

# California DHCS Recovery Incentives Program

Web Portal Training Document





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## Q2i IM Web Portal Overview





## Q2i

#### Who is Q2i?

- Q2i is a digital health company focused on innovation, development, and supplying evidence-based technology that improves treatment for Substance Use Disorder (SUD).
- Our mission is to design, develop, and supply the most advanced technologies that enable care teams to improve the success of their Substance Use Disorder treatment programs and interventions.
- Our solutions consist of patient mobile applications connecting to a health care team portal.
- Q2i improves connection, communication, support, and insight while increasing availability, accessibility and program success.
- Q2i's technology-enabled <u>contingency management</u> solutions are a significant scientific and clinical advancement that improves treatment for SUD.

#### What is our role in this program?

- Q2i will configure, delivery, and implement a web-based, provider-facing portal that will support this pilot program.
- Q2i will train DHCS, Counties, Providers, and CM coordinators on the use of this portal.
- Q2i will further support stakeholders through trainings, troubleshooting, and a support center accessible via telephone.
- Q2i will support Counties and Providers in accessing and analyzing data from this program to support better outcomes.
- Q2i's California-based teams are available to Counties and Providers for education, training, and support.



Design Specifications

- Accessibility through all modern web browsers Chrome, Safari, Edge, and other Chromium-based browsers.
- UDT information captured and archived for reporting and analysis
- Automated incentive determination and distribution based upon UDT events configured specifically to the DHCS Program rule sets
- Comprehensive and extensible demographics and program data capture
- Highly extensible program reporting and business intelligence
- Strict compliance with industry information security and privacy standards (e.g., NIST SP 800 Standards, FIPS 140-2 encryption standards via AES-256 encryption, etc.).







Privacy, Security, and Compliance

#### **Privacy**

- Monitor platform with Netskope to identify and block any privacy data (PII / ePHI) data at rest or in transit and Spirion for data leakage
- Follow *federal guidelines* data transfers requiring a secure transfer (encryption) and access control.
- Monitor critical data transfer internally and externally using state of the art surveillance software

#### Security

- HIPAA attestations with annual external 3rd party review of information systems to validate via penetration tests
- Follows NIST 800-53 and Defense in Depth frameworks
- Monitored with CrowdStrike SOC (24/7/365)

#### Compliance

- Monitor platform for compliance NIST (42CFR) and HIPAA Compliance using SecureFrame
- Platform hosted on FedRAMP compliant AWS instance
- FedRAMP compliant call center technology and service

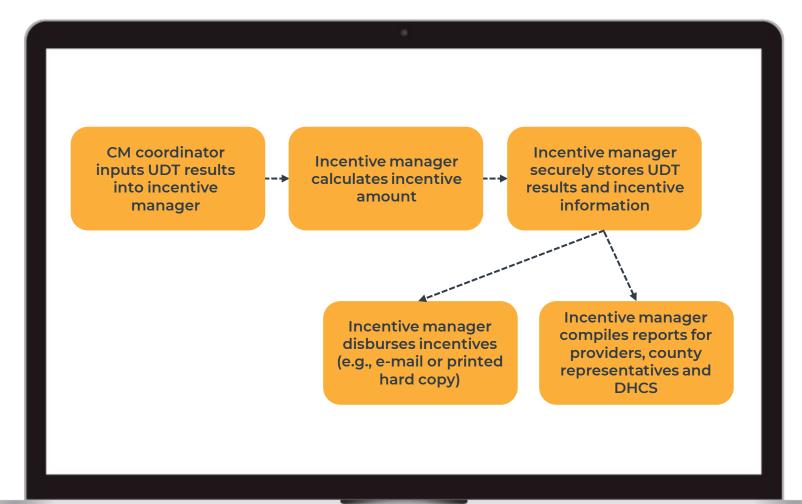






#### Incentive Mechanics

- UDT results are entered
- System automatically assesses member-specific circumstances
- System automatically applies correct incentive amount
- Incentive amount is "dispatched" meaning CM coordinator can select delivery method for member
- Incentive transaction is logged









Key User Activities

#### DASHBOARD .....

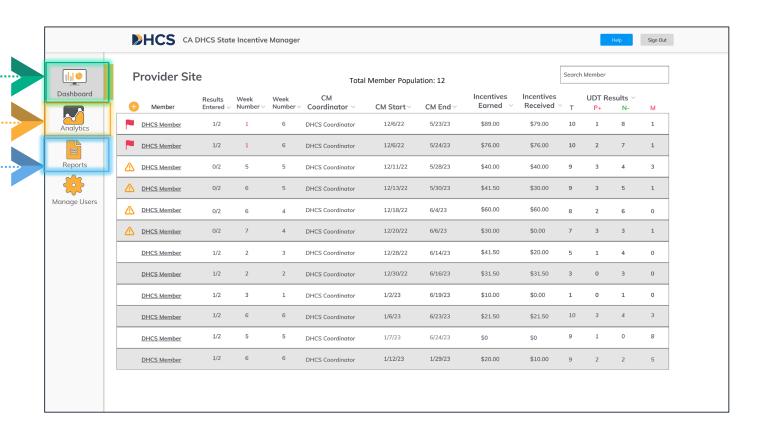
- · Adding new users into the program
- Managing member progress
- Logging UDT results or absences
- Calculating, Offering, and Dispensing incentive rewards

#### ANALYTICS .....

**Generating and Analyzing** population-level analytics related to member progress

#### REPORTS

**Compiling and Downloading** standard reports for Counties and Provider organizations





## Know your Portal Role







#### Overview

Stakeholder	Role	Eligibility Approver
DHCS Leadership	DHCS User	N/A
DHCS Administration	DHCS User	N/A
County Leadership	County User	DHCS
County Administrator	County User	DHCS
CM Supervisor	CM Coordinator	Q2i, DHCS or County
CM Coordinator	CM Coordinator	Q2i, DHCS or County
Backup CM Coordinator	CM Coordinator	Q2i, DHCS or County
Q2i	Administrator	Q2i
Support Team	Administrator	Q2i

**Note:** Members do not have roles in the system. Members are managed by CM coordinators





### Access Rights

	USER ACCOUNT CREATION			
	DHCS	County	CM Coordinator	
Admin	$\odot$	$\odot$	$\odot$	
DHCS		$\bigcirc$	$\odot$	
County			$\bigcirc$	
CM Supervisor / Coordinator				

MEMBER MANAGEMENT				
Add new member	Change member site / county	View Progress	Log UDT results	Dispense Incentives
<b>⊘</b>	$\odot$	$\bigcirc$		
	$\odot$	$\bigcirc$		
		$\bigcirc$		
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ANALYTICS AND REPORTS				
State-level	County- level	Site-level		
$\odot$	$\bigcirc$	$\odot$		
$\odot$	$\odot$	$\odot$		
	$\bigcirc$	$\odot$		
		$\odot$		



### Admin / DHCS

USER ACCOUNT CREATION			
DHCS	County	CM Coordinator	
$\bigcirc$	$\odot$	$\odot$	

MEMBER MANAGEMENT					
Add new member site member / county  Change View Log UDT Dispense results Incentives					
	$\odot$	$\odot$			

ANALYTICS AND REPORTS					
State-level County-level Site-level Member-level					
<b>⊘</b>	<b>⊘</b>	$\odot$	<b>⊘</b>		

