California DHCS Recovery Incentives Program

Web Portal Training Document

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Q2i IM Web Portal Overview

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Q2i IM Web Portal Overview

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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 (SUD) 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 contingency management solutions are a significant scientific and clinical advancement that improves treatment for SUD.

Who is Q2i?

What is our role in this program?

Q2i will configure, deliver, 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.

**WEB PORTAL OVERVIEW**

**Q2i Incentive Manager Portal**

**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**

- HIPAA attestations with annual external third-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) and Splunk Enterprise Security.
- Platform hosted on FedRAMP compliant AWS instance.
- FedRAMP compliant call center technology and service.
Q2i Incentive Manager Portal

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

Q2i Incentive Manager Portal

Key User Activities

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

**ANALYTICS**
- Generating and analyzing population-level analytics related to beneficiary progress

**REPORTS**
- Compiling and downloading standard reports for Counties and Provider organizations

Know your Portal Role
User Roles
Overview

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Role</th>
<th>Eligibility Approach</th>
</tr>
</thead>
<tbody>
<tr>
<td>DHCS Leadership</td>
<td>DHCS User</td>
<td>N/A</td>
</tr>
<tr>
<td>DHCS Administration</td>
<td>DHCS User</td>
<td>N/A</td>
</tr>
<tr>
<td>County Leadership</td>
<td>County User</td>
<td>DHCS</td>
</tr>
<tr>
<td>County Administrator</td>
<td>County User</td>
<td>DHCS</td>
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<tr>
<td>CM Supervisor</td>
<td>CM Coordinator</td>
<td>Q2i, DHCS or County</td>
</tr>
<tr>
<td>CM Coordinator</td>
<td>CM Coordinator</td>
<td>Q2i, DHCS or County</td>
</tr>
<tr>
<td>Backup CM Coordinator</td>
<td>CM Coordinator</td>
<td>Q2i, DHCS or County</td>
</tr>
<tr>
<td>Q2i Administrator</td>
<td>Administrator</td>
<td>Q2i</td>
</tr>
<tr>
<td>Support Team</td>
<td>Administrator</td>
<td>Q2i</td>
</tr>
</tbody>
</table>

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

Who are you?
• Q2i, DHCS leadership or DHCS administrator
• DHCS contractor (given DHCS leadership approval)

What is your responsibility?
• Managing the program
• Assessing program outcomes
• Monitoring for fraud, waste, and abuse
• Creation of new users (excluding DHCS leadership)
• Addition or changes to program information (e.g., changing status)
• View of information related to program

What are your access rights?

User Roles
Access Rights

User Roles
Admin / DHCS

User Roles
DHCS

User Roles
Country

User Roles
Q2i

User Roles
CM Coordinator

User Roles
CM Supervisor / Coordinator
User Roles
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 enrolling providers
- Work with the State's coordinating and technical assistance provider to complete readiness and fidelity reviews

What are your access rights?
- Creation of CM coordinator users
- Addition or changes to beneficiary information (i.e., change provider)
- View county-level, site-level and beneficiary-level information

User Roles
CM Supervisor / Coordinator

- 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 LPHA

What is your responsibility?
- Collect CM consent and enter beneficiary information
- Collect and enter urine drug test (UDT) results and ensure delivery of incentives to beneficiary
- Communicate with clinical staff regarding UDT results and any information of clinical relevance
- Refer beneficiaries to treatment and recovery staff for follow-up

What are your access rights?
- Creation of CM supervisor/coord users
- View beneficiary level information
Welcome E-mail

- Each new user will receive a specific welcome email (not applicable to beneficiaries).
- 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 the unique link will provision access rights as defined by user role.
- Note: The link expires after 72 hours for security purposes.

Password Creation

- 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 Beneficiaries
Beneficiary
CM Coordinator
- Open "dashboard pane"
- Click "button which is to the left of "beneficiary" on the top of the data table
- Input required patient information (including CIN/beneficiary ID)
- Input optional information (these fields support incentive delivery)
- Select associated provider
- Verify beneficiary program eligibility

*Note: The beneficiaries 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 beneficiary’s information (CIN or Beneficiary ID) has matched an existing entry.
- This functionality is a safeguard against beneficiaries who may try to enroll in multiple centers simultaneously – this is against protocol.
- This may occur because a beneficiary is seeking to transfer to your clinic from another.
  - Please see guidance on changing beneficiary location.

