I. How to Create a MASS Appointment and WR Appointment

1. Open:
   A. The email with the 60 Day Callout,
   B. OMNI – Health Service Tab, Appointments, Create Mass Appointments
   C. Releasing or Work Release SharePoint
   D. Contacts for MASS Appointments
2. From the emailed callout list, filter by your name and "blanks" and "N" for Suspension (see SUSPENISON section towards the end for directions on those).
   A. Look at the first facility on the list (filter if needed) and see how many offenders are listed. Ensure it fits the amount requested by facility on the Contact List
   B. In OMNI, Health Services tab, Appointments select "Create Mass Appointment"
      1) Click on "Edit Offender List" and copy and paste the DOC from the emailed list and paste in OMNI Mass Encounter screen. Click "view offender list' to verify all showed up and are in the correct facility.

      2) Enter the appointment date for Thursday – this is creating a 'shell appointment' the facility will go in and update the date and time. Generally go ahead and make the appointment for in morning and about 30 minutes, depending on the list of offenders.
      WCC – make two Monday's ahead. They have a special population
      3) Select "Encounter Type" per the contact list – most are Admin(Admin) or Mental Health
      4) Select "Encounter Type" as "ACA Application Process"

5) Leave "venue" as "on-site DOC"
6) Using the drop down, select the appropriate facility and "HS Unit" should be "HSB," "Medical," "Clinic," etc. See the contact list for notes indicated specifics

7) "Staff/Provider" will be the main ACA Coordinator on the Contacts List.
8) Save (double click if necessary)
9) After entering one facility, go back and check to ensure that the appointment was saved.
   1. Click on the Health Services Tab
   2. Appointments
   3. Enter a DOC from the list and click "search"
   4. Open the appointment "ACA Application Process" and that should open the mass appointment
   5. Ensure all the DOC numbers from the list are in the appointment
    C. Then clear "Suspension" filter so all the callout under your name shows.

3. Work Release
   A. Suspension should already be checked when the entry is created in SP so there will not be a column on the WR Callout for filtering by "y" or '"no"
   B. The appointments for WR will be created individually.
   C. In OMNI, Health Services tab, "Appointments" and select "Create Appointment"
   D. Enter the appointment date for Thursday – this is creating a 'shell appointment' the facility will go in and update the date and time. Generally go ahead and make the appointment for in morning and about 30 minutes, depending on the list of offenders.
   E. **WCC – make two Monday's ahead. They have a special population**
   F. Select "Encounter Type" per the contact list – most are Admin(Admin) or Mental Health
   G. Select "Encounter Type" as "ACA Application Process"

H.   Leave "venue" as "on-site DOC"

I.   Using the drop down, select the appropriate facility
and "HS Unit" should be "HSB," "Medical," "Clinic," etc. See the contact list for
notes indicated specifics

J.   "Staff/Provider" will be the main ACA Coordinator on the Contacts List.

K.   Save (double click if necessary)

L.   After entering one facility, go back and check to ensure that the appointment
was saved.

    1.   Click on the Health Services Tab

    2.   Appointments

    3.   Enter a DOC from the list and click "search"

    4.   Open the appointment "ACA Application Process" and that should open
the mass appointment

    5.   Ensure all the DOC number from the list is in the appointment

II.   How to Create an HQ ACA App Tracking Encounter

1.   Open OMNI and select the 'Health Services' tab

2.   Search for possible open encounters.

From the Health Services Menu select 'Encounters'

From the Encounters Menu select 'Create Encounter'

3. The Offender demographic information will populate from OMNI.
4. All fields marked with an (*) are mandatory fields and must be filled in for the appointment to be 'Saved'

> - **Date –** this will be today's date
> - **Time –** the current time
> - **Duration –** should be a minute or two for each encounter
> - **Origin –** Referred by Other
> - **Origin Date –** Callout Date or Date App Received
>   - ▪ **Encounter Category -** Category – Admin(HQ)
>   - ▪ **Encounter Type -** Type – HQ ACA App Tracking
> - **Venue – On-site DOC**
> - **Facility –** Release Facility – THIS DEFAULTS TO AHCC – MAKE SURE YOU CHANGE THIS!
> - **Staff/Provider -** the ACA Facility Coordinator

