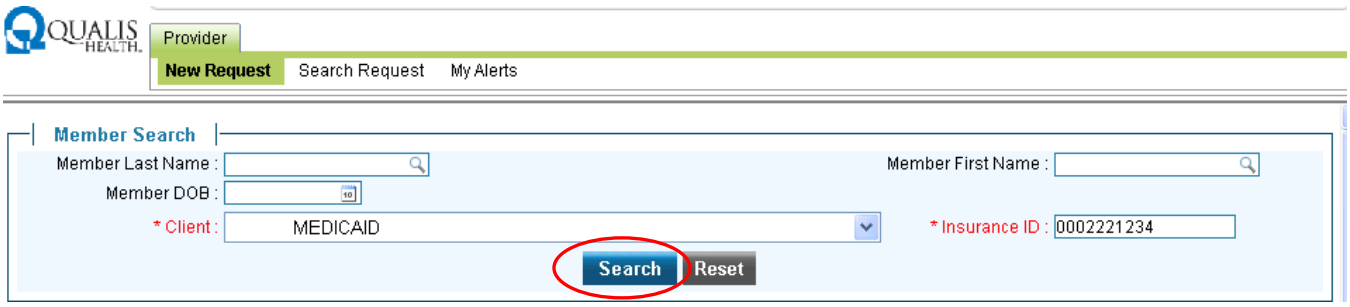
Incorrect Search Parameters will return an error message indicating additional parameters needed for a search.



Add New Member

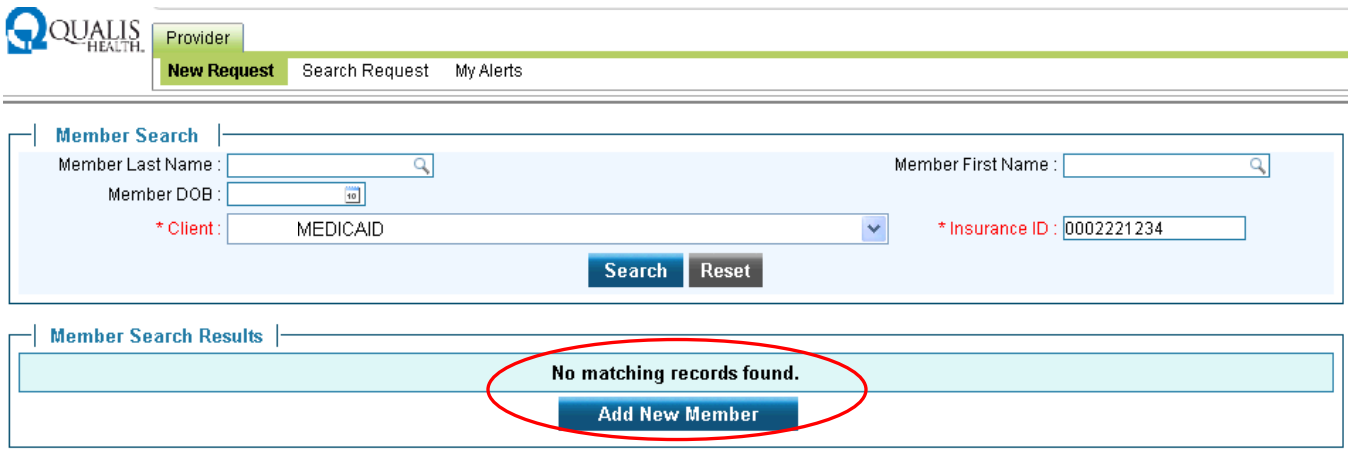
If you search for your member and they are not found, you will be given the opportunity to add them to the database as a new member. Not all Client Groups allow you to add a new member record. If you are unsure of whether your group allows this, please contact your *Qualis Health representative*.

To search for your member, go to Provider>New Request> and enter the member information. You must enter the Client and the Insurance ID. We recommend that you use *only* these fields in your search. Click on the **Search** button. (Example below uses Idaho Medicaid.)

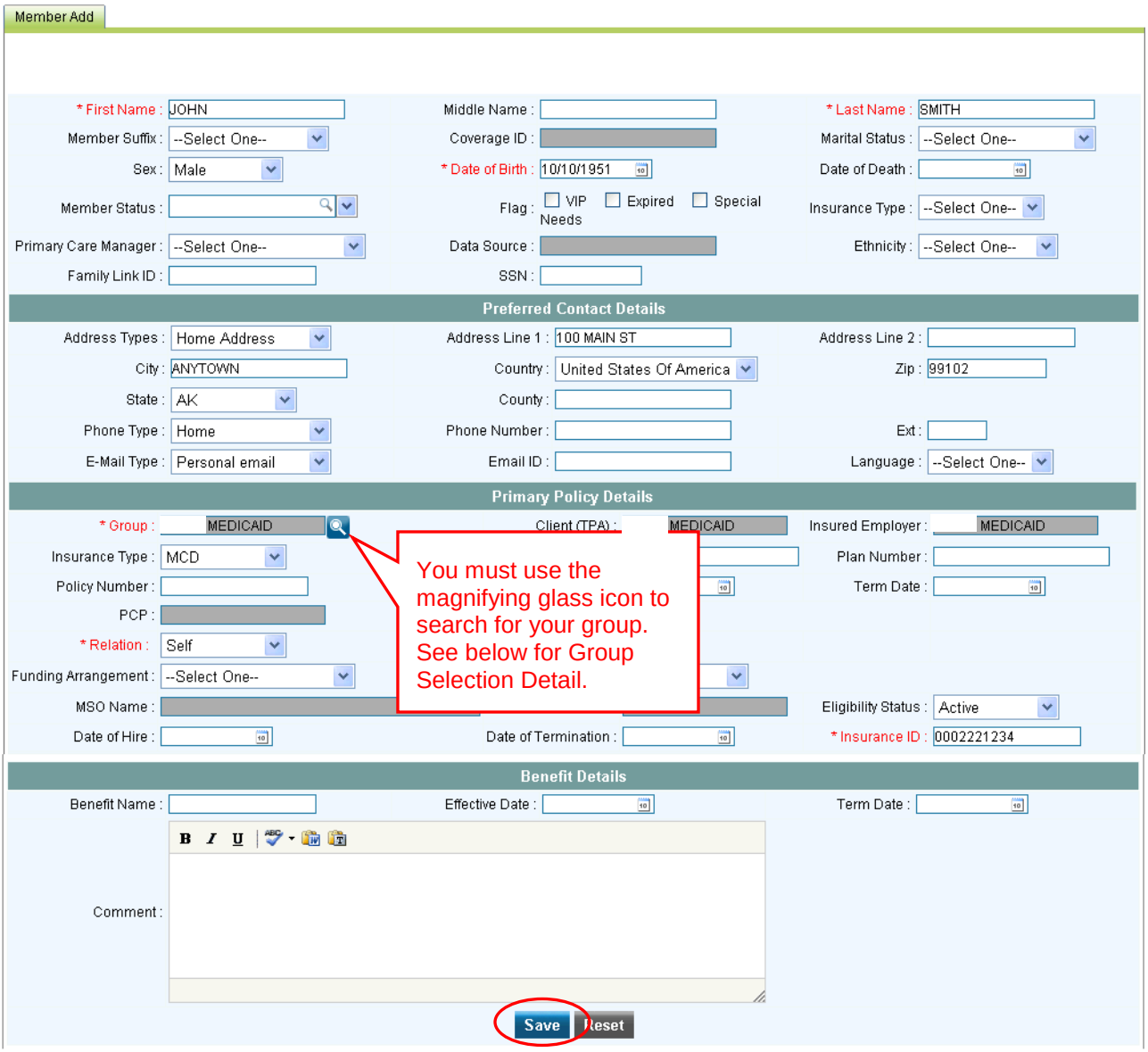


If the Search returns *no matching records found*, it will display the **Add New Member** button.

- Click the button to go to the Member Add screen.



Fill out the needed fields using **ALL CAPITALS**. Mandatory fields are indicated with an asterisk and red font. Fields "Sex" and "State" are also required fields. In the Group field, you must use the magnifying glass to search for your group and add it to your form. See *Group Selection Detail* for more details.



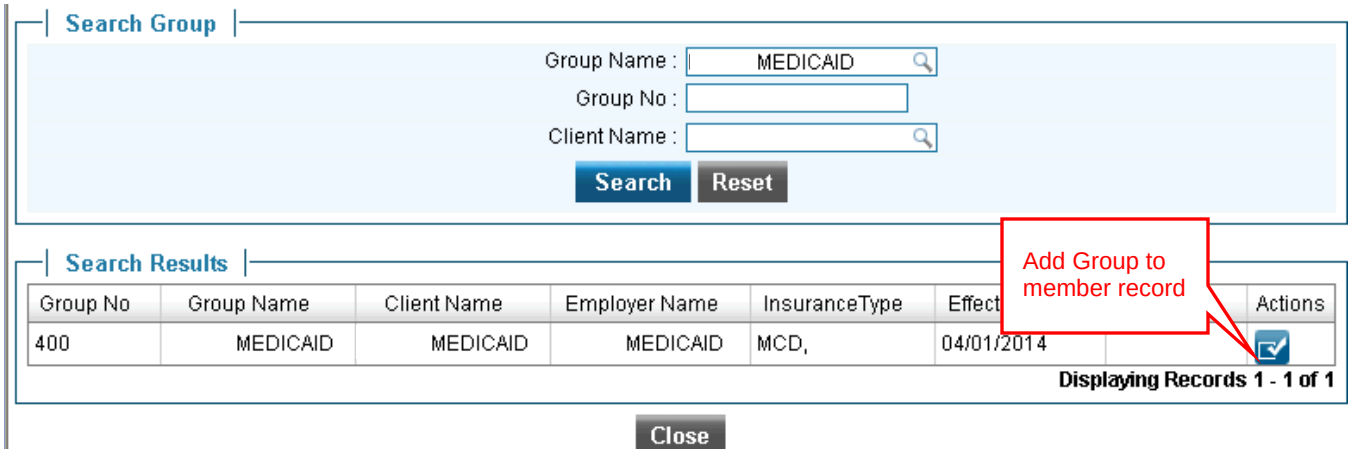
- When you are done, click the **Save** button at the bottom of the form. The new member record will be saved and you will then be able to add a new request for that member.

Group Selection Detail

You must type at least the first three letters of your group to pull up your group name.

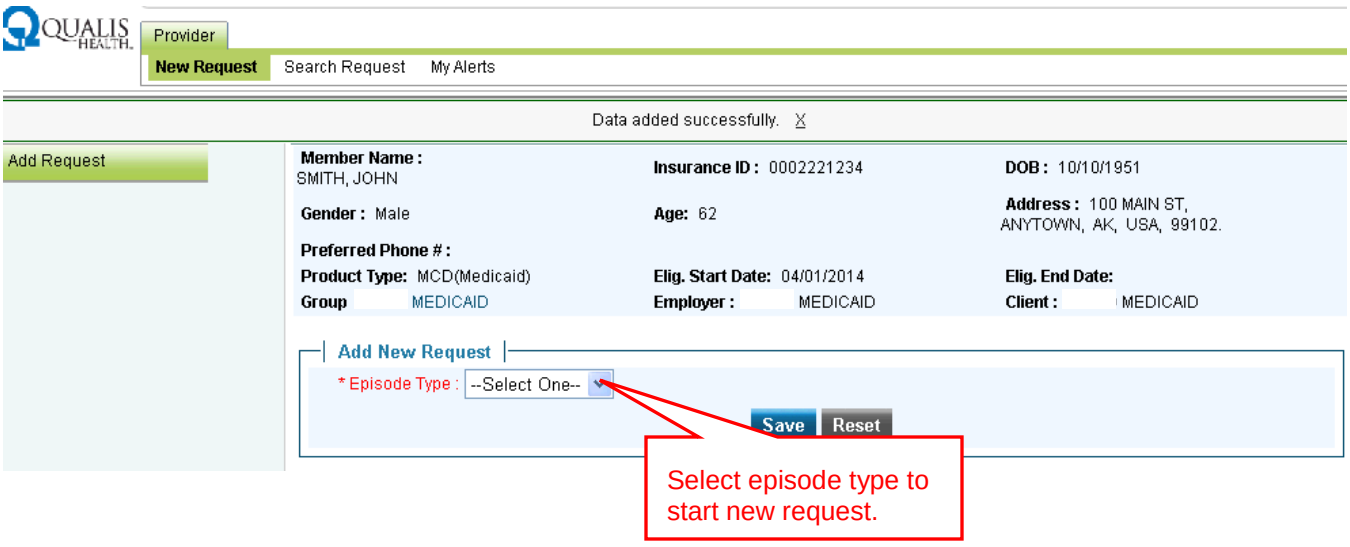


➢ *Your group name can be found in the Client drop-down list when you search for your member.*



Select the checkbox to choose your group and add it to the member record.

When you have completed the member record, click the **Save** button at the bottom of the form. The new member record will be saved and you will then be able to add a new request for that member.



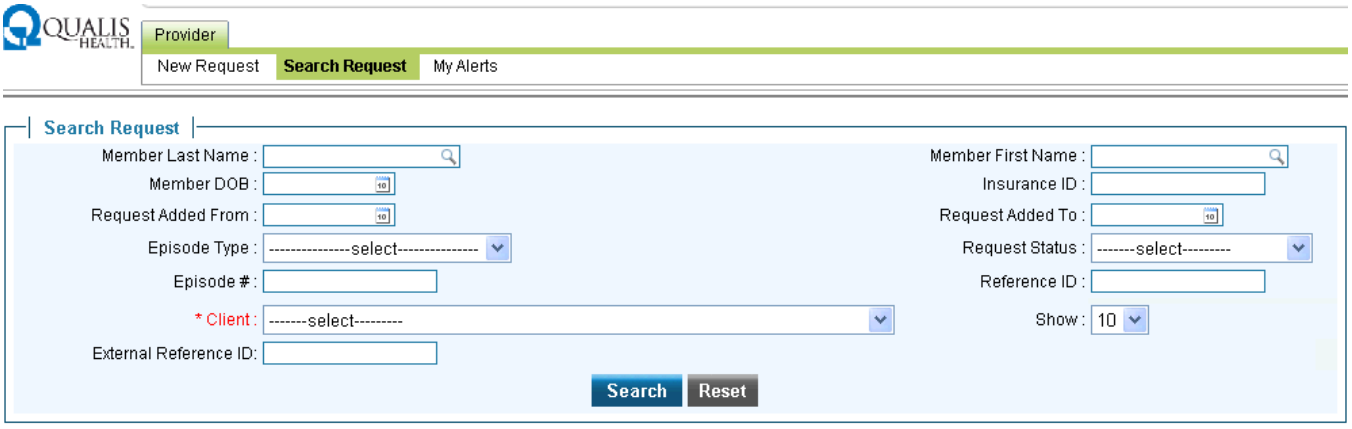
View or Work on a Request

Qualis Health Provider Portal enables you to access a request at any point of time. You can:

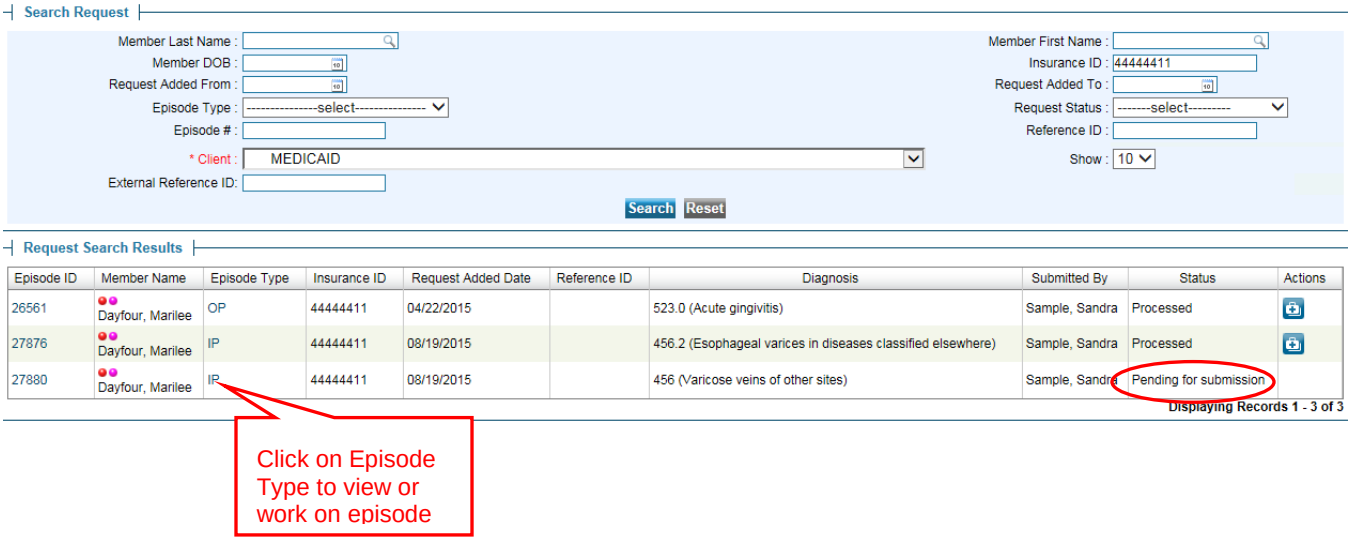
- Access a request pending for submission;
- Access a submitted request;

