CLEVELAND TGA CAREWARE USER MANUAL

2018

Revised February 2018

TABLE OF CONTENTS

Introduction – 2

- Who was Ryan White? – 2

- About the Ryan White HIV/AIDS Program (RWHAP) – 2

- Federal Reporting Requirements – 3

- What is CAREWare? – 4

- Appendices Intro – 5

Appendix A: CAREWare Install – 6

Appendix B: Account Password Reset – 9

Appendix C: Data Entry – 11

Appendix D: Data Entry Tip Sheet – 13

Appendix E: Electronic Eligibility – 14

Appendix F: Data Quality – 17

Appendix G: RSR Tip Sheet – 21

Appendix H: Client-Level Data Elements – CLE Modified – 23

Appendix I: Billing Instructions – 24

Appendix J: Resources – 28

INTRODUCTION

Who Was Ryan White?

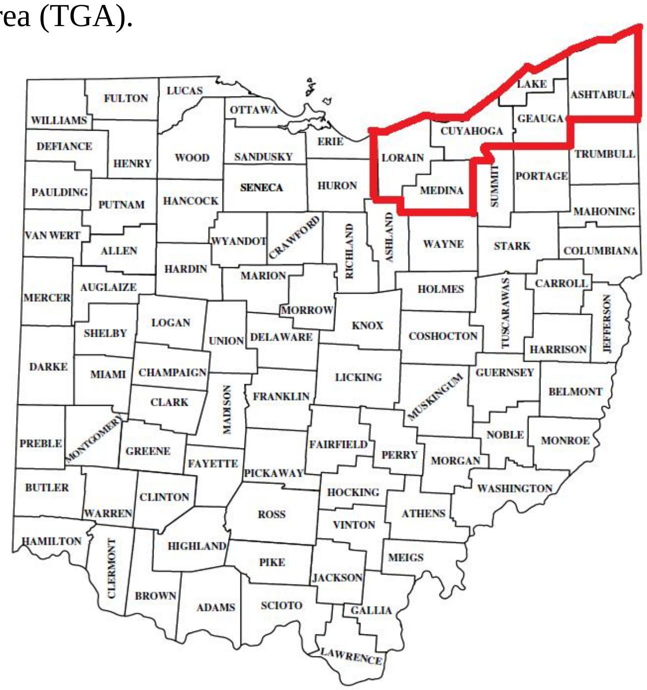
Ryan White and his mom courageously fought AIDS-related discrimination and helped educate the Nation about his disease.

Ryan White was diagnosed with AIDS at age 13. He and his mother Jeanne White Ginder fought for his right to attend school, gaining international attention as a voice of reason about HIV/AIDS. At the age of 18, Ryan White died on April 8, 1990, just months before Congress passed the AIDS bill that bears his name – the Ryan White CARE (Comprehensive AIDS Resources Emergency) Act.

About the Ryan White HIV/AIDS Program (RWHAP)

The Ryan White HIV/AIDS Program provides HIV-related services for those who do not have sufficient health care coverage or financial resources to cope with HIV disease. The program is federally funded through the U.S. Department of Health and Human Services (HHS), Health Resources and Services Administration (HRSA), HIV/AIDS Bureau (HAB). Annually, the Ryan White HIV/AIDS Program serves an estimated 533,036 individuals living with HIV/AIDS throughout the United States. In 1996, HRSA first designated the six county Cleveland Region as a Part A Transitional Grant Area (TGA).

25 YEARS Ryan White HIV/AIDS Program
Moving Forward with CARE:
Building on 25 years of Passion, Purpose and Excellence



The Cuyahoga County Board of Health (CCBH) serves as the Administrator of the Cleveland TGA grant which serves the following Ohio Counties:

- Cuyahoga
- Ashtabula
- Geauga
- Lake
- Lorain
- Medina.

According to the Ohio Department of Health, in 2016 there were a total of 5,429 individuals living with HIV/AIDS throughout the TGA. The Cleveland TGA Part A program provided care and support services to a total of 2,844 individuals in 2016, or 52% of the region’s total population living with HIV/AIDS.

Federal Reporting Requirements

As a condition of the grant awards, Ryan White HIV/AIDS Program (RWHAP) recipients are required to report data on clients, services provided, and expenditures.

What kind of data is collected?

Previously, the HIV/AIDS Bureau (HAB) required all RWHAP-funded recipients and the contracted service providers (or "sub-recipients") to report aggregate data annually using the RWHAP Annual Data Report (RDR). However, aggregate data are limited in two ways:

1. Aggregate data lack client identifiers and, by definition, cannot be merged and unduplicated across providers within a given geographic area. As a result, recipients—and ultimately HAB—cannot obtain accurate counts of the number of people RWHAP serves.

2. Aggregate data cannot be analyzed in the detail required to assess quality of care or to sufficiently account for the use of RWHAP funds.

What is client-level data?

To address the barriers with aggregate data, in 2009 HAB started to require all recipients use a new data reporting system called the Ryan White HIV/AIDS Program Services Report (RSR). HAB's goal was to have a client-level data reporting system that provides data on the characteristics of the funded recipients, their providers, and the clients served.

The data submitted through the RSR will be used to do the following:

- Monitor the outcomes achieved on behalf of HIV/AIDS clients and their affected families receiving care and treatment through RWHAP recipients and/or providers;

- Address the disproportionate impact of HIV in communities of color by assessing organizational capacity and service utilization in minority communities;

- Monitor the use of RWHAP for appropriately addressing the HIV/AIDS epidemic in the United States;

- Address the needs and concerns of Congress and the Department of Health and Human Services (HHS) concerning the HIV/AIDS epidemic and RWHAP; and

- Monitor progress toward achieving the goals identified in the National HIV/AIDS Strategy.

HAB has taken every measure possible, including the implementation and use of an encrypted Unique Client Identifier (eUCI), to limit data collection to only the information that is "reasonably necessary to accomplish the purpose" of the RSR.

Client-level data must be submitted for all providers who used RWHAP funds to provide core medical or support services directly to clients during the reporting period.

HAB also understands how important the data reported can be to each RWHAP as each assesses its client service needs and establishes practical outcome measures for its programs. HAB considers these data the property of the grantee and will not share the data with other grantees without the permission of the reporting grantee.

What is CAREWare?

CAREWare is free, HRSA sponsored software used to manage and monitor HIV clinical and supportive care as well as produce federally required service reports. CAREWare is updated regularly to be compliant with HAB reporting requirements. The software is scalable and can be customized to meet local needs.

CAREWare was originally released at a Grantee (Recipient) Meeting in 2000. Usage has increased steadily each year and today over 800 Ryan White-funded agencies in 48 States, Puerto Rico, and the U.S. Virgin Islands use the software to manage their HIV/AIDS information.

CAREWare on a local level

The Cleveland TGA began using the CAREWare data collection system in 2011. The Cleveland TGA CAREWare database is hosted on our own secure server and meets all federal, state and local privacy standards. All Cleveland TGA sub-recipients are required to enter data using the CAREWare system. Due to changes in HRSA/HAB reporting requirements and availability of new features or modules, the Cleveland TGA CAREWare software is typically updated every 6-8 months.

Cleveland CAREWare User Manual Appendices

Each agency is responsible for securely installing CAREWare on their own agency computers. As computers are upgraded or new staff come on board, you may need to reference **Appendix A** for the current instructions to install/reinstall CAREWare on your agency computer. **Appendix B** also provides instructions to utilize if a user account is locked out and needs to reset their password.

Appendix C and **Appendix D** outline the specific requirements for client level data entry. Standards have been developed for the Cleveland CAREWare server to ensure that all users are entering client-level data in a consistent manner. This simplifies data-entry for all funded providers and helps reduce duplicate client records in CAREWare.

In 2015 the Cleveland TGA began requiring that all sub-recipients upload client eligibility applications and verification documents to individual records using the CAREWare database. Electronic Eligibility instructions are outlined in **Appendix E**. Maintaining shared eligibility documents in CAREWare streamlines the eligibility process throughout the region.

The Cleveland TGA also uses customized built-in CAREWare Data Quality Reports outlined in **Appendix F**. Using these customized reports, agencies can quickly identify and correct missing client-level data. This enables funded sub-recipients to maintain high data quality standards throughout the reporting year.

As mentioned above, as a condition of award of Ryan White funds, HRSA/HAB requires that each funded provider submit their own annual RSR Provider Report. The RSR TIP Sheet outlined in **Appendix G** was developed as a reference for program staff that are responsible for submitting the RSR for their agency and is updated annually.

Each service category in the Cleveland TGA has certain client-level data elements required within CAREWare. These elements are outlined in **Appendix H.**

In 2014, the Cleveland TGA also began collecting billing information through CAREWare. Through this addition, providers no longer have to maintain separate spreadsheets with billing notations, instead contracts are set up in CAREWare to either default to a pre-negotiated rate or are adjusted so that the provider can enter the dollar amount associated with the services themselves. CAREWare billing instructions are included in **Appendix I** and are also updated annually.

The final appendix, **Appendix J**, includes federal and local CAREWare and data reporting resources.

As resources are updated or new information is released, an updated Cleveland TGA CAREWare Manual will be distributed to your agency and an electronic copy will be posted on the Cleveland TGA Provider website. Please make sure that you maintain the most recent CAREWare manual resources at your agency.

IMPORTANT SYSTEMS NOTICE: New system requirements for CAREWare Build 915 and higher:

<u>You must have .NET Framework version 4.5.2 or greater</u> installed for this build of CAREWare to run. The download for this version of framework is available from the Microsoft site: https://www.microsoft.com/en-us/download/details.aspx?id=42643 .

IMPORTANT: Prior to beginning any computer install, grant 'Administrator Rights' under the user profile. If not, the user may not have adequate permissions to complete the install or run the application under their user profile login.

Following are user instructions to complete the software installation of the RW CAREWare Client Tier on a ***Windows Vista, 7, 8, or 10*** operating system(s). Complete each step of the installation in order sequence as listed below, including security permissions listed on page four (4) of the instructions.

