



# Outreach Management System Provider User Guide

[www.checkup.org.au](http://www.checkup.org.au)

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## Outreach Management System

*A Quick reference guide for Outreach providers*

### OMS and the Provider Portal

CheckUP's Outreach service delivery is planned and monitored using CheckUP's custom built Version 4 of the Outreach Management System (OMS), which includes:

- an Outreach management and monitoring portal for CheckUP
- an online reporting portal for providers.

### A provider's role

All health service providers delivering services under the CheckUP Outreach Programs are required to use the CheckUP Outreach Reporting System to:

- **Set visit dates** - Providers are requested to submit visit dates at least 3-6 months in advance. This supports the planning and organisation of clinics for both the provider and the facility and enables CheckUP to monitor service delivery.
- **Submit an OR** - Providers are required to submit ORs within two weeks following a visit. This will ensure prompt payment and enable CheckUP to monitor service delivery.
- **Monitor service delivery** - Providers are required to ensure they are on track to deliver the services as outlined in the Service Schedule of their contract.

### Changes to service delivery

CheckUP understands that circumstances may arise which may change or impact on a provider's ability to provide a service or a visit. Providers are requested to contact their Regional Coordinator if:

- a service or visit is unable to be delivered as contracted;
- travel arrangements to the outreach location change; and/or



- changes to service needs are identified.

If advised, CheckUP may be able to issue a variation to the provider's contract to facilitate the change in service delivery arrangements.

## Login details

The OMS is accessible using the following link <https://oms-provider.powerappsportals.com/>

Each Health Professional/Organisation requires a username and password to login to the online reporting system. *Please note:*

- Multiple people can be added as users. Each user requires a unique email address.
- If passwords are forgotten, please use the "Forgot your Password" option on the sign in page of the portal to reset password

If there are any staff changes or a need to add more users, please email [outreachservices@checkup.org.au](mailto:outreachservices@checkup.org.au)

## Outreach Reporting System: provider homepage

The provider homepage provides a brief introduction to the funding programs associated with the account.

A snapshot of contact information, and a pie chart of the progress of the funding program is displayed.

The top bar displays the fund admins that are connected to this provider (as they may have multiple organisations associated with the provider).

## Commissioning Portal

[CHECKUP](#) | 
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 [Contact Information](#) | 
 [Referral Information](#) | 
 [Students](#) | 
 [Test Provider](#) -



## Welcome to the Outreach Service site.

CheckUP is a not-for-profit organisation dedicated to better health for people and communities that need it most. CheckUP works with partner organisations and health providers to create healthier communities and reduce health inequities through a range of initiatives. CheckUP is the designated fundholder overseeing a comprehensive suite of Outreach health service programs in Queensland and plays a vital role in ensuring the effective planning and delivery of these services to Queensland communities.

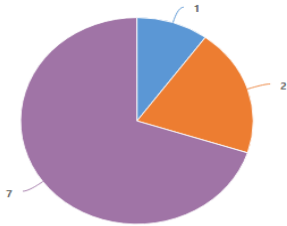
The Outreach programs are funded by the Commonwealth Department of Health. This page allows you to be able to view/edit/modify/ confirm the scheduled visits as per your contract.

Please contact CheckUP on Ph: 07 3105 8300 or email [outreachservices@checkup.org.au](mailto:outreachservices@checkup.org.au) if you have any issues with the schedule or budget, or any other queries.

1a Test Provider1

Account Name	1a Test Provider1
Account Number	
ABN	1111111122
Address 1	Level 2, 36 Russell Street Brisbane QLD 4000 Australia
Address 2	PO Box 3205 South Brisbane Brisbane, QLD 4101
Business Function	Aboriginal and Torres Strait Islander Organisation (ACCHO)/Medical Service (AMS)
Email	
GST Applicable	true
Financial Code	
Modified By	# Microsoft CRM Portals
Owner	
Provider Code	

Total Contracted Visits



●	Completed
●	Dates Set - OR In...
●	Requiring Dates

[Completed Visits requiring an Outcome Report](#)

[Future Visits](#)

[Visits without dates set](#)