To view or work on a pending request:

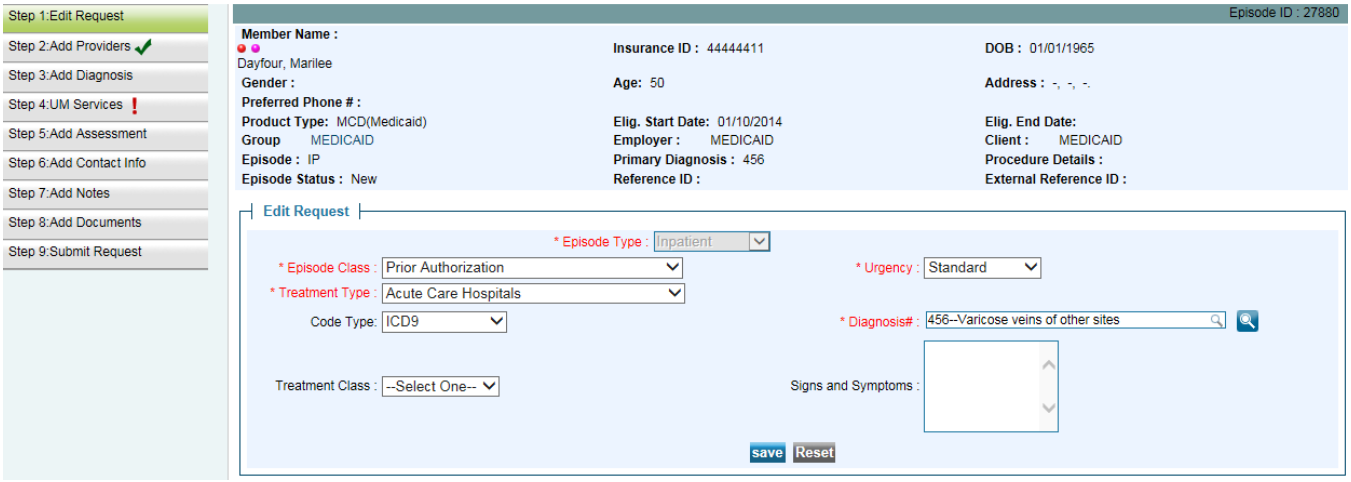
- Click the Search Request tab under the Provider tab to display the Search Request screen.



- Perform a search for the pending request by selecting a client and entering your search criteria. Try to search with the *minimum information possible* and the *fewest possible fields* to get your result. This displays the search results (below).



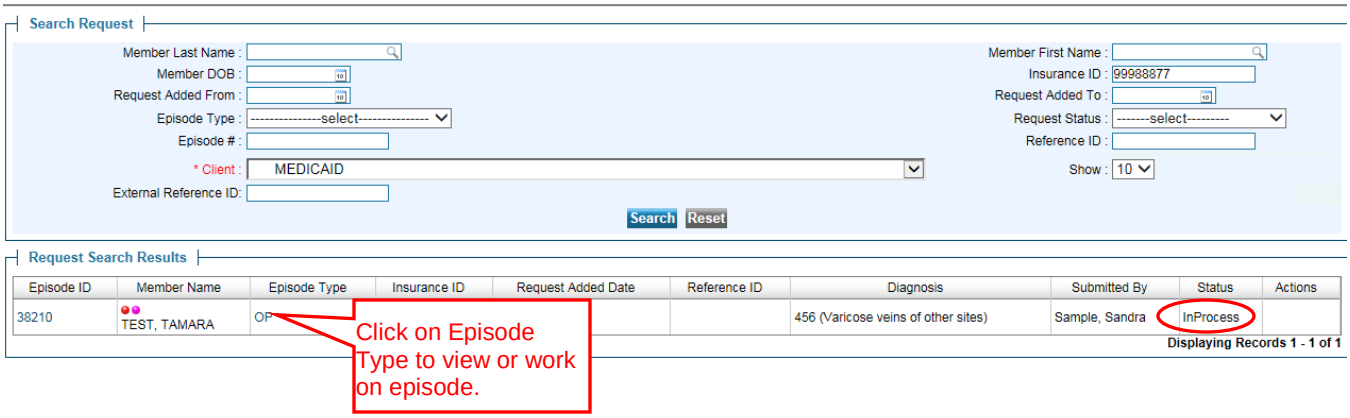
- Click on Episode Type (as shown above). This opens the Edit Request screen with Left Navigation Panel (below).



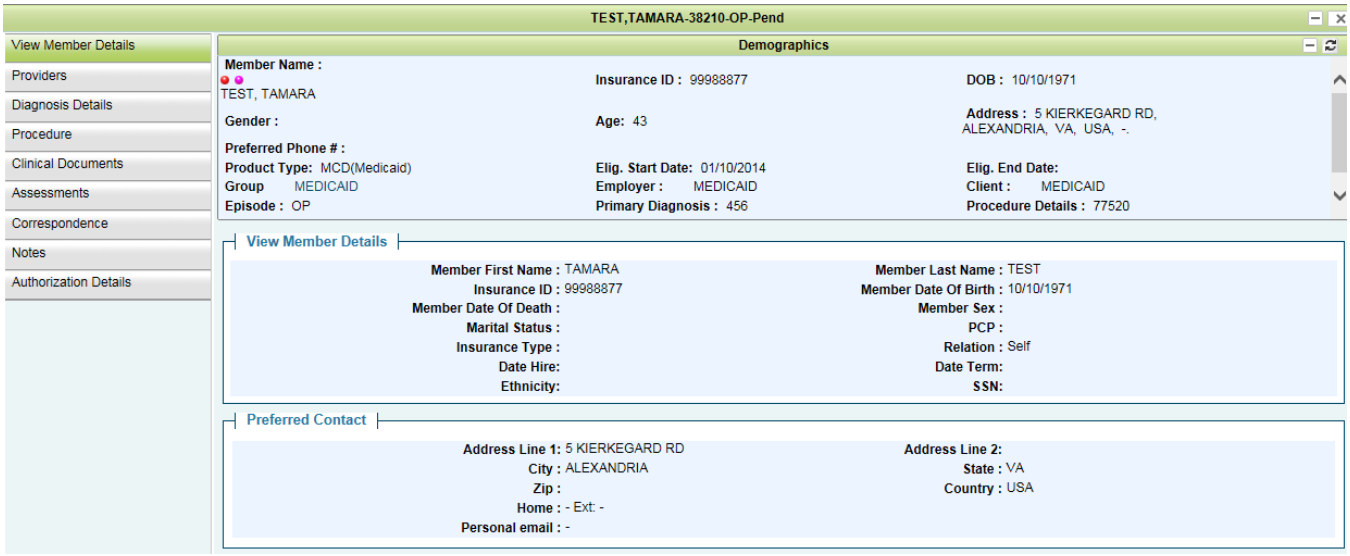
View or Work on Submitted Request

To view or work on an already submitted request:

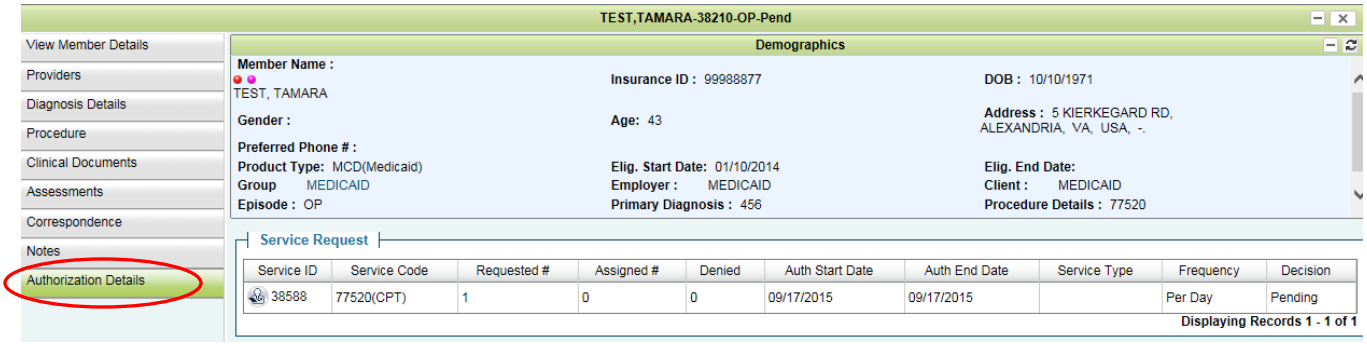
- Click the **Search Request** link under the Provider tab. This displays the Search Request screen.
- Perform a search for the submitted request. Try to search with the *minimum information possible* and the *fewest possible fields* to get your result. This displays the search results.



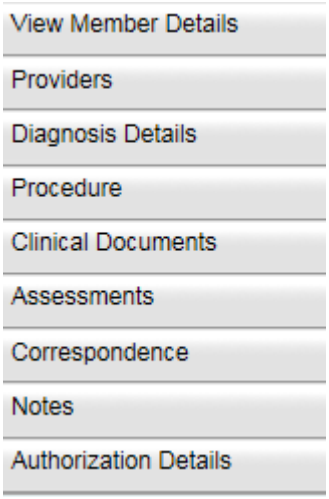
- Click on Episode Type (above). This opens a new screen with multiple links on the Left Navigation Panel (below).



- Go to the Authorization Details tab on the left of the screen for details on the case.



The following links for a submitted request are available on the Left Navigation Panel:

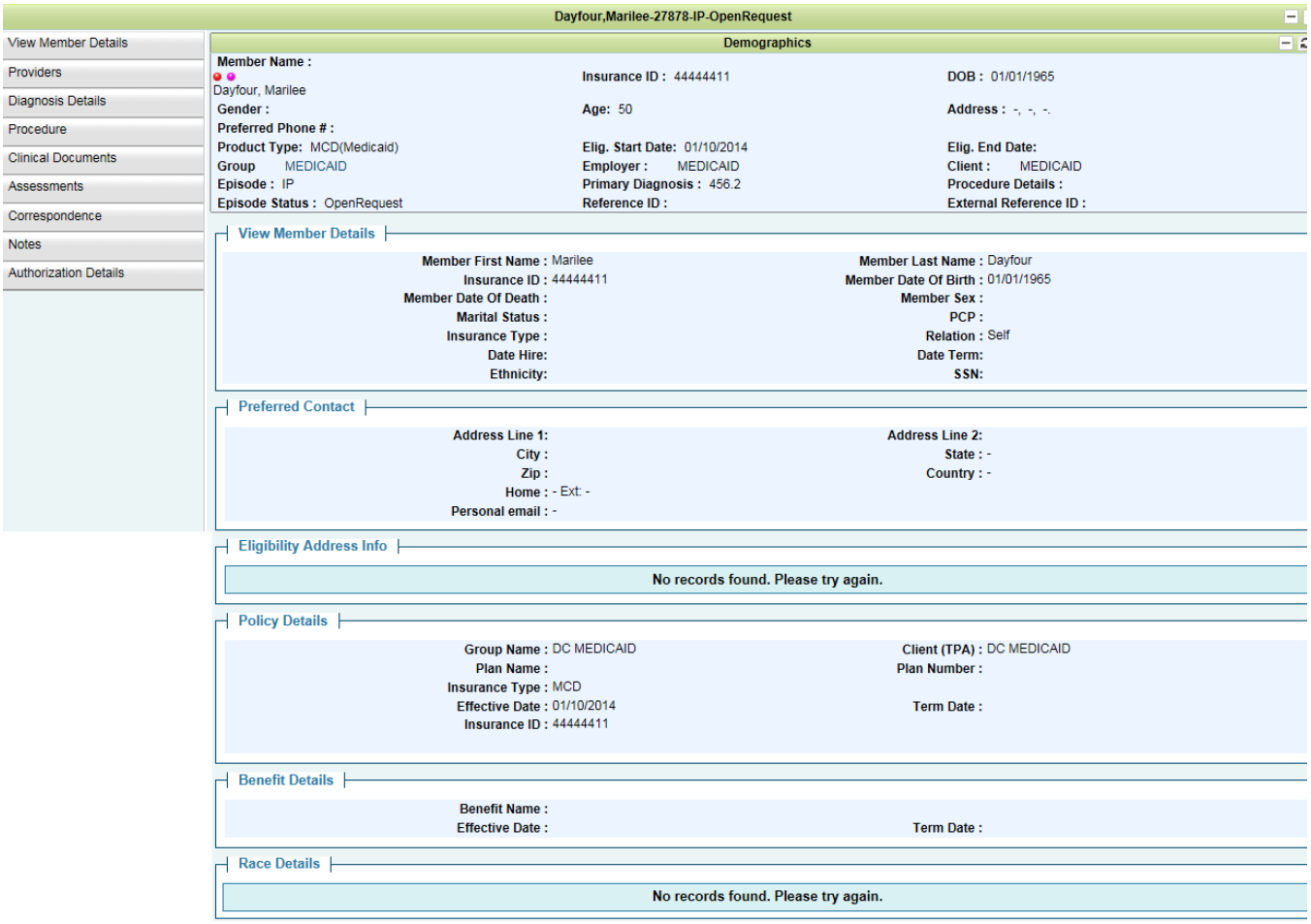


Each link that appears on the Left Navigation panel is described in the next section.

View Member Details

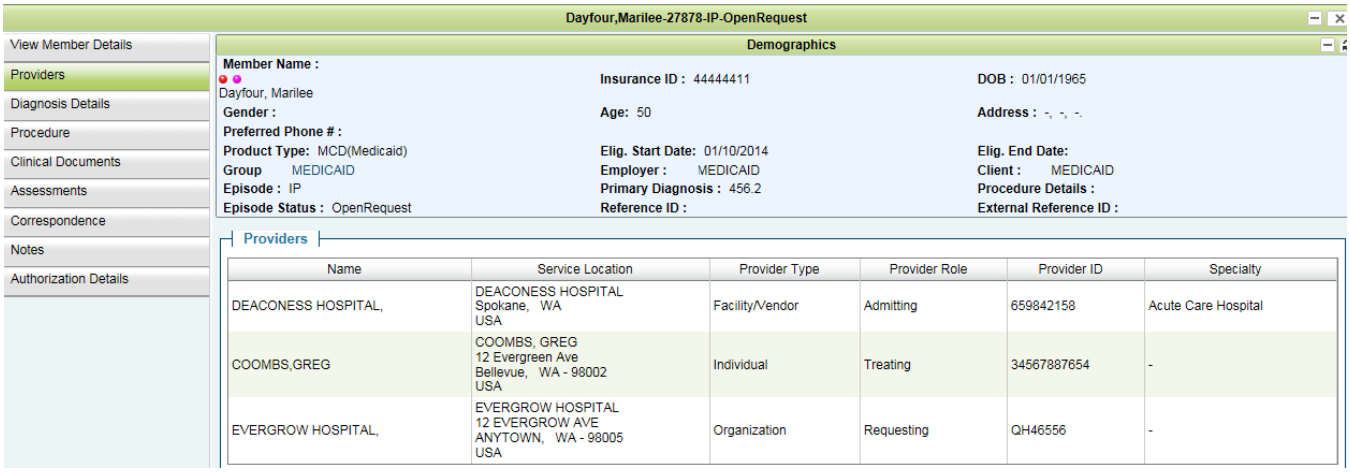
The View Member Details link displays a read-only screen (below) with the following details:

- Member Demographics
- View Member Details
- Preferred Contact
- Eligibility Address Info
- Multiple Member IDs
- Policy Details
- Benefit Details
- Race Details.



Providers

The Providers link opens the read-only screen that displays the providers attached to member episode.