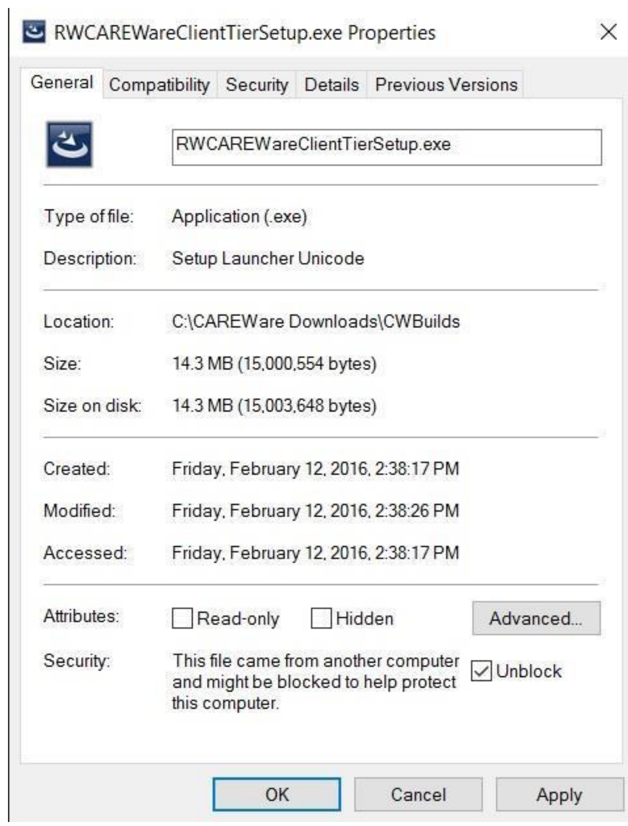
1) Download the RW CAREWare Client Tier setup file and ***Save*** to your computer. (It is recommended that this file be saved to your computer *Desktop*)
www.jprog.com/tools/frmwk4.5.2/build929/rwcareclienttiersetup.exe

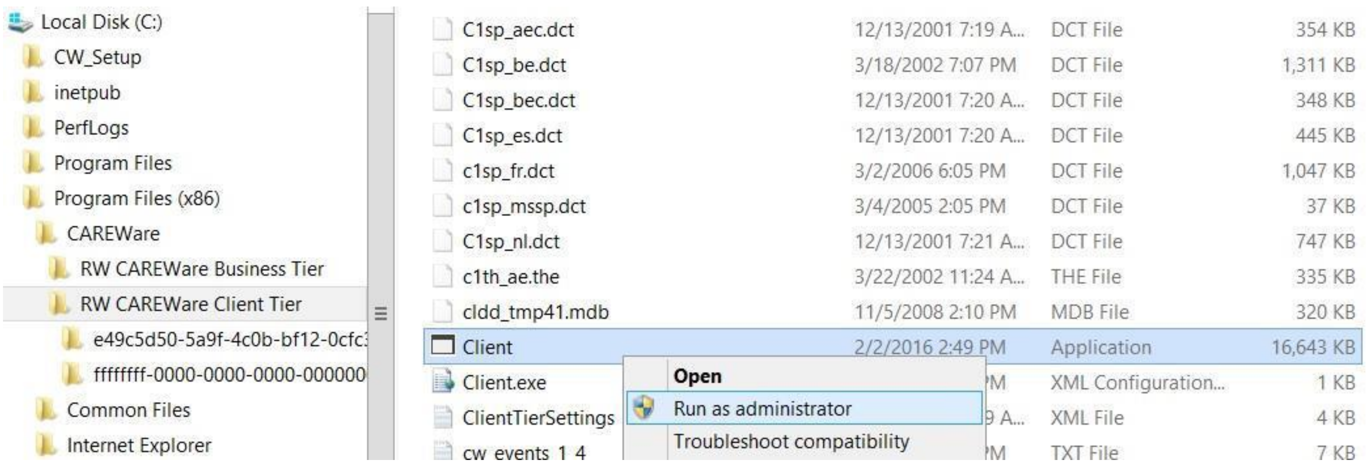
2) For CAREWare builds 865 and newer:

a) **Right click** the install file
b) Click ***Properties***
c) Click ***Unblock***
d) Click ***Apply***
e) Click ***OK***
f) **Right-click** the saved file **'rwcareclienttiersetup.exe'**

3) Select- Run as administrator The CAREWare Setup Wizard should automatically start, when completed click ***Finish***.

4) Browse (using File Explorer) and locate the ***Client*** file location in the *Local Disk* ***(C:) >Program Files (x86) > CAREWare > RW CAREWare Client Tier > Client.***
Right-click the file icon Client.exe and select Run as administrator the first time you run the CAREWare Client Tier.

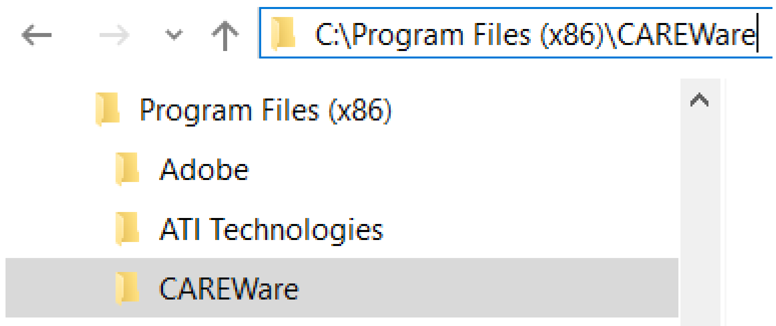




5) Click the box <<*Options* > *Server List*. Click ***Add*** manually enter (do not Copy/Paste) the server name: **cuyahogacountycareware.ixn.com** ; use default server port **8124**, click ***Save*** and ***Close***.
6) Select the **cuyahogacountycareware.ixn.com** now in the drop-down list for the *Server:* Have the user login to the application with their assigned CAREWare username and password.
7) *May be prompted to *Update Files*, if so, click **Yes**, status bar will appear to synchronize files. Allow the update to finish completely, this may take several minutes.
8) Have user re-enter password after the update is completed. User should now have access to CAREWare.

(IMPORTANT: Proceed to next page and change user permissions on the CAREWare folder.)

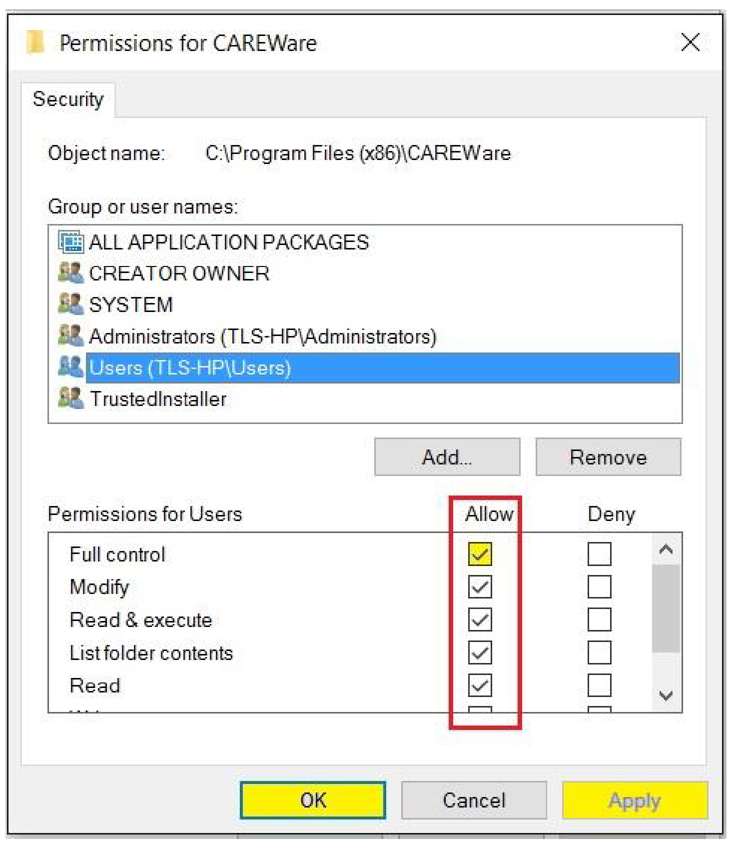
Change User Permissions on the CAREWare Folder - *for all Windows operating systems!*



User Error: *'Access to the path 'C:\Program Files (x86)\CAREWare\RW CAREWare Client Tier\Client.exe' is denied OR Access to the path 'C:\Program Files (x86)\CAREWare\RW CAREWare Client Tier\CWUpdater.exe' is denied.'*

Resolving Error: Edit permissions on the **Security** tab of the CAREWare folder ***C: > Program Files (x86) > CAREWare*** folder to 'Full control' for ALL Groups or user names – specifically the '**Users**' Group

Click **Apply** > **OK**, then Close the properties box.

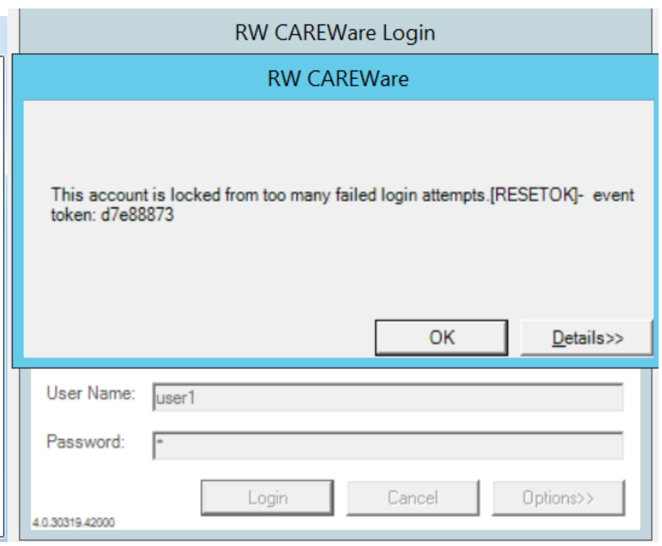


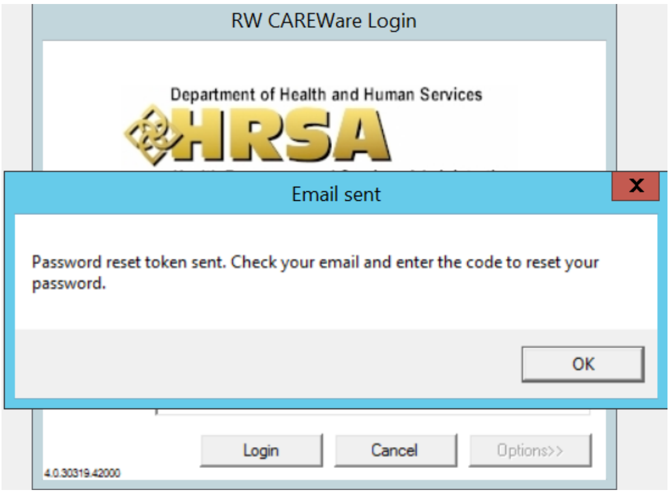
APPENDIX B – ACCOUNT PASSWORD RESET

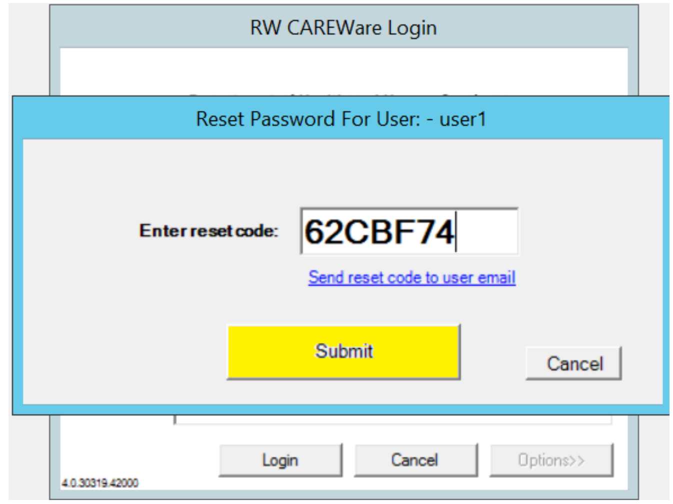
Each user now manages their own CAREWare account. There is no need to contact the Ryan White program office or contractor to 'unlock' your user account. (CAREWare does not keep any historical record of previous user passwords, so you can use the same password indefinitely for CAREWare.)

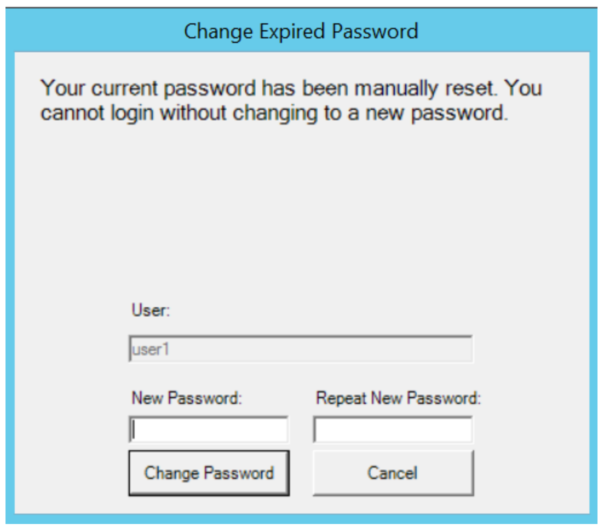
Should you forget your password or your CAREWare account becomes locked, follow these steps with the 'User Password Reset' feature in CAREWare. Remember, your CAREWare account must actually be <u>locked</u> for the '**Reset Password**' link to appear on the CAREWare login screen, (see screenshots below). (Note: you can intentionally lock your account, by entering an incorrect password three times in CAREWare.)

