

## Outreach Management System Quick Reference Guide - Provider User

Login at: <https://oms-provider.microsoftcrmportals.com>

For assistance, contact the Regional Services team on 08 6389 4500 or email [outreach@ruralhealthwest.com.au](mailto:outreach@ruralhealthwest.com.au)

Please note that Microsoft Edge and Internet Explorer are the recommended browsers for the Outreach Management System. Google Chrome or other non-Microsoft browsers may experience issues for certain functions. If issues occur when using the recommended browsers please contact the Regional Services team.


### Provider Home Page

Commissioning Portal

1

Rural Health West | Visits | Referral Information | OMS Username

2



distance is no obstacle

3

Welcome to the Outreach Management System Service Provider Dashboard

Rural Health West is the jurisdictional Fundholder in Western Australia for the following Australian Government Department of Health outreach programs: Rural Health Outreach Fund, Medical Outreach Indigenous Chronic Disease Program, Healthy Ears - Better Hearing, Better Listening, Visiting Optometrists Scheme and Eye & Ear Surgical Support Service.

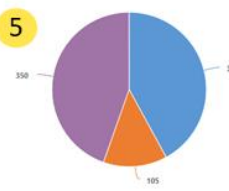
This page allows providers to view, edit, modify and confirm scheduled visits. If you encounter any problems, please contact the Regional Services team at Rural Health West on 08 6389 4500 or [outreach@ruralhealthwest.com.au](mailto:outreach@ruralhealthwest.com.au).

4

Service provider

|                             |                               |
|-----------------------------|-------------------------------|
| Name (Owning Business Unit) | Rural Health West             |
| Account Name                |                               |
| Account Number              |                               |
| ABN                         |                               |
| Address 1                   |                               |
| Address 2                   |                               |
| Business Type               | Default Value                 |
| Email                       | CommissProviderUser@gmail.com |
| GST Applicable              | true                          |
| Financial Code              |                               |
| Modified By                 | UAT Rural Health West         |
| Owner                       | Rural Health West             |
| Provider Code               |                               |

5



| Completed | Dates Set - OR In... | Requiring Dates |
|-----------|----------------------|-----------------|
| 330       | 105                  | 350             |

6

Completed Visits requiring an Outcome Report

Future Visits

Visits without dates set

All Visits

The provider home page allows a provider user to view information about their organisation and visiting services. From this page, provider users are able to access the 'Visits' page, where they are able to enter or change visit dates, and submit Service Activity Reports (SAR) to Rural Health West.

1. The options ribbon displays different tabs the user can access, these tabs are:
  - a. Rural Health West (current homepage)
  - b. Visits
  - c. Referral information
2. Provider Name displays the name of the user currently logged into the portal.
3. Welcome and overview of the outreach programs as well as contact information for provider users to access support.
4. The service provider tab provides information on the service provider organisation represented by the provider user.
5. Pie chart representing the status of funding for the current funding period. The pie chart shows visits with no dates set, visits requiring entry of a SAR, and completed visits.
6. Links to filtered data in OMS. Following these links takes you to the 'Visits' page (described below) with the following filters applied (filters are explained below under the 'Visits' section).
  - a. Completed visits requiring a SAR
  - b. Future visits
  - c. Visits with no date set
  - d. All visits

## Visits

The 'Visits' page can be accessed by selecting the 'Visits' link in the options bar. 'Visits' is where provider users search for and select individual visits in order to enter or change visit dates, or submit a SAR. At the top of the page are the filters which can be used to isolate visits based on certain characteristics (see A). Below this is a table of visits where each row represents a specific visit for a given service (see B).

### Commissioning Portal

Rural Health West

Visits

Referral Information ||

## Visits

Replace one or more characters in your text searches with a wildcard character (\*) to return more results

A

|                  |                     |         |                     |                |
|------------------|---------------------|---------|---------------------|----------------|
| Start Date Range | Visit Id            | Service | Delivery Date Start | Funding Source |
| 1                | 2                   | 3       | 4                   | 5              |
| Team Id          | Health Professional | Site    | Community           | Invoice Status |
| 6                | 7                   | 8       | 9                   | 10             |
| General Location |                     |         |                     |                |
| 11               |                     |         |                     |                |

Filter

B

| Visit Id | Service ↑  | Site           | General Location | Health Professional                     | Team Id | Travel Team | No. of Sessions | Delivery Date Start ↑ | Invoice Status | Invoice No. | Service Valid From |
|----------|------------|----------------|------------------|---|---------|-------------|-----------------|-----------------------|----------------|-------------|--------------------|
| 238037   | A-EESS3000 | Derby Hospital | Derby            | Physician - Surgery - Ear Nose & Throat |         |             | 10              | 22/06/2020            |                |             | 01/07/2019         |
| 238086   | A-EESS3000 | Derby Hospital | Derby            | Physician - Surgery - Ear Nose & Throat |         |             | 10              | 22/06/2020            |                |             | 01/07/2019         |
| 238038   | A-EESS3001 | Derby Hospital | Derby            | Physician - Anaesthetics                |         |             | 10              | 22/06/2020            |                |             | 01/07/2019         |
| 238041   | A-EESS3002 | Derby Hospital | Derby            | Audiology                               |         |             | 10              | 22/06/2020            |                |             | 01/07/2019         |

## Filters

Rather than scroll through the list of visits, users are able to narrow the field of search using filters. Filters are available at the top of the page. Descriptions of the functions of each filter are listed below.