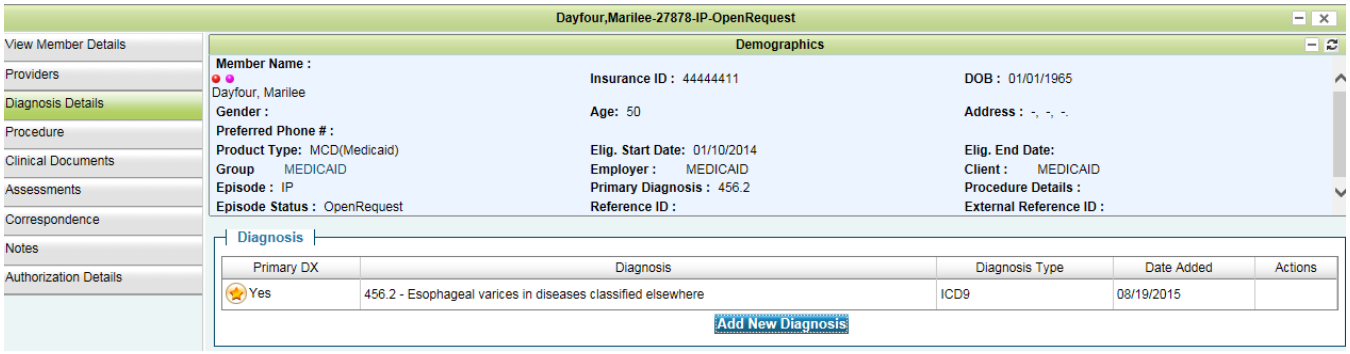


Diagnosis Details

The Diagnosis Details link opens a screen that enables you to add member's diagnosis details.

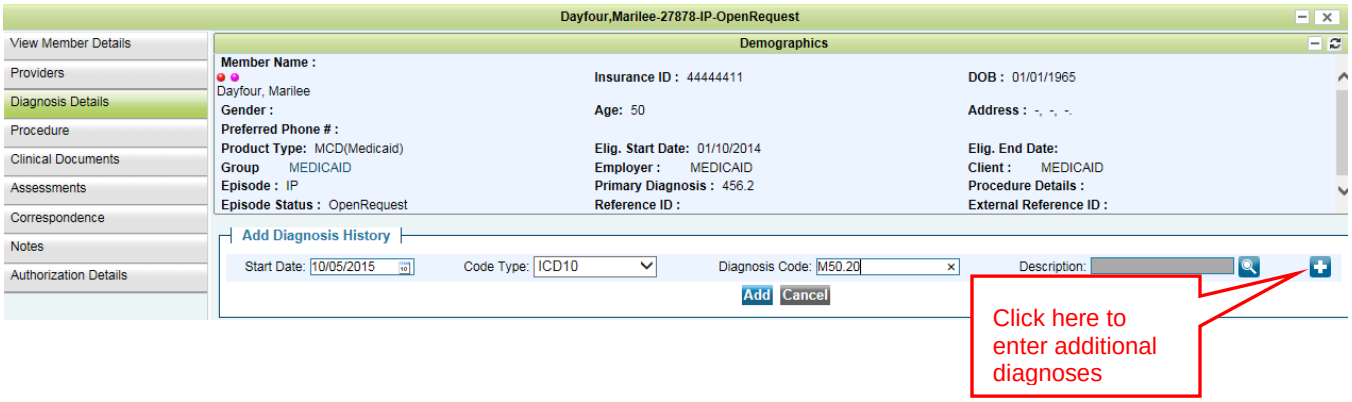
To add a diagnosis:

- Click the **Diagnosis Details** link on the Left Navigation Panel. This displays the Diagnosis Details screen.



- *By default, the primary diagnosis of the member is displayed in the Diagnosis screen.*

Click **Add New Diagnosis**. This displays the Add Diagnosis History screen.



- Enter the diagnosis start date (today's date) in the Diagnosis Start Date field.
- Enter the diagnosis code in the Diagnosis field or click to open the Diagnosis Code Search Form.

  Enter any of the search criteria.

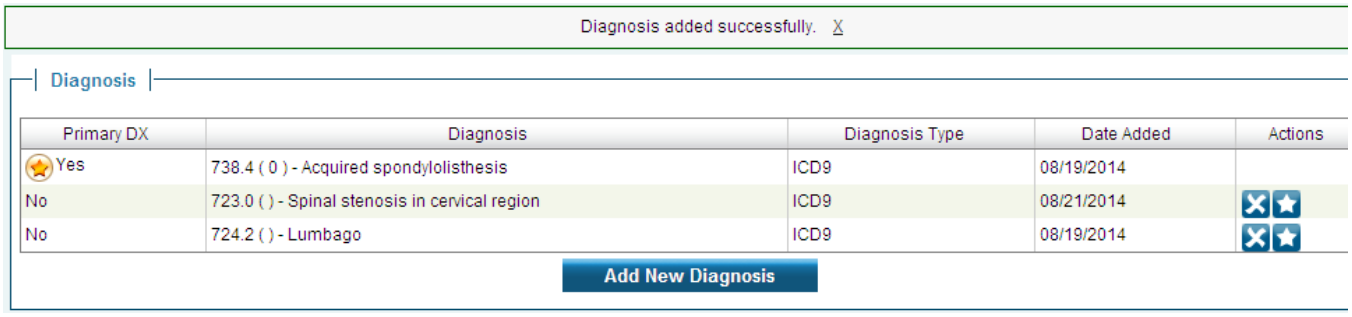
  Click Search. This displays the search results in the same screen.

  Click corresponding to the ICD9 Code that the needs to be attached. This automatically displays the relevant details in the Diagnosis Code and Diagnosis Description fields.

  Click to add additional diagnosis.

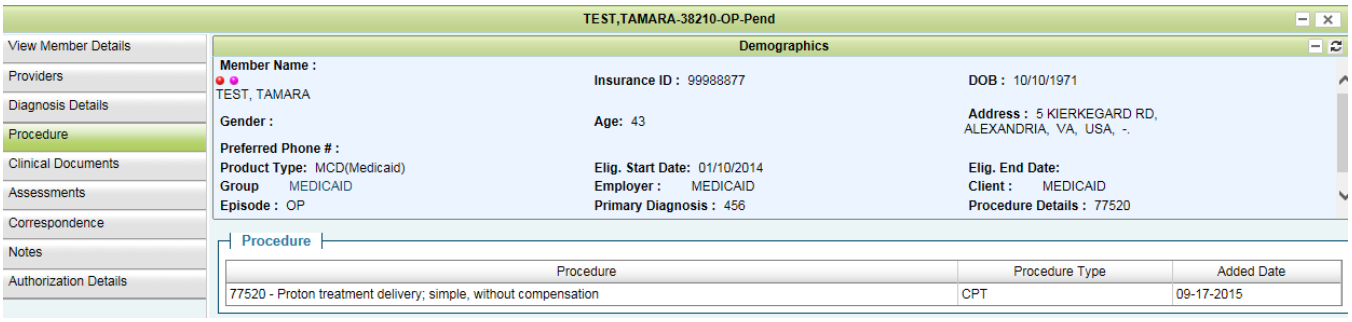
  Click to delete the additional diagnosis details.

  Click **Add** to save the diagnosis details.



Procedure

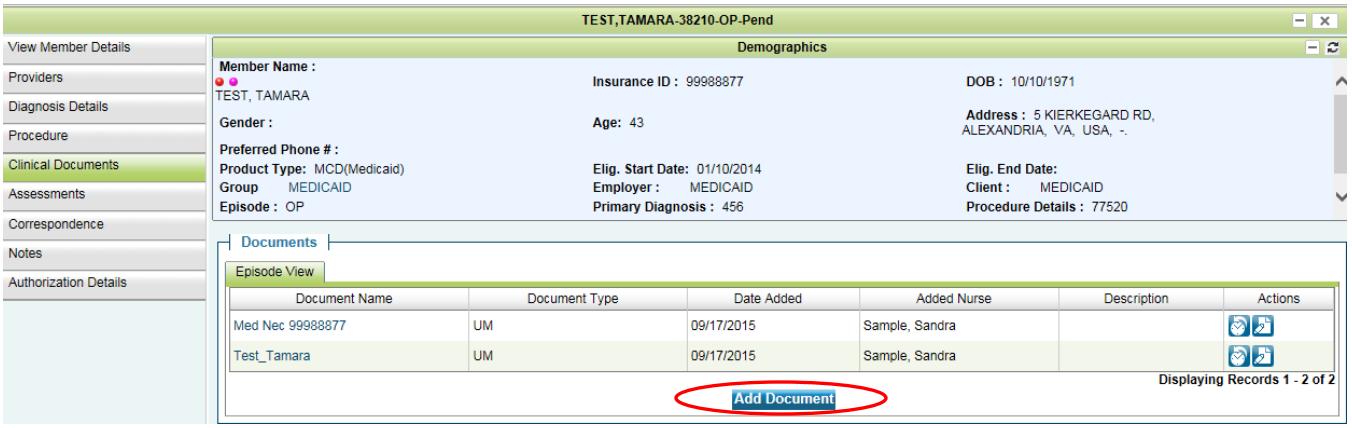
The Procedure link opens a read-only screen that enables you to view the procedure details of the episode.



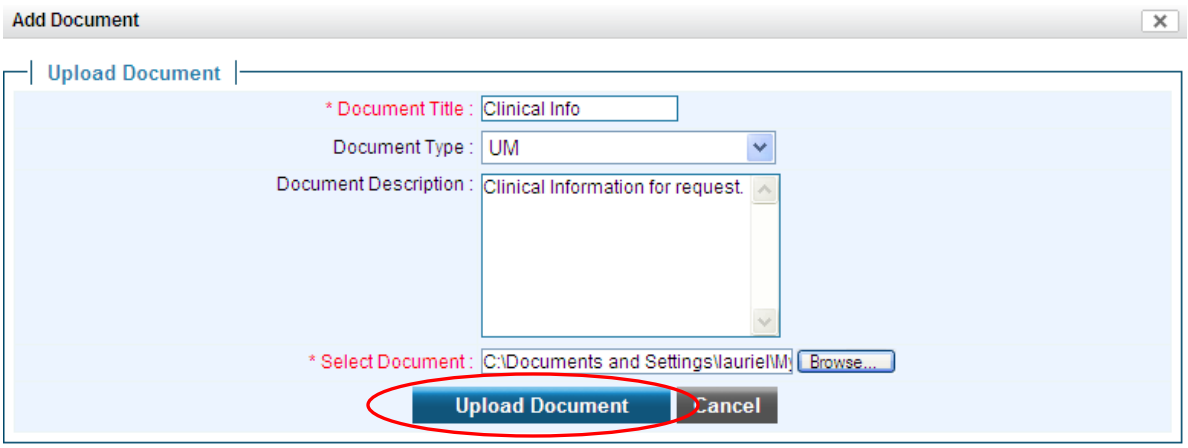
Clinical Documents

This screen allows you to view any documents attached to the episode or to the member record, and to add documents if needed. To add a document to an episode, in the Episode View tab, click on the **Add Document** button.

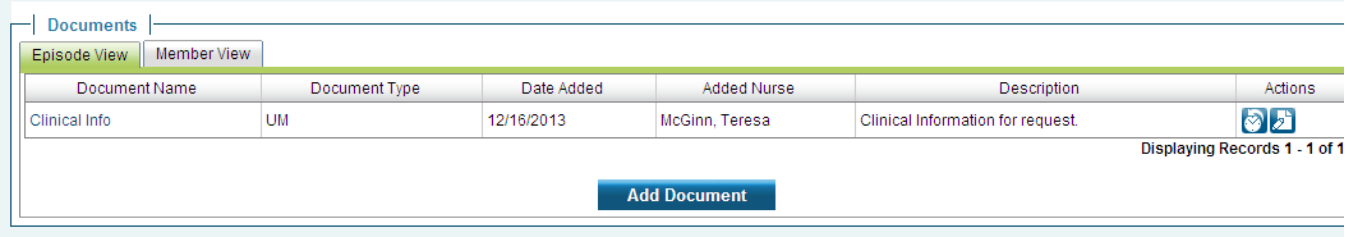
- *Once an episode is Pended or Decisioned, (unless it is being pended for additional information or extended), the **Add Document** button will no longer appear.*



This will bring up the Add Document window. Enter the Document title, Document Type, Document Description (if desired) and click the **Browse** button to select your document. Once you are done, click the **Upload Document** button.



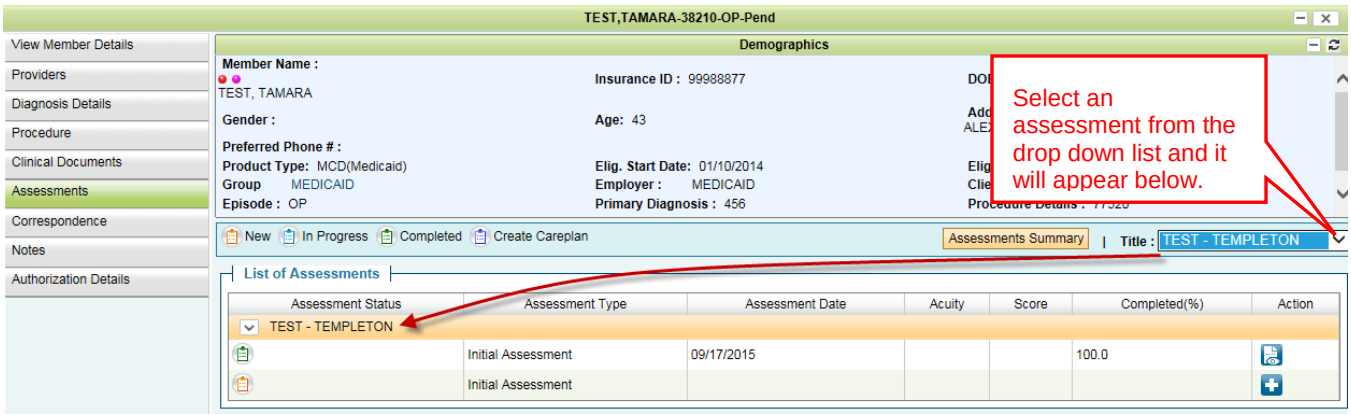
This will attach the document to your episode and also send the document to Qualis Health.



Assessments

This screen allows you to view any existing assessments that you have completed or entering additional assessments. To view or complete an episode, select it from the drop-down list.

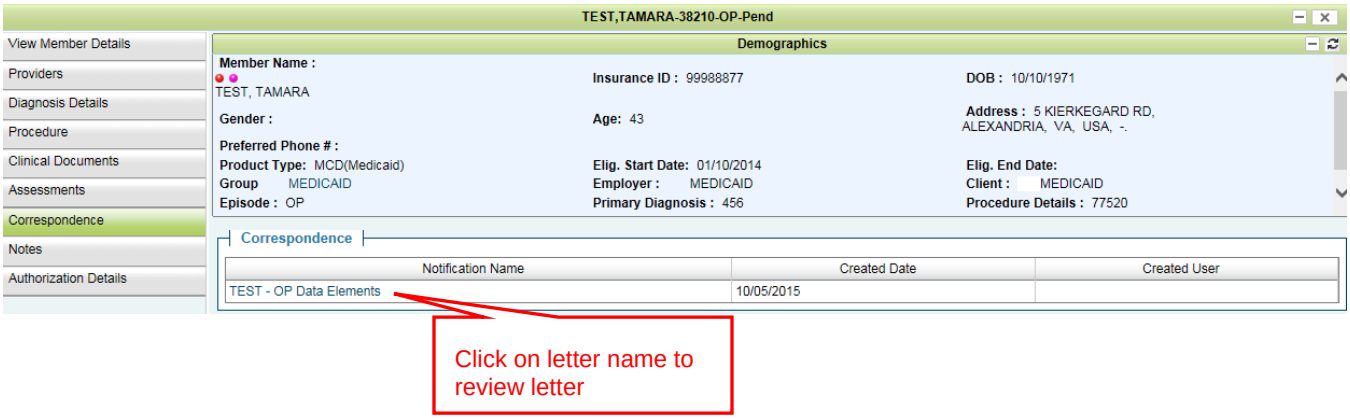
- *Once an episode is Pended or Decisioned (unless it is being pended for additional information or extended), you will no longer be able to enter a new assessment.*



Click on the eye icon to the right to view the assessment. If your episode has not yet been reviewed, you can also add an assessment.

Correspondence

The Correspondence link opens a read-only screen that displays the details of letters.

