90 Day Report Instructions

Due: Every Monday

1. Open Report Builder 90 Day Report
    A. Open OMNI
    B. Select OMNI Reports
    C. Select Report Builder
    D. Select Open (Open a saved report)
    E. Select My Computer
    F. Select W:\
    G. Select Health Care Services Folder
    H. Select Healthcare Finance Unit Folder
    I. Select ACA Folder
    J. Select ACA-ReleasingMedCoverage Folder
    K. Select ReleaseIn90Days Folder
    L. Select Running Report Files
    M. Open 90Day.rdl file

2. Update Report
    A. Expand Datasets Folder (left hand side) and Right click on "DataSet1"
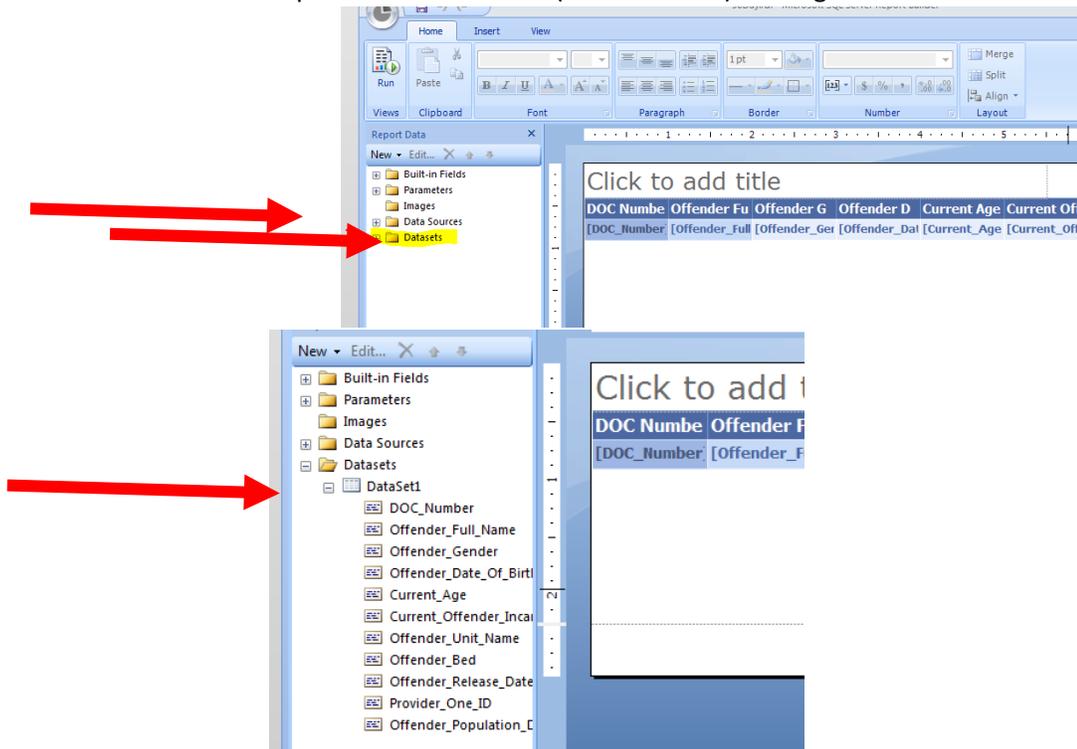
    B. Select "Query"
    C. Choose "enter Data Source Credential" when the window pops up, click "use the current windows user" and click "OK"

D. Query Designer Box in center of screen will have a hyperlink "Click to execute the Query." Click on link and report will show up
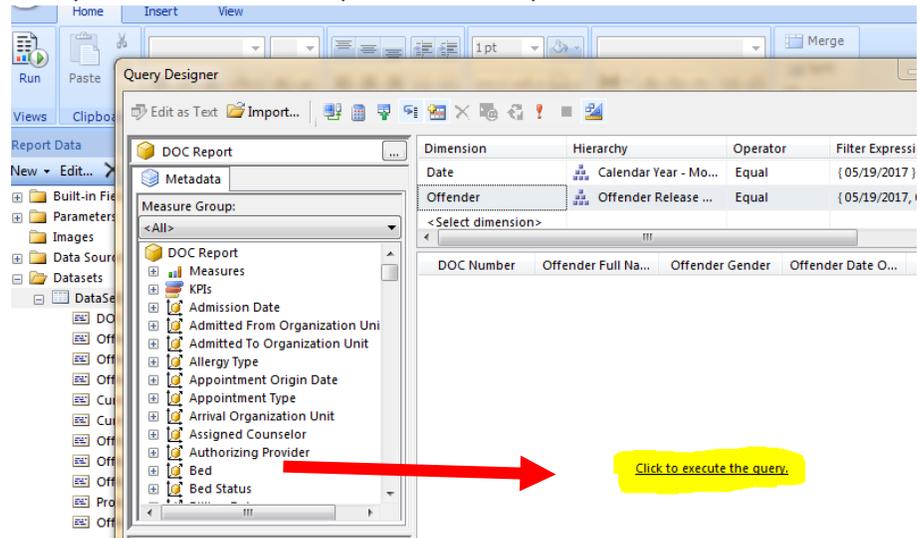
E. Change the "Date" Dimension Filter Expression, unselect date and select the Previous Friday (should be the only day selected) Then hit OK