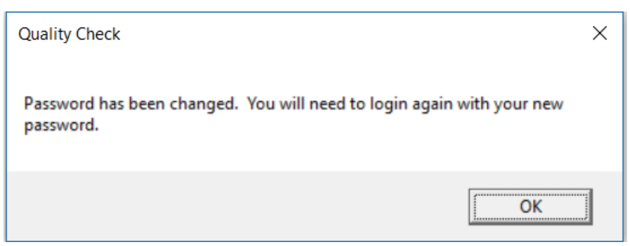
Click the **Reset Password** link, then the **Send reset code to the user email**. You should receive confirmation prompt that '*Password reset token sent*'. Then Copy/Paste the token/code from your email to the **Enter reset code** box in CAREWare. (Note: you may need to request *multiple* reset codes, until receiving the prompt - **Change Expired Password**.



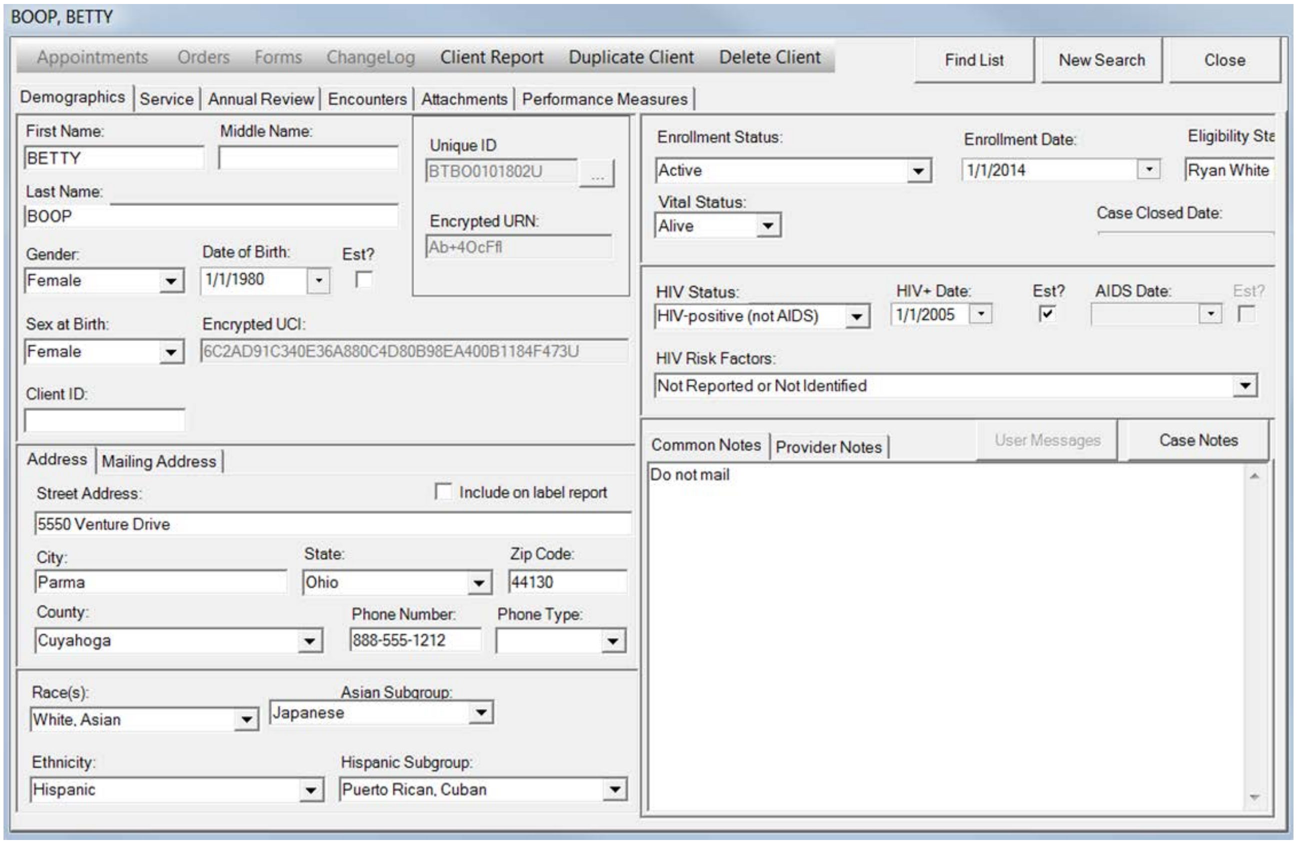

RW CAREWare Login
Department of Health and Human Services
HRSA
Email sent
Password reset token sent. Check your email and enter the code to reset your password.
OK
Login
Cancel
Options>>
4.0.30319.42000


RW CAREWare Login
Reset Password For User: - user1
Enter reset code:
62CBF74
Send reset code to user email
Submit
Cancel
Login
Cancel
Options>>
4.0.30319.42000

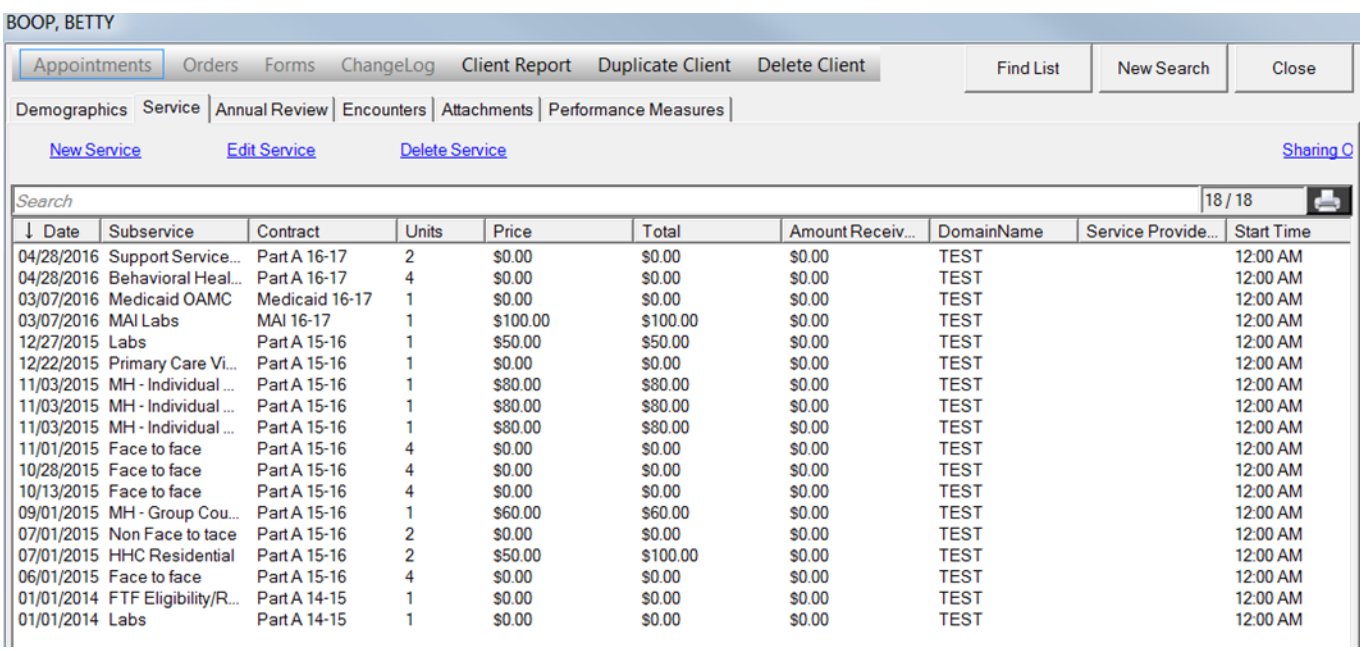

Change Expired Password
Your current password has been manually reset. You cannot login without changing to a new password.
User:
user1
New Password:
Repeat New Password:
Change Password
Cancel


Quality Check
Password has been changed. You will need to login again with your new password.
OK