#### Who are you

**DHCS** 

- Q2i, DHCS leadership or DHCS administration
- DHCS contractor (given DHCS leadership approval)

#### What is your responsibility?

- Managing the program
- Assessing program outcomes
- Monitoring for fraud, waste and abuse

#### What are your access rights?

- Creation of new users (except DHCS roles)
- Addition or changes to member information (i.e., changing site)
- View all information related to program







#### County

_	USER ACCOUNT CREATION					
	DHCS	County	CM Coordinator			
			<b>⊘</b>			

MEMBER MANAGEMENT				
Add new member site / county  Change View Log UDT Dispense results Incentive				
	$\bigcirc$	<b>⊘</b>		

ANALYTICS AND REPORTS					
State-level County-level Site-level Member- level					
	$\odot$	$\bigcirc$	$\bigcirc$		

#### Who are you

County

- County health leader or administrator
- County leader (given DHCS leadership approval)

#### What is your responsibility?

- Build network providers
- Participate in required trainings
- Collect information from participating providers
- Work with the State's training and technical assistance provider to complete readiness and fidelity reviews

#### What are your access rights?

- Creation of CM coordinator users
- Addition or changes to member information (i.e., changing provider)
- View county-level, site-level and member-level information







### CM Supervisor / Coordinator

	USER ACCOUNT CREATION			
	DHCS	County	CM Coordinator	
CM Supervisor / Coordinator				

MEMBER MANAGEMENT				
Add new member	Change member site / county	View Progress	Log UDT results	Dispense Incentives
$\odot$		$\odot$	$\odot$	$\bigcirc$

ANALYTICS AND REPORTS			
State-level	County-level	Site-level	Member- level
		<b>⊘</b>	<b>⊘</b>

#### Who are you

- Licensed Practitioners of the Healing Arts (LPHAs) or Certified Peer **Support Specialists**
- Substance use disorder (SUD) counselors that are certified / registered by a DHCS recognized organization and accredited with the National Commission for Certifying Agencies
- Other trained staff under supervision of an IPHA

#### What is your responsibility?

- Collect CM services consent and enter member information
- Collect and enter urine drug test (UDT) results and ensure delivery of incentive to member
- Communicate with clinical staff regarding UDT results and any information of clinical relevance
- Refer Members to treatment and recovery staff for follow-up

#### What are your access rights?

- Create new member account
- Manage member progress and log UDT results
- Select and dispense incentive awards
- View member level information



## Password Creation and Log-In





#### **HCS**

## Welcome E-mail

All

- Each new user will receive a specific welcome email (not applicable to Members)
- The email will introduce the user to the service
- It will provide a unique link to create a new password
- This link will take you to a password creation page (see next page)
- Please note this unique link will provision access right as defined by user role.
- Note: This link expires after 72 hours for security purposes.



#### Hello & Welcome!

Welcome to your dashboard, where you'll manage your DHCS Contingency Management Program Members. Let's set up your dashboard to get you started.

Setting up your DHCS Contingency Management Dashboard account up is easy. If you have any questions at all, please don't hesitate to reach out to us!

Follow this secure link to create your password; this is tied to your work email, which will be your username for the program:











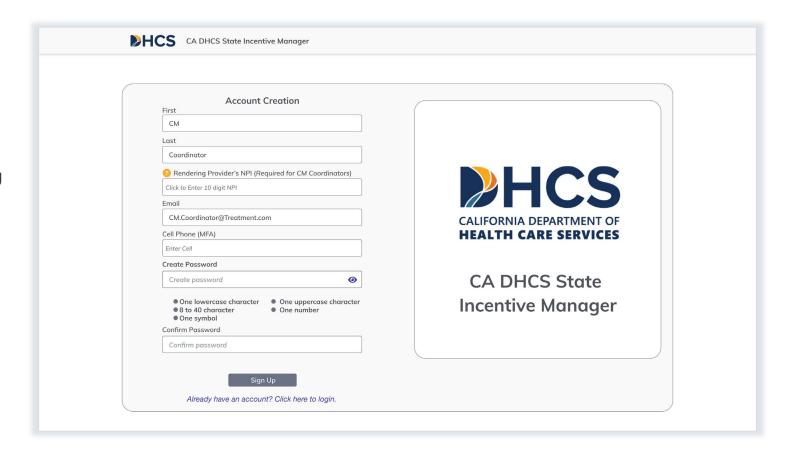




## **Password Creation**

ΑII

- Usernames will be the email address provided upon account creation
- Passwords must comply with the following requirements:
  - Contain at least 8 characters
  - capital letter
  - Number
  - special character such as "\$"





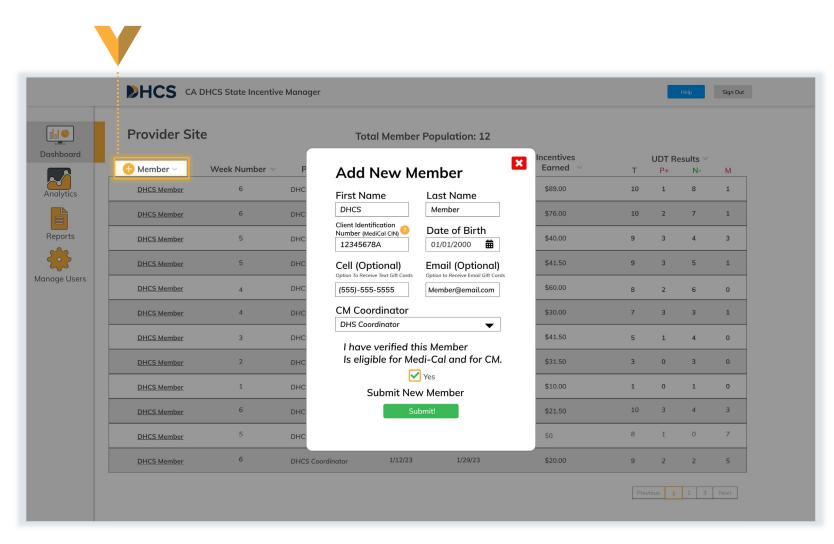
## Managing Members





## **MEMBER**

- Open "dashboard pane"
- Click " to button which is to the left of "member" on the top of the data table
- Input required patient information\* (including CIN/Member ID)
- Input optional information (these fields support incentive delivery)
- Select associated provider
- Verify Member program eligibility
- \* Note: The Members are only permitted to be enrolled at one site. Please see next page.