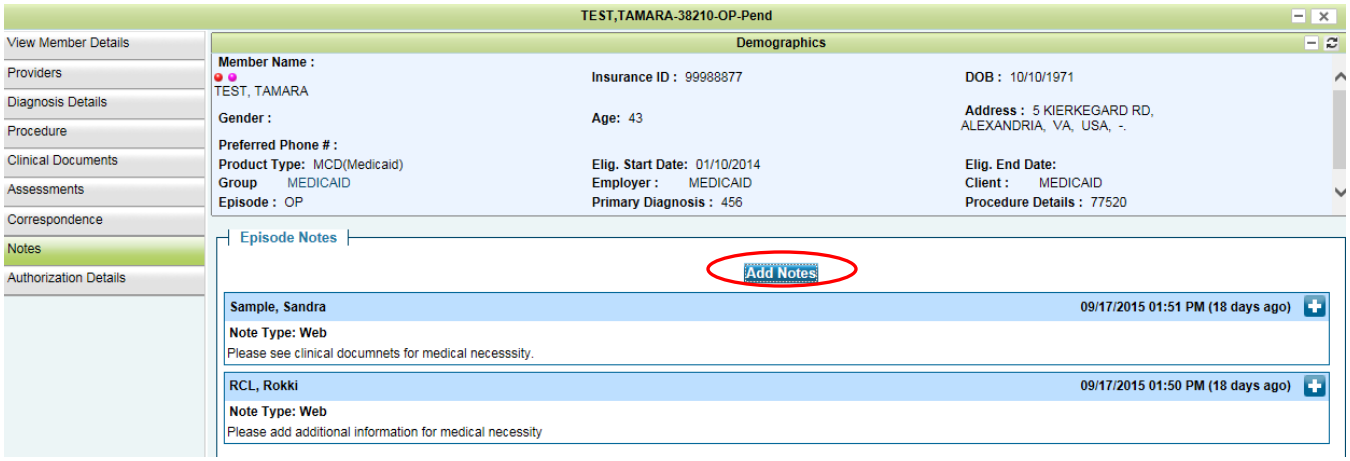


Notes

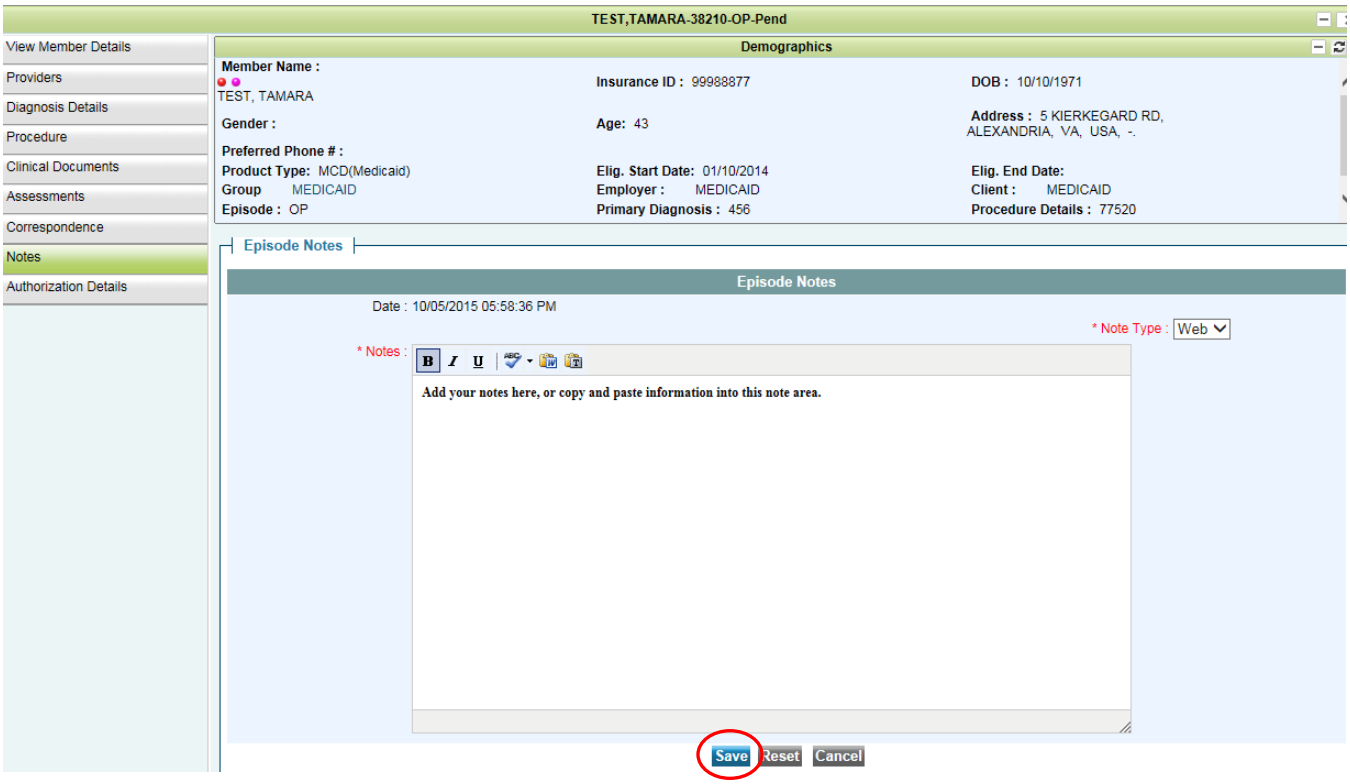
The Notes tab on the Left Navigation Panel enables you to add, view and edit episode-specific notes. You can also add addendum to notes.

To add a note:

- Click Notes link on the Left Navigation Panel. This displays the Episode Notes screen.

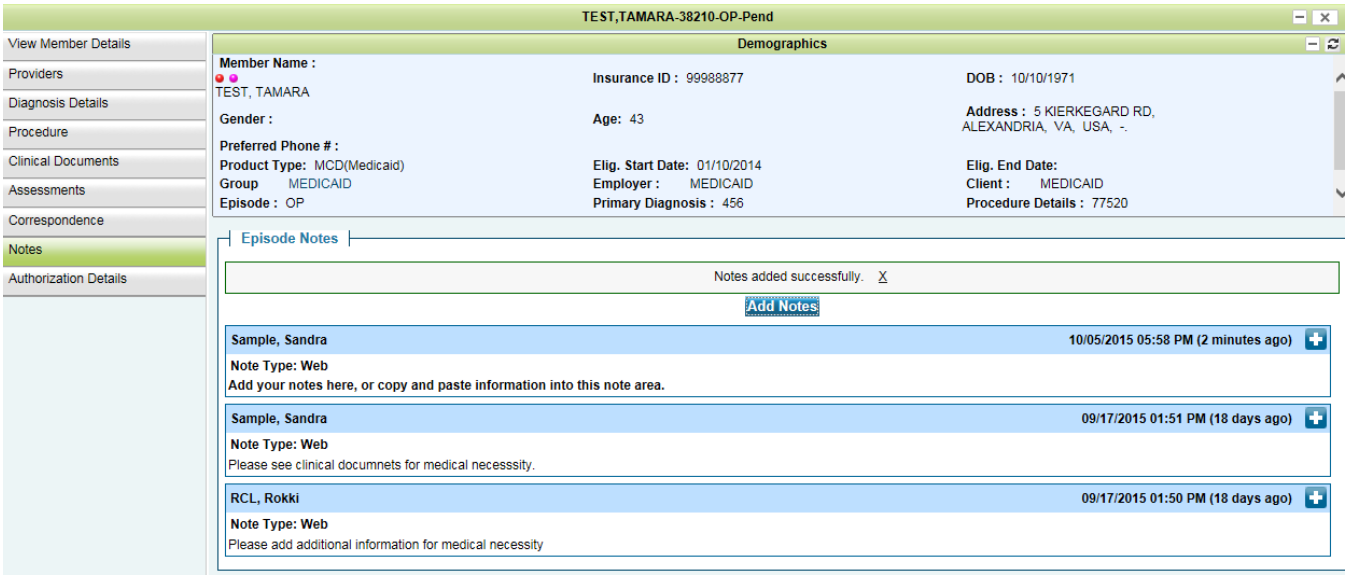


- Click **Add Notes**. This displays the fields to add notes in the same screen.



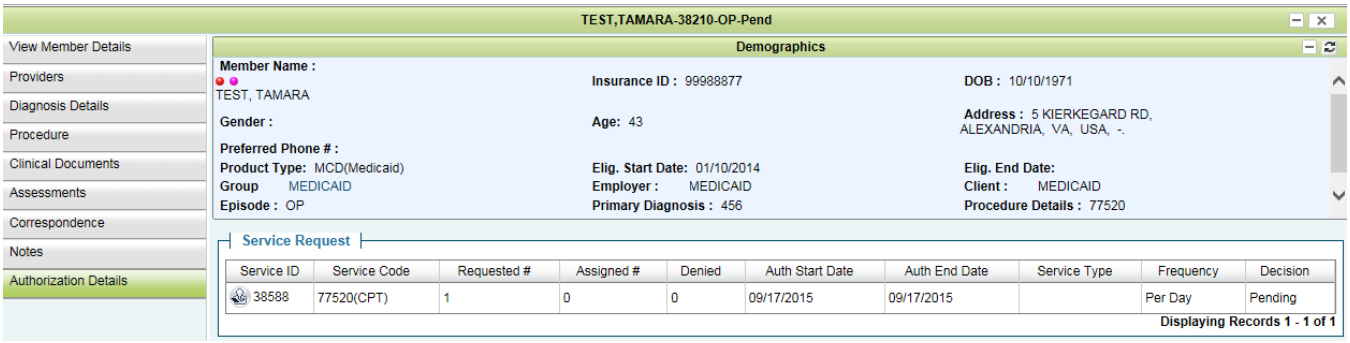
- By default, the Date field displays the current date.
- The Note Type defaults to Web.
- Enter the note in the Notes text field.

- Click **Save** to save the entered details. This displays the newly added notes in the Episode Notes screen (below).



Authorization Details

The Authorization Details link opens a screen that enables you to view the authorization details of the service requested.

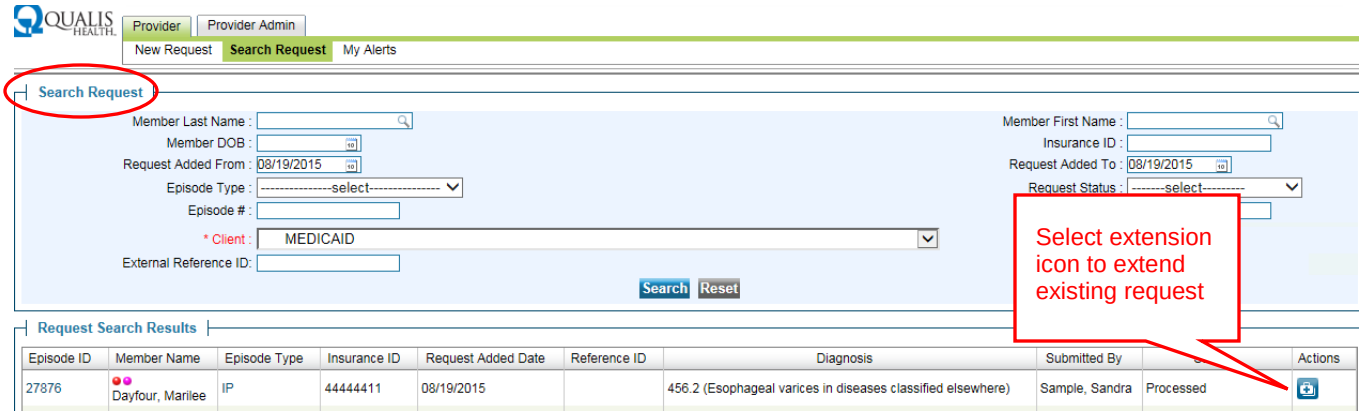


Extending an Inpatient Request from Search Request

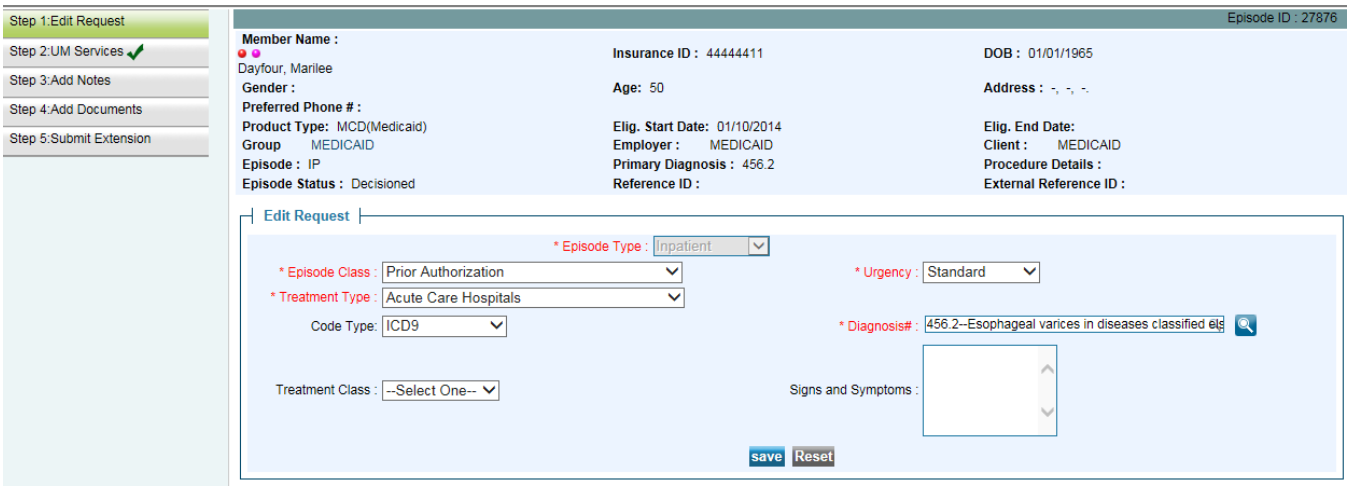
Extensions should be initiated from the Search Request tab at the top of the page.

To extend a request, go to the Search Request tab and bring up the Search Request screen.

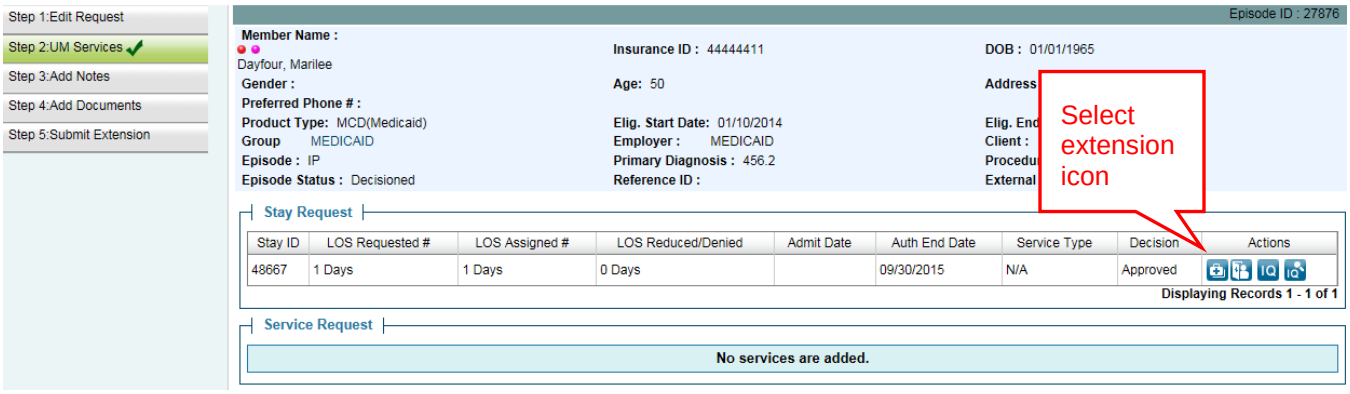
- Enter search parameters to find your episode. Try to search with the *minimum information possible* and the *fewest possible fields* to get your result.
- Once your episode is displayed in the Request Search Results area, select the extension icon.



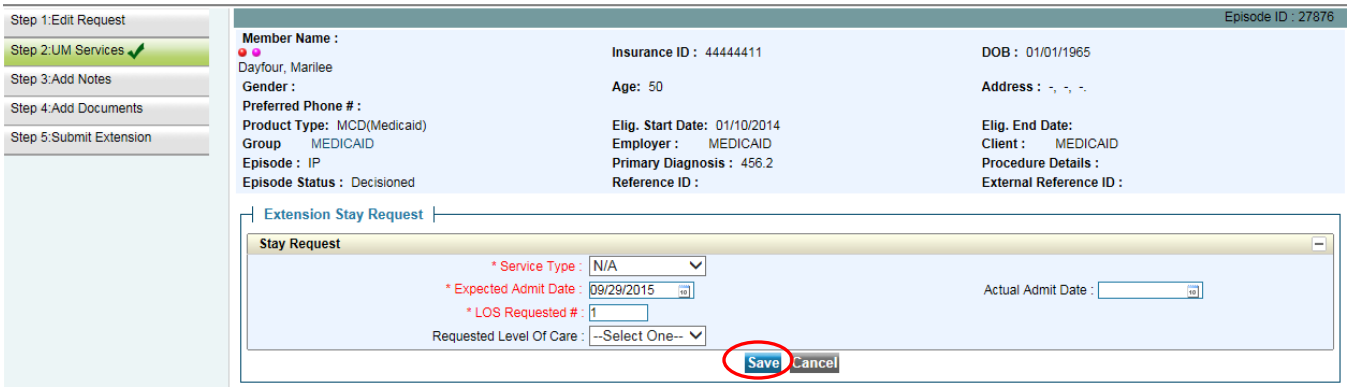
This opens the request extension screen with the steps to extend your request on the left navigation panel.



