



## Transcript of recorded Qualitrac Registration Training

February 2021

### Slide 1

Hi everyone. Thank you for joining us today. My name is Stephanie Wilson, and I will be leading us through today's training.

The goal for today is to provide you with an introduction to Telligen along with direction on how to get signed up for a Qualitrac provider portal account.

Pam Valvano is also on the call with us. She is the program director over the contract with the state of Colorado and may have had the opportunity to work with or talk with some of you prior to this training.

As I said, my name is Stephanie Wilson. I'm the implementation specialist and I'm here to assist you with utilizing the Qualitrac provider portal.

I'm excited to be working with all of you, and welcome all of your questions. I'll keep everyone muted throughout the presentation, but feel free to enter questions in the chat window or hold them to the end and we will try to answer all of them then.

### Slide 2

Our agenda today is to start with the introduction to Qualitrac. We will walk through the provider portal registration process and talk about what authorized officials will do.

I have a few things for you to note and remember, along with some direction on where to go for help.

We will finish up the session with all of the questions that are submitted in the chat window and any questions that you want to ask at the end. The presentation should only take about 20 minutes, and we will have the rest of the time available to answer any questions.

### Slide 3:

Let's get started with our introduction to Qualitrac.

Qualitrac is a web-based population health management system.



Qualitrac is a proprietary system developed and created by Telligen. It was originally released in the late 1990s and has continued to be developed and refined since that time.

With being a web-based system, the Qualitrac provider portal is available anywhere that you have an Internet connection. This allows users to access the system at any time and have real-time information related to the data in the system.

At Telligen, we have worked to streamline the review process and have all necessary information contained on one page.

The workflow processes built into the system allow for the review to move through the review process in the most effective and efficient way.

The system also provides users with real-time notification letting you know of any change in the in the status of a review or if additional information is needed.

Telligen is also very aware of the need to ensure that all documentation and information loaded into the Qualitrac portal is kept secure. We work to maintain a system that meets and exceeds industry standards, so you never have to worry about the security of the data that you are submitting.

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Beginning Monday, March 1<sup>st</sup>, case management agencies will submit review request using the Qualitrac provider portal to submit reviews. To use the system, we have to make sure that you have an account set up in the system.

To do that each organization will need to have at least one authorized official setup in the system. The authorized official will manage all of the user accounts for the organization or organizations.

The authorized official will set up any users for the organization that they are the authorized official for. They will also be able to remove any accounts if someone leaves or changes positions and should no longer have access to portal information.

The website link where you can find the registration packet is listed at the bottom of this slide is currently located on the Colorado website on the long-term services training page. (Link: <https://www.colorado.gov/pacific/hcpf/long-term-services-and-supports-training>)



I will show you some additional information around how to get to this page in the next few slides. So, if you follow or click on the link listed here...

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It will take you to the Colorado long term services and support training page and I have a screenshot of that page listed here. Once you land on this page you'll want to scroll down toward the bottom of the page.

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So, you'll scroll down until you see the panel titled Telligen's Qualitrac Review and Provider Portal and you can click on the plus sign or anywhere in this panel to open it up.

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Here you will see the link to the provider portal registration and the official training guide.

The official training guide will be emailed to each authorize official when we send the email with your username and the link to activate your account, but we have also posted it here for you to have as a resource.

Please remember this page and this location because we will continue to post additional information here.

The slides from the training, along with the recordings of the training will be located in the same place. Once the portal is live, we will also post the link to access the portal here to.

## Slide 8

Now let's walk through the provider portal registration process. I do want to point out that some of you may be attending the training for PASRR, along with attending today.



Please be aware that you only need to sign up for the portal once. The portal for PASRR is the same portal as for all of the other reviews. So, once you're signed up for an account, you'll be able to access the system for all of the processes necessary.

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The provider portal registration is completed entirely online. We previously had a paper process but moved this to a completely online process so that paper doesn't have any passed around or put through the mail.

The process is initiated by an executive or manager at the organization and they will click on the provider portal registration link listed here.

A thing to note if you're going to have more than one authorized official for your organization or organizations, you'll need to repeat this process for each authorized official.

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When you click the link for the provider portal registration, this is what the first page in the process looks like. This is where the executive manager or a team lead will indicate who they want to be named as an authorized official and click the begin signing button at the bottom.

From this, an email will be sent to the email address indicated in the authorized official's section.

The authorized official needs to click on the link in the email and complete their section of the process. Once everyone has completed their part, a final version of the agreement will be emailed to the authorized official and the email address indicated in the provider executive section.

Just to talk about it again, if there will be multiple authorized officials, once this page is completed, you will close the website. Click on the link again and then fill that form out for each individual that will be named as an authorized official.

So just to kind of walk through this the provider executive, whether that's a team lead a manager, someone who has the authority to indicate who is going to be



the authorized official, will enter their name and email address in the provider executive section. And then they will enter the name and email address of the person that they're indicating to be the authorized official. And then you'll just click the "Begin Signing" button to kick off that process. Again, you'll close this and start over for each authorized official for that organization.