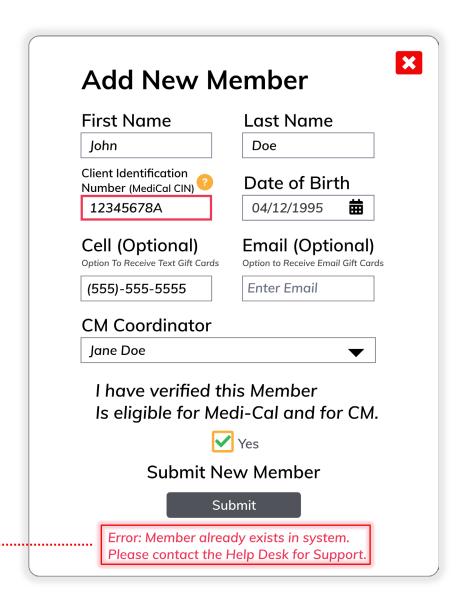


## **Double Entries**

CM Coordinator

#### CM Coordinators may see error at right

- This occurs when a member's information (CIN or Member ID) has matched an existing entry
- This functionality is a safeguard against Members who may try to enroll in multiple centers simultaneously – this is against protocol
- This may occur because a member is seeking to transfer to your clinic from another.
  - Please see guidance on changing member location







## **Member Location Changes**

**CM** Coordinator

#### Only Admin users can adjust treatment location. Below is the approval procedure:

- CM Coordinator is informed by member about necessary location change
- CM Coordinator assists member in site selection
- CM Coordinator contacts new site to ensure they can accept the additional caseload
- CM Coordinator calls the call center (find via help section) to inform them of the details of the necessary change

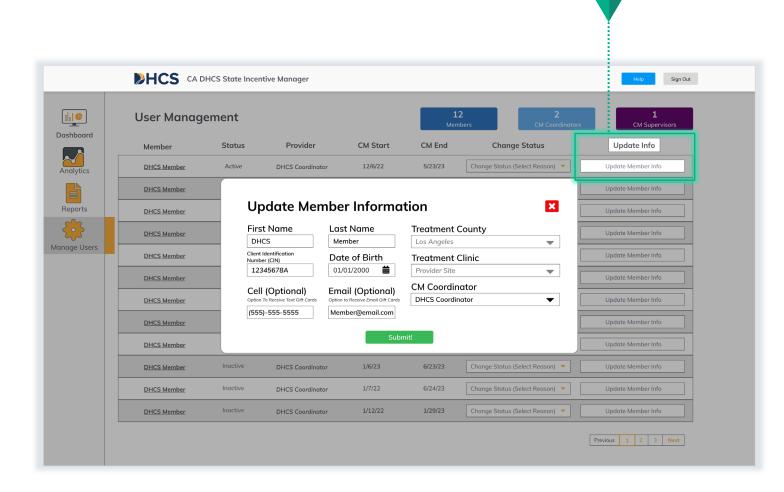
The call center will contact Q2i to make this change.

Note: All such changes must be logged in the electronic health record system



## **Member Information Changes**

- Click "Manage Users" on left pane
- Find relevant user
- In data table, click "update info"
- At any point, a can call the call center to assist with these changes. Contacts can be found here.

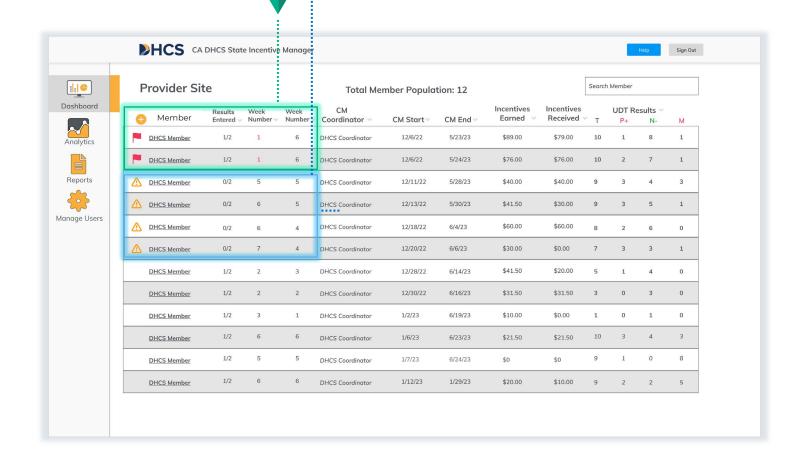






## **Member Week & Alerts**

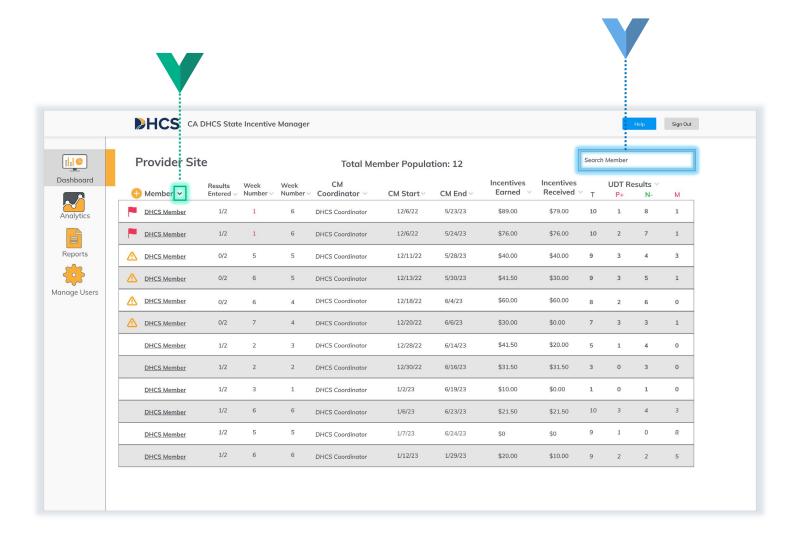
- During the first 12-weeks, 2 visit entries are required per week per Member within their cm week
- During weeks 1-12, it is recommended that Members are scheduled on either a Monday/Thursday, or Tuesday/Friday Schedule
- The icon represents a **Member** that only has either 1 or 0 visits entered for their week
- The icon represents a Member that has no visits entered so far for their week





## Select Member

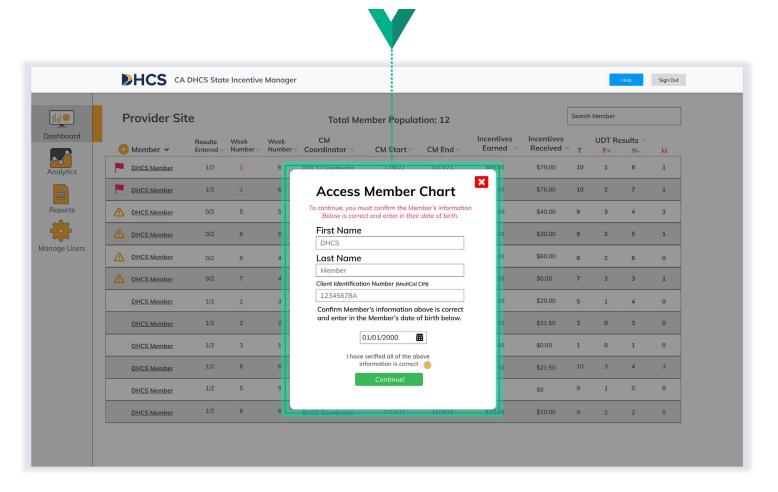
- Open "dashboard pane"
- Find member either by sorting or searching
- Click on the member's name (you will note that it is underlined)
- This action will open that specific patient's chart (next page)





## **Access Member Chart**

- Click on the member's name (you will note that it is underlined)
- Ask the Member to confirm their DoB then enter it in
- Select the Radio Button to confirm the information is collect
- This action will open that specific patient's chart (next page)