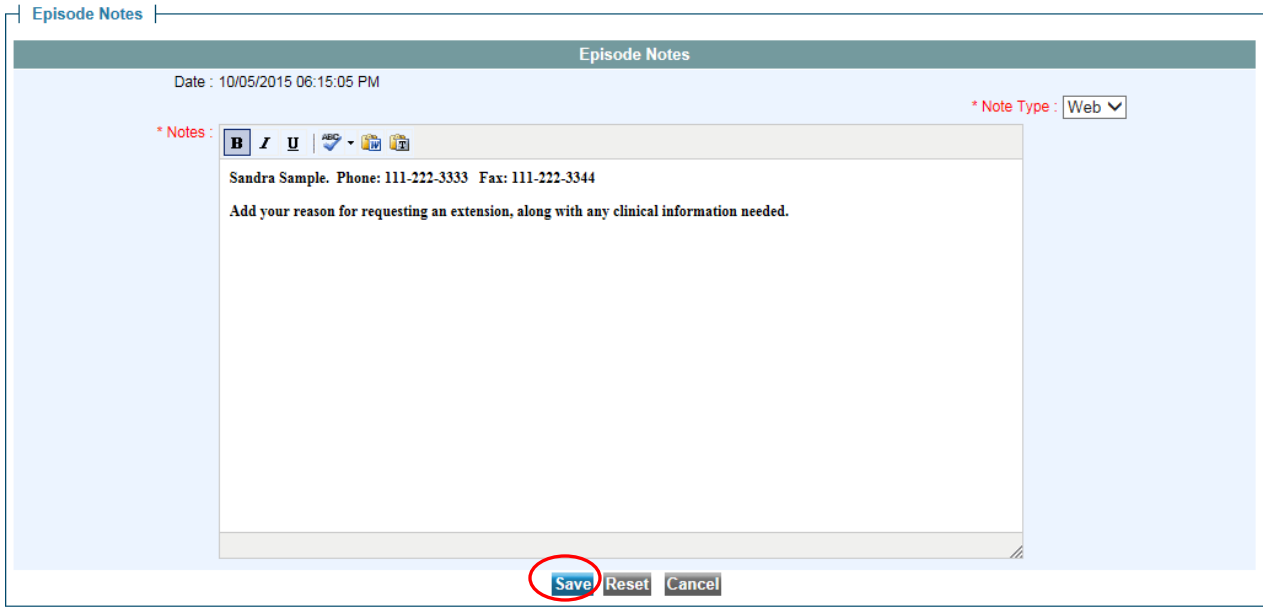
Go to the UM Services tab (Step 2) and select the extend icon from the Stay Request line.



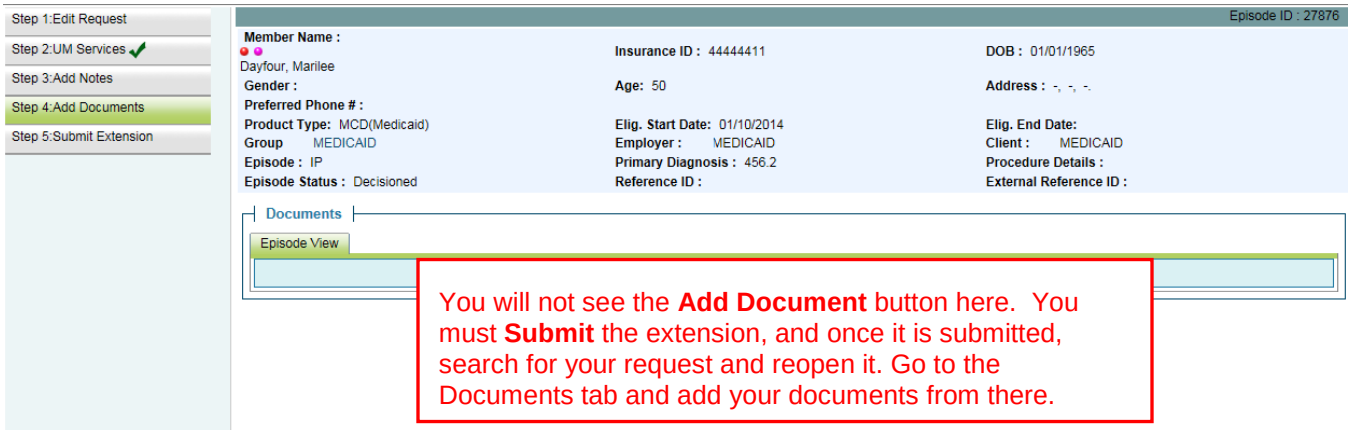
In the Extension Stay Request screen, the Service Type and Expected Admit Date will be populated. The Actual Admit Date may also be populated. If not, please add the actual admit date. Enter the additional days requested in the LOS Requested # field and **Save**.



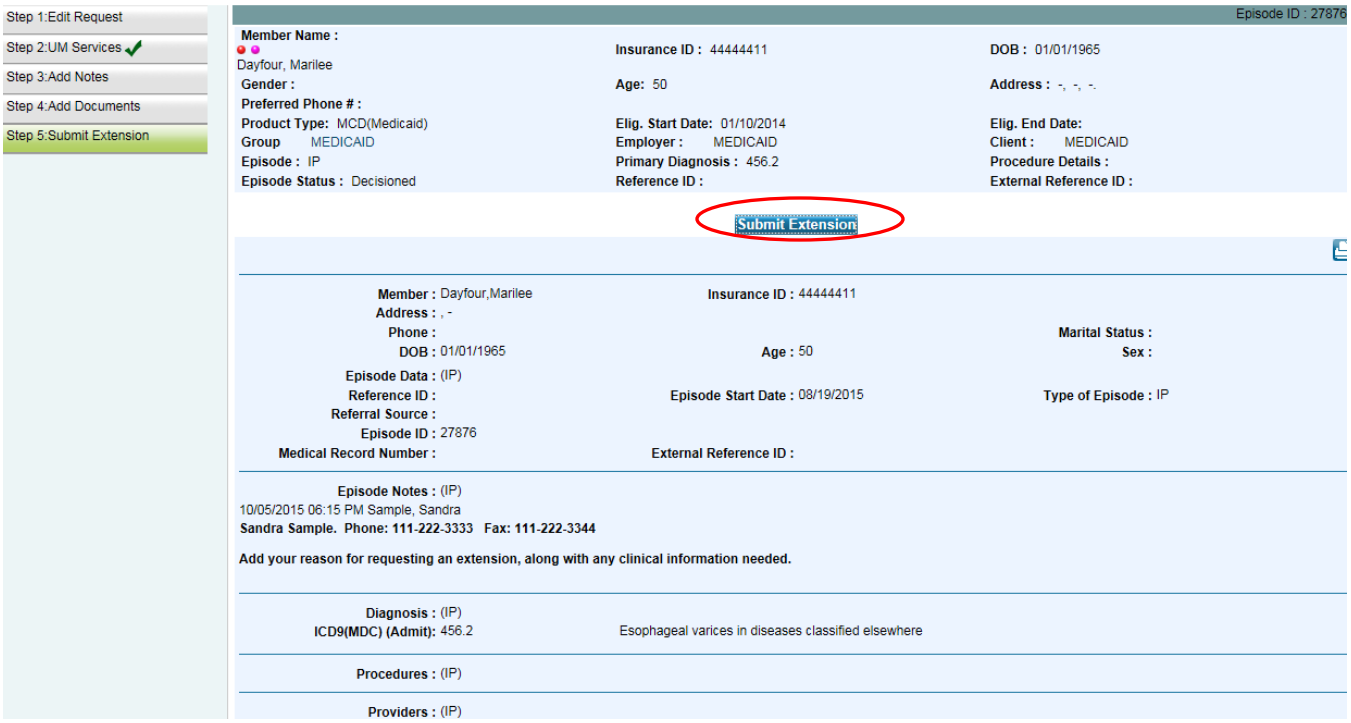
In Step 3: Add Notes, select the **Add Notes** button. Choose "Web" as your Note Type. In the Notes field, you can type the clinical information for the extension, or you can copy and paste it here from another program.



In Step 4: Add Documents, because of the episode status you will not see the **Add Documents** button. To add a document, go to Step 5 and submit your request. Submitting the request changes the status. Use the reference number to search for and reopen your request. Once your request is open, go to the Documents tab and add your documents from there. (see To Add a Document to An Extension)

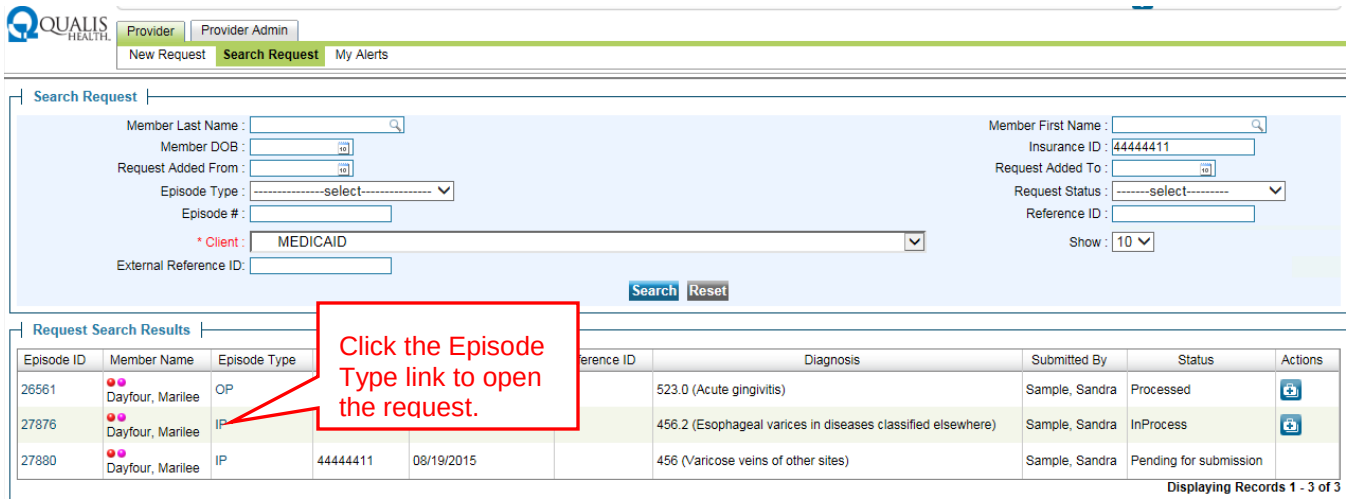


In the final step, Step 5: Submit Extension you can review your extension request and print if needed before selecting the **Submit Extension** button.

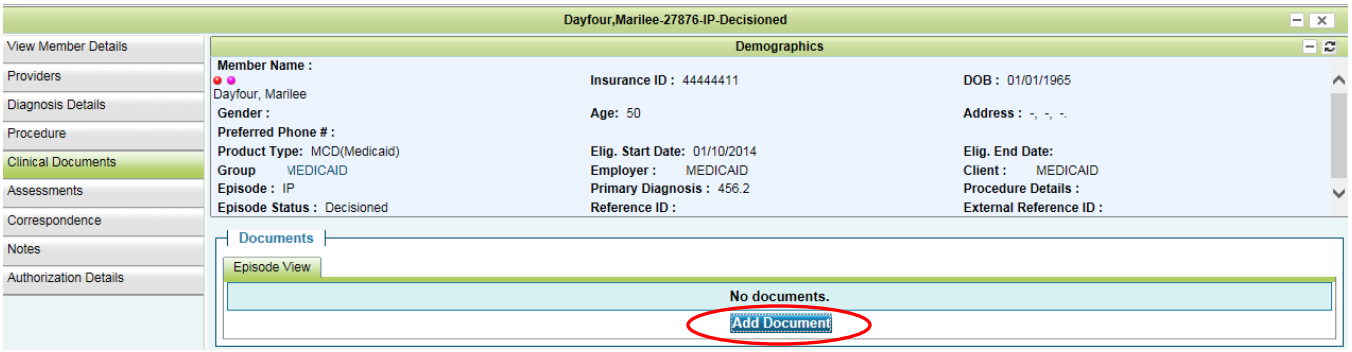


To Add a Document to an Extension

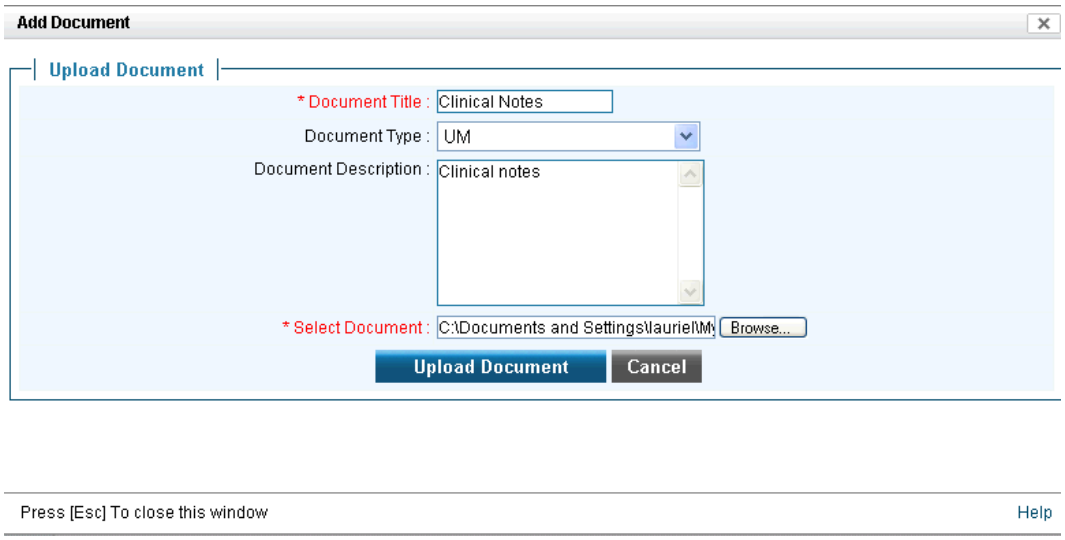
Go to Search Request and find your request. Click the Episode Type link to open the request.



Once the episode is open, go to the Clinical Documents tab and select the **Add Document** button.



- This displays the Upload Document screen.



- Enter a title for the document that the needs to uploaded in the Document Title field. **Please use the Member ID for the document title.**
- Select the type of document from the Document Type drop-down list.
- You may enter a brief description for the document in the Document Description field.

- Click **Browse** to navigate to the location of the document and upload it.
- Click **Upload Document** to upload the document. The uploaded document is displayed in the Documents screen.

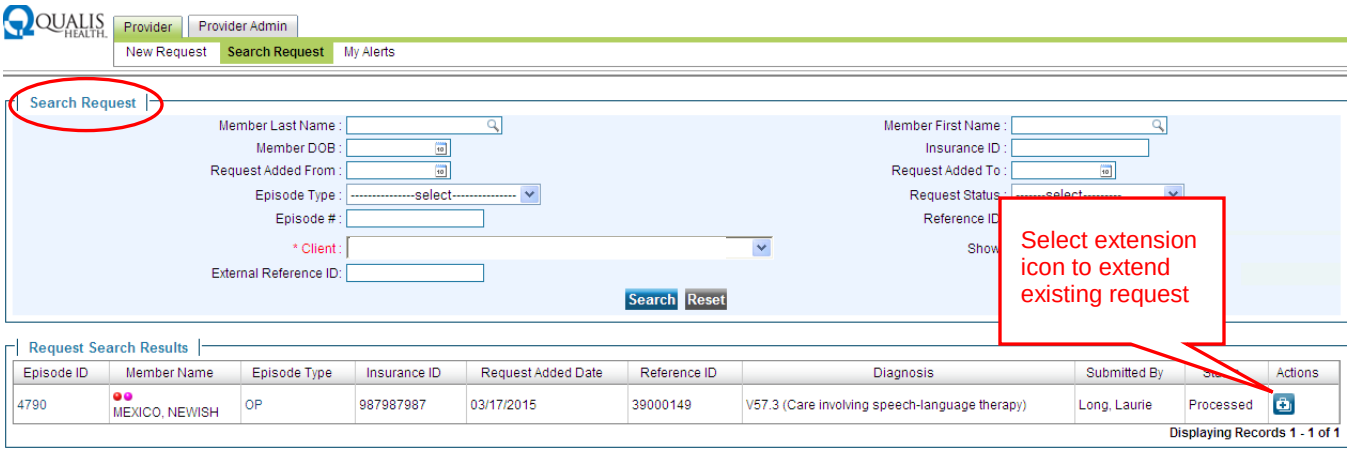
➢ *Uploaded documents can include image files (.jpg, .png, .bmp, etc.) for radiology images.*

Extending an Outpatient Request from Search Request

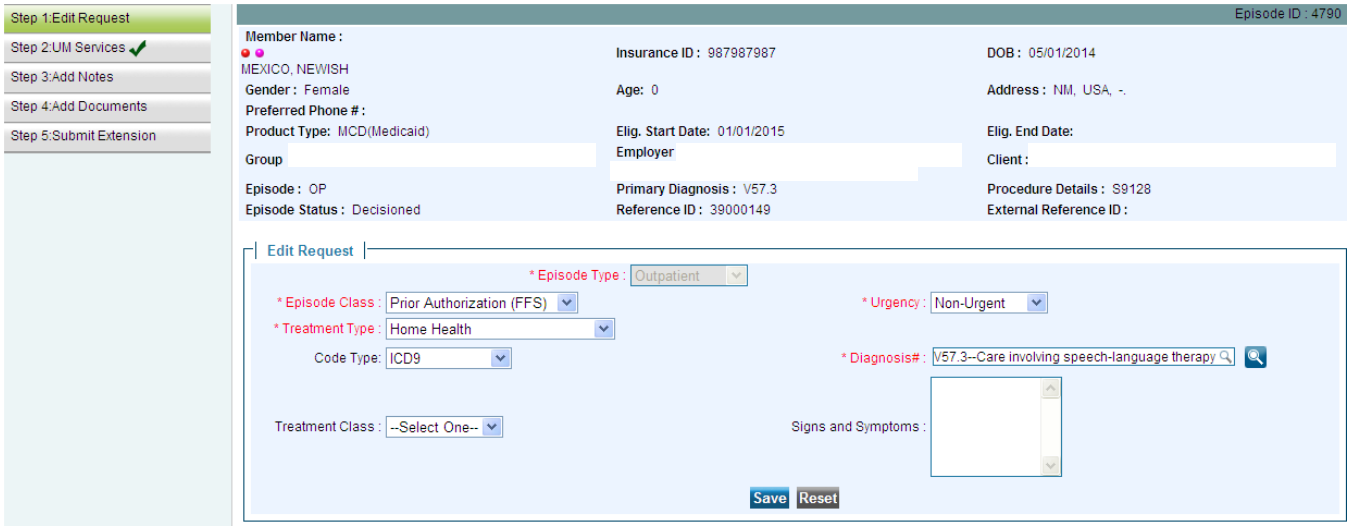
Qualis Health only performs extensions for specific outpatient services. Please contact your Qualis Health customer service representative to verify your outpatient request can be extended before you enter an extension request. Extensions should be initiated from the Search Request tab at the top of the page.

