QTool
Clinical Support Tool

Admin Quick Tips

Alabama Medicaid Agency

February 2010

URL

www.qtool.alabama.gov

CREATE A BUSINESS

Your business has been created for you.

EDIT A BUSINESS

Must have the role of Business or Customer Administrator

- Select Business Admin from the Menu Listing.
- Business Administration View page is displayed.
- Click on to edit
- Enter in changes
- Click on Button to save the changes

CREATE A LOCATION

Must have the role of Business or Customer Administrator

- Select Business Admin from the menu listing or if the Business Admin View page is displayed click on the hyperlink, Location.
- Location Administration View page is displayed.
- Click on [Add a New Location]
- Enter in values into appropriate fields
- Click on Button to save the changes

EDIT A LOCATION

Must have the role of Business or Customer Administrator

- Select Business Admin from the menu listing or if the Business Admin View page is displayed click on the hyperlink, Location.
- Location Administration View page is displayed.
- Click on that is next to the location that needs editing .
- Location Administration Add/Edit screen is displayed.
- Enter in changes.
- Click on Button to save the changes.

CREATE A USER

Must have the role of Business or Customer Administrator

- Select Business Admin from the menu listing or if the Business Admin View page is displayed click on the hyperlink, Staff
- Staff Administration View page is displayed.
- Click on [Add a New Staff]
- Enter in values into appropriate fields

NOTE: For Doctor, Nurse, and PA Person Types, the following is required: DEA, NPI, Medicaid Id

- Click in box for [ ] Add a User?
- Click on [Update] Button to save the changes
- Create a User screen displays.
- Enter in the information to set up a user id and password.
- Click on the [Create] button
- The Staff Administration Add/Edit Screen is displayed.
- Assign Roles for user by clicking in the appropriate box. You may make any other changes as well.
- Click on the button.

NOTE: If the new user is using the computer that was used to set up the account, please do the following.

- Log out of the application
- Close the Internet (browser) page
- Open up a new Internet (browser) page
- Enter in the QTool url
- New user may log in.

NOTE: Password Requirement—8 characters numbers and letters only.

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PASSWORDS

Forgot Password

- Select Forgot Password on the sign-in page.
- Type in user name, which is an e-mail address.
- Click on Get Password button.
- An e-mail is sent to your user name. Answer the security question.
- Copy the new password from the e-mail and paste into the password field when logging in.

Change Password

- Select Change Password from the menu listing.
- Enter in Existing password in Password field.
- Enter in new password in New Password field.
- Retype new password in Confirm Password field.
- Left mouse click on the to change password to new password.

USER ROLE DEFINITIONS

Business Administrator—Front Office Staff, nurses, and other staff responsible for managing system security and staff information are recommended to be given this role.

Clinical User—Nurses, Case Workers, laboratory technicians are recommended to be given this role. This role enables the provider to see all screens. Doctor's, not e-prescribing, should also be given this role.

Customer User- Auditor or Case Worker are recommended to be given this role.

Everyone Role—Staff requiring read only access to the Patient Summary Screen and the Patient Health Summary.

Prescriber— Doctor's Physician's Assistants and Nurse are recommended to be given this role. This is tied to the ability to E-Prescribe in the system and can create, save, print, and send e-prescriptions.

Prescriber Agent—Full: Acts on behalf of a doctor and has the ability to create, save, print, and send e-prescriptions.

Prescriber Agent—Partial: Acts on behalf of a doctor and has the ability to create and save e-prescriptions. A Prescriber must review their "draft" prescription and indicate the prescription can be sent/make change etc.

Scheduler— Scheduling staff, back office staff with no reason to update or view detailed patient data are recommended to be given this role.

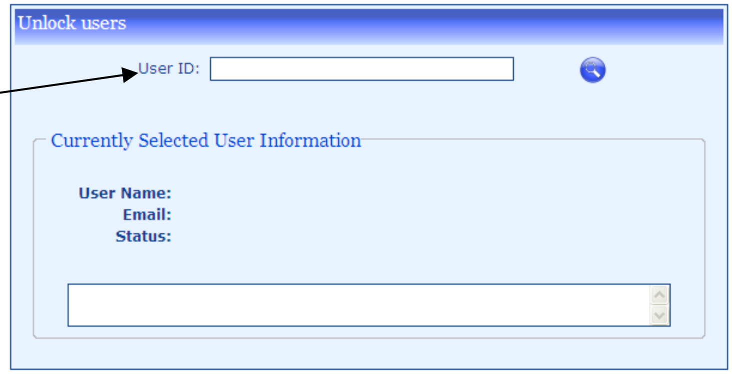
	Screens and System Activities												
Security Roles	View Patient History	Run Patient Report	Add patient & Update Demographics	Add & Update Eligibility	Add & Update Vitals	Add & Update Self-Rpt Meds	Add & Update Lab Data	Add & Update Personal History	Alert Deactivation & Fulfillment	Message Center	Create, Send, & Save e-Prescriptions	Execute Office Reports	Manage Business Admin
Business Admin	x	x	x	x	x	x	x	x	x	x	x	x	x
Clinical User	x	x	x	x	x	x	x	x	x	x		x	
Customer User	x	x	Update only							x		x	
Everyone	x	x											
Prescriber	x									x	x		
Prescriber Agent - Full										x			
Prescriber Agent - Partial										x			
Prescriber w/Clinical User	x	x	x	x	x	x	x	x	x	x	x	x	
Prescriber - Full w/Clinical user	x	x	x	x	x	x	x	x	x	x	x	x	
Prescriber - Partial w/ Clinical User	x	x	x	x	x	x	x	x	x	x	Save Only	x	
Scheduler	x									x			