Demographics



Services

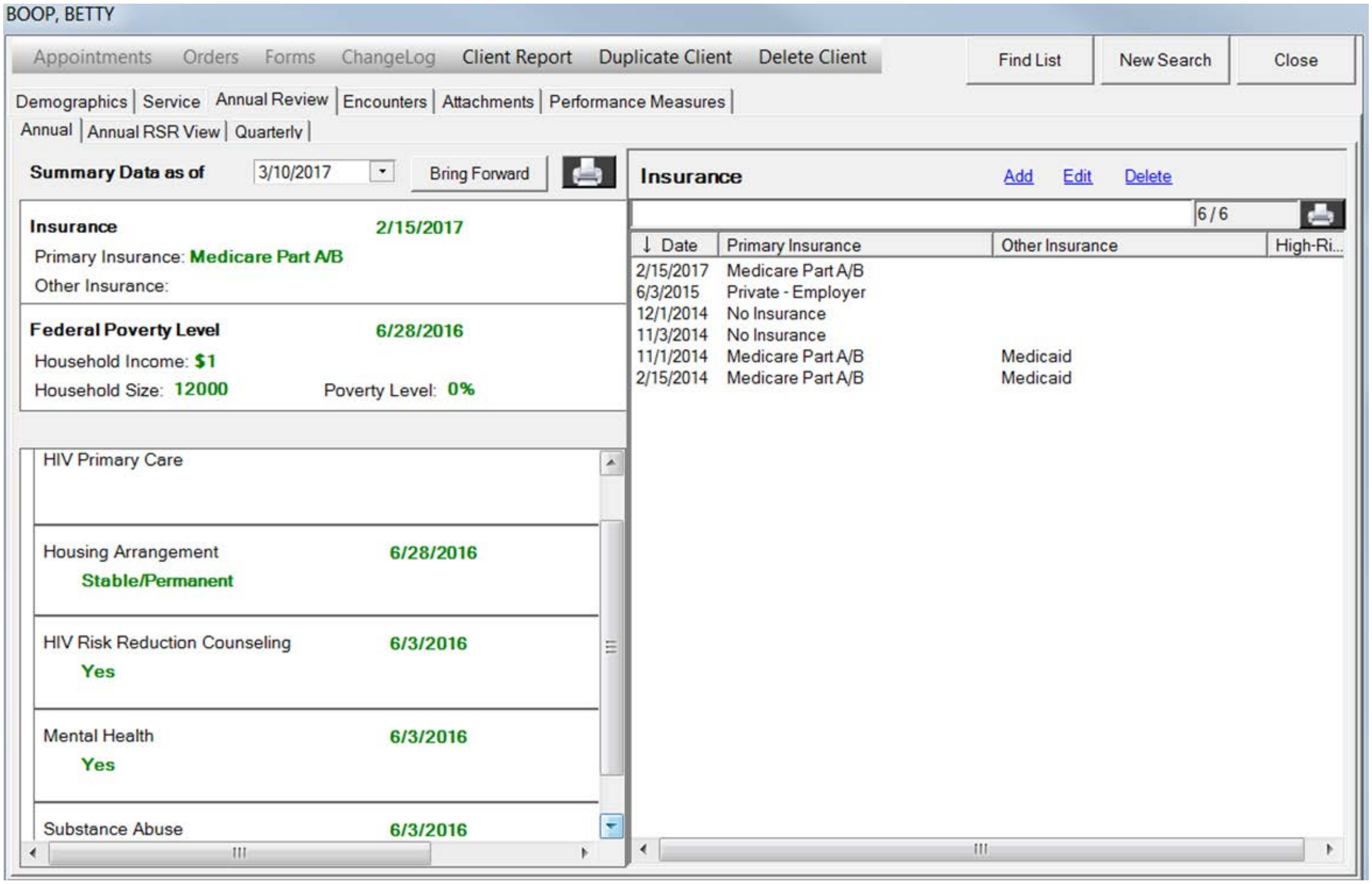


Date	Subservice	Contract	Units	Price	Total	Amount Receiv...	DomainName	Service Provide...	Start Time
04/28/2016	Support Service...	Part A 16-17	2	$0.00	$0.00	$0.00	TEST		12:00 AM
04/28/2016	Behavioral Heal...	Part A 16-17	4	$0.00	$0.00	$0.00	TEST		12:00 AM
03/07/2016	Medicaid OAMC	Medicaid 16-17	1	$0.00	$0.00	$0.00	TEST		12:00 AM
03/07/2016	MAI Labs	MAI 16-17	1	$100.00	$100.00	$0.00	TEST		12:00 AM
12/27/2015	Labs	Part A 15-16	1	$50.00	$50.00	$0.00	TEST		12:00 AM
12/22/2015	Primary Care Vi...	Part A 15-16	1	$0.00	$0.00	$0.00	TEST		12:00 AM
11/03/2015	MH - Individual ...	Part A 15-16	1	$80.00	$80.00	$0.00	TEST		12:00 AM
11/03/2015	MH - Individual ...	Part A 15-16	1	$80.00	$80.00	$0.00	TEST		12:00 AM
11/03/2015	MH - Individual ...	Part A 15-16	1	$80.00	$80.00	$0.00	TEST		12:00 AM
11/01/2015	Face to face	Part A 15-16	4	$0.00	$0.00	$0.00	TEST		12:00 AM
10/28/2015	Face to face	Part A 15-16	4	$0.00	$0.00	$0.00	TEST		12:00 AM
10/13/2015	Face to face	Part A 15-16	4	$0.00	$0.00	$0.00	TEST		12:00 AM
09/01/2015	MH - Group Cou...	Part A 15-16	1	$60.00	$60.00	$0.00	TEST		12:00 AM
07/01/2015	Non Face to face	Part A 15-16	2	$0.00	$0.00	$0.00	TEST		12:00 AM
07/01/2015	HHC Residential	Part A 15-16	2	$50.00	$100.00	$0.00	TEST		12:00 AM
06/01/2015	Face to face	Part A 15-16	4	$0.00	$0.00	$0.00	TEST		12:00 AM
01/01/2014	FTF Eligibility/R...	Part A 14-15	1	$0.00	$0.00	$0.00	TEST		12:00 AM
01/01/2014	Labs	Part A 14-15	1	$0.00	$0.00	$0.00	TEST		12:00 AM

Annual Review

All Providers report Insurance, Federal Poverty Level, Housing Arrangement

Medical Providers report HIV Risk Reduction Counseling, Mental Health, Substance Abuse



CAREWare Data Entry TIP Sheet

1. Only enter new clients into CAREWare after the initial Intake or first client service has been completed at your agency. Work from left to right as you click on the tabs in RW CAREWare; ***Demographics**, **Service**, and **Annual Review**, completing *ALL* required fields and dropdowns.
*** *Enrollment Date*** needs to be entered for new clients and **RW Eligibility History** added/updated for all clients!

2. Determine the legal name and exact date of birth (do not estimate birth date) and gender of client from approved federal, state, and/or legal ID (driver's license, birth certificate, etc.). *These fields are critical to the generation of the Unique Record Number (URN)* and if incorrect, creates duplicate client records in CAREWare.

***Note:** If there is a change in the legal name and/or gender for an existing client, update the information in the **existing client record**. Do not create a new client record, as this causes duplicate clients records.

3. When entering compound or hyphenated names, do not leave any spaces or use apostrophes. For example: *William O'Connor*, *Jr*. should be entered as: Last Name: **OConnor Jr** list surname(s) afterwards, First Name: **William**. Addresses should use the same format, **123 N Main St Apt 3** *without* punctuation, with abbreviations used by the United States Postal Service website: https://tools.usps.com/go/ZipLookupAction!input.action

4. Remember to enter **both** *Ethnicity* and *Hispanic Subgroup*, **and** *Race and Race Subgroup, when applicable*, as these
entries are treated as separate and required fields, remember not to leave either section 'Blank'.

5. The *Enrollment Date* (mm/dd/yyyy) should be the client's First service (Intake) at your agency. A *Case Closed Date* is required anytime the *Enrollment Status* is reported differently than '**Active**'. If the *Vital Status* is reported as '**Deceased**', a *Date of Death* is also required.

6. When reporting the *HIV Status*: be sure to fill in the corresponding *HIV+ Date* **and** *AIDS Date*, as applicable. When selecting the *HIV Risk Factor(s):* this refers to client's current risk factor(s) for HIV infection, which may not necessarily be the initial mode of HIV infection.

7. Remember to complete all sections under the Annual Review tab, including, **Insurance** and **Federal Poverty Level**. (For clients with no income, enter zero (0) in the Household Income field, CAREWare auto-fills the dollar sign and decimals, to show $0.00; and will calculate the Poverty Level Percent (%), once the household size is entered.)

8. Complete other Annual Screening fields, **Housing Arrangement**; **HIV Risk Reduction Counseling, Mental Health** and **Substance Abuse**, as applicable. [The *HIV Primary Care* field is obsolete and can be disregarded.]
Annual Review information should be verified every year, every six (6) months for recertifications; specifically, **Income** and **Insurance**. If there are no changes - the 'Bring Forward' feature may be used.

9. It is highly recommended to schedule regular time throughout the week and month, to enter and correct client-level data in CAREWare and avoid waiting until the last day of the month.

10. **IMPORTANT:** First correct the **TLSMissingRyanWhiteEligibility** report, then the **RSR Client Report Viewer** correcting all *Missing* and *Unknown* values, and remaining **TLS Missing** data reports until *'No records were found. The report will not be displayed.'* for each custom missing data report – prior to submitting monthly agency reimbursement requests.

Have Program Questions? Regarding contracted funded services, unit rates, or reimbursement requests?
Please contact the Ryan White Part A program office at (216) 201-2001 or visit: www.ccbh.net/ryan-white
Need Help with CAREWare or Technical Assistance?
Please contact the Ryan White program office at (216) 201-2001.

MAR2017 REV PB

APPENDIX E – ELECTRONIC ELIGIBILITY

Electronic Eligibility is the centralized storage of all Ryan White Part A client eligibility documents in the CAREWare database. To accomplish this, provider agencies upload eligibility documents to the “Attachments” tab in individual client CAREWare records. The "Attachments" tab is in the shared domain, meaning every agency serving the client can view the uploaded documents.

Getting Started:

1. Prior to upload, each eligibility document must be saved in one of the following formats:
   - .bmp
   - .jpg
   - .pdf

2. Prior to upload, each eligibility document must be assigned the correct file name:
   - In assigning the file name, the Eligibility Document Type[1] determines the File Name Format[2] used. The client eligibility date, located on the Eligibility Application or Six-Month Recertification Form, is used to populate mm dd yy in the file name.

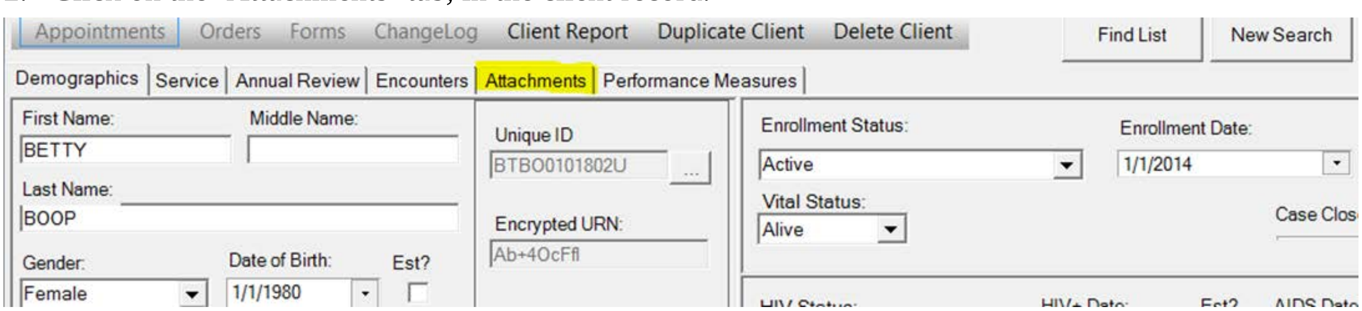
     Note: The value of mm dd yy in the file names of an eligibility application and every document supporting it, such as Proof of Income, will be identical.
   - Each Eligibility Document Type is assigned a corresponding Custom Attachment Field[3] to which it will be uploaded.

Eligibility Document Type[1]	File Name Format[2] mm dd yy = Eligibility Date	Custom Attachment Field[3]
Eligibility Application	mm dd yy APP	Eligibility Application
Proof of Residency	mm dd yy RES	Proof of Residency
Proof of Income	mm dd yy POI	Proof of Income
Proof of HIV Status	mm dd yy HIV	Proof of HIV Status
Proof of Insurance Status	mm dd yy INS	Proof of Insurance Status
Six Month Recertification- No Change	mm dd yy 6NC	Eligibility Application

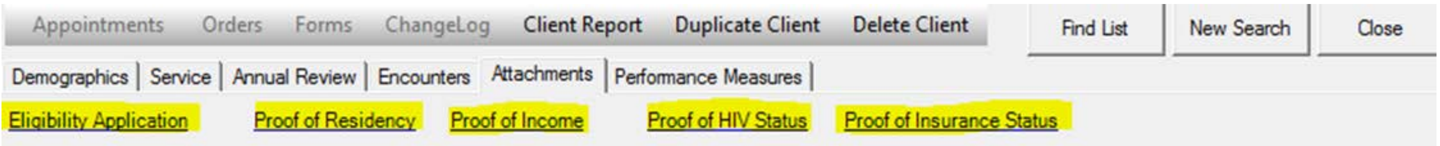
Uploading Documents:

1. Find and open the CAREWare client record to which you want to upload a document(s).

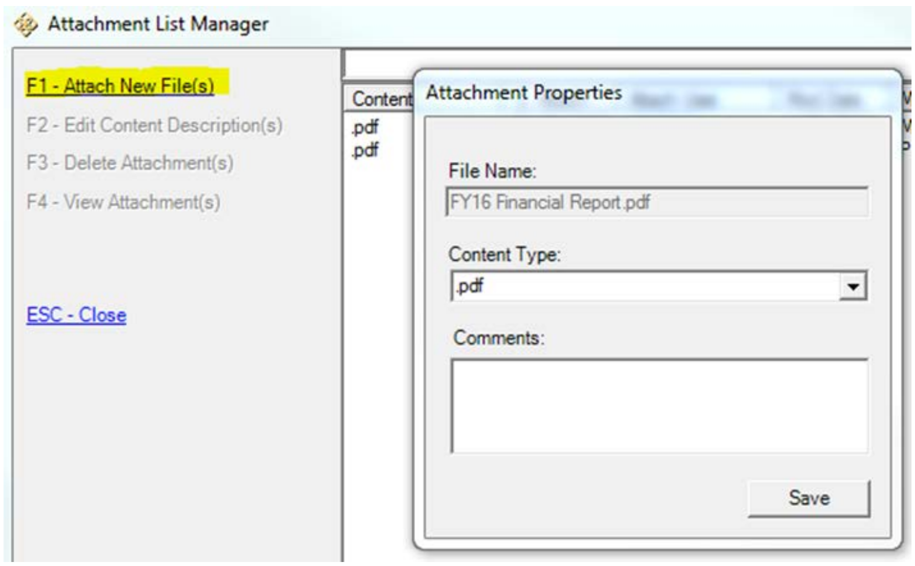
2. Click on the ‘Attachments’ tab, in the client record.