To extend a request, go to the Search Request tab and bring up the Search Request screen.

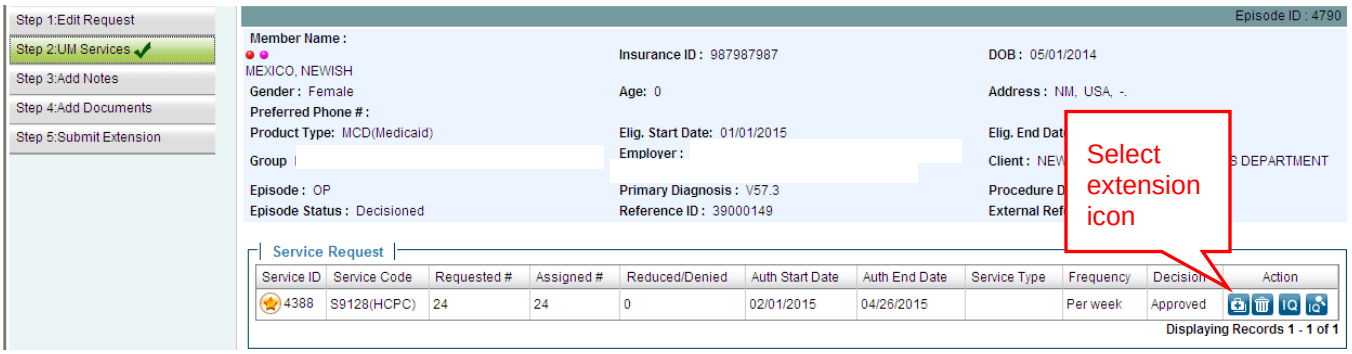
- Enter search parameters to find your episode. Try to search with the *minimum information possible* and the *fewest possible fields* to get your result.
- Once your episode is displayed in the Request Search Results area, select the extension icon.



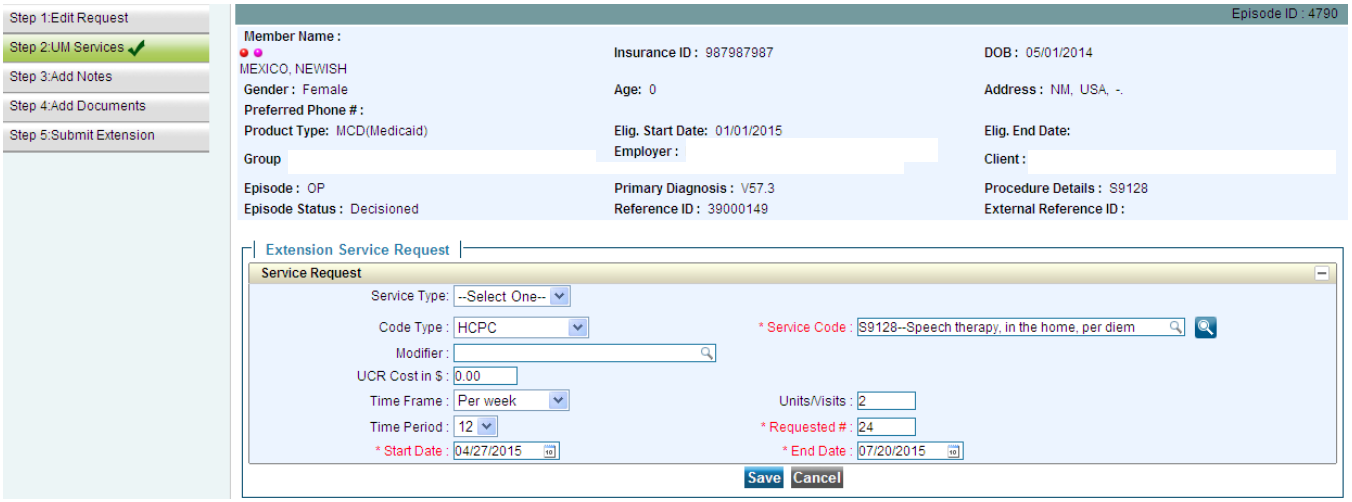
This opens the request extension screen with the steps to extend your request on the left navigation panel.



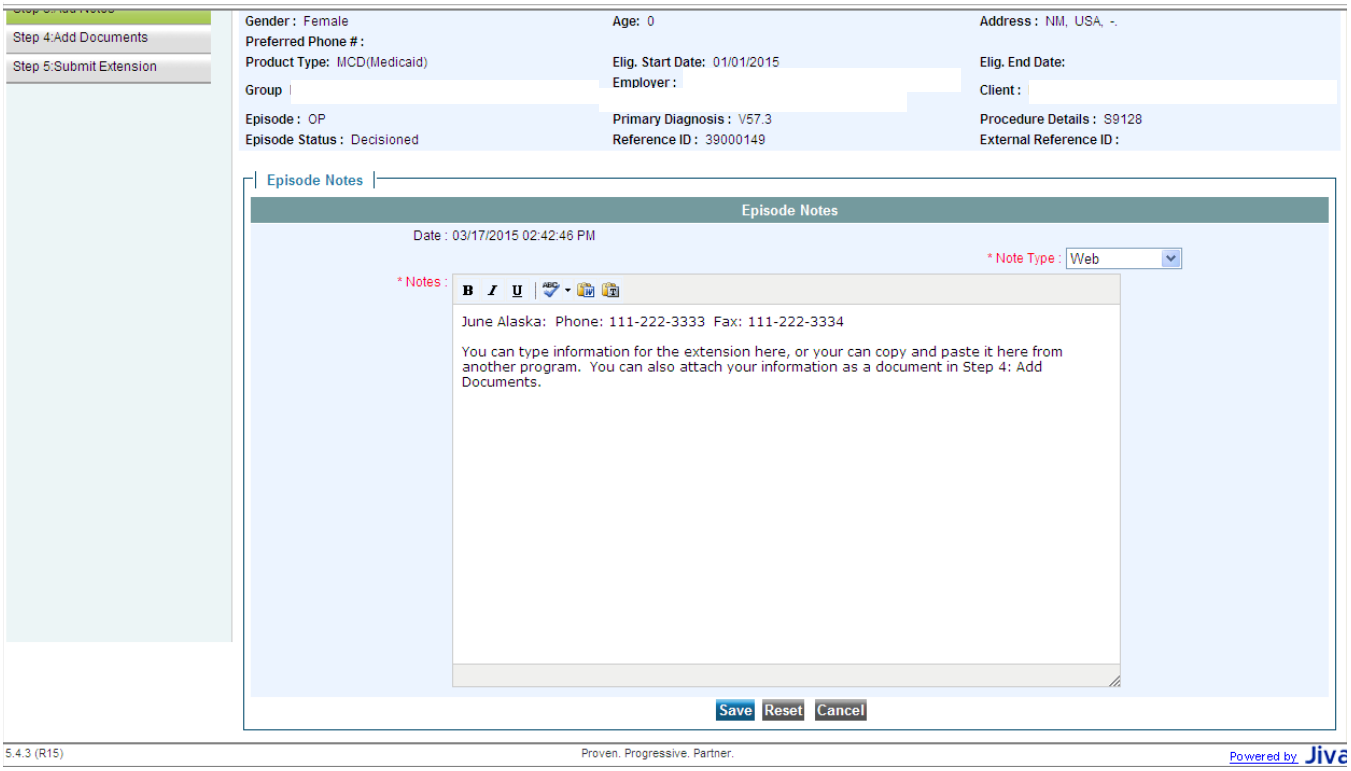
Go to the UM Services tab (Step 2) and select the extend icon from the Service Request line.



In the Extension Service Request screen, select the Time Frame, Units/Visits, Time Period and Requested # for the extension of service. The Start Date and End Date of the extension will auto-populate. **Save**.



In Step 3: Add Notes, select the **Add Notes** button. Choose "Web" as your Note Type. In the Notes field, you can type the clinical information for the extension, or you can copy and paste it here from another program.



Step 4: Add Documents – You will not see the **Add Documents** button until you have submitted your extension, changing the status of the request. Once the status has been changed you will be able to add a document.

To do this, **go to Step 5 and submit your request**.

Once it is submitted, go to the Search Request tab and use the Reference number or the Member Insurance ID to search for your request. When the search returns your request in the *Request Search Results* area, click on the Episode Type (IP/OP, etc.) to reopen your request.

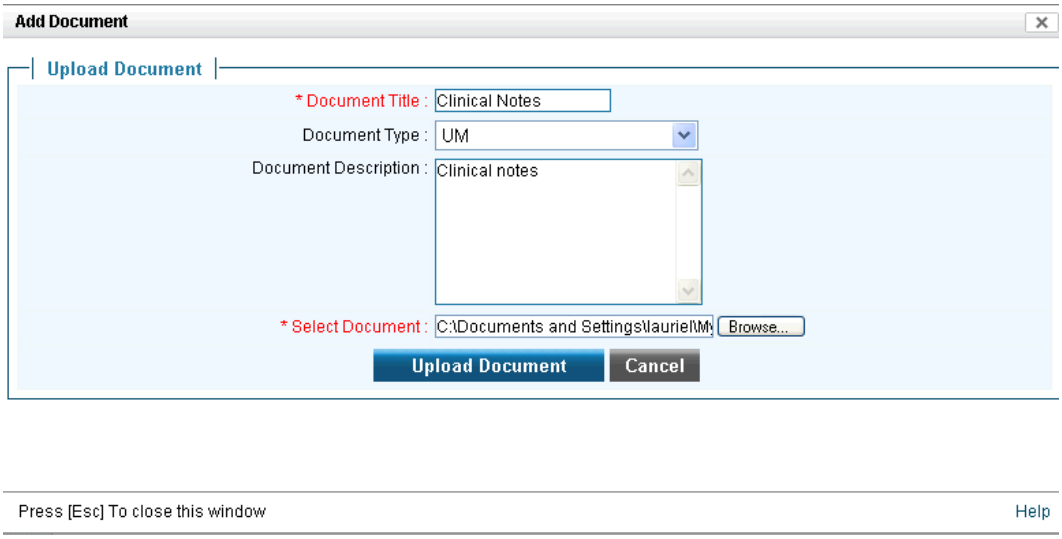
Go to the Clinical Documents tab and add your documents from there.

To upload a document:

- Click the **Add Documents** button in the Episode View.



- This displays the Upload Document screen.



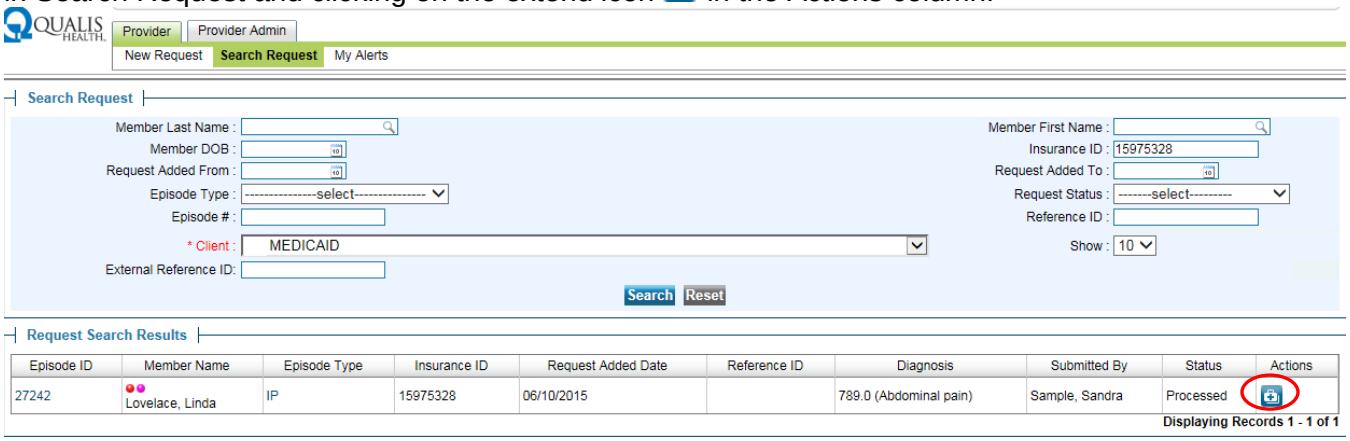
- Enter a title for the document that the needs to uploaded in the Document Title field. **Please use the Member ID for the document title.**
- Select the type of document from the Document Type drop-down list.
- You may enter a brief description for the document in the Document Description field.
- Click **Browse** to navigate to the location of the document and upload it.
- Click **Upload Document** to upload the document. The uploaded document is displayed in the Documents screen.

➢ *Uploaded documents can include image files (.jpg, .png, .bmp, etc.) for radiology images.*

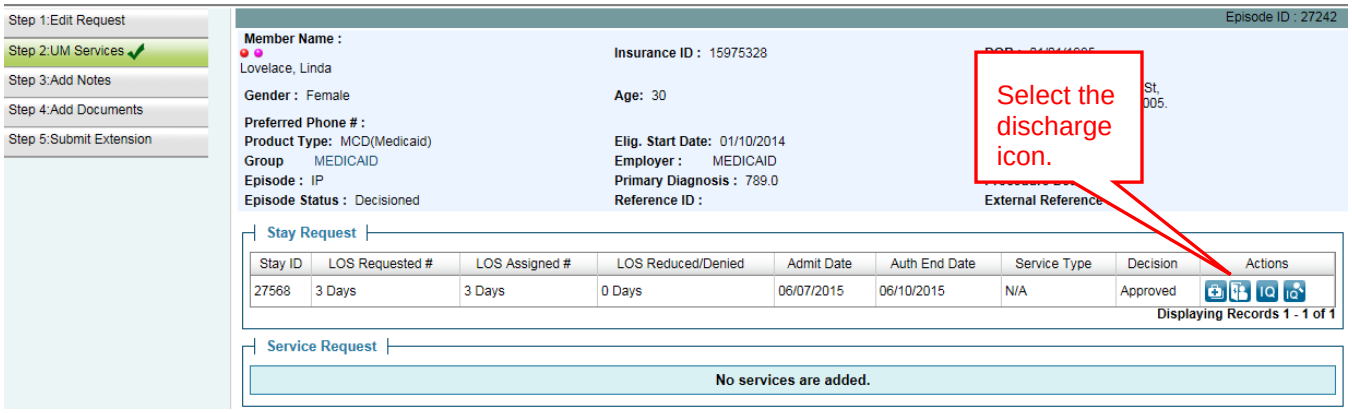
Discharge Summary

To enter the discharge summary details for an inpatient (IP) stay, you have two options. You can enter the information in a note by searching for your request, selecting the IP to open the request, entering your discharge information in the Note tab and saving the note.