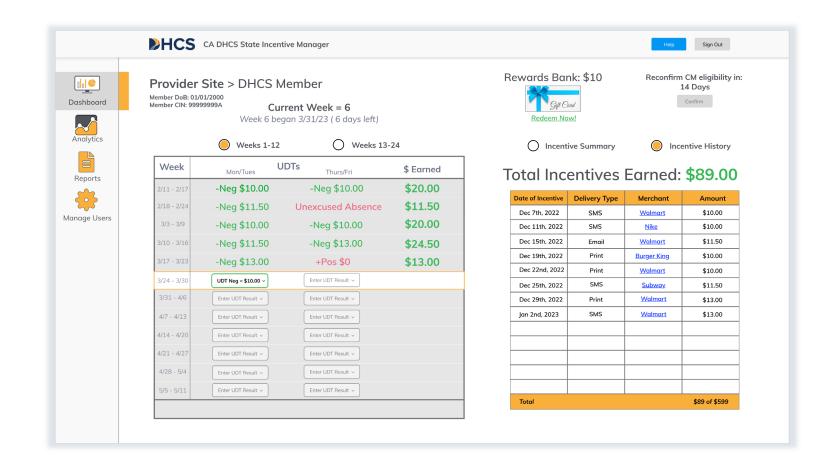


## **Member Chart**

CM Coordinator

This page contains member-specific information: (from left to right)

- UDT results by visit
- Incentive earned by visit and week
- Next UDT input
- Rewards bank
- Reconfirmation of eligibility for program (completed monthly by CM coordinator)
- Summary of incentives earned
- Incentive history (date, delivery type, merchant, and amount)



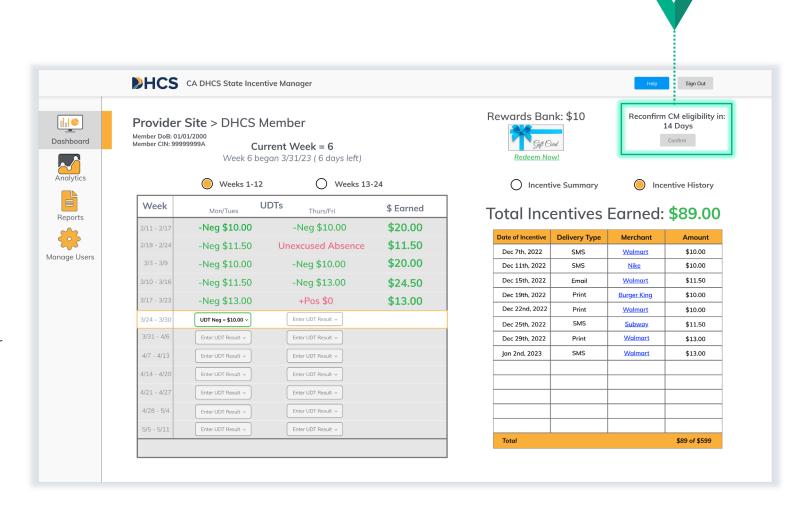


## **Member Pane**

CM Coordinator

Every 30 days, the CM coordinator must attest to the members eligibility:

- Navigate to the Member's Pane (screen on right)
- Locate the "Reconfirm CM eligibility in:" section in the top right of the screen:
  - The system has a countdown to 30 days
  - The system will allow for attestation 14 days after the last attestation – giving 16 calendar days to attest
- Simply click the "confirm button" when this is available





## Managing Incentive Rewards







## **Overview**

#### CM Coordinator

#### How are rewards calculated?

- Rewards will be earned after a negative urine drug test is logged in the system.
- Rewards are calculated by the system using a well-defined schedule.
- For weeks 1-12 (2 visits per week), the reward amounts start at \$10 and will increase by \$1.50 with each 2 consecutive negative UDTs. The rewards will "reset" to \$10 after a positive UDT or unexcused absence. The reward will "recover" to the previous level after 2 consecutive negative UDTs.
- For weeks 13-24 (1 visit per week), the reward amounts do not change. Each negative UDT in weeks 13-18 equates to \$15 in rewards; weeks 19-23 are \$10; week 24 is \$21.

#### How are rewards delivered?

- · Rewards are offered as vendorspecific gift cards.
- Rewards can also be "banked" to aggregate earnings to larger amounts.
- Rewards can be delivered via text. email, or printed out in the office..
- If shared via text or email, the reward can be added to an Apple or Google wallet.

#### What are the limitations on rewards?

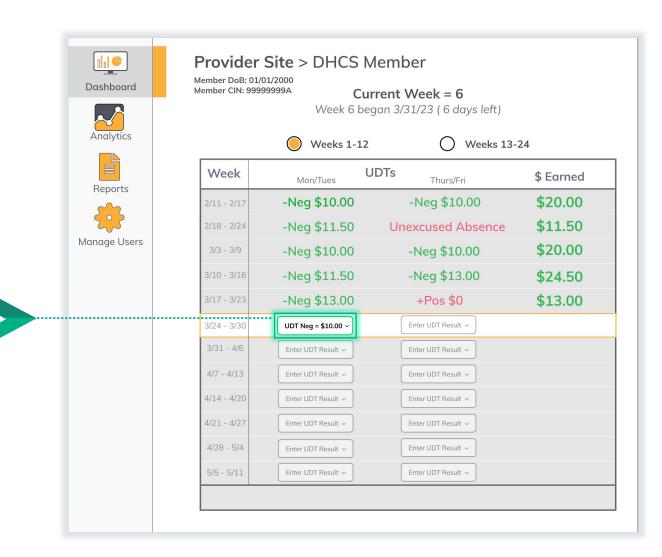
- As of pilot kick-off, the member is limited to \$599 of total earnings (the reward schedule is oriented to this maximum).
- Gift cards are only available for vendors who limit purchase of alcohol, tobacco, cannabis, lottery tickets, and other gambling services.
- Wal-Mart additionally restricts the purchase firearms or ammunition.





## **Reward Calculator**

- Navigate to the "Member pane"
- <u>Follow instructions</u> for inputting appropriate result (i.e., UDT result or absence)
- The system will automatically calculate the correct incentive award in advance of UDT input
- If the UDT input is negative, the reward will be immediately available for dispense (see next page)
- Rewards will be calculated for that particular visit given that week's unique methodology (weeks 1-12; weeks 13-18; weeks 19-23; week 24)





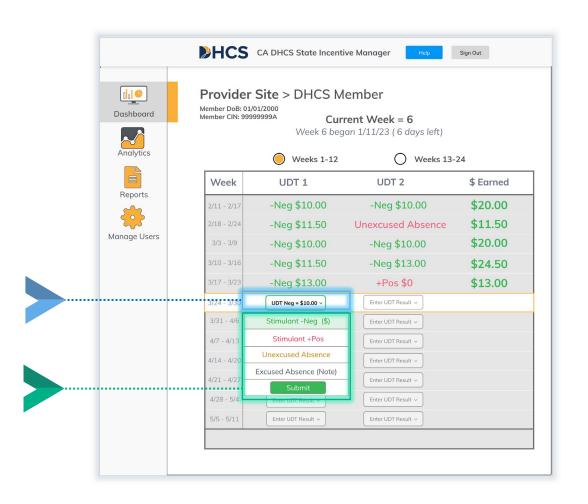
## **Enter UDT Results**

#### CM Coordinator

#### Once you are on the Member Pane:

- Identify the next available session
  - This will be the "Enter UDT result" button which is not gray
  - Other session buttons will not work when clicked on as they are locked
- Click the "Enter UDT result" button (note: the text will change to the selected result)
- From the dropdown list, select the relevant option\*:
  - If the UDT was negative for stimulants, select "Stimulant -Neg (\$)"
  - If the UDT was positive for stimulants, select "Stimulant +Pos"
- The system will automatically calculate the correct incentive reward

Note: UDT results can only be input at least 48 hours after the previous input. This will be limited in the system.