F. Click second Filter Expressions box "Uncheck" the first 7 and "check" the last 7. Choose OK
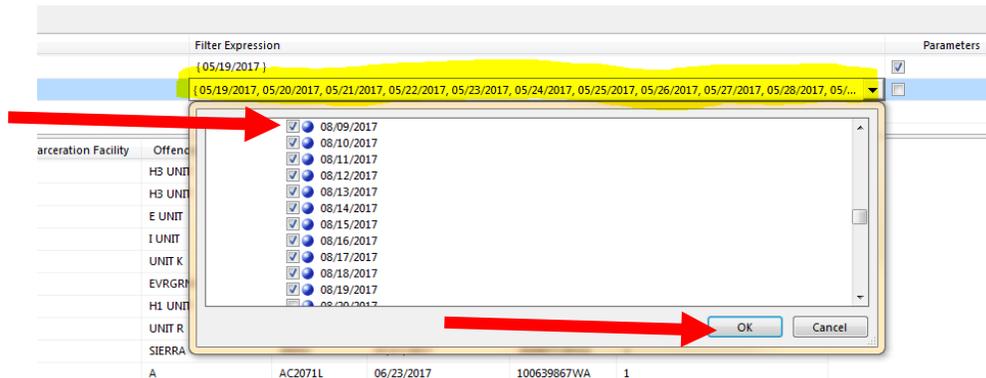
G. Select "OK" at the bottom of the Query Designer window

3. Run report
A. Click on the Run icon in the top left hand corner image
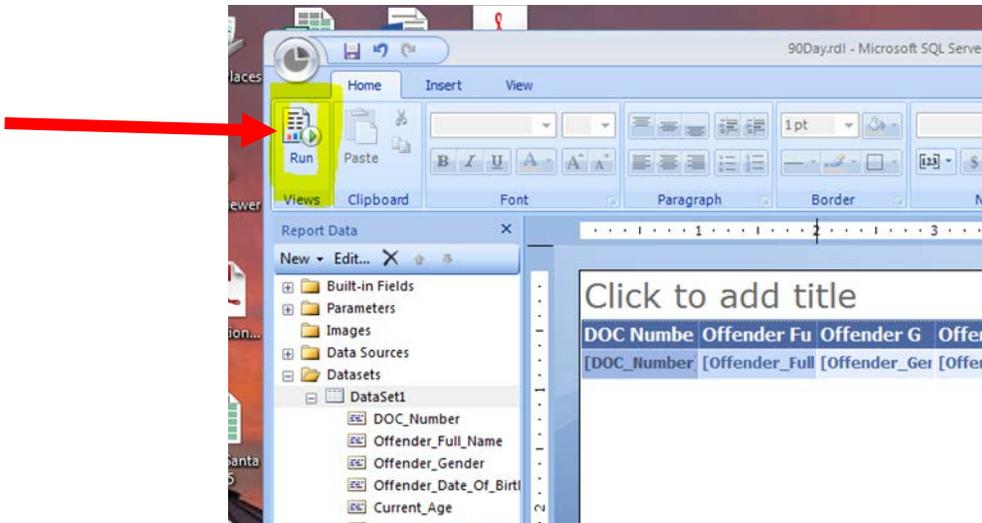
B. Click 'Export' button, choose the 'CSV' (comma delimited)
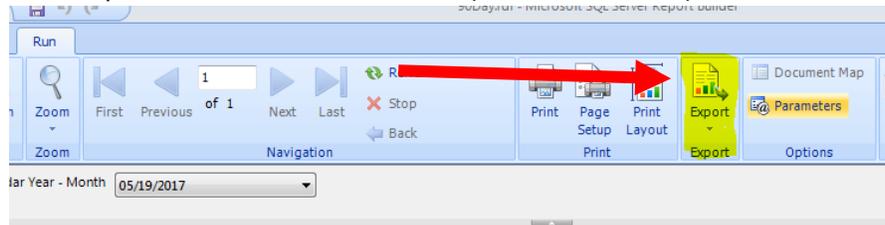
4. Save 90Day csv report in Health Care Services>Healthcare Finance Unit>ACA>ACA-ReleaseMedCoverage>ReleaseIn90Days>Running Report Files folder

    A. Keep as "CSV" format when saving

    B. Replace old copy (when you click save you will see a message "Replace already existing file – "Yes"

5. Exit out of OMNI Report Builder

    A. Select "Yes" to Save Changes to report

6. Open up the 90 Day CSV report – located in Health Services>HealthCare Finance Unit>ACA>ACA-ReleaseMedCoverage>ReleaseIn90Days>Running Report Files, 90Day CSV possibly put in short cut

