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The IRT Survey Tool

Welcome to NCQA’s web-based platform, the Interactive Review Tool (IRT). The end-to-end survey process for Tailored Care Management AMH+/CMA Provider Certification is managed in IRT. Providers use IRT to complete the desk review, site review, readiness review, and recertification. Key features include the ability for providers to upload documents, complete self-assessed scoring, review documents, reconcile issues, receive feedback for improvement, and review re

How to Access IRT

Step 1  Providers notify the North Carolina Department of Health and Human Services (DHHS) of their intent to apply for NC AMH+/CMA Certification during predetermined time frames. NCQA then creates an IRT license for each provider and emails them when their license has been created.

Step 2  Open a browser and go to https://irt.ncqa.org to display the Login screen.

Note: NCQA recommends using Chrome or Safari for IRT. Internet Explorer was retired in June 2022; do not use this browser for IRT.

Step 3  Click Sign in.

Note: If this is your first time logging in, you must create an account. To do this, click Forgot Password? and follow the instructions. If you already have an account and do not remember your password, click Forgot Password? and follow the instructions.

Step 4  Once you have created an account or changed your password, click close this window to return to the Login screen and log in.
IRT Key Functionality

How Do I View the Dashboard?
Once you log into IRT, you will land on the Home page, also known as the Dashboard.

- The Dashboard displays a list of current submissions for which you have an active role under the following tabs:
  - **My Orders:** Contains all your current licenses.
  - **Completed Submissions:** Contains previous surveys.

A top-level menu provides access to the Resources page, which includes tip sheets, tutorials, and other information.

The training Support page contains Frequently Asked Questions (FAQ) and other resources to help you complete your task. This page icon turns red when updated with new information.

I Don’t See Anything Under “My Orders”
Please contact Medicaid.TailoredCareMgmt@dhhs.nc.gov if you do not see a license under My Orders.

How Do I Begin My Review?
The ACTIONS drop-down menu has seven options:

1. Upload documents and complete the self-assessment using the scoring tool under the Fill Application action.
2. Details will display the Submission Evaluation Products.
3. Add, View, or Remove documents from the Document Library.
4. Select Timeline to view or move the survey Timeline.
5. Select Validate to enable a system check of issues and Organization Background responses.
6. Resources will display system help, as well as general and product resources (e.g., tip sheets, tutorials, and other information).
7. Complete the application from the Organization Background.
What Is the Timeline?

The **Timeline** displays the different stages of the survey process. Providers use the Timeline to submit their applications.

- Select **Timeline** from the **ACTIONS** drop-down menu.
- Each stage contains a bulleted list of tasks, the current status, and an associated due date to complete each task. The **Target Date** is when that stage in the process will end and your tasks are due.

*Note: If the target due date is different from the date communicated by the NCQA NC AMH+/CMA Certification Project Team, please follow up with the Team to confirm the correct date at NCTailoredCareMgmt@ncqa.org.*

- The **Tasks** list depends on the user role and captures key activities that must be completed in each stage. There is the option to check off each task.

- **Stage Colors:**
  - Completed stages are **green**, the current stage is **blue**, and stages that are not complete (skipped stages, stages that are not applicable, stages not yet in) are **white**.

How Do I Review Issues and Comment?

Surveyors report issues for elements and selected factors. Providers then review and respond to these issues, and surveyors complete their review and scoring assessment after the (Virtual) Site Review.

- During the (Virtual) Site Review, organizations can review issues and ask the survey team questions about issues.
- Before and after the (Virtual) Site Review, organizations can provide a written response to issues and submit additional documents to support their response.

The Provider Administrator receives an email notification from NCTailoredCareMgmt@ncqa.org when issues are ready for review in IRT.
Types of Issues

- **Data source**: Documentation submitted does not include the required data sources.
  - The standards and guidelines specify data sources for elements. The data source identifies the type of documentation needed to demonstrate compliance. If an element has more than one data source, the Explanation clarifies which data source is required for each requirement.

- **Look-back period**: Documentation submitted does not address the entire look-back period.

- **Documentation does not address requirement**: Documentation submitted is not sufficient for the surveyor to recommend that the requirement is met (e.g., does not address all factors, the surveyor cannot determine the documentation’s relevance).

- **Insufficient direction**: Documentation submitted does not contain sufficient direction (e.g., annotation, highlighting, narrative) to demonstrate compliance.

Reviewing Issues

- The navigation tree has active default filters.
- Elements without issues are listed in sequential order under **All other elements**.
- Click the element to review, or click **NEXT** at the top right of the element.
- To review issues, click **Issues/Support Texts**.
To add comments to issues at the element level, scroll to the **ORG’S ISSUE RESPONSE** field in the **Issues/Support Texts** tab.

To add additional documents at the element issue level, click **ADD document** or **LINK document** beneath the issue response field.