1. Start date Range – used to search for a visit using a range of time-based parameters.
2. Visit Id – the number or code of the visit.
3. Service – the service number as listed on the payment schedule (eg A-RHOF0000).
4. Delivery Date Start – the Delivery Date of the visit (if entered).
5. Funding Source – this filter is not used by Rural Health West.
6. Team Id – this filter is not used by Rural Health West.
7. Health Professional – the health professional providing the outreach visit as shown on Schedule A - Payment Schedule (please note, the role matches the payment schedule text ie physician – cardiology, not just cardiology).
8. Site – the approved facility where the service is taking place.
9. Community – this filter is not used by Rural Health West.
10. Invoice Status – drop down menu indicating the status of a visit (eg Submitted, Paid).
11. General Location – the town or community visited by the health professional.

Once the filters have been chosen, select the filter button to apply. Visits which match your filters will appear below the filters.

## Selecting a visit

To select a visit that you wish to add/edit a date or to enter a SAR for, provider users can click a specific 'Visit ID' in the column as shown below. This will navigate you to the visit page.

|         |      |      |           |
|---------|------|------|-----------|
| Team Id | Role | Site | Community |
| ▼       | ▼    | ▼    | ▼         |

| Visit ID | Service ↑        | Provider | Site                   | Role                   | Team      |
|----------|------------------|----------|------------------------|------------------------|-----------|
| SER-30   | CNE_ANGUMBINU000 | !        | Angurugu Health Centre | Cardiac nurse educator | CNE_DNE_F |
| SER-31   | CNE_ANGUMBINU000 | !        | Angurugu Health Centre | Cardiac nurse educator | CNE_DNE_F |
| SER-32   | CNE_ANGUMBINU000 | !        | Angurugu Health Centre | Cardiac nurse educator | CNE_DNE_F |

## Entering a visit date

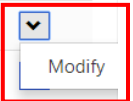
Data relating to the visit will appear once the provider user has selected the Visit ID as above. Visit dates must be entered for each session. One session is equal to 3.5-4 hours of clinical time. Each visit is funded for a specific number of sessions as outlined in Schedule A – Payment Schedule. If there are more or less sessions displayed than are required for your visit, or more or less than indicated in Schedule A – Payment Schedule, please contact the Regional Services team.

To enter a visit date, follow the steps below:

1. Locate the table with the heading: 'sessions'. This will appear as a table with a blue border underneath the heading 'Visit Details'.
2. For each approved session, click the drop down arrow and click 'modify'.

Sessions (Visit)

| Visit  | Delivery Date | Time of Day ↑ |
|--------|---------------|---------------|
| 174531 |               |               |
| 174531 |               |               |



The Modify Session screen will open as shown below

3. Use the calendar function or type into the field to enter the 'Delivery Date'.
4. From the drop down menu, select either morning or afternoon.
5. Click 'Save Changes'.

### Modify Session.

Please note: duplicate Sessions are not able to be saved for a Visit. Please ensure that the date/time are unique for this Visit.

Delivery Date \*



Time of Day \*



Visit \*



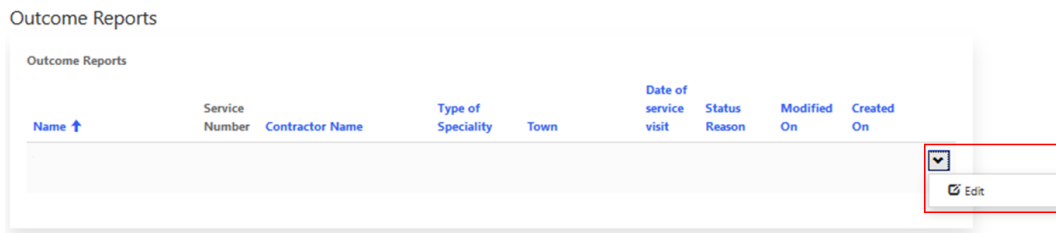
Save Changes

6. Repeat steps 2-5 for each approved session.
7. Scroll to the bottom of the page and click 'Save Changes'.

## Submitting a SAR

SARs are to be submitted after a visit has passed. To submit a SAR:

1. Select the visit for which the SAR is required from the Visits menu (see 'selecting a visit' above).
2. Once a visit has been selected, SARs can be accessed by scrolling down to the heading 'Outcome Reports', and selecting the arrow box on the right hand side of the visit, and selecting 'Edit' as shown below.



3. Once 'Edit' has been selected, the page will navigate to the SAR for the relevant visit. SAR templates have been provided to your organisation. The queries displayed in the OMS SAR will exactly mirror this template. Please ensure that all fields are correctly filled out when entering a SAR, paying particular attention to fields with a red asterisk (\*), as this denotes a required field.
4. Once a SAR has been completed, you can either 'save' and return to it at a later date if required, or 'save and submit', which will submit the SAR and trigger the automatically generated invoice for payment within 30 days (see below)



End.