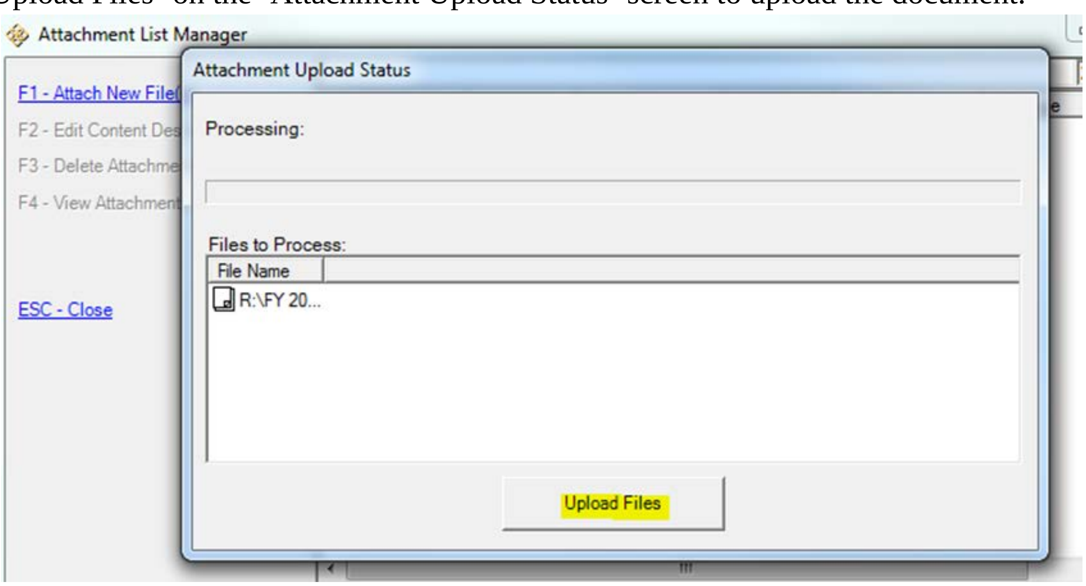
3. Click on the blue '[Custom Attachment Field']'[3] that matches the eligibility document you want to upload, such as, 'Proof of HIV Status'.



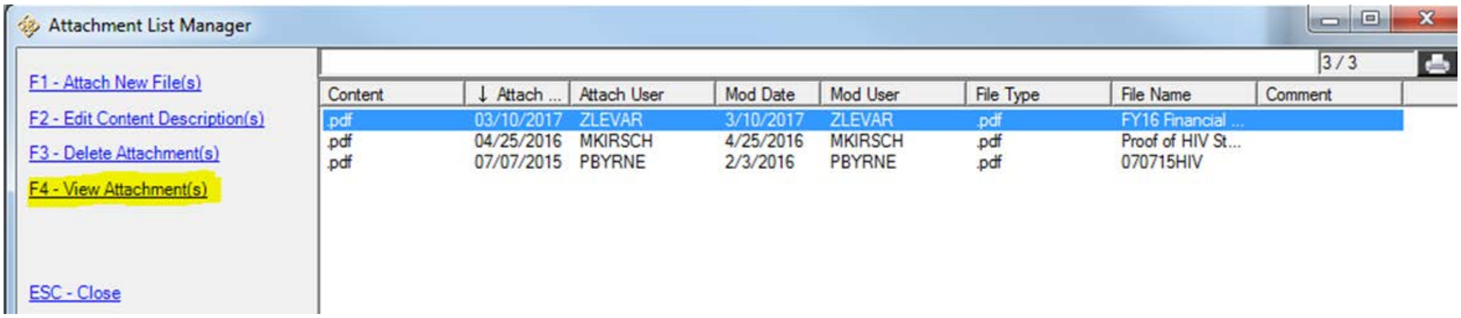
4. Click on F1 - Attach New File(s). Find and select the document you want to upload (click 'Open' or double-click the file). Select the file type from the 'Content Type' drop-down list in the 'Attachment Properties" box and click 'Save'



5. Click 'Upload Files' on the 'Attachment Upload Status' screen to upload the document.

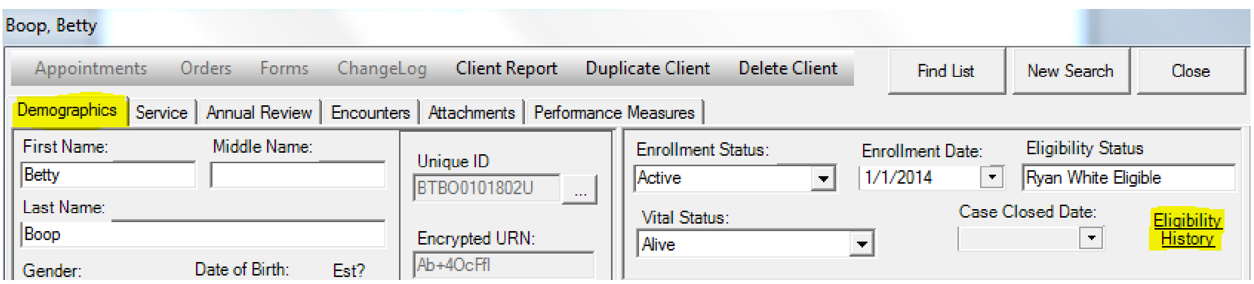


6. Once uploaded, click the document row to highlight it and click F4 - View Attachment(s) to confirm the document uploaded correctly.

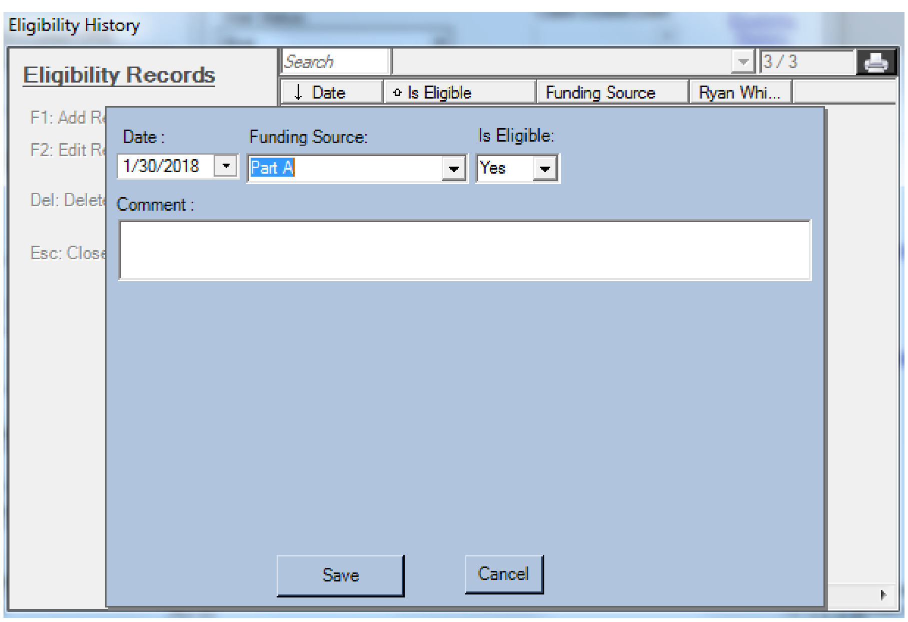


Eligibility History

7. Once all attachments have been uploaded, go to the demographics tab and select "Eligibility History"



8. Click "F1: Add Record" and enter the date of eligibility application or 6 month recertification, funding source, and eligibility status.



In CAREWare build 881 or higher, enhanced RSR data quality reports are available, including; the **RSR Client Report Viewer**.

TECH TIPS

The *Client Report Viewer* requires use of the *RSR Client Report* to view results.

Following are the five (5) data quality reports used to identify and correct missing client data in CAREWare. These reports should be run in the order listed, prior to submitting monthly reimbursement requests. For each of the custom missing data reports, set the Data Span from: 1/1/2017 through 12/31/2017 to display accurate results.

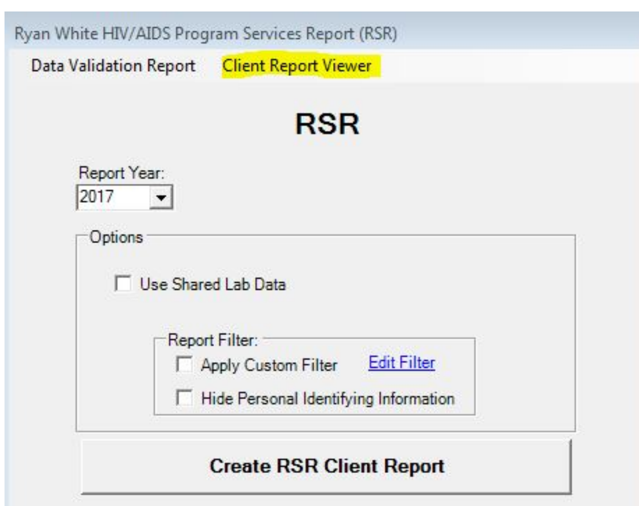
1. **TLSMissingRyanWhiteEligibility** – clients listed have been reported as, 1) Not Eligible for Ryan White; however, 2) have received a Ryan White funded service in the reporting year. (Note: clients listed on this report will not be included on the annual RSR report, until corrections are made.)

> **TO RESOLVE:** add an Eligibility History record for a qualifying Ryan White Funding Source(s); AND/OR delete/change the service(s) to a non-Ryan White funded contract.

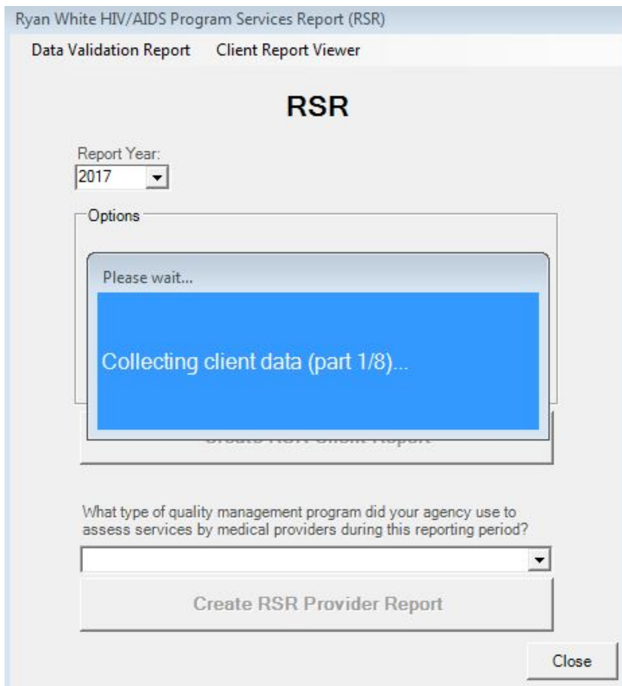
2. **RSR Viewer Report** – Demographic/Clinical – run for the current Report Year: 2017, the number of client records with missing data will be listed under each Category, "Missing or Unknown."