[All Visits](#)

## Visits

**Select 'Visits' from the top menu bar.**

Providers are able to filter through the visits in which they are contracted to provide by utilising the filters at the top of the page:

1. Start date Range – the start date in which the provider will be providing the visit
2. Team ID – team ID number or code if involved in a team visit
3. Visit ID – the number or code of the visit
4. Role – the role the provider in which the provider will be providing the visit
5. Service – the service number or code in which the visit is associated
6. Site – the facility or name of the building where the service is taking place
7. Delivery Date Start – the Delivery Date of the visit
8. Community – the community the service will be taking place
9. Funding Source – the funding program associated with the service (i.e. MOICDP)
10. Invoice Status – drop down menu Select:
  - a. Submitted
  - b. Approved
  - c. Withdrawn
  - d. Credit Note
  - e. Invoice Re-Issued
  - f. Paid

General Location – the location where the service is taking place

11. Once the filters have been selected, select the filter button to narrow down the search.

Home > Visits

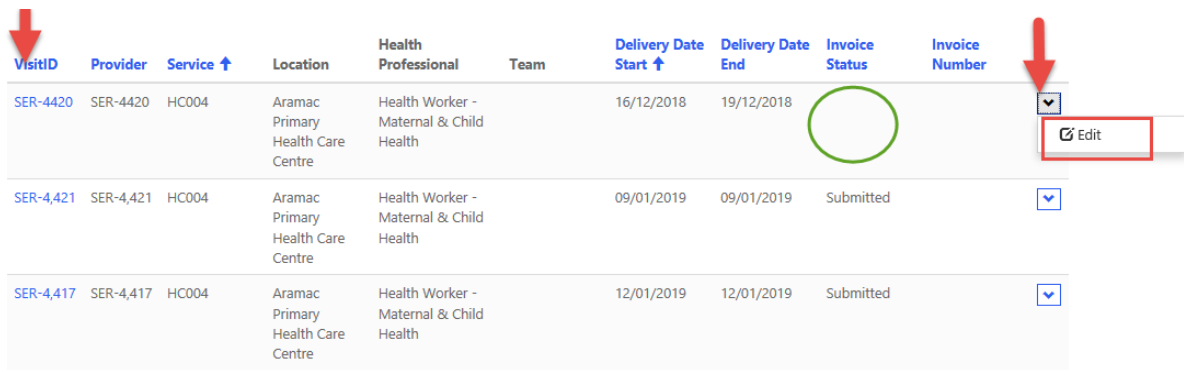
## Visits



1 Start Date Rang 2 Visit Id 3 Service 4 Delivery Date St 5 Funding Source  
 6 Team Id 7 Health Professio 8 Location 9 Community 10 Invoice Status  
 11 Filter

### Inputting visit dates

A list of visits will appear, providers are able to click into a visit by selecting the 'Visit ID' or alternatively users can select the drop-down arrow and select 'Edit'.



VisitID	Provider	Service	Location	Health Professional	Team	Delivery Date Start	Delivery Date End	Invoice Status	Invoice Number
SER-4420	SER-4420	HC004	Aramac Primary Health Care Centre	Health Worker - Maternal & Child Health		16/12/2018	19/12/2018		
SER-4,421	SER-4,421	HC004	Aramac Primary Health Care Centre	Health Worker - Maternal & Child Health		09/01/2019	09/01/2019	Submitted	
SER-4,417	SER-4,417	HC004	Aramac Primary Health Care Centre	Health Worker - Maternal & Child Health		12/01/2019	12/01/2019	Submitted	

Data relating to the visit will appear once the provider has clicked into the visit. The suggested date range are automatic dates that have been suggested by the fund administrators.

Users are able to add a delivery date start and delivery date end by updating (or editing) the session details. The session dates and time will automatically flow through to the delivery start and end date.

Service: 9-AS100 TEST

Visit Id: 341629

Travel Team:

General Location: Acacia Ridge

Site: CU - Acacia Ridge

Role: Speech Pathology

Health Priority:

Visit Details

Suggested Date Range Start: 01/07/2021

Suggested Date Range End: 30/06/2022

Delivery Date Start: —

Delivery Date End: —

No. of Sessions: 4

Start Date:   Time Of Day: Morning   Include Weekends?