5. Click 'Continue'

Clicking 'Continue' will cause the 'ACA Application' Information section of the encounter to open

6.	All fields marked with an (*) are mandatory fields and must be filled in for the appointment to be 'Saved' (<u>UNLESS</u>: **they are marked as SUSPENDED – see below**)
- ➢	**Date App Received at HQ enter "12/31/2999"**
- ➢	**Partner Name-should be your name**
- ➢	**Date App Started – "12/31/2999"**
- ➢	**Determination Date – will be left blank**
- ➢	**Application Status -**Select "Pending"

The following screen shot show what the Encounter will look like.
Once the application is submitted, the mandatory fields are no longer editable. Only the OMNI-HS Super User can amend the encounter after it has been submitted.

Update Encounter

Offender

*DOC No: 328050

Offender Name: WOLF, Ryan William Offender Location: CRCC-MSU - CAM Category: Regular Inmate ERD: 11/04/2017
Gender: Male   Birthdate: 10/25/1984   Age: 32

Encounter

*Date	*Time	*Duration	Primary Therapist
05/11/2017	10:10	1 minutes	Ruge, Laura N

*Encounter Category	*Encounter Type	*Origin	*Origin Date
Admin(HQ)	HQ ACA App Tracking	Refer By Other	05/09/2017

*Venue	*Facility	HS Unit	*Staff/Provider
On-Site DOC	CRCC-MSU	Any	Lingle, Joyce D

ACA Application Information

*Date App Received At HQ:	Partner Name:	*Placed On 60 Day List:
12/31/2999	Lingle, Joyce D	09/05/2017

*Date App Started:	Determination Date:	Mailing Address:
12/31/2999		

*Application Status:
◉ Pending   ○ Submitted-Classic   ○ Approved   ○ Denied   ○ Not Received   ○ Suspen

Determination Letter Sent:	Reason Denied:	Reason Not Received:	Reason For
	Please Select	Please Select	Please Sele

7.   Update SharePoint that an Encounter was done.
  ➢   Add "Callout Date" to SharePoint. If this is not entered, it will show up again next week.
  ➢   Check the "Encounter in OMNI" box

III.   SUSPENSION

A.   If there is ProviderOne suspension, the offender will <u>not</u> need to go on a Callout. An encounter will still need to be created.

  1.   The same field as above will need to be filled out in the Encounter

    ➢   **Date –** this will be today's date (callout)
    ➢   **Time –** the current time
    ➢   **Duration –** should be a minute or two for each encounter
    ➢   **Origin –** Referred by Other
    ➢   **Origin Date –** Callout Date or Date App Received
      ▪   **Encounter Category -** Category – Admin(HQ)
      ▪   **Encounter Type -** Type – HQ ACA App Tracking
    ➢   **Venue – On-site DOC**
    ➢   **Facility –** Release Facility – THIS DEFAULTS TO AHCC – MAKE SURE YOU CHANGE THIS!

  2.   Under the ACA Application Information section the dates will be updated to the callout date, this is because no application will be received or worked.
    ➢   **Date App Received at HQ enter callout date. It should match the Callout Date**
    ➢   **Partner Name-should be your name.**
    ➢   **Date of Callout It should match the Callout Datew**

2018 03 23

> ➢ **Date App Started enter callout date. It should match the Callout Date**
> ➢ **Determination Date – leave blank. Will be filled closer to release**
> ➢ **Application Status select "Pending"**
> ➢ **Add to "Notes" – ProviderOne Suspended**
> ➢ **Save. <u>Do not submit</u>, as the ERD/PRD gets closer, the address will need to be verified and/or updated**

    B.   Update SharePoint

        1.   App Received Date - enter callout date "mm/dd/yyyy"

        2.   Callout Date - enter callout date "mm/dd/yyyy"

        3.   Application Status – leave "Not Selected" so as the ERD/PRD gets closer the address will get verified and/or updated

        4.   Notes – add "ProviderOne Suspension" so when staff work it, they know benefits are established and the address and chrono need to be added.