

RSR Data Updates and Reports

February 2020



This document provides instructions for running data quality reports, making data corrections, running the RSR XML file, and transferring the file off of the remote server.

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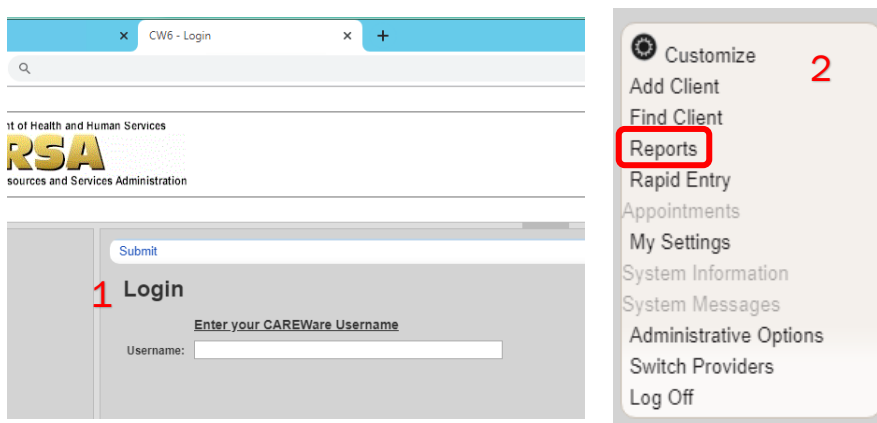
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2019 Changes

1. Changes to Client Level Report
 - Six variables modified
 - Nine variables removed (mostly clinical information)
 - One variable added (date housing status collected)
 - CAREWare will automatically generate the revised RSR.
2. Changes to RSR Instrument: Provider Report
 - **New:** List of provider ZIP codes in service area and number of clients services in each ZIP code
 - A custom report is available that produces the number of clients served by ZIP code to upload to the HRSA web application.

Navigating to Reports

1. To navigate to the different reports, first log in to Massachusetts CAREWare.

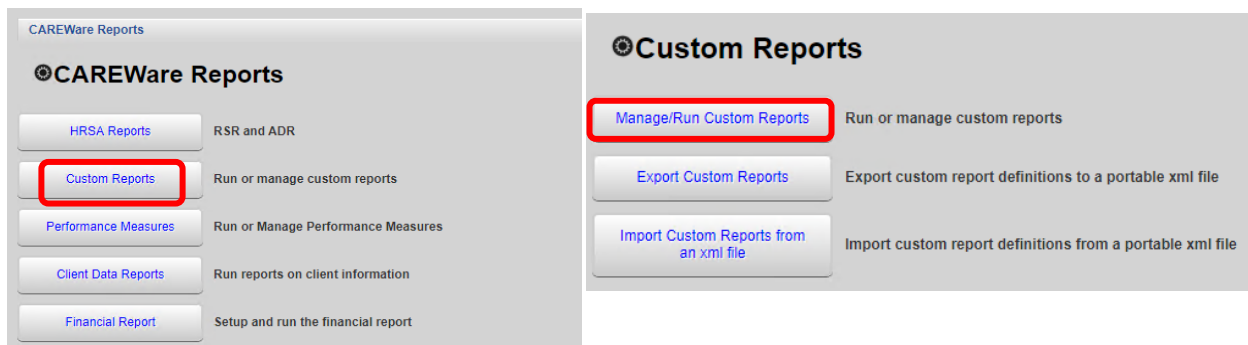


2. Click on “Reports” from the main menu.
3. This will bring up a Reports menu of different types of reports that can be run.



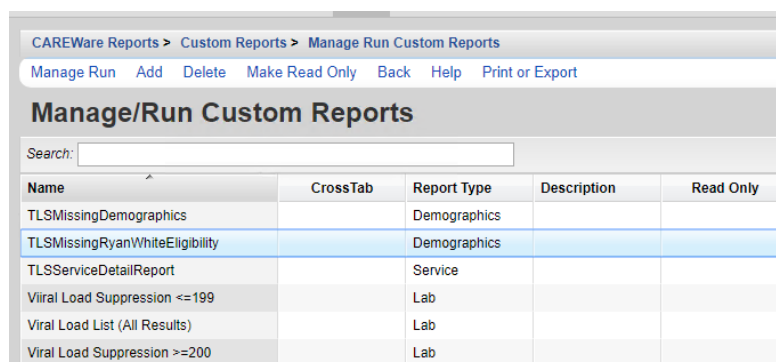
Custom Reports

There are several Custom Reports that are available in CAREWare MA. To get to the Custom Reports screen, go to the reports menu and click on “Custom Reports,” then “Manage/Run Custom Reports” (below). When running Custom Reports, the desired report (1) and date span (2) will need to be specified. When done, click “Run Report” (3) (below, right).