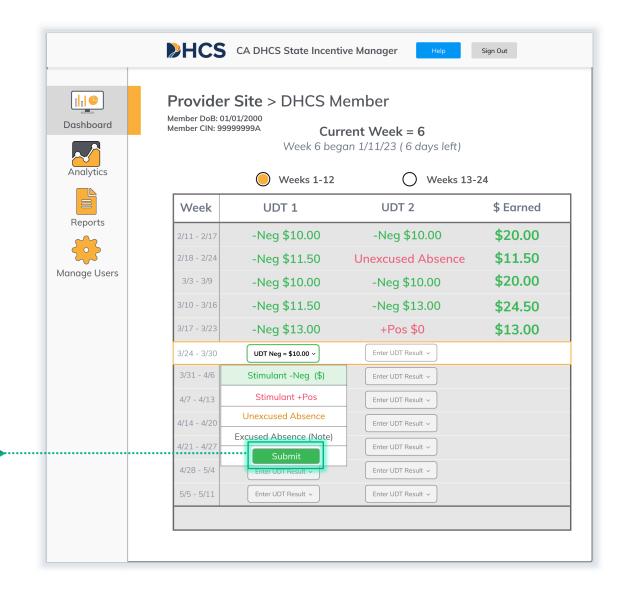
<sup>\*</sup> Please provide appropriate praise for stimulant-negative UDT and encouragement in the case of stimulant-positive UDT as directed by DHCS





## **Submit Selection**

- When you select the appropriate option during a visit (i.e., stimulant negative, stimulant positive, excused absence, unexcused absence) the submit button will become green
- In order to submit the result, you must click the submit button
- To avoid error, this button will not be "clickable" until you select an input and the inputs will not be registered until you click submit

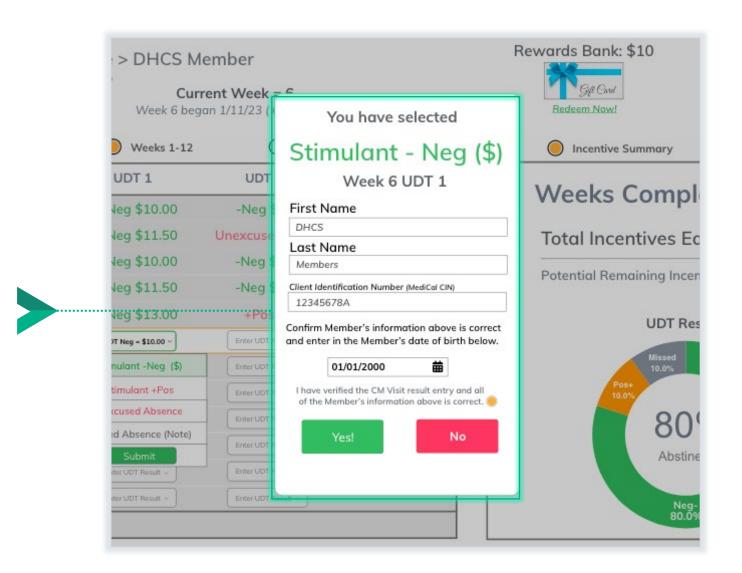






## **Confirm Selection**

- As a final confirmation before submitting StimNeg results, you will be prompted to make one more confirmation
- Ask the Member for their Date of Birth, and enter it in.
- Select the Radio Button to confirm the information is collect
- If you are certain of your input, please select "yes" when prompted.
- If not, select "no" and re-input your selection

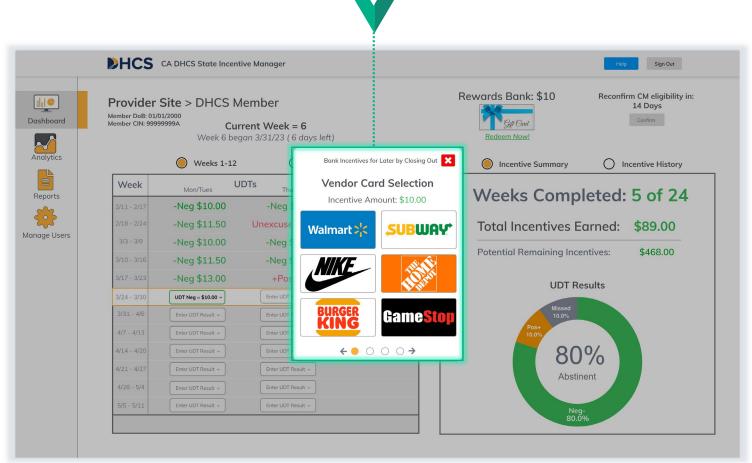






## **Reward Type Selection**

- Once a negative UDT is input, the system will offer the reward type selection.
- CM coordinators will work with the Member to select the preferred vendor.
- There are 2 options:
  - 1. <u>Gift card for a specific vendor</u> (see next page for list of vendors)
  - 2. Adding funds to a "bank"
- Simply click the preferred option and proceed to "delivery type" selection







## **Gift Card Vendors**

CM Coordinator









Please remember this gift card cannot be used to purchase alcohol, tobacco, cannabis, and/or lottery tickets or other gambling services.





<sup>\*</sup>Wal-Mart additionally restricts the purchase of firearms or ammunition.

<sup>\* \*</sup>Wal-Mart gift card allows for the purchase of gasoline at participating locations.



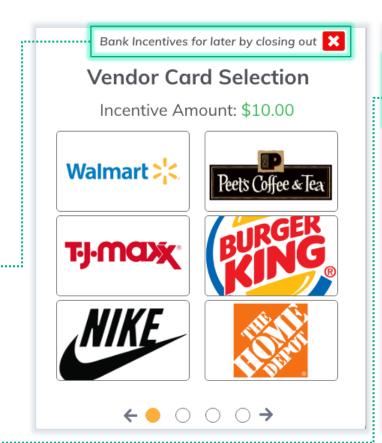


## **Rewards Bank**

CM Coordinator

Rewards are also able to be "banked" or saved:

- If the member chooses not to to redeem the reward immediately, they can save earnings in the rewards bank
- To select "banking" as an option, click the
   "X" on the vendor selection
- Once the rewards are banked, they can be converted into gift cards at any time by selecting the rewards bank.
- This will return you to the vendor selection screen (previous page).













### **Rewards Bank Confirmation**

CM Coordinator

Any banked rewards that are redeemed required Member date of birth validation:

- Select member requested vendor gift card to be redeemed from the rewards bank.
- Verify the members information is correct and **enter in their date of birth**.
- If the member's information and selection is correct, **select "Continue" to proceed to select a delivery option.**
- If the member wants to choose a differed card, select "Back" to choose another vendor.