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The complete process is really completed in three easy steps. That executive or manager at the organization will initiate the process. They'll click on the link to open the online document.

That person will enter the organization information and indicate who they want to be the authorized official. If the organization would like to have more than one, the executive or manager will need to initiate the process for each authorized official.

I do want to clarify here, and it usually comes up regularly in questions, there are times when the authorized official and the manager executive are the same person. And this process will work exactly the same. You will just indicate yourself as the authorized official. Click the begin signing button and then, once you receive the email with the link, you'll fill out that additional information.

That link in the email that you received will allow that authorized official to complete their portion of the registration process.

And they'll need to have basic information ready, such as their phone number, organization address, the NPI of the organization. If your organization does not have an NPI you can enter your Medicaid ID in that section and then fill the rest of that information out.

Once the authorized official has completed their section and submitted the documents, Telligen will receive that completed packet and we'll set up that authorized official account.

Once we have the account setup, we will send back out an email letting the authorized official know what their username is, and we'll also have that training document and the link to activate the account and create their password.



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So just to recap all forms are completed online. If more than one authorized official is needed, you'll just repeat the process for each one.

We do use DocuSign technology for this process and that ensures all documents that need to be submitted are routed via the email to the appropriate person.

Once everyone has signed, the executive and the authorized official will receive a fully executed agreement to retain for their records.

The Telligent Qualitrac registration team will create the account and provide instructions to the user.

Once that's done the authorized official will then be able to manage additional users for the organization.

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We'll talk a little bit about authorized official training.

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So, the official training guide is posted here on the website and we've included that link and then the Telligent's Qualitrac Review and Provider Portal panel and then you can find that documentation within there. Like we said, we'll also send that out with the email with the username once the account is set up.

The training is a PowerPoint presentation, and it walks an authorized official through every step of how they can create a user account, update any information for the users, and how they also can deactivate accounts if needed.

So, we won't walk through each of those steps in this presentation, but the training guide does that. There are step-by-step screenshots and additional helpful hints. Things like that to provide guidance and best practices.



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So just a few things to note and be aware of.

As you're filling out the packet, you'll probably see on there that it says we will have an account set up within three to five business days. Usually that's our process.

In this instance, since the portal will not be available to users until March 1st, we will not be setting up those authorized official accounts until the last week in February.

And the reason for this is that the link to activate the account is only good for seven calendar days.

And we want to make sure that when you click on those links to set up and activate your account that they're actually live and working so that you don't have to ask us to resend that to you.

We do recommend that people go ahead and fill out that packet and get it sent into us this will assure that we have those accounts set up and ready to go on March 1st when everything goes live, but just know that we won't be sending out those emails until the week of February 22.

Another thing to note is that to comply with industry standards, the system will ask all users to change or update their password every 90 days.

Once you login set up your account, you'll have 90 days from that time and then the system will indicate to you that you need to reset your password.

It's a pretty easy process. On the sign in page, there's a link that just says reset password. A modal will pop-up, or a pop-up window, you will enter your username in there and click submit and then you'll receive an email at the email address that is associated with that username with the link to reset your password. You don't have to go back to your authorized official or to Telligen to reset your password. you can just follow that simple process, and then you can change or reset your password whenever it's needed.

Just to say it again, that Qualitrac portal will not be available until March 1st. Once it is available those reviews can start to be submitted to the system and additional users can be added and set up for organizations.



Again, I've listed the website where all the information in the training documentation is going to be listed and that's the Colorado long term services and supports training page. (Link: <https://www.colorado.gov/pacific/hcpf/long-term-services-and-supports-training>)

And like I said before, but I do recommend that people bookmark or make sure they have an easy way to get to that link because will continue to post any additional information such as user guides, FAQs, these recordings, and different things like that, so that you have access to those details and can find them easily.

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So, finally, where to go with questions.

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I've listed some important information here for you to have this as a resource, again we have that website at the top.

The long-term services and support training page where you can go to find all of this information.

That's where the provider portal registration link currently is to set up those authorized officials and that official training user guide for how those authorized officials can set up accounts or if they need to update any information on the accounts that are set up. All of that is available there in that user guide.

There will be a help desk that users can reach out to if you have any questions about your account or questions about the Qualitrac portal once you began to use it. And we've listed the phone number there, so you have access to that. Just remember that this will not be available until March 1<sup>st</sup>, once everything goes live.

Just a quick reminder, we will be having training that will walk users through the entire process of submitting reviews through our system.

Anyone that will be submitting reviews or checking on the status of reviews is welcome to join us. We really encourage participation because it will answer a lot of the questions you have about the system itself. And will also provide a





resource, because each panel and screen will have a screenshot, and we'll walk through each one and how what information needs to be entered.

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That completes our training for today, please enter any questions in the chat window or feel free to unmute yourself and ask those questions. I appreciate the opportunity to present this information to all of you and look forward to working with you as this contract goes live.