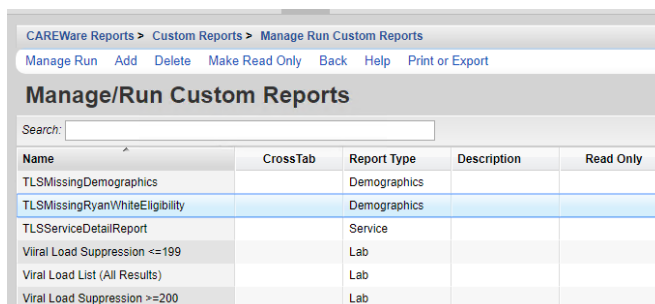


TLS Missing Ryan White Eligibility

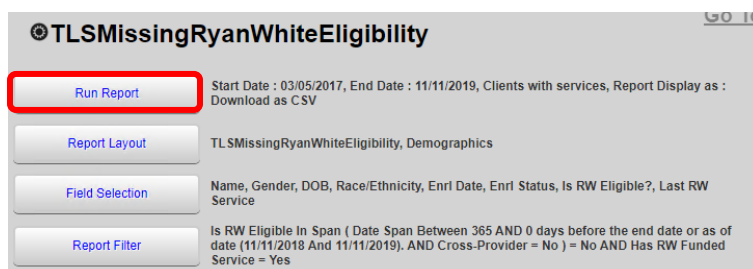
This report shows a list of clients that are not eligible for receiving Ryan White services. If your agency receives funding through the MA Department of Public Health and submits RSR report to HRSA, we recommend running this report before you submit the RSR to make sure it includes all of your Ryan White eligible clients. That way all of your eligible clients will be reported to HRSA.



1. Select TLSMissingRyanWhiteEligibility from the list of reports and select Manage Run.



2. Under the report page for TLSMissingRyanWhiteEligibility, select Run Report.



3. In the Run Report page, select Edit and modify the date range to the desired range. Then save.
4. Click on "Run Report".

CAREWare Reports > Custom Reports > Manage Run Custom Reports > TLSM

Edit Run Report Back

Run Report

Parameters

Date From: 3/5/2017

Date Through: 11/11/2019

Clinical Review Year: 2019

Output Display: Open in New Window

Show New Clients only: ☐

Show Clients with Service only: ☒

Show Specifications: ☐

Sum Numeric Fields: ☐

CAREWare Reports > Custom Reports > Manage Run Custom Reports > TLSM

Save Cancel

Run Report

Parameters

Date From: 3/5/2017

Date Through: 11/11/2019

Clinical Review Year: 2019

5. The report will look like this:

CW6 - mdavis x CW6 - TLSMissingRyanWhiteElig x +

test.mphcw.net/careware/rp/75bc9a44-c91e-434d-b8c3-526a2d7bd869/fl/48b8c124-c70c-457c-ae8f-a36d4159d2f2%2FTLSMissingRyanWhiteEligibili