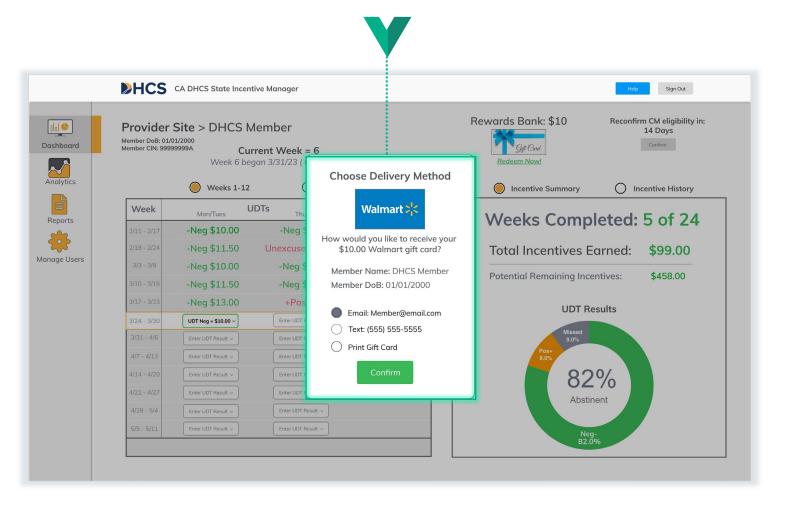






# **Reward Delivery Type Selection**

- Once a reward type is selected, the system will offer the **delivery type option**.
- For vendor-specific gift cards, the Member can select text, email, or printed in person.
- For "banking" of rewards, this screen will not show up.
- For texts, Members will be required to input their phone number.
- For emails, Members will be required to input their email address.
- Text and email gift cards can be added to Apple or Google wallets.





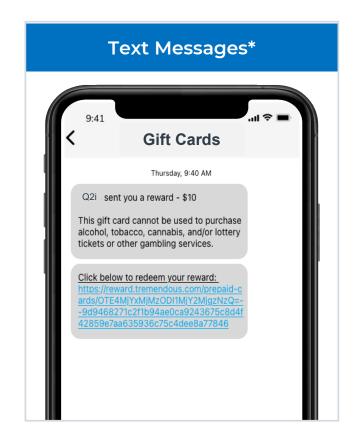


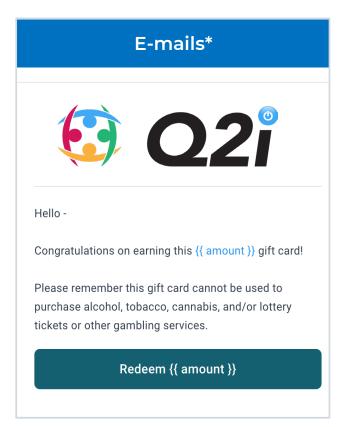
### E-mailing or texting Rewards

### CM Coordinator

### Gift Cards will be delivered by the same address each time:

- The text message will come from same number each time
- The email will come from Q2i via
   Tremendous (rewards@tremendous.com)
- We recommend having the member save this contact (as shown at right)
- The member can use the code in the email or add to their Apple or Google Wallet







<sup>\*</sup> Deleted messages cannot be regenerated. Please do not delete rewards texts or emails.



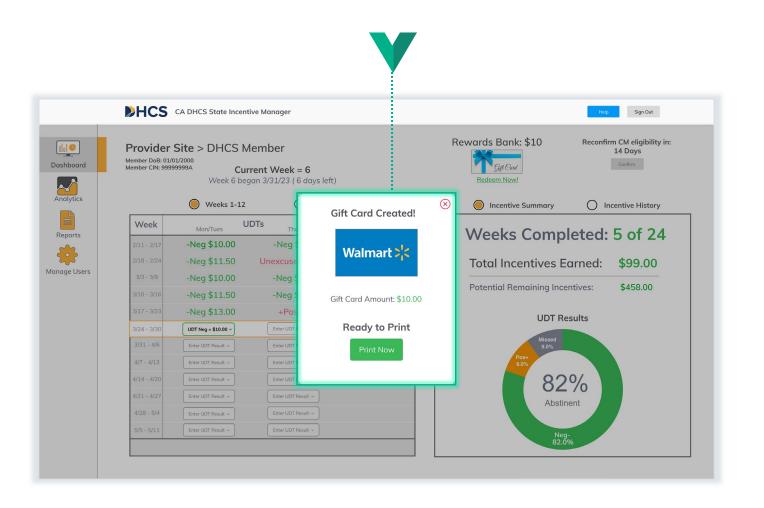


# **Printing Rewards**

CM Coordinator

Rewards are available for printing in the office immediately after the rewards are earned:

- Much of the effort here will be focused on linking a printer to the computer.
- Once "Print Now" is selected, the print screen will come up as shown at right.
- Please note that printed cards CANNOT be re-printed. Once these are generated, the member must keep track of these rewards.





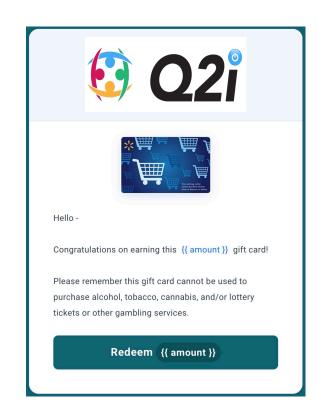


# **Printing Rewards**

CM Coordinator

### The portal will route you to a new tab in your browser:

- You will click the "redeem" button on the screen
- Then you will click "view code" on the subsequent screen
- You will then be able to print the following screen for use





View code

#### Walmart Gift Card

#### Using your eGift Card is simple

You can redeem your Walmart eGift Card at Walmart.com and Samsclub.com or print it out to use in a Walmart or Sam's Club store.

#### eGift Card Support

You can check your balance online. If you have concerns, please email customer service at help@walmart.com. This card is not redeemable for cash. If you have concerns, please email customer service at help@walmart.com?Subject=eGift Card Support. This card is not redeemable for cash.

Please treat this e-gift card like cash and safeguard it accordingly

#### Cashier instructions

- 1. Total the order
- 2. Select 'Shopping Card'
- 3. Scan the barcode on this pag

eGift Card Customer Service | eGift Card Privacy Policy

#### Terms and conditions

For balance inquiry, call 1-888-537-5503 or go to Walmart.com/giftcards or samsclub.com. Use this card at any retail or on-line format of Wal-Mart Stores, Inc. in the U.S. or Puerto Rico. including Sam's Clubs. The balance on this card is a liability of Wal-Mart Stores Arkansas, LLC. This card cannot be redeemed for cash except where required by state law. Lost or stolen cards will not be replaced. In the case of fraud, misrepresentation, abuse or violation of the terms and conditions, Walmart reserves the right to refuse acceptance of this card and to take all available action, including the forfeiture of any remaining card balance. Terms and conditions subject to change without notice. See Walmart.com for complete terms.