Please note the dates will be sequential unless edited manually. Tick the check box to include weekends.

Service Number (calculated)	Visit ↑	Delivery Date ↑	Time of Day
9-AS100 TEST	341629		<input checked="" type="checkbox"/>
9-AS100 TEST	341629		<input type="checkbox"/>
9-AS100 TEST	341629		<input type="checkbox"/>
9-AS100 TEST	341629		<input type="checkbox"/>

Modify

Users can select to add or edit session dates automatically or manually.

### Setting session dates automatically:

1. Start date – the first date the visit will be taking place
2. Time of day (morning or afternoon)
3. Check box – to include the weekend if visit delivered over the weekend
4. Update Sessions – this will automatically update all the delivery dates and time of day

Once Update Sessions is selected it will automatically add all the delivery dates and time of day. The dates will be sequential unless edited manually.



### Setting session dates manually:



Users can enter delivery dates manually by selecting the drop-down arrow next to each session and modify. The below pop-up box will appear, ensure the data is completed in full before exiting:

1. Delivery date – the date the visit will be taking place
2. Time of day (morning or afternoon)
3. Visit ID – automatic field that is populated with the visit ID
4. Save changes – saves the changes made to the session dates and time

### 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.

1 **Delivery Date \*** 16/12/2018  2 **Time of Day \*** Afternoon 

3 **Visit \*** SER-4420  

4 **Save Changes**

## Saving and submitting an Outreach Report

Once the session details have been added/edited users are able to open/save and submit an outcome Report (OR).

Scroll down the page until the Outcome Report section appears, and using the same method as session select the arrow and click 'Edit'

Sessions			
Service Number (calculated)	Visit ↑	Delivery Date ↑	Time of Day
HC004	SER-4420	16/12/2018	Afternoon <span>▼</span>
HC004	SER-4420	19/12/2018	Morning <span>▼</span>

Outcome Reports

Outcome Reports												
Name ↑	Visit Name (Visit Number)	Contractor Name	Type of Speciality	Site (Visit Number)	Outcome Report Template	Status Reason	Service Number	Town	Date of service visit	Modified On	Created On	
SER-4420	SER-4420					Open	HC004		16/12/2018	28/02/2019 2:14 PM	28/02/2019 2:14 PM	<span>▼</span> <span>Edit</span>

Once the OR has been opened, complete the relevant fields.

Ensure the 'submitted by' field is complete, the field should automatically produce the user currently logged into the system.

1. **Save and Close** to save the OR data but not submit
2. **Cancel** to cancel the OR submission and not save data
3. **Save and Submit** to save the OR and submit the data

Declaration

As authorised to upload this information on behalf of the service provider, I declare that the above information to be true and correct.

**Submitted By \***

## Invoicing and payment

Once 'Save and Submit' is selected, this will automatically generate a Recipient Created Tax Invoice (RCTI). A copy of the invoice will be sent to the provider's nominated email address. Payment for all approved invoices will be made to providers fortnightly.

## Facility and Appointment Details

The facility and appointment details tab links directly to the live CheckUP Health Service list for our website currently being developed. This list will help promote your services.

To support the promotion of your services and to ensure the accuracy of the service list, it is important that the reporting system is kept up to date and maintained throughout the year.

Providers can select specific referral information for services by using the filter to establish the right service and using the tick box to edit or update the relevant details.

Commissioning Portal | CHECKUP | Document Library | Notices | Visits | Contact Information | **Facility and Appointment Details**

### Facility and Appointment Details

Provider	Service Number	Role	General Location	Facility	Facility Address Search	Referral Details
1a Test Provid						

Filter

Provider	Service Number ↑	Role	General Location	Facility	Facility Address	To book an appointment
1a Test Provider1	12-RPHS028	Dietetics	Moura	Moura Hospital	14 Nott Street Moura 4718	Call - 07 3105 8316 Email - malau77@hotmail.com Website - https://checkup Fax - 07 3105 8312