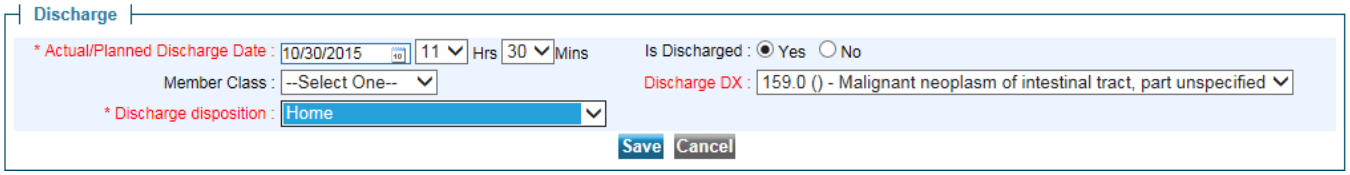
You can also add the discharge summary details to a decisioned episode by searching for your episode in Search Request and clicking on the extend icon in the Actions column.



Once the episode is open, go to Step 2: UM Services and click the discharge icon in the Actions column.



This displays the Discharge screen.

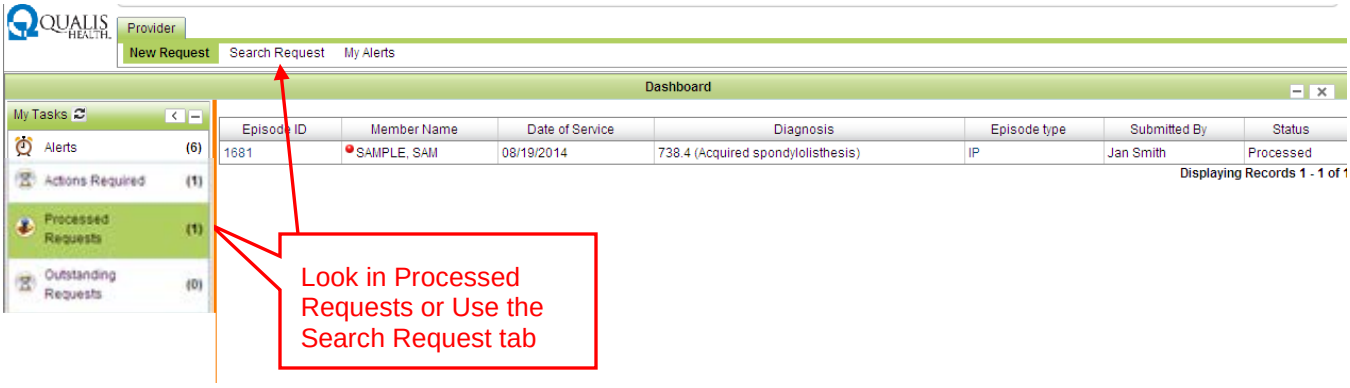


- Click the Actual/Planned Discharge Date field to view a calendar and select a discharge date. **Complete this field only when a member has actually discharged.**
- Select appropriate radio buttons from the Is Discharged field to indicate discharge status.
- Select discharge diagnosis from the Discharge DX drop-down list.
- Select discharge disposition from the corresponding drop-down list.

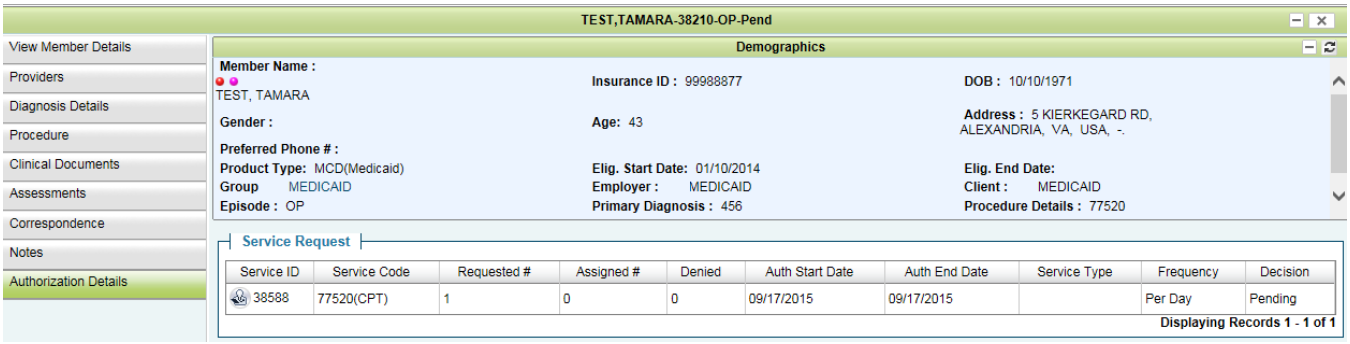
Click **Save** to save the details entered. Do not follow any extension steps or Submit extension.

Checking the Status of Your Review

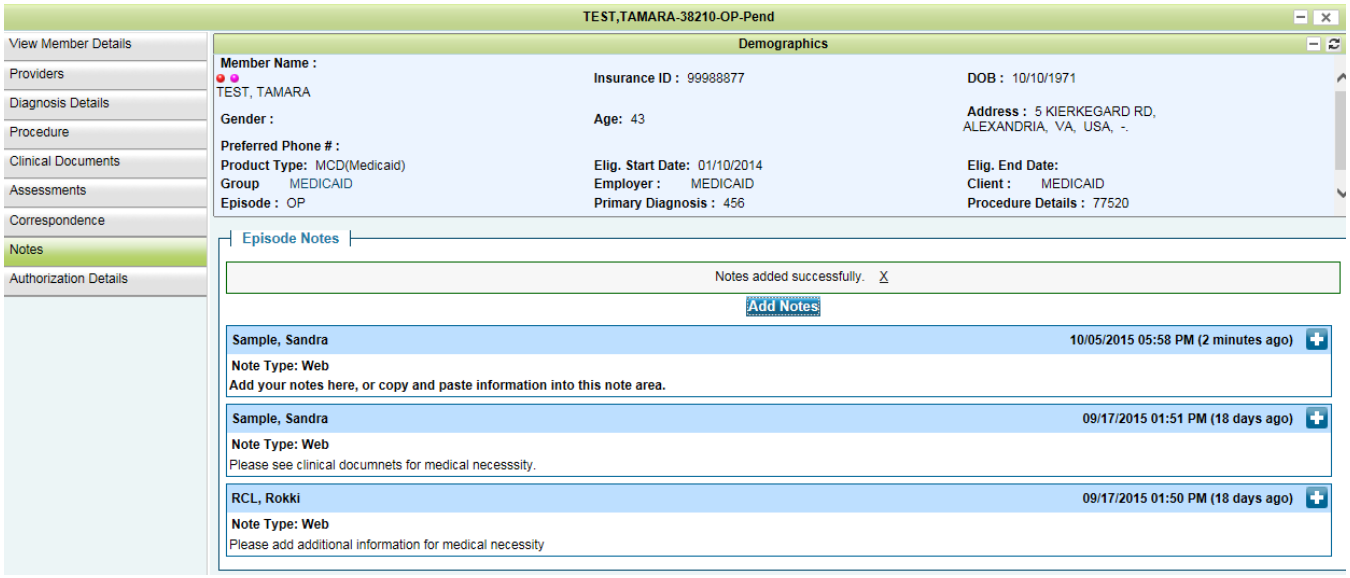
When Qualis Health has made a review determination you will receive an alert, which can be viewed from the My Alerts tab. In order to check on a request submitted to Qualis Health, you will need to open the request and view the Authorization Details. If you are viewing an alert, you can open your request from there. Otherwise, to find your request you can go to the Processed Requests in your Dashboard, or you can use the Search Request tab and enter search criteria to pull up and open your request. Try to search with the *minimum information possible* and the *fewest possible fields* to get your result.



Once you have opened your request, go to the Authorization Details tab to see the details of your request.



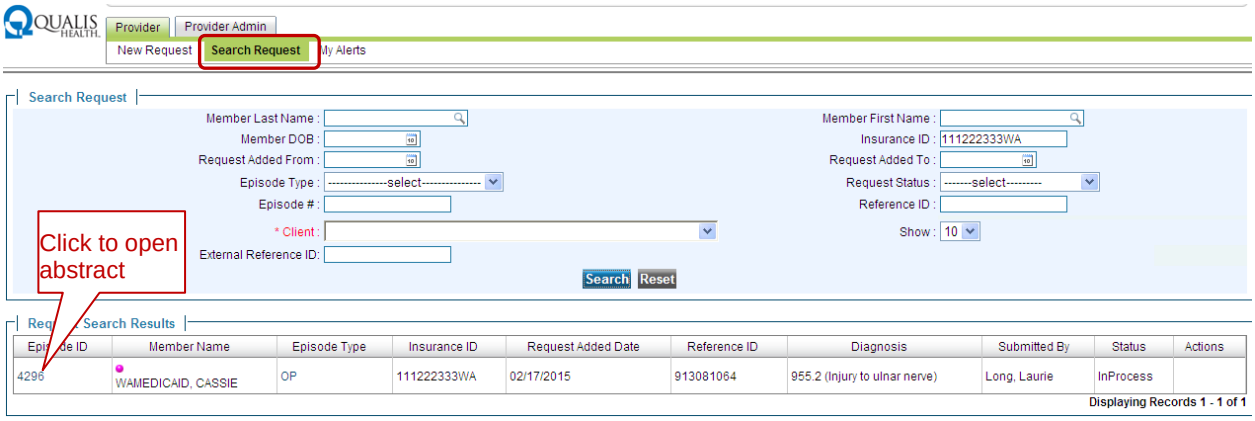
To view any notes or requests from Qualis Health regarding your request, go to the Notes tab.



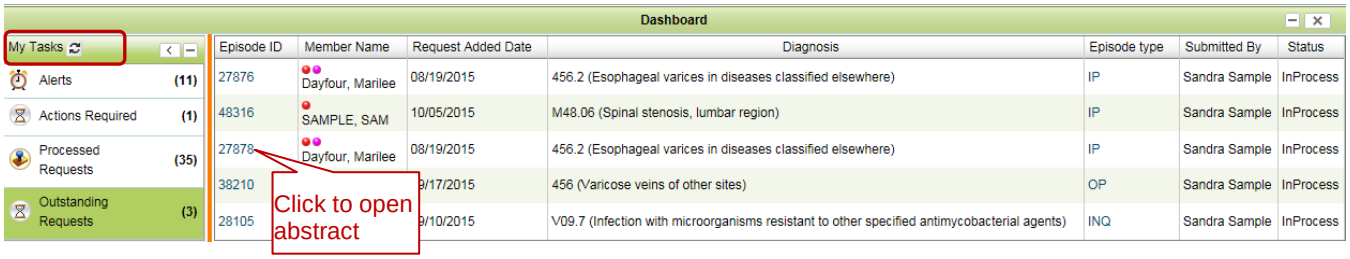
If Qualis Health required any additional information or documentation regarding this request, details about the information being requested would appear here, in the Episode Notes. As long as the episode is Pended for additional information, the provider can attach additional documentation in the Clinical Documents tab, or respond to questions via the notes field.

How to Print a Request

First find your request, either by using the Search Request screen…

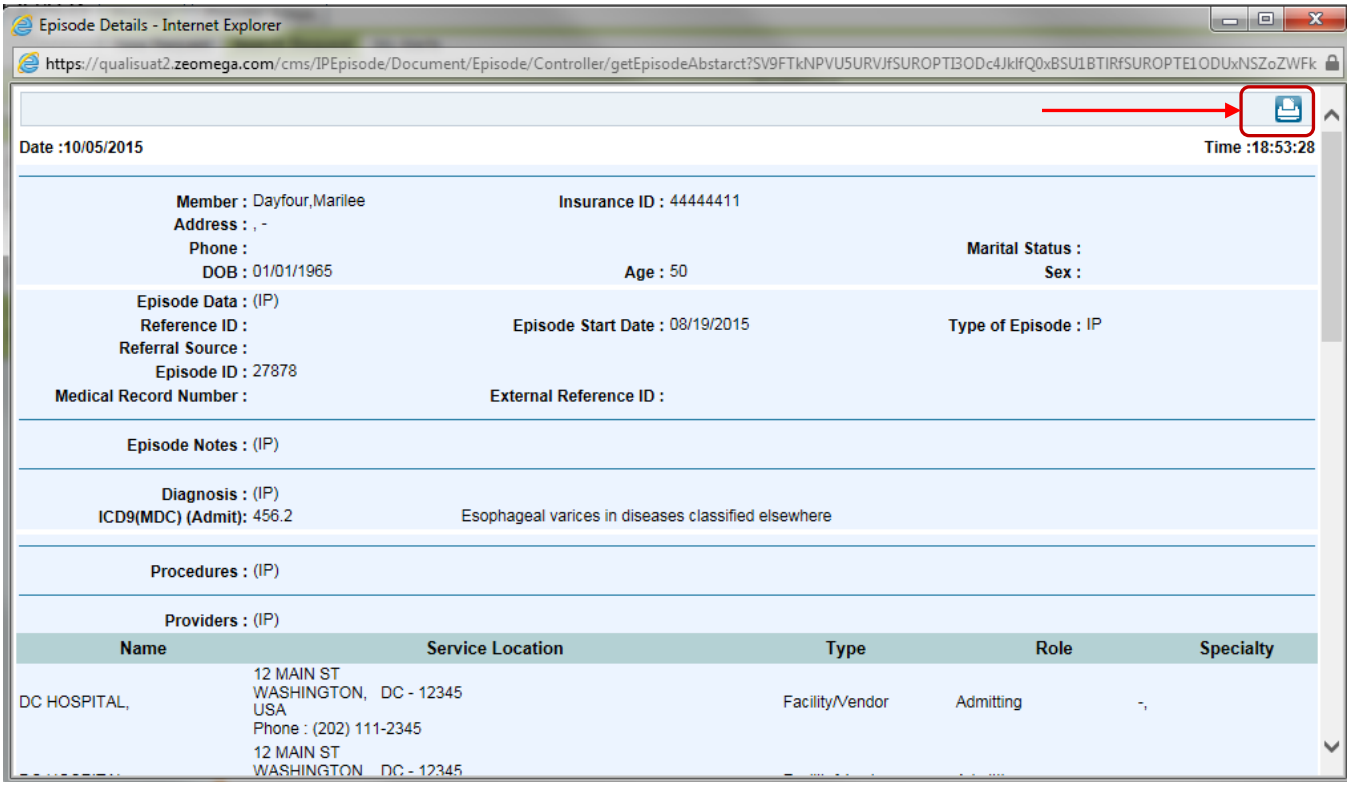


Or by finding it in the My Tasks bar of your Dashboard.



Click on the Episode ID number of your request to open the request abstract.

The abstract will have a printer icon at the top. Click on this to print the abstract of your request.



Provider Portal Administrator Tasks

The Provider Portal Administrator has additional system access and system tasks to perform. The Provider Portal Administrator is responsible for:

- Adding all User accounts
- Keeping User account registration information
- Managing all User accounts, including resetting the passwords and deactivating User accounts when staff leave or are reassigned.

For each Provider Portal You account you create, you must keep a record of the *Provider Portal User Agreement* and *Provider Portal User Registration Form*. Qualis Health will audit these on a regular basis.

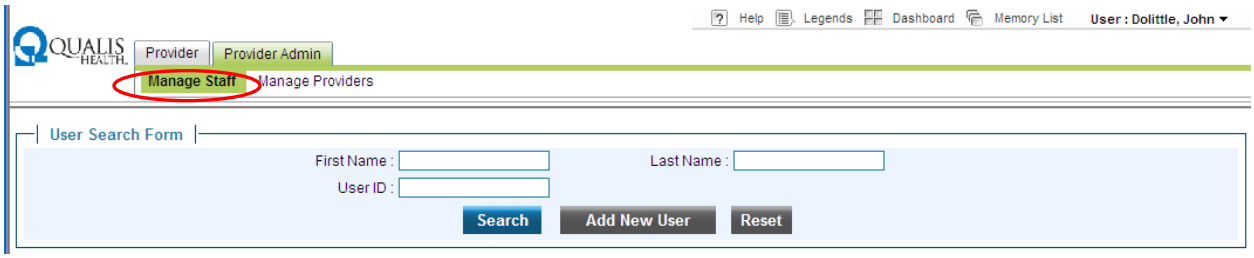
For each additional Provider Portal Administrator, an *Executive Agreement*, a *Provider Portal Administrator Agreement* and *Provider Portal Administrator Registration Form* must be sent to Qualis Health.

- **One Health Port** (OHP) accounts will not have Provider Portal Administrators. All OHP account changes will be through One Health Port and performed by the One Health Port Administrator for your group.