7. Clean up the "90 Days CSV" spreadsheet

    A. Delete columns L and M

    B. Insert column before Provider_One_ID column

    C. Go back into the running Reports folder and open 'ACA Database Headers,' copy the headers

    D. Paste the "ACA database headers over the "90 Day CSV" report headers to replace them

8. Insert column before DOCNumber (A) and starting on line 2, Trim the DOC numbers by typing =trim(b2) then hit enter
   A. Double click on the small square at the lower right corner of highlighted (A2) cell to copy formula all the way down the column

9. Copy and paste these trimmed DOC numbers over top the old DOC numbers in Column B (Ctrl C, right click and paste as values using 'Values V')

10. Delete Column A

11. To find new offenders

    A. Open the "Running Total List" Excel workbook - W:>Health Care Services>Healthcare Finance Unit>ACA>ACA ReleaseMedCoverage/ReleaseIn90Days/RunningReportFiles
    B. In the "90 Day CSV" click in cell J2
    C. Select the formulas tab
    D. On the top left of the ribbon select "fx Insert Function"
       Choose VLOOKUP OK
       In Lookup Value Box type A2,
       Table Array – Double Click on Column Lable A and drag to B In the Running Total List
       Col_index type a 2
       Range lookup FALSE
       click OK
    E. Double click the box in the bottom right to copy down the rest of column J. (Should show offender names and N/A's)

12. 'Save As' into the "90 DayReleaseReport-Old folder" for the current year.
    W:\Health Care Services>Healthcare Finance Unit>ACA>ACA-ReleaseMedCoverage>ReleaseIn90Days>Running Report Files>90DayReleaseReport-Old
    A. Change the file type from 'Unicode Text' to 'Excel Workbook'
    B. Name the file Release Medical Coverage

    Release Medical Coverage (03-16-2018)

    C. Save

13. Using the new workbook "Release Med Coverage, add filters to the columns (highlight entire sheet, including headers, select 'Data' tab, 'filter')
    A. Filter for "N/A" in the"New90DayOffenders" column (J). Uncheck Select All and then check "N/A"
    B. Filter for **only** the prisons in the FacilityShortName column (F), **no work release facilities, no violator facilities, no CPA, no schools- *prisons only except MCC-IMU***

14. Open a New Excel Workbook
    Copy and normal paste that data, including headers, into a new Excel work book by highlighting- A-L columns.

15.   Save file to desktop as 90 Day List if asks to replace existing say Yes

16.   From the new Excel Workbook you just open copy and paste into *'Running Total List'* (should still be open)

17.   Copy and paste as values corresponding data (A-D) (F & I) into the appropriate columns of the 'Running Total List'

18.   Using Column A in "Running Total List", sort A-Z

19.   Save the "Running Total List" file

20.   In the "desktop" file, highlight all the data and choose Sort to Custom; sort by FacilityShortName

21.   In the new Workbook do the following:
  A. Add filter
  B. Select the carrot for admission date, to show all years.
  C. Uncheck everything in filter box
  D. Expand box for 2017, check July 2017 forward to include 2018 etc
  E. Manually check all dates for p1 suspension (See P1 suspension instructions in the HPF section of manual)
  F. Delete the row if they are p1 suspended
  G. Clear filters

22.   change columns D and I to "short date" in the ribbon

23.   Save

Mail Merge

1. Open the 90 day letter for Mail Merge Word doc. (90 Day List (mmddyyyy) W:Health Care Services\Healthcare Finance Unit\ACA\ACA-ReleaseMedCoverage\Releasein90Days/running report file/90 day letter (for mail merge).

2. When you open the letter answer "yes" to the SQL question. This will automatically link the data file with your mail merge.

   A. Go to "Mailings" tab image
   B. Click "Start Mail Merge"
   B. Click "Letters"
   C. Click "Select Recipients"
   D. Select "Use Existing List"
   E. Open Report that is saved on Desktop
   F. In the box that pops up, select the first line "sheetI$" and click ok.

2. Click "Preview Results" (under the Mailings tab) section to check the letters prior to printing. Facilities should be alphabetical-AHCC-WSP. Use the arrows to go to the beginning and end of the list of letters.
3. Select "Finish and Merge"
4. Select "Print Documents"
5. In properties select "print one sided"
6. Do not save the changes for the letter when you close the file.
7. Delete the temporary file from the desktop
8. Fold all letters, rubber band facilities together WCC will need to have application folded and stuffed into envelope with it.

Mail: 90 Day Letters

1. Fold all letters and individually place them into a window envelope.
   o Note: WCC is the only prison facility that will need 1 blank ACA application folded and included with each letter.
2. Once each envelope has been sealed, group letters by Prison name, i.e. all AHCC letters are to be grouped and rubber band together.
3. If the Prison has a Mail Stop (refer to Prison Mailstop document or Health Services Manager Roster) then apply a sticky note on top of the first letters of each group with the Mail Stop.
   o If the Prison does not have a Mail Stop you can write the address on the top letter that is grouped and rubber band with the rest.
4. Once all letters have been folded, sealed, labeled and grouped properly distribute them to the outgoing mail box in the Work Room.