



Mountain-Pacific
Quality Health

Montana Medicaid: Personal Representative Panel Training in Qualitrac

February 2021

Agenda

- Intro
- Provider requirements
- Demo
- Q&A
- Closing

Introduction



Personal Representative panel

Used as method for documenting current guardianship information



Updated guardianship documentation
crucial to UM outcome communication

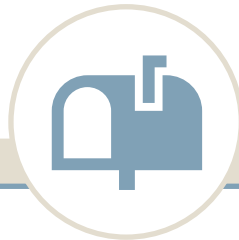


Data must be **reviewed at each CSR**

Provider Requirements



Complete
Personal Rep
panel with current
guardian
information



Mailing address is
required field



Include all
contacts who
receive PHI

Demo



Personal Representative

+ Add

Name	Relationship	Phone	Phone Type	Address	Action
No Personal Representative Supplied					

From any new authorization request, select “Add” in the Personal Representative panel.

Demo

Add Personal Representative

Choose an existing entry or create a new one

Name	Relationship	Phone	Address
<input type="radio"/> Captain Hook	Guardian		1 Neverland Dr., Helena, MT 59626
<input type="radio"/> John Doe	Parent		1 Unknown Dr, Helena , MT 59626
<input type="radio"/> Adam Joneson	Guardian	(123) 456-7890	123 Sunshine Lane, Helena, MT 59601
<input type="radio"/> Add New			



Cancel

Submit

You may either select from an existing personal representative and/or, create a new one.

Demo

Add New

Relationship to Member *

Address Line One *

First Name *

Last Name *

Address Line Two

Phone Number

City *

Ext

Phone Type

State *

Zip *

Cancel

Submit

All fields with the * are required. Though phone numbers are not required, they are encouraged.



Demo

Relationship to Member *  Relationship to Member is a required field

- Case Manager
- Key Person
- Person or Other Entity Legall Responsible for a Child
- Executor of Estate
- Ex-Spouse
- Other Insured
- Guardian
- Power of Attorney
- Legal Representative
- Responsible Party
- Parent
- Significant Other
- Spouse
- Custodial Parent

Choose the best fit relationship type.

Demo

Personal Representative + Add					
Name	Relationship	Phone	Phone Type	Address	Action
Wendy Darling	Case Manager			20 London Ave Helena, MT 59601	
Captain Hook	Guardian			1 Neverland Dr. Helena, MT 59626	

- Add as many current personal representatives as appropriate to who will receive UM outcome letters.
- Use the trash can icon to remove any previously attached to a case, if the guardian is no longer involved.



**Let's view the process
directly in Qualitrac...**

DEMO IN QUALITRAC



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QUESTIONS?



This project is funded in whole or in part under a Contract with the Montana Department of Public Health and Human Services. The statements herein do not necessarily reflect the opinion of the Department.