Manage Staff

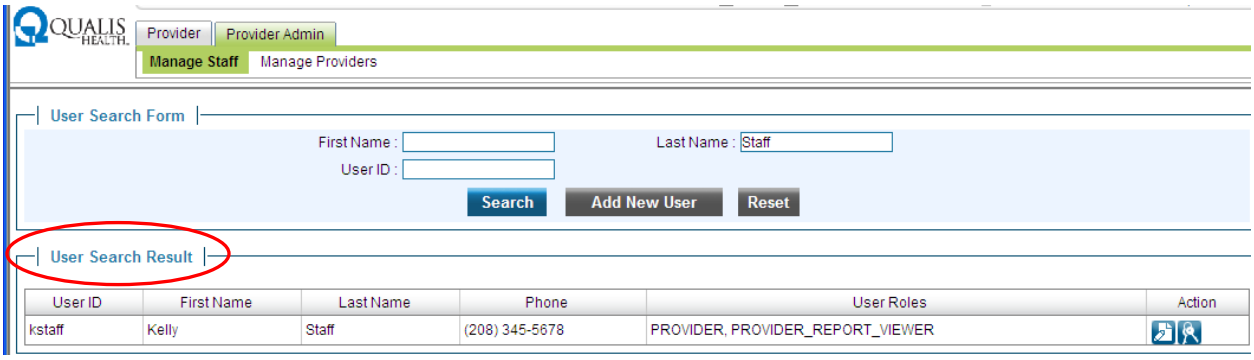
The Manage Staff tab under the Provider Admin tab enables the Provider Portal Administrator to manage the accounts. The Provider Portal Administrator can:

- Search for the existing accounts
- Add an account
- Modify an account
- Reset a password



To search for an existing account, click the Provider Admin>Manage Staff tab. This displays your Search Form (above).

- Enter any of the search criteria and then click **Search**. This displays the search results in the same screen.

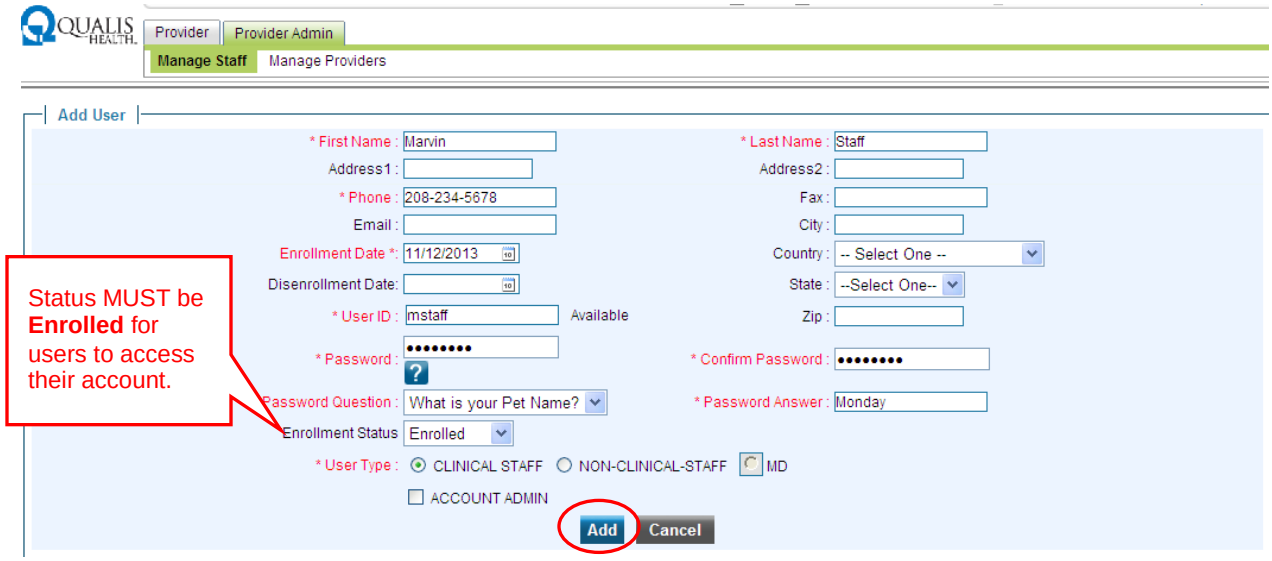


➢ *To view all accounts, click **Search** leaving the search criteria blank.*

Add a User Account

To add a User account, click the Provider Admin>Manage Staff tab. This displays your Search Form.

- Click **Add New User**. This displays the Add User screen (below).



Enter the details in the fields as described below:

- Enter the user's first and last name and the contact details in the corresponding fields.
- Enter the user's phone number.
- Enter the date on which the user is enrolled in the Enrollment Date field.
- Enter the unique login ID for the user to log into the Provider Portal in User ID field. *When the User ID is entered, one of the following text messages appears:*
  - *Available*- Indicates that the User ID is unique and does not exist in the database. This User ID is available.
  - *Not Available* - Indicates that the User ID already exists in the database. The User ID is therefore unavailable and a different User ID needs to be entered.
- Enter a password in the Password field.
- Re-enter the password in the Confirm Password field.
- Using the security question & answer from user's registration, select a question from the Password Question drop-down list.
- Enter the answer to the password question selected, in the Password Answer field.

- *The security question and answer helps in verifying the user's identity if they forget the password.*

- Select the appropriate option from the Enrollment Status drop-down list. ***Unless status is "enrolled", the user will not be able to log into their account.*** Refer to the Enrollment Statuses Table for more details.
- Select the radio button corresponding to the User Type that will be assigned. *Please Note:* Select Clinical Staff, otherwise the user will not be able to access Assessments in the Provider Portal.
- Do not select the checkbox Account Admin. If the user needs to be assigned with the Account Admin role, they need to send their Provider Portal Administrator registration information to Qualis Health to set up their account.
- After entering the details, click **Add** to save the details entered or…
- Click **Cancel** to discard the details entered and re-enter the new details

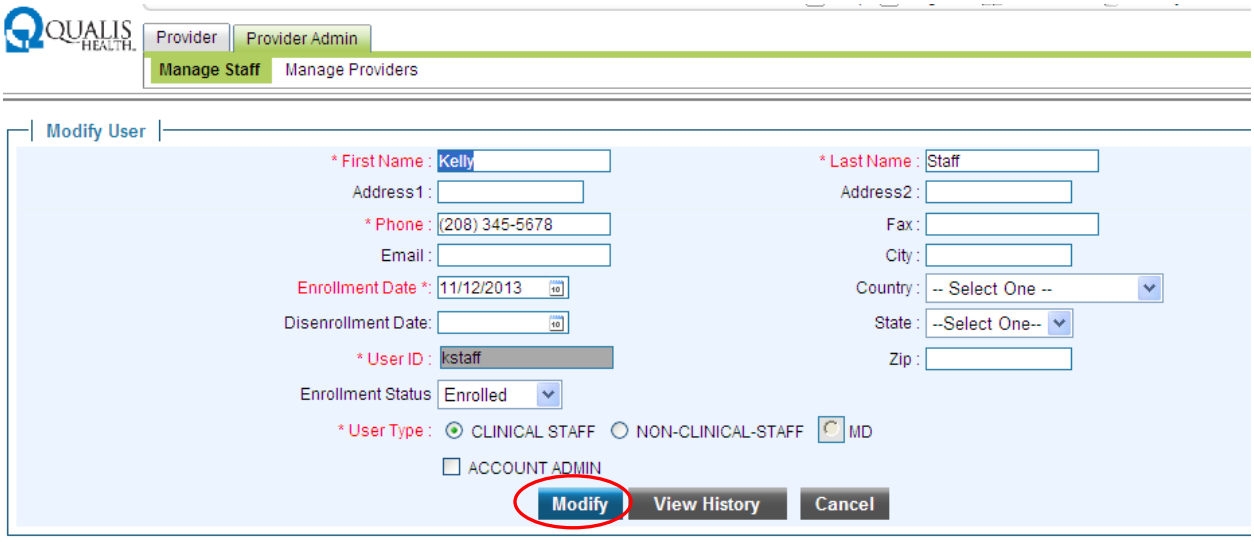
Table: Enrollment Statuses

Enrollment Status	Description
Enrolled	User is enrolled to Qualis Health Provider Portal User status is ACTIVE User can log in to the Provider Portal
Disenrolled	User is not enrolled to Qualis Health Provider Portal User status is INACTIVE User cannot log in to the Provider Portal
Pending	User's enrollment to Qualis Health Provider Portal is Pending User status is INACTIVE User cannot log in to the Provider Portal

Modify Staff User Account

To modify a user account:

- Click Provider Admin>Manage Staff link. This displays the User Search Form.
- Enter any of the search criteria and then click Search. This displays the search results in the same screen.
- In the search results, click  to modify. This displays the Modify User screen.



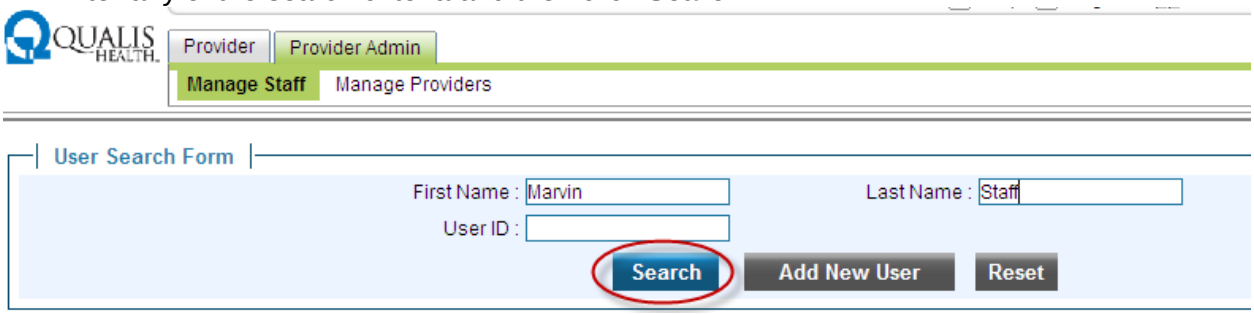
- Modify the required details and then click **Modify** to save changes.

Reset Staff User Password

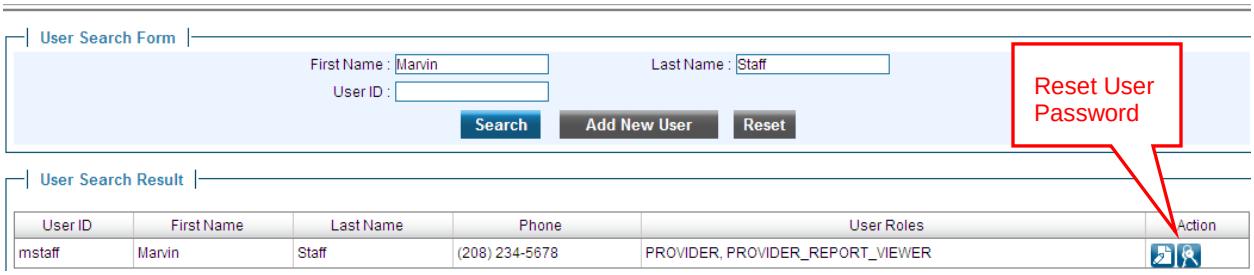
There may be instances when the user has lost their password. They should be able to use the “Forgot Password” link on the login page to reset their own password. If they cannot reset their own password, you can reset the password for them.

To reset the password, click the Provider Admin>Manage Staff tab. This displays the User Search Form.

- Enter any of the search criteria and then click **Search**.

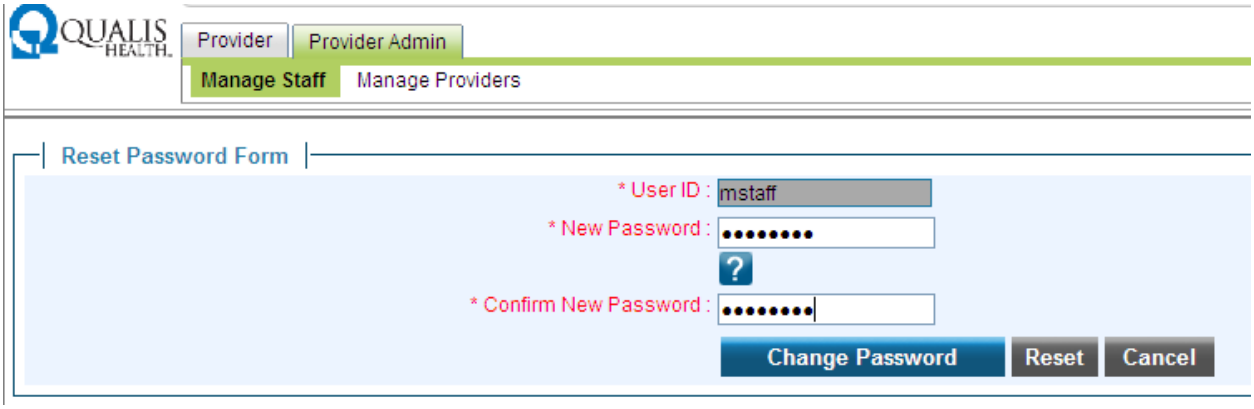


- In the User Search Result section click the Reset Provider Staff Password icon . This displays the Reset Password Form screen.



- Enter a new password in the New Password field.
- Re-enter the new password in the Confirm New Password field.

- Click **Change Password** to save the new password.



Locked and Inactivated Accounts

If you have an account that is locked or inactivated, you need to email or phone a request (*see Qualis Health Support*) to unlock or reactivate the account. You must provide the User ID for the locked account in your email.

Manage Providers

The Provider Admin>Manage Providers tab facilitates viewing and managing the master user account for an affiliated entity. This is not currently in use.

Provider Portal Troubleshooting – Q&A

Below is a list of commonly asked questions from providers when they first begin using the Qualis Health Provider Portal. Please feel free to contact us if you have additional questions.

Q: What can Qualis Health help me with?
A: We can assist with technical issues with the Qualis Health Provider Portal, help with questions regarding Provider Portal Registrations, setting up new Provider Portal accounts, new Provider training, unlocking user accounts and resetting System Administrator accounts.

Q: Who do I send new User applications to?
Qualis Health does not set up user accounts, only System Administrators. All User applications should be kept by the System Administrator.

Q: I forgot my password and now my account states it's been locked, what do I do?
Please call or submit an email (*see Qualis Health Support)* requesting we unlock your account. Be sure to include your User ID#.

Q: How do I reset my password?
A: Please contact your System Administrator(s).

Q: My System Administrator is on vacation right now, how do I get it reset it?
A: Yes, please call or submit an email (*see Qualis Health Support)* requesting a password reset. Be sure to let us know your System Administrator is on vacation and include your User ID#.

- *Note: Once your password has been reset you may want to set up a Security Question and Answer so you can reset your own password.*

  Once you are logged in, click on your User Name in the upper right hand corner and then click on *Edit My Profile*. Select a Security Question and Answer and click **Modify** to save the update.

Q: My co-worker submitted a request to Qualis Health, I have an episode ID number but when I search for it I can't find it.
A: Your Group, Practice or Facility may not have been associated to the episode as the Requesting Provider.

Q: How do I check the status of my prior authorization?
A: If *you* submitted the request you can use your Dashboard, Outstanding Requests and use the Abstract Summary to view all episode information at a glance, or, click the IP/OP links from anywhere in Provider Portal to navigate to the episode and review Authorization and/or Procedure details.

If you did not submit the request, use the Search Request tab and search for the member. Remember, enter the least the amount of search criteria (i.e. the Insurance ID).

Q: I submitted a request for review that was approved but it's no longer in my Processed Requests list in My Tasks.
A: All episodes with an episode status of Closed or Void will drop from your Processed Requests in 60 days. You can still search for the episode using the Search Request tab though.

If an extension of services was submitted by another user within your Practice, Facility or Group the episode will reside in that person's My Tasks list.

Q: How do I upload a document?
A: If the request has not been submitted to Qualis Health for review yet, navigate to the episode workflow using the IP or OP Episode Type link, click the Documents tab in the LHN and click the **Add Document** button.

If the request has been submitted to Quails and we've initiated our review Documents cannot be uploaded unless we request additional information.

Q: I just navigated to an IP episode and, per notes, I need to upload clinical notes but the **ADD Document** button is missing.
A: It's possible that the episode was not pended correctly. Please contact Qualis Health Customer Service for your group.

Q: I just navigated to an IP Episode and per notes I need to complete an assessment, I can see an assessment in the drop-down list but I don't have the option to *take* the assessment.
A: It's possible that the episode was not pended correctly. Please contact Qualis Health Customer Service for your group.

Q: I'm trying to take an assessment but the Title drop-down list is empty.
A: It's possible that your user-role needs to be changed. Click on your User Name in the upper right hand corner then click on My Profile. If Current User Roles do not state **PROVIDER** please have your System Administrator update your User Role.

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