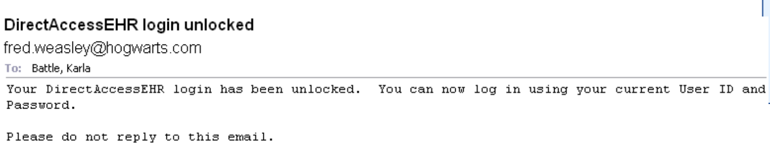
Disclaimer: Please note that certain data is not/may not be reported due to State and Federal Laws for HIPAA and Sensitive Data.

UNLOCKING USERS

Business Administrators and Customer Admins will select Unlock User from the Admin Menu.

- Enter in User ID and press
- If User ID is found, the user's first and last name displays, email address, and Status of locked or unlocked. "User Found" message is displayed in the box.
- If user is locked, press Unlock button To unlock the user and send them a new password via e-mail.
- If the user does not have a valid e-mail address or errors occur, first validate that the user id is correct. If it is and errors still occur, contact the Help Desk.
- User is able to log in using his/her existing user ID and password.
- Example of the email.

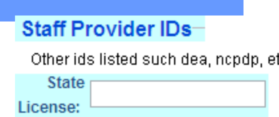



DirectAccessEHR login unlocked
fred.weasley@hogwarts.com
To: Battle, Karla

Your DirectAccessEHR login has been unlocked. You can now log in using your current User ID and Password.

Please do not reply to this email.

SET-UP TASKS TO DISPLAY PRIOR AUTHORIZATION



- **State License**
  - Business Admins must update the State License for each prescriber and prescriber agents (full and partial).
  - The state license is the number used when linking prior authorization requests from HID.
  - Select Business Admin option, select Staff option, locate prescribers name and click to update the state license field.
  - Press to save the state license number. Repeat for each prescriber and prescriber agent.

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Connected to the Pharmacy Health Information Exchange Operated by SureScripts

E-PRESCRIBING - SET UP FOR USERS

Business Administrator Users,: When creating new prescribers, you will need to use this information and follow the current create-a-new-user step. Prescriber Agents will use the Prescribers numbers when sending a prescription. You need to set the Prescriber Agents role for Nurses and other clinical users with the authority to refill or send electronic prescriptions on the behalf of a prescriber.

PRESCRIBERS ONLY- SureScripts ID

Setting up Your E-Prescribing Access

Business Administration Screen—Location Subscreen

- **Step 1—Location Information**—Please **first** make sure each location has its appropriate phone, address, zip and fax information for the e-prescribing network (Surescripts) is correct. Surescripts requires each location to have an address, fax, and phone number available to their participating pharmacies.

Business Administration Screen—Staff Subscreen

- **Step 2—DEA Number**—Please make sure each prescriber has their appropriate **DEA number** on their Staff page. This is the number Surescripts uses to post on prescriptions and refill requests for each physician.

- **Step 3—SPI Set Up.** For each **physician, nurse practitioner or physician's assistant's** staff page, you will use the following screen.
    - **From the following screen,** you will need to **select(check)** the appropriate options for your location and prescriber.
        - **Request SPI (Surescripts Prescriber Identifier) Checkbox**
            - Check the box beside each location for which the selected Prescriber wishes to perform e-prescriptions or draft and send faxed/printed prescriptions
        - **Select each function the provider wishes to perform with Surescripts**.
        - **Send New Rx= Ability to Send new Prescriptions** from the system to Pharmacies
        - **Receive Refill Request/Send Refill Response = Ability to receive refill requests to this system from Pharmacies**
        - Click to request the SPIs for each location checked.

Are You an Existing Surescripts Prescriber?