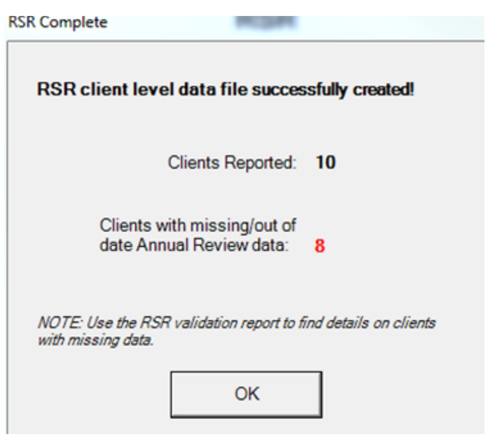
> **TO RESOLVE:** Run the Viewer Report, click on "Missing" (hyperlink), make corrections and update.

- <u>**RSR Client Report Viewer**</u> - click *Main Menu > Reports > HRSA Reports > RSR*



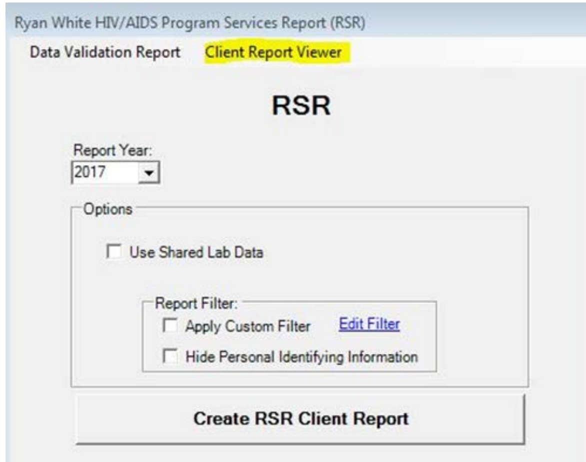
- Select **Report Year: 2017**, then click *Create RSR Client Report*;
- Choose a location on your computer to save the CLDClientExport2017. xml file, such as the **Desktop**, then click *Save*;
- Allow the RSR Client Report to finish;
- Check the RSR Complete box, for total Clients Reported, and the number of ‘Clients with missing or out of date Annual Review data:’, should be zero (0);
- Use the RSR Client Report Viewer to find and correct clients with missing data. After all corrections are made, rerun the RSR Client Report and verify 'Clients with missing/out of date Annual Review data' is zero (0).



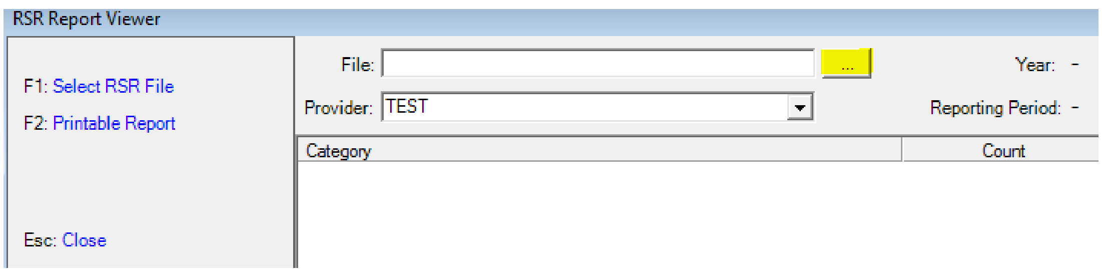


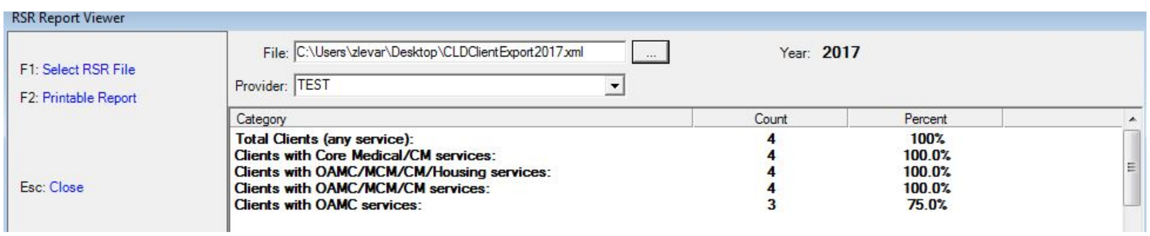
Look for prompts throughout CAREWare; such as, red  or yellow  exclamation points. These indicate a data-mismatch exists and require <u>manual</u> correction of client field(s).

- Click on the Client Report Viewer at the top of the screen;

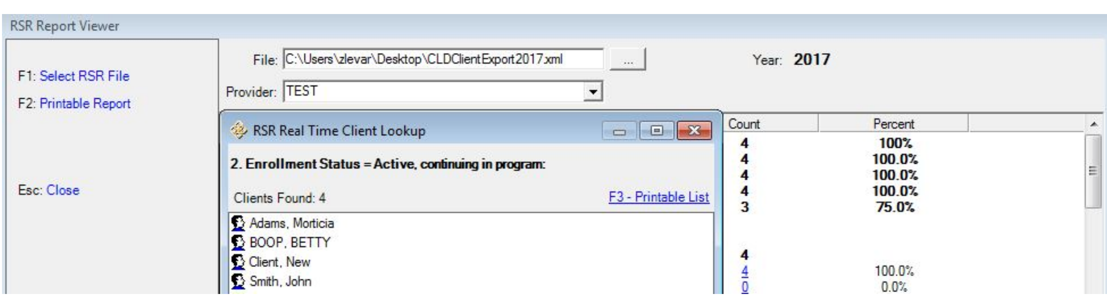


- Click on the ellipses box (…) and *Browse* to the location of the file CLDClientExport2017, saved on your computer, and click *Open*;

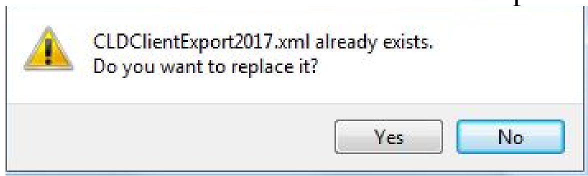




- Click on the **Count** column, (underlined number); this is a direct hyperlink to the client record in CAREWare with the data error and correct the client data field. Specify the Tab or section of CAREWare to view in the client record, such as, **Demographics**. Select the client(s), then click **F1 – Go to Selected Client** or double-click client name(s).



- Make corrections to client records in each Category, resolving all records listed as 'Unknown or Missing', as well as other inconsistencies noted in client-level data reporting;



- Continue this process, until zero (0) is listed under the Count column, for 'No Value or Unknown' sections of the RSR Report Viewer.
- Rerun RSR Client Report to reflect corrections made to client record(s).

3. **TLSMissingAnnualReview** – clients listed may be missing insurance, income, housing arrangement.
3A. **TLSMissingAnnualReviewMedical** – clients listed may be missing insurance, income, housing arrangement, and/or risk counseling, mental health screening, or substance abuse screening.

****Only those agencies funded for OAHS will run the "Annual Review Medical" report****

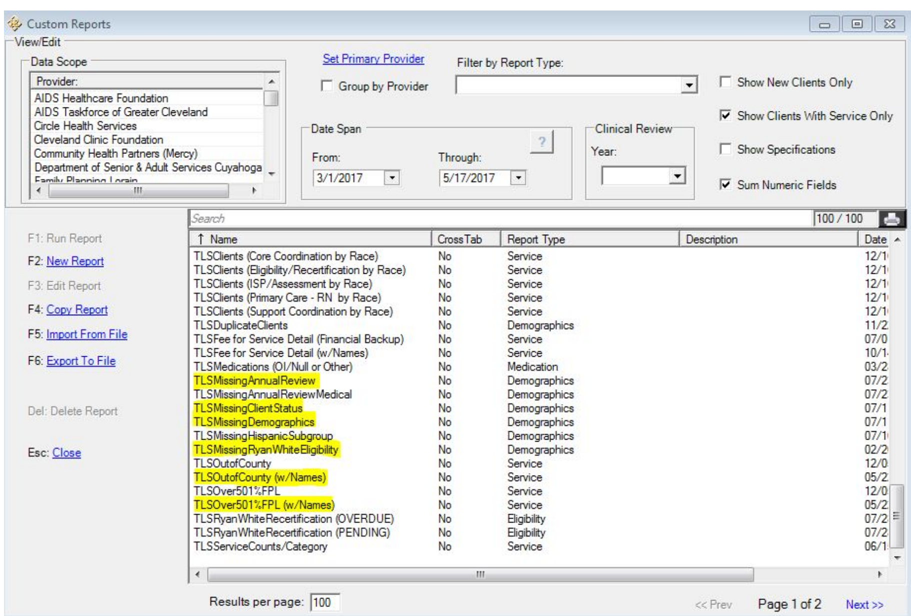
4. **TLSMissingClientStatus** – clients listed may be missing enrollment date, case closed date if discharged, vital status, HIV status, HIV risk, and/or HIV+ date, or AIDS date.

5. **TLSMissingDemographics** – clients listed may be missing ethnicity, race, street address, city, county, state, or zip code.

TO RESOLVE: correct all fields for clients listed until – 'No records were found. The report will not be displayed.' – is shown when running each of the custom missing data reports.

To help ensure that the client is eligible for Ryan White services within the TGA, these reports have been added and are located in the Custom Reports section:

- TLSOutofCounty(w/Names)
- TLSOver501%FPL(w/Names)



As of November 2018, all reports must be 100% accurate, agencies will be given monthly provider reports if they have any non-compliance noted in the reports above.

RSR TIP SHEET

2017 RSR Submission / HRSA Electronic Handbook
Using CAREWare to Create the Client Level Data XML File

1. For complete RSR data submission instructions, please refer to the HRSA/HAB 2017 Annual Ryan White HIV/AIDS Program Services Report (RSR) Instruction Manual, available for download here:

2017_RSR_Manual_Final_HAB_Approved_508 090817.pdf

2. (STEP ONE) A valid registered user account on the HRSA Electronic Handbook (EHB) or HAB RSR Web Application system is required to submit your 2017 RSR Report to HRSA/HAB.

(See > *Browser Requirements* on the HRSA EHB or HAB Web Application system for a list of compatible browsers and settings to submit accurate results.)

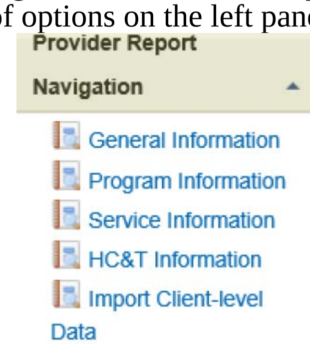
Recipient and Recipient-Providers: use the HRSA EHB **https://grants.hrsa.gov/webexternal** and navigate to Performance Reports.

Providers Only: use the HAB RSR **https://performance.hrsa.gov/hab/RegLoginApp/Admin/Login.aspx**

Enter your username and password, and click "login." You will automatically be taken to the first page of your Provider Report. If you have submitted the RSR report in the past, you do not need to re-register in the system.

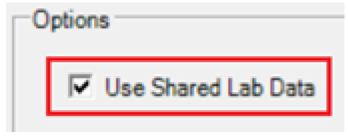
If you do not have an account, you will need to complete a **Registration Form**, which requires your agency's HAB Registration Code and Tax ID (EIN) number to create a username and password.