**Note:** Additional documents may be submitted both before and after the (Virtual) Site Review.

**How Do I Manage Users?**

NCQA recommends assigning two providers to the survey, if possible, to have a secondary (back-up) user if the primary administrator is unavailable. Contact the NCQA NC AMH+/CMA Certification Project Team (**NCTailoredCareMgmt@ncqa.org**) to add users.
How to Complete the Desk Review Application: Fill Application Stage

Step 1  Under the ACTIONS drop-down menu, select Organization Background.

Step 2  Complete the Organization Background information and attest to the Tailored Care Management criteria:

A. Cover Sheet (e.g., Legal Entity Name, DBA Name, NPI Number, Contact Information).
B. Organization Information (Region NPI and Location Code, Tailored Plans).
C. Intent and Service Lines (e.g., Scope of Services, Attestation).
D. Capacity (e.g., Attestation, Capacity and Sustainability).
E. Staffing (Care Management Staff Attestation).
F. Delivery of Tailored Care Management (Policies and Procedures for Communication Attestation).
G. Health IT (Electronic Health Record, Care Management Data System, Admission Discharge Transfer).
H. Quality Measurement and Improvement (Quality Measurement and Improvement Attestation).
I. Training (Training and Site Review Attestation).
J. Other (Site Review Documents, Post-Application Notes and Instructions).
**Step 3**  After completing the Organization Background information, use the navigation tree to complete the following elements:

- ISL 1
- ISL 2
- FIN 1A, 1B, 1C, 1D
- FIN 2A, 2B

Complete each question in the respective element, attach the necessary document(s), and click NEXT.

Refer to [How to Complete Self-Assessed Scoring & Submit Documents for the Desk and Site Review](#) for details.
Note: The **Guidelines** and **Resources** tabs are to the right of the **Scores** tab. Both will help you complete the answers for each element.

- The **Guidelines** tab displays the instructions and benchmarks for providing the appropriate responses to each element, the scoring criteria, data source, and scope of review.
- The **Resources** tab provides a selection of document links to aid with system help, product resources, and general resources.
Step 4  After completing the appropriate elements, submit the application by moving the stage in the Timeline.
Once the application is submitted, NCQA staff will conduct a Desk Review and an Executive Review. NC DHHS will notify providers of their status and when to proceed to the Site Review.

<table>
<thead>
<tr>
<th>DESCRIPTION</th>
<th>TARGET DATE</th>
<th>ACTIONS/TASKS</th>
<th>COMPLETED DATE</th>
<th>MOVE STAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fill Application</td>
<td>08-25-2022</td>
<td>NC FillApplication</td>
<td>08-25-2022</td>
<td>Next &gt;</td>
</tr>
</tbody>
</table>
How to Complete Self-Assessed Scoring & Submit Documents for Desk/Site Reviews

Do not submit more than 100 documents for each phase. NCQA recommends linking only up to three documents for each element.

Although not all elements require documentation, the self-assessed scoring must be completed even if factors are not applicable.

**Step 1** After the application is completed in the Organization Background, complete the self-assessed scoring tool and submit documents for the Desk Review:

1. Click **ACTIONS**.
2. Click **Fill Application**.
3. Complete the self-scoring under **ORG ANSWER**. Select “NA” for factors that are not applicable.
4. Click **SAVE**.
5. Upload documents (**Step 2**).
Step 2  Click the DOCUMENTS section at the bottom of the Scores tab.

*Note:* Providers may omit the Organization Submission Statement section for each element.

1. Click ADD document to attach files.
2. Click Choose File to search for a file; click Open to select a file.
3. Rename file NAME if needed.
4. Provide applicable REFERENCES.
5. Select the DATA SOURCE.
6. Click SAVE documents.
Using the Document Library

The Document Library should house all submitted files. NCQA recommends uploading and linking documents in the tool.

**Step 1** To add documents, click Document Library on the ACTIONS drop-down menu or scroll to the Documents section in the Scores tab of an element.
Step 2  Drag and drop files into the box labeled **Drop files here to upload**. You can add as many documents as needed.

**Note:** The **Bulk Linker** lets you easily add multiple files to multiple elements.
Step 3 For each file, click **VIEW / CHANGE links** on the **ACTIONS** drop-down menu to the right of the file path.

1. Click **Add Link** to link the document by data source to another element.
2. Select the appropriate category from the **DATA SOURCE, ELEMENTS, and IMPORTANCE** drop-down menus, and complete the **REFERENCE** field.
3. If the document should be attached to the **Organization Background**, click the category on the drop-down menu.
4. Click **SAVE**.
Note: Documents can be submitted before and/or after the (Virtual) Site Review during the following stages:

- Submit Site Review Documents.
- Submit Additional Site Review Documents.
- Review and Comment (Site Review).