- Wish to Switch your receipt of Refill Requests to the QTool?
    - Perform **Step 3** and select both choices (New RX and Refill) above and Click Request SPI
- Wish to perform/write New Prescriptions from this system but only pick up refill requests from your other system(s)?
    - Perform **Step 3** and select New RX choice only and Click Request SPI

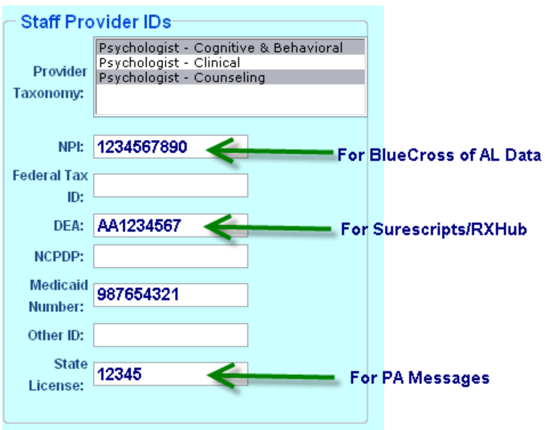
- Other Definitions of Fields on Surescripts ID Request Screen
    - Prescriber Name
        - The name of the prescriber. System provides from the main staff page.
    - Active
        - System provides. Identifies if the SPI record is active. Indicates that the provider is an Active Surescripts Prescriber.
    - SPI Root
        - This is the overall number for Surescripts for the provider without regard to provider location. Surescripts sends this number upon set up
    - SPI
        - Surescripts Prescriber specific number per prescriber location.
        - Surescripts provides upon successful request

E-PRESCRIBING - SET UP USERS

Business Administrator: These steps are for Prescriber, Prescriber Agent—Full, and Prescriber Agent—Partial only. All other roles do not have access to e-prescribing. Please execute the following for existing users. Please add these steps when creating a new user.

Prescribers & Prescriber Agents: Setting Roles, Prescriber Agent, and Other fields

STAFF PAGE ID CLARIFICATION—USED FOR SYSTEM ACCESS TO DATA



- **<u>For Prescriber only:</u>**
- Ensure that these fields contain the appropriate values:
  - Ensure that Prescribers also have a Clinical User Role in the system for patient screen access
  - NPI, DEA, Medicaid Number, and State License.
  - Prescriber agents will use the doctor's numbers and these number are not required.

STAFF PAGE ROLE CLARIFICATION—SYSTEM ACCESS TO E-RX SCREENS

- **<u>For Prescribers and Prescriber Agents:</u>**
- Select the appropriate ROLE for the staff member: Prescriber, Prescriber Agent—Full, Prescriber Agent –Partial by clicking in the appropriate box.
  - **Prescriber** : She/he can create, save, print, and send e-prescriptions.
  - **Prescriber Agent—Full:** She/he acts on behalf of a doctor and has the ability to create, save, print, and send e-prescriptions.
  - **Prescriber Agent—Partial**: She/he acts on behalf of a doctor and has the ability to create and save e-prescriptions. A Prescriber must review their "draft" prescription and indicate the prescription can be sent/make change etc.

STAFF PAGE AGENT AUTHORITYE-RX CREATION ON BEHALF OF PRESCRIBER

- **<u>For Prescribers Only:</u>**
- The Staff Page displays a list of available users that contains the Pre-scribers, Prescriber Agent-Full, or Prescriber Agent-Partial roles
- Select the appropriate name(s) that may act on behalf of the selected staff member (doctor) by clicking in the box.

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ADMINISTRATIVE REPORTS

REPORTS FOR ADMINISTRATORS

- From the Home/Search Page, click on Report Center to access the available reports.
- Click on the a menu option when finished viewing the report.

Report Category	Display Name	Explanation
Administrative	# of E-Prescribing Sent by Provider By Location	Enter in Start and End date and click view Report to see number of e-prescriptions sent by location's providers
Administrative	# of E-Refills Sent by Provider By Location	Enter in Start and End date and click view Report to see number of refill requests sent by location's providers
Administrative	# of Patient Searches Execute Grouped by Location (all locations)	Enter in Start and End date and click view Report to see number of search executed location's providers
Administrative	# of Patient Searches from EMRs	Enter start and end date, select a prescriber or a staff type to see number of e-prescriptions prescribed and sent.
Administrative	DDI severity 1 Prescribed	Enter in start and end dates, select business, locations or a specific role or user and list DDI Severity 1 that were pre-scribed during the start and end dates.
Administrative	Training Executed Per Business Per Location	Enter start and end date to list the users' training that oc-curred between the start and end dates.
Administrative	Users List Per Business (Practice) (All Businesses)	Enter start and end date to list all users for all businesses.
Trend	Medicaid Asthma Quality Trend by County	Select start and end date and the County to obtain a trend report regarding asthma for the providers in the County.
Trend	Medicaid Asthma Quality Trend by Provider	Select start and end date and the County to obtain a trend report regarding asthma for a selected providers.
Trend	Medicaid Diabetes Quality Trend by County	Select start and end date and the County to obtain a trend report regarding diabetes for the providers in the County.
Trend	Medicaid Diabetes Quality Trend by Provider	Select start and end date and the County to obtain a trend report regarding diabetes for the selected provider.

QTool Help Desk: (877) 222-3218, Option 2
For assistance with User Access and General System Questions.

Policy Questions:: Kim.davis-allen@medicaid.alabama.gov

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