Beneficiary Location Changes
CM Coordinator
Only Admin users can adjust treatment location. Below is the approval procedure:
- CM Coordinator is informed by beneficiary about necessary location change
- CM Coordinator assists beneficiary 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.
Beneficiary Information Changes

CM Coordinator

- 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.

Beneficiary Week & Alerts

CM Coordinator

- Beneficiary weeks run 7 days from when they are added into the IM Portal
- The week runs from Saturday, two weeks before Sunday
- During the first 12 weeks, 2 visits are required per week per Beneficiary within their cm week
- The icon represents a Beneficiary that only has either 1 or 0 visits entered for their week
- The icon represents a Beneficiary that has no visits entered so far for their week

Select Beneficiary

CM Coordinator

- Open “dashboard pane”
- Find beneficiary either by sorting or searching
- Click on the beneficiary’s name (you will note that it is underlined)
- This action will open that specific patient’s chart (next page)
Beneficiary Pane
CM Coordinator

This page contains beneficiary-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)

Every 30 days, the CM coordinator must attest to the beneficiary’s eligibility:
- Navigate to the Beneficiary’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 attestations 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

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 reward 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 vendor-specific 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.

As of pilot kick-off, the beneficiary 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 of firearms or ammunition.

Managing Incentive Rewards

Reward Calculator

Navigate to the “beneficiary pane”

Follow instructions 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 are calculated for the particular visit given that week's unique methodology (weeks 1-12; weeks 13-18; weeks 19-23; week 24)

Note:

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

Enter UDT Results

Once you are on the Beneficiary 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 “Enter UDT result” (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 is limited in the system.
Submit Selection
CM Coordinator
- When you select the appropriate option during a visit (e.g., 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, submission will not be "clickable" until you select an input and the inputs will not be registered until you click submit.

Confirm Selection
CM Coordinator
- As a final confirmation before submitting results, you will be prompted to make one more confirmation.
- If you are certain of your input, please select "yes" when prompted.
- If not, select "no" and re-input your selection.

Reward Type Selection
CM Coordinator
- Once a negative UDT is input, the system will offer the reward type selection.
- CM coordinators will work with the beneficiary to select the preferred vendor.
- There are 2 options:
  1. Gift card for a specific vendor (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 the gift card cannot be used to purchase alcohol, tobacco, cannabis, and/or lottery tickets or other gambling services.

*Wal-Mart additionally restricts the purchase of firearms or ammunition.

Rewards Bank
CM Coordinator

Rewards are also able to be "banked" or saved:
• If the beneficiary chooses not 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).

Reward Delivery Type Selection
CM Coordinator

• Once a reward type is selected, the system will offer the delivery type option.
• For vendor specific gift cards, the beneficiary can select text, email, or printed in person.
• For "banking" of rewards, this screen will not show up.
• For texts, beneficiaries will be required to input their phone number.
• For emails, beneficiaries 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 beneficiary save this contact as shown at right
• The beneficiary can use the code in the email or add to their Apple or Google Wallet

* 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 reprinted. Once these are generated, the beneficiary must keep track of these rewards.

* Confidential. For Internal Use only. Do not distribute.
Managing Absences

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 beneficiary informs you in advance
  - There is a valid reason for the absence
  - The beneficiary 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

CM Coordinator

- 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 the reasoning.
- Note: You must track this information in your EHR as well.

Confirming Excused Absences

CM Coordinator

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

- The beneficiary provides adequate documentation supporting the documented absence.
- You will confirm by clicking “excused”.
- The beneficiary 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 beneficiary (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 1 entry per week per beneficiary (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 beneficiary 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

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 of 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) or raw data (.csv or .json).
- Data can be selected based on a specific date range.

Analytics Customization

- Analytics panes can be customized based on several factors (as can be seen 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 (shown as reward history, UDT results, Beneiciary 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 "..." (more information).
- These reports do not contain any beneficiary-level information (i.e., PHI).
- These reports can be downloaded, printed, or emailed.

Help Center and Support
Locating the Portal Help Center

- From anywhere 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 (pdf)
3. Call center available by phone

DHCS Program Call Center
+1 (800) 454-1698