3. Log into your EHB user account and navigate to the Provider Report for your agency. You should see your agency name or organization, and a menu of options on the left pane, (similar to that listed below):



4. (STEP TWO) Complete the Provider Report online in the HAB RSR system, for each item **#1-12**, including, **General Information**, **Program Information (1-4), Service Information (5)**, and **HC&T Information (7-12)**, as applicable. Click *Save* at the bottom of each web page and proceed to the next section. (HC&T Information - only applies to agencies that are required to report anonymous HIV testing.)

5. a)(STEP THREE) Complete and Import the RSR Client Level Data Report XML upload file from CAREWare. *Main Menu > Reports > HRSA Reports > RSR > **Create RSR Client Report*** (Note: the Create RSR Provider Report feature is disabled.)
Medical Providers (only): check the * '*Use Shared Lab Data*' box under Options, then click '**Create RSR Client Report**'



(It is recommended to Save the ***CLDClientExport2017.xml*** *file on your computer's Desktop, for easy retrieval.)*

5.b) **Import Client-level Data** to the HAB RSR system. Upload the **CLDClientExport2017.xml** file created from CAREWare in step 5.a)

6. (STEP FOUR) Validate your RSR Provider Report and client-level data. Validation of the 'RSR Provider Report' requires review of all report validation results. This may require fixing data errors in CAREWare and re-uploading a corrected client-level data file to the HRSA EHB or HAB RSR System.

- **Errors –** information that triggered the error **MUST be corrected** prior to submission; it may be related to contracts, services, missing or unknown client-level data, etc.;
- *Warnings* – should be corrected if possible or a comment must be entered explaining the data. (see the Ryan White Part A '*Warning Comments'* list for suggested provider comment(s);
- Alerts – are informative and intended to help you identify potential issues in your data collection and reporting processes. You can submit your report with alerts.

(Note: In subsequent RSR reporting periods – Alerts may become *Warnings, Warnings* may become **Errors**.)

7. (STEP FIVE) Submit the 2017 RSR Provider Report, which includes agency information entered in the RSR Provider Report, as well as client level data uploaded in the RSR Client Level Data Report.

Click **Submit** from the HAB RSR menu options.

IMPORTANT: Continue to monitor the HRSA EHB or HAB RSR Web System and e-mails for changes in your 2017 RSR Provider Report status – through the submission deadline of **Monday, March 26, 2018 6:00 PM.**

Need Help with the HRSA EHB or HAB RSR Web Application system?

Please contact the HRSA Contact Center at (877) 464-4772, available Mon – Fri, 8am – 8pm ET or electronically: http://www.hrsa.gov/about/contact/ehbhelp.aspx

Need Help with the RSR data content and/or reporting requirements?

Please contact HRSA Data Support at (888) 640-9356 or email: RyanWhiteDataSupport@wrma.com

Have Program, Fiscal, or Agency Specific Questions? Please contact the Ryan White Part A program office – Cuyahoga County Board of Health at (216) 201-2001 or reference http://www.ccbh.net/ryan-white

Need Help with CAREWare?

To arrange CAREWare technical support or training – please contact the Ryan White Part A program office – Cuyahoga County Board of Health at (216) 201-2001 or reference http://www.ccbh.net/ryan-white

IMPORTANT – all subrecipient 2017 RSR Provider Reports need to be in "Review" status on the HAB RSR Web Application System by **Monday, February 19, 2018!**

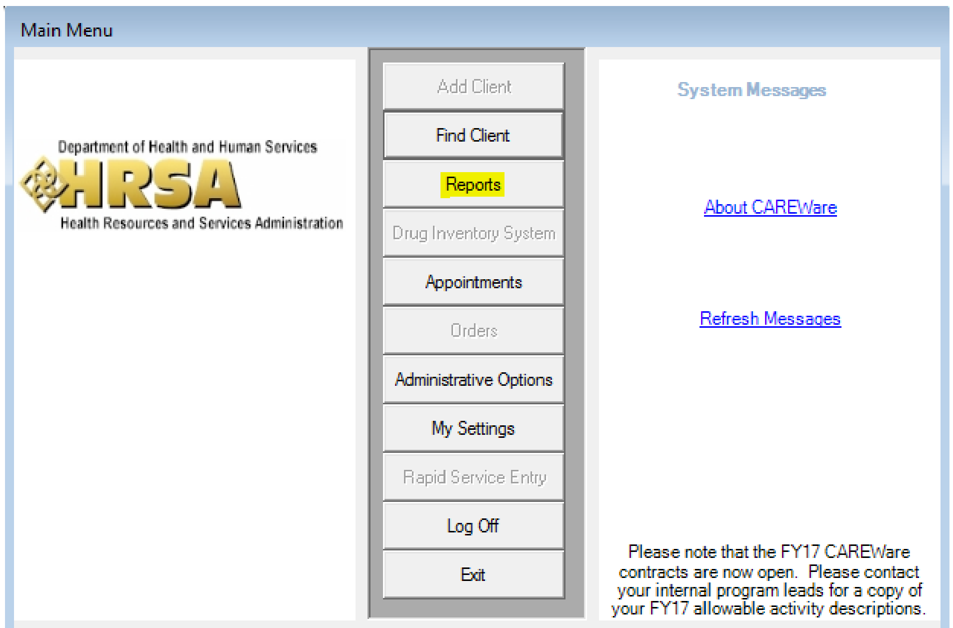
Client-level Data Elements	Core Services	Early Intervention Services (EIS)	Health Insurance Program (HIPCSA)	Home and Community-Based Health Services	Home Health Care	Medical Case Management	Medical Nutrition Therapy	Mental Health Services	Oral Health Care	Outpatient Ambulatory Health Services (OAHS)	Substance Abuse Outpatient Care	Support Services	Emergency Financial Assistance (EFA)	Food Bank / Home Delivered Meals	Medical Transportation	Non-medical Case Management Services	Other Professional Services	Outreach Services	Psychosocial Support Services	Substance Abuse Services (residential)
Year of birth		●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●
Ethnicity		●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●
Hispanic subgroup		●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●
Race		●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●
Asian subgroup		●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●
NHPI subgroup		●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●
Gender		●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●
Transgender subgroup		●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●
Sex at Birth		●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●
Health insurance		●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●
Housing status		●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●
Federal poverty level		●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●
HIV/AIDS status		●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●
Client risk factor		●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●
Vital enrollment status		●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●
HIV diagnosis year		●	●	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●
HIV risk reduction screen/counseling										●										
First outpatient/ambulatory health service visit										●										
Outpatient ambulatory care visits										●										
CD4 counts and dates										●										
Viral Load counts and dates										●										
Prescribed PCP Prophylaxis										●										
Prescribed ART										●										
Screened for TB since diagnosis										●										
Screened for syphilis										●										
Screened for Hep B since diagnosis										●										
Completed Hep B Vaccine series										●										
Screened for Hep C since diagnosis										●										
Screened for substance abuse										●										
Screened for mental health										●										
Pap smear										●										
Pregnant										●										
Date of first positive HIV test										●										
Date of OAHS visit after first positive HIV test										●										

APPENDIX I – BILLING INSTRUCTIONS

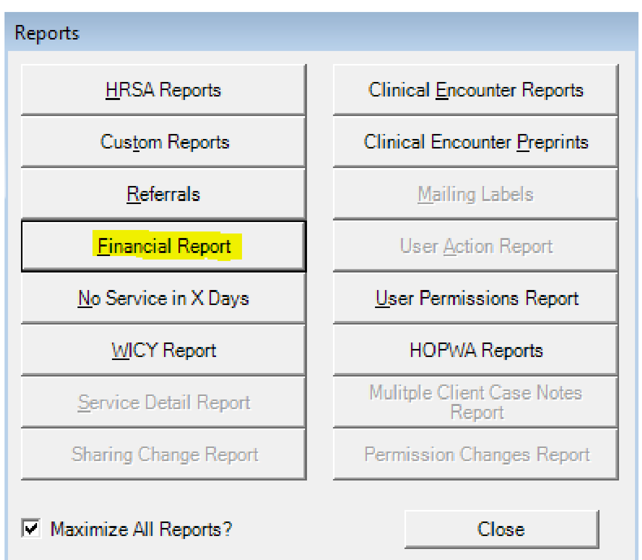
1. All service level data should be entered into CAREWare by your agency's agreed upon internal deadline. We suggest entering in data as close to real time as possible. Your agency should use the FY2018 CAREWare Activity Description spreadsheet to assure that you are using the proper unit descriptions and associated costs.

2. As soon as all service level data is entered you will need to run the following two reports out of CAREWare:

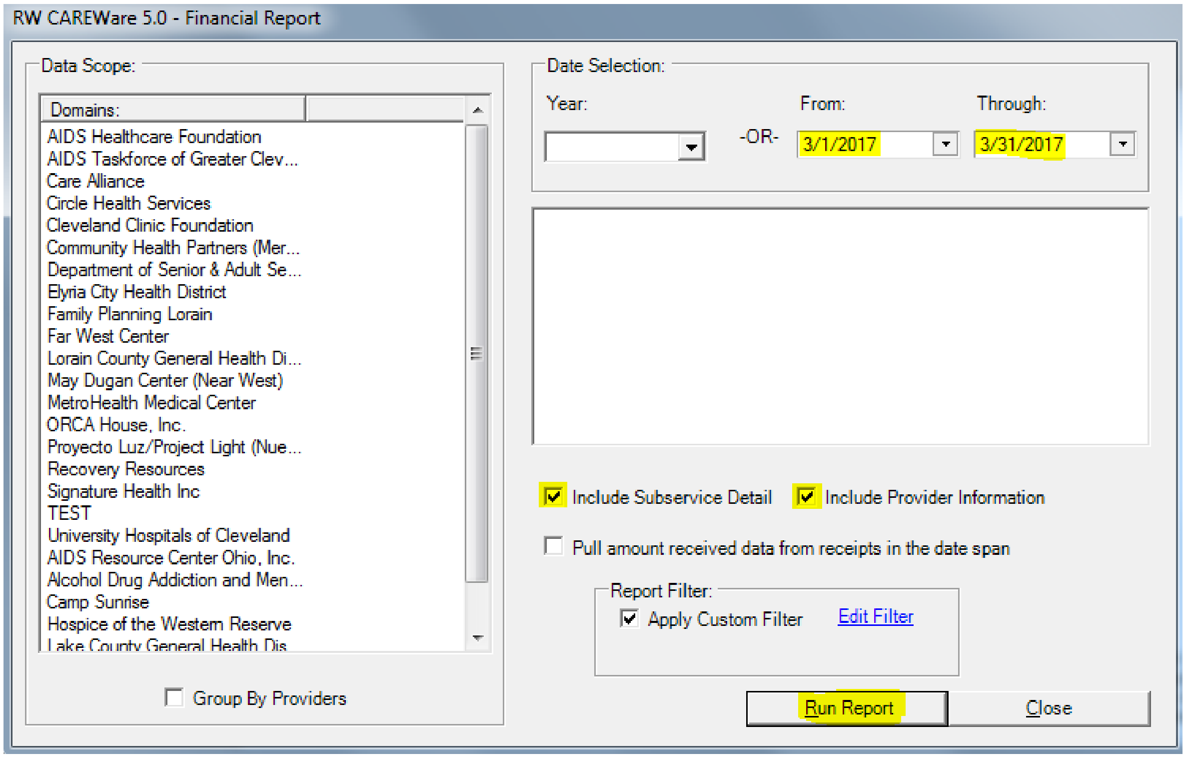
a) From your home screen you will click the reports tab.