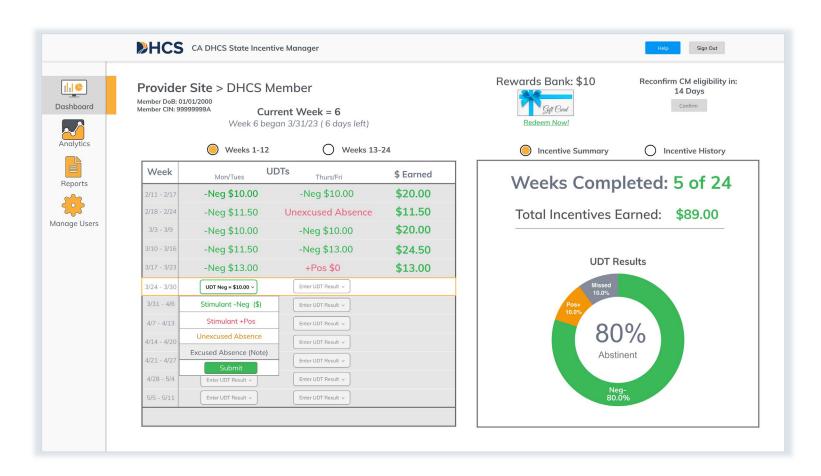


### Managing Absences

**CM** Coordinator

### In addition to logging a UDT result, you can also log absences:

- Excused absences do not trigger a "reset" while unexcused absences do.
- Excused absences can only be logged if:
  - A member informs you in advance
  - There is a valid reason for the absences.
  - The member presents valid documentation supporting the absence
  - They have missed MAXIMUM 2 sessions in a row
- Selections are made in the same way as UDT results (click submit button)

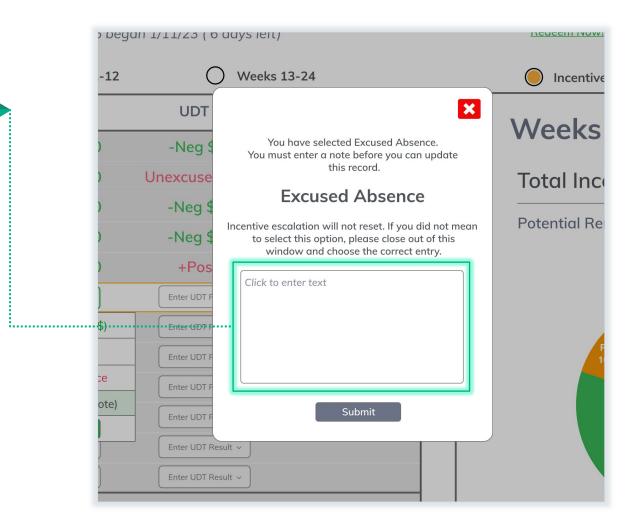






### **Submitting Excused Absences**

- In addition to confirming submission of the "excused absence", you will be asked to input a note.
- This note should capture the reasoning behind the excused absence.
- **Note:** In the subsequent visit, you will be asked to confirm that documentation was provided to support this reasoning.
- Note: You must track this information in your FHR as well.





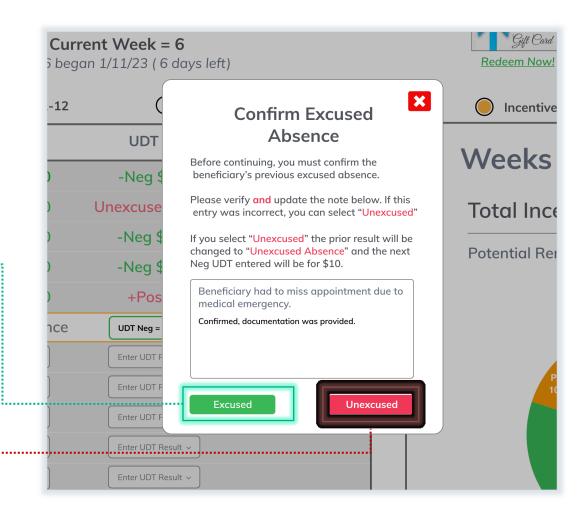


### **Confirming Excused Absences**

CM Coordinator

### In the subsequent visit, you will be asked to confirm your input:

- If the member provides adequate documentation supporting their excused absence, please confirm.
- You will confirm by clicking "excused".
- If the member does not provide documentation, you must reverse the excused absence.
- You will change entry by clicking "unexcused".
- Note: Unexcused absences trigger a "reset".
- Note: Only 2 excused absences are allowed in a row.









### **Missed Entries and Corrections**

#### **Missed Entries:**

#### Weeks 1-12

- CM coordinators must make 2 entries per week per member (i.e., you must log unexcused absences on the day the absence occurred).
- If you do not do this, the system will automatically create an absence entry (for M-W or W-S).
- Upon subsequent visit, the system will prompt you with the same screen as confirming an excused absence (i.e., select excused or unexcused absence).
- If no entries are made in a week, they will be assumed as unexcused absences.

#### • Weeks 13-24

- CM coordinators must make I entry per week per member (i.e., you MUST log unexcused absences on the day the absence occurred).
- If no entries are made in a week, they will be assumed as unexcused absences

#### **Incorrect Entries:**

- Input positive UDT when intended to do negative UDT
  - Call the call center
  - Keep member in the office
  - This change will (ideally) be made within minutes
  - Worst case, this will be made within 24-48 hours and the reward will be placed in the rewards bank
- Input negative UDT when intended to do positive UDT
  - Call the call center
  - This change will be made within 24-48 hours
- Input wrong type of absence
  - Correct upon subsequent visit as shown on previous page



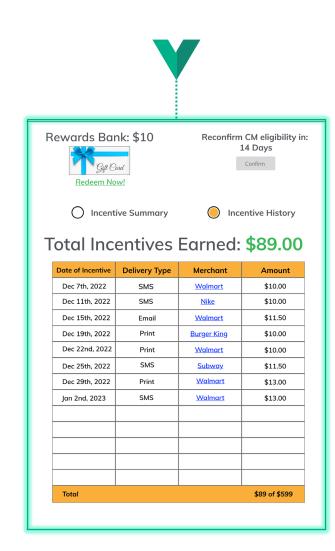


### **Rewards History**

CM Coordinator

Rewards history can be seen in two ways:

- 1. As a comprehensive list of every reward earned:
  - Date
  - Delivery type
  - Vendor
  - Amount
- 2. As a summary of results earned in total:
  - Total earnings
  - Percentages of sessions with negative UDT











# Appropriate Disclaimer(s)

- Incentive rewards cannot be used for the following uses:
  - Alcohol
  - Tobacco
  - Gambling
  - Cannabis
- Vendor-specific gift cards are either for vendors who do not offer these items OR have inherent restrictions
- Incentive rewards cannot be re-distributed once already delivered
- "Please remember this gift card cannot be used to purchase alcohol, tobacco, cannabis, and/or lottery tickets or other gambling services."
- Wal-Mart additionally restricts the purchase firearms or ammunition.