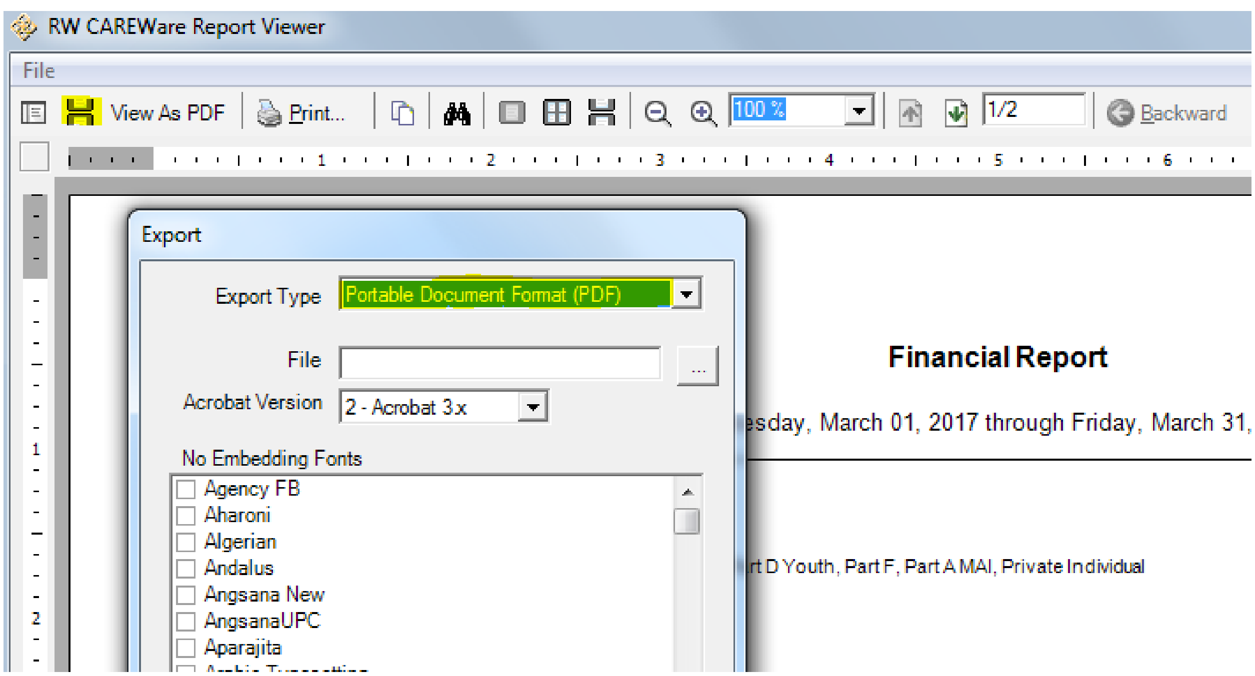
b) The first report you will run is the Financial Report.



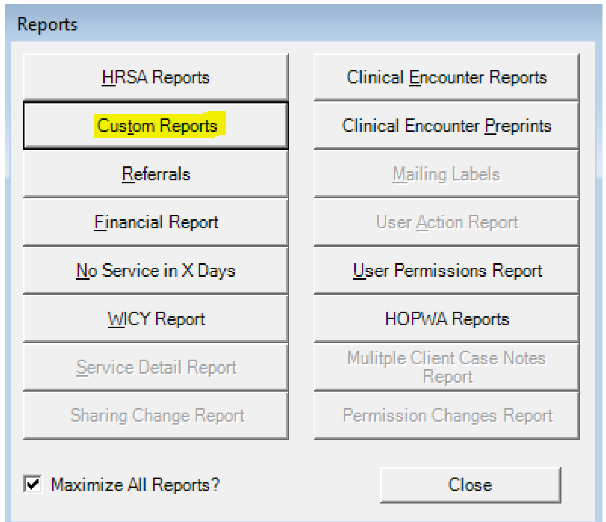
c) When setting up the Financial Report, you want to make sure that you set the date range to the billing month and check the two boxes that say: *Include Subservice Detail* and *Include Provider Information*. Then you run the report.



d) Once you have reviewed and approved the Financial Report you will need to export it by hitting the disc-like button in the upper left side and save it as a PDF file to your computer.

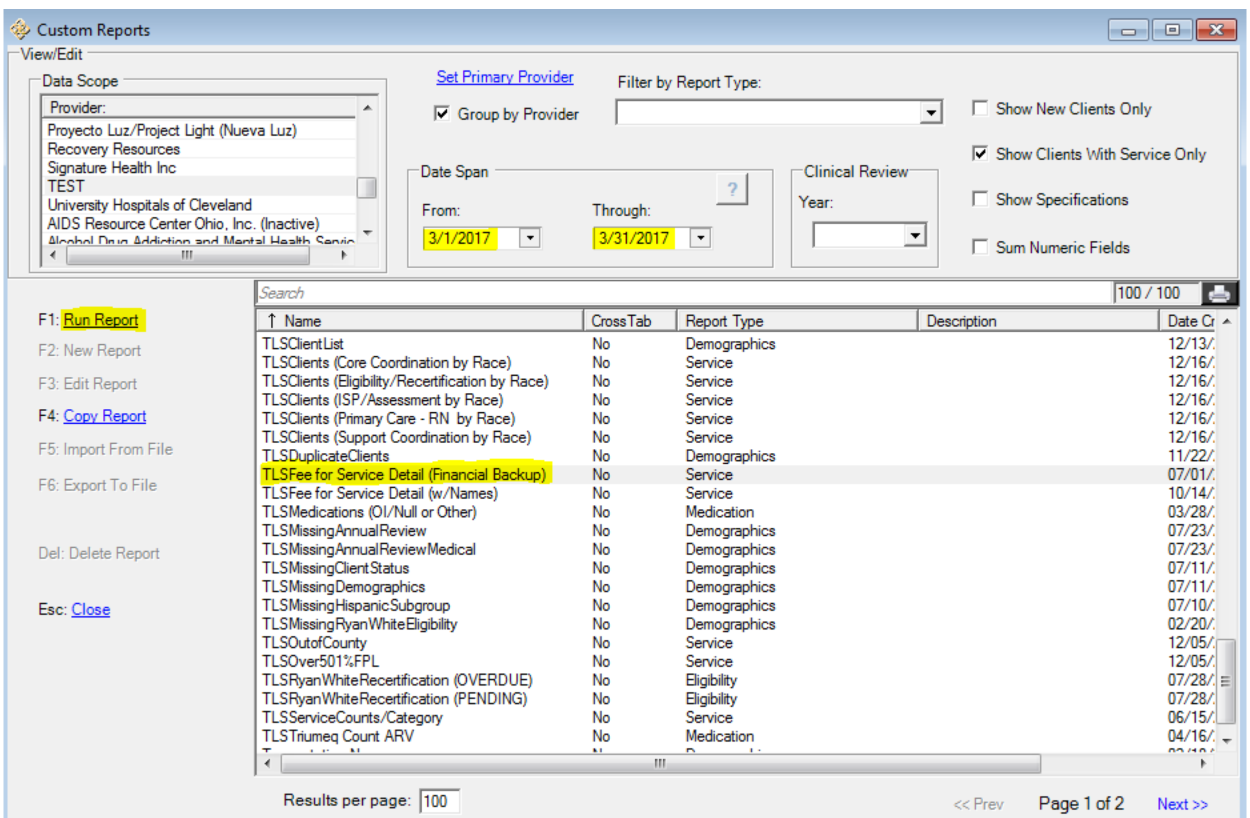


e) The second report you will run is located under the custom reports tab

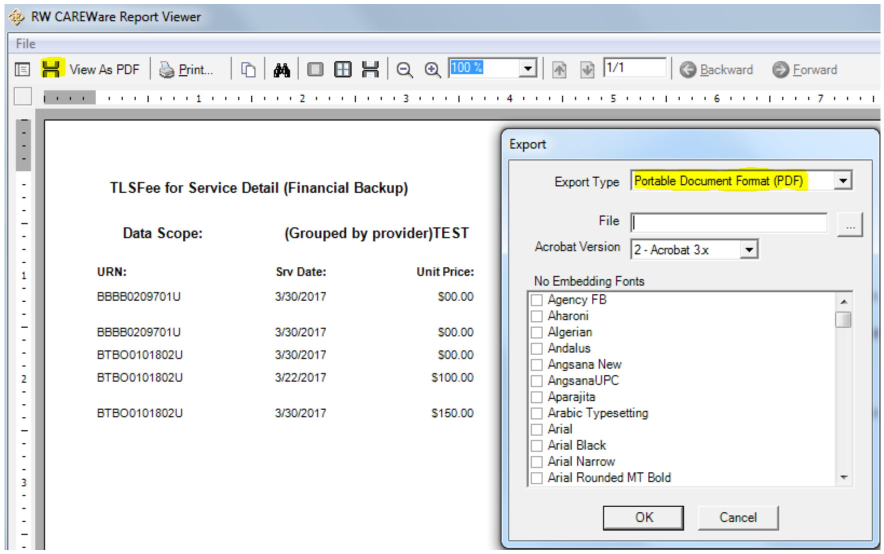


f) Set the date span again for your invoice time period. In your list of custom reports, click on Fee for Service Detail (Financial Backup) and run a new report.

*Please note that some agencies have the ability to run this report with client names. Please make sure that you are not running the report with names for your invoice submission.



g) Once you have reviewed and approved the Fee for Service Detail (Financial Backup) report, you will need to export it by hitting the disc-like button in the upper left side and save it as a PDF file to your computer.



3. Both of these reports should be printed from your computer and, depending on your agencies internal process, submitted to your fiscal contact or combined with the required items listed on the FY2018 Fiscal Checklist.

4. If your agency receives funding for Lab services under OAHS, or Emergency Financial Assistance (EFA):

- You will also need to maintain a monthly spreadsheet that includes the following information:
  - Service Category Name
  - **Client URN (CAREWare ID)**
  - **Date of Service**
  - Name of drug or lab service performed.

This spreadsheet should match the total number of units that you have entered into CAREWare and be submitted with your financial package on a monthly basis. Where applicable, a sample spreadsheet has been provided on your FY2018 flash drive.

- If you have services within these three categories that are not able to be billed during the current invoice period, you will also need to maintain a spreadsheet outlining back-charges within the grant period. This spreadsheet should also include:
  - Service Category Name
  - Client URN (CAREWare ID)
  - Date of Service
  - Name of drug or lab service performed.

Again, where applicable, a sample spreadsheet has been provided on your FY2018 flash drive.

APPENDIX J - RESOURCES

1)CAREWare Help Desk

Free technical support for the RW CAREWare software available to end-users nationwide.

Toll Free (877)294-3571
Mon - Fri
12pm - 5:00pm ET
Email: cwhelp@jprog.com

2)Using the CAREWare Modules

Link to interactive CAREWare on-line training modules, developed by the State of Oregon, (scroll to the bottom of the webpage, see 'CAREWare Modules'). This training consists of a series of 11 modules demonstrating the features of CAREWare.

http://public.health.oregon.gov/DISEASESCONDITIONS/HIVSTDVIRALHEPATITIS/HIVCARETREATMENT/Pages/CaseManagerTraining.aspx

3)Join or Leave the NIH CAREWare ListServ

Sponsored by the National Institute of Health (NIH), CAREWare ListServ is an on-line user group forum. End-users can inquire and collaborate with colleagues regarding the use of modules and features in CAREWare.

https://list.nih.gov/cgi-bin/wa.exe?A0=CAREWARE

4)TARGET Center

Resource Library (archived HRSA/HAB webinars), News and Events, Ryan White Community, and Help Desk.

https://careacttarget.org/

5)Cleveland TGA Website

Resources for providers, and the community. Information includes local policy notices, presentations, training materials, service standards of care, and more.

www.ccbh.net/Ryan-White