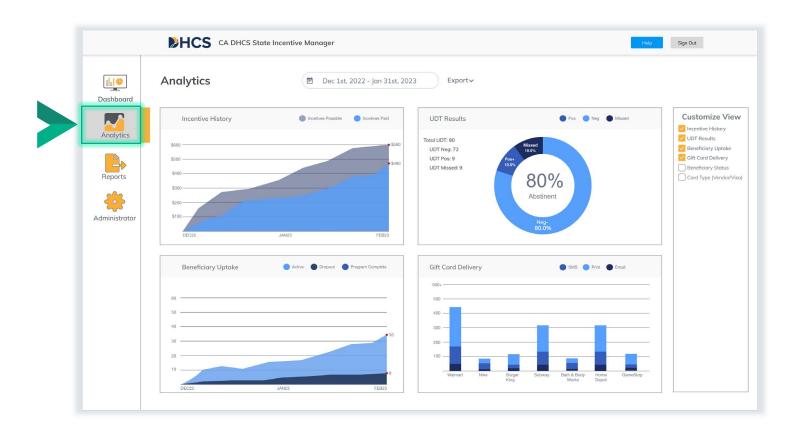
# **Analytics and Reports**





### **Analytics Pane**

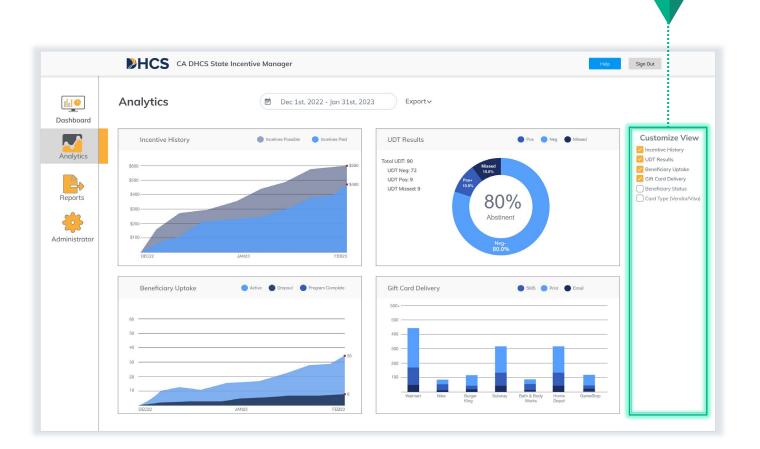
- The analytics pane is available by clicking "analytics" on the left pane.
- The analytics pane is highly customizable by the user using the "customize view" pane on the right side
- Data can be downloaded as charts (.pdf)
- Data can be selected based on a specific date range





### **Analytics Customization**

- Analytics panes can be customized based several factors (as can be see at right)
- Selections by county will filter the data available in the charts on the left
- Other selections will add new charts to the left side (here shown as reward history, UDT results, Member Uptake, and reward delivery type)



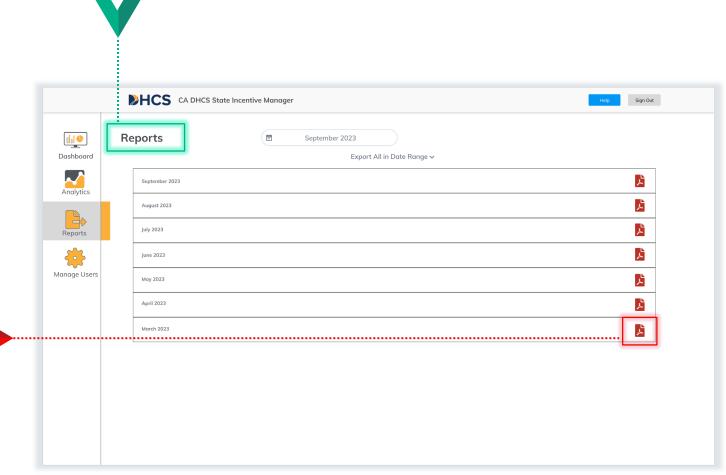


# **Analytics Report Pane**

CM Coordinator

### Reports will be compiled automatically by the system:

- Reports are available monthly
- Reports are available at all levels available for your role (see access rights) – you can select via dropdown
- Reports can be selected for specific counties or providers – and at the aggregated levels
- To select a report, click the " " icon
- These reports do not contain any member-level information (i.e., PHI).
- These reports can be downloaded, printed, or emailed.

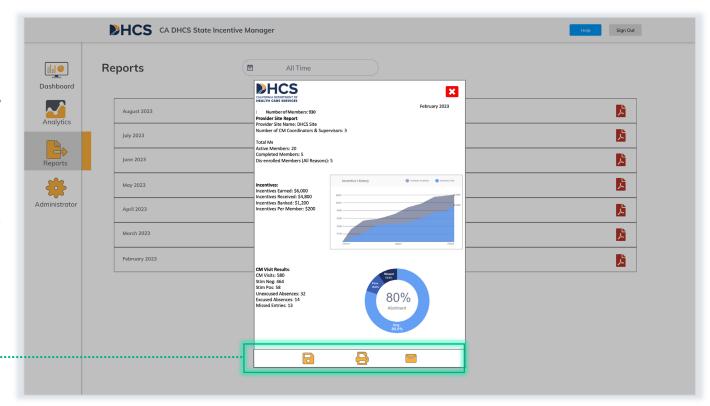






### Reports

- Once a specific report is selected, it will be downloaded as a .pdf to your local machine.
- Once these reports are **downloaded** you can open the .pdf file to view the contents
- These reports do not contain any member-level information (i.e., PHI).







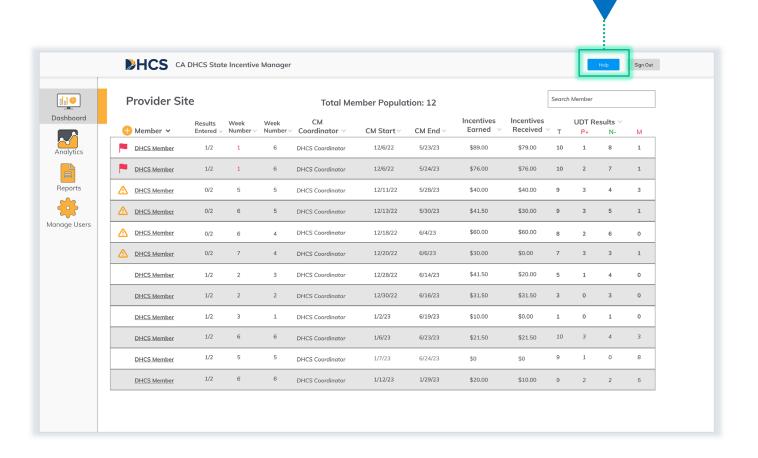
# Help Center and Support





### Locating the Portal Help Center

- From any pane you can find the help button
- The button is in the same spot for each portal view



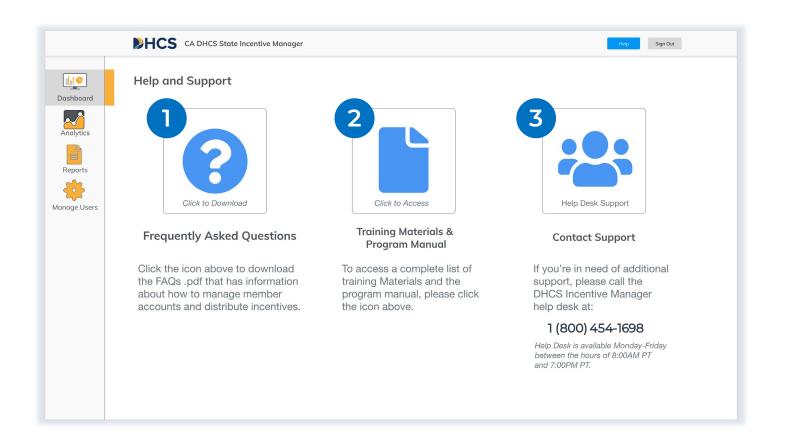




### Overview of the Portal Help Center

# There are 3 types of support available in the portal:

- 1 Frequently Asked Questions Documents (.pdf)
- 2 Training Materials (UCLA site)
- 3 Call center available by phone





### **Q2i Call Center**

Call Center

### **DHCS Program Call Center**

+1 (800) 454-1698