TLSMissingRyanWhiteEligibility

Data Scope: MDPH
Report Start Date: 03/05/2017
Report End Date: 11/11/2019

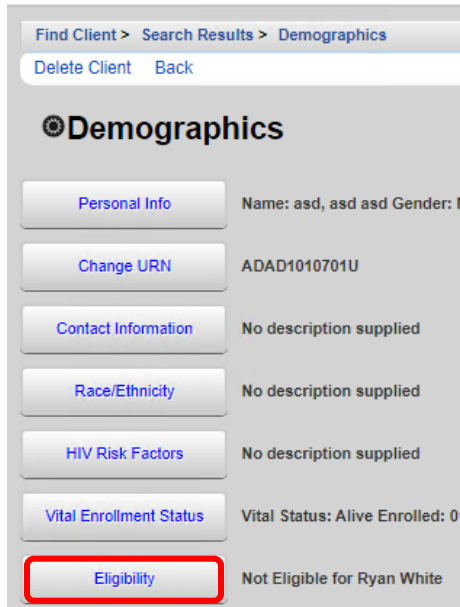
Name:	Gender:	DOB:	Race/Ethnicity:	Enrl Date:	Enrl Status:	Is RW Eligible?:	Last RW Service:
asd, asd	Male	01/01/1970	Not Specified	06/01/2018	Active	No	09/05/2019
asd, asd asd	Male	10/10/1970	Not Specified	01/08/2019	Active	No	01/08/2019
bet, alpha test	Female	07/08/1994	White (non-Hispanic)		Active	No	12/03/2019
Bond, James L	Male	10/07/1977	White (non-Hispanic)	03/06/2012	Active	No	12/20/2018
Boufflet, Phoebe	Transgender MIF	06/13/1970	More than one race		Active	No	06/05/2017
Brady, Tom M	Transgender FTM	01/01/1975	Pacific Islander	01/30/2018	Active	No	06/01/2018
edelman, ton	Male	01/15/1979	More than one race	01/10/2019	Active	No	01/10/2019
Johson, James	Male	01/06/1999	Black or African-American	01/10/2019	Active	No	01/10/2019
Lugo, hector Javier	Male	05/17/1980	Hispanic	01/30/2018	Active	No	01/30/2018
Pepe, Juan DeLaLuma	Male	09/09/1999	Hispanic	01/30/2018	Active	No	01/30/2018
S, B	Female	11/11/1977	Hispanic	11/29/2018	Active	No	01/11/2019
Silva, Anthony E	Female	12/12/1974	White (non-Hispanic)	12/07/2012	Referred or Discharged	No	06/11/2017
Smith, Bil	Male	01/01/1970	White (non-Hispanic)	11/05/2018	Referred or Discharged	No	11/05/2018
Test1, Test1	Male	01/01/1988	More than one race	01/30/2017	Active	No	05/30/2017
Thunder, Alaska	Transgender MIF	01/01/1979	White (non-Hispanic)	10/31/2018	Active	No	06/25/2018

Number of Records : 15
(Count is unduplicated across providers)

Correcting Ryan White Eligibility Status

Follow these steps to update a client's Ryan White Eligibility Status:

1. Navigate to the client record Demographics page and select "Eligibility"



Find Client > Search Results > Demographics

Delete Client Back

Demographics

Personal Info Name: asd, asd asd Gender: M

Change URN ADAD1010701U

Contact Information No description supplied

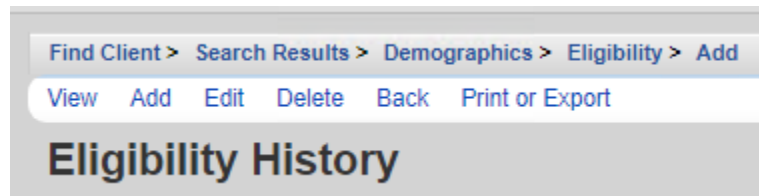
Race/Ethnicity No description supplied

HIV Risk Factors No description supplied

Vital Enrollment Status Vital Status: Alive Enrolled: 0

Eligibility Not Eligible for Ryan White

2. Click the "Add Record" link

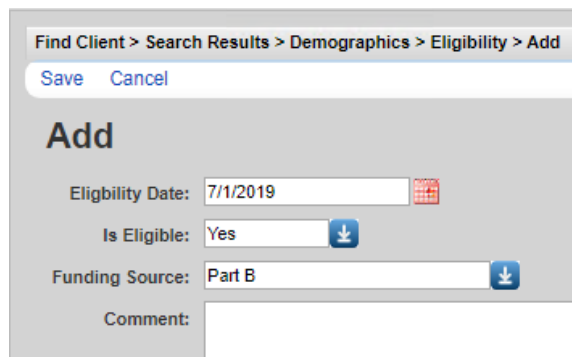


Find Client > Search Results > Demographics > Eligibility > Add

View Add Edit Delete Back Print or Export

Eligibility History

3. Edit the date so it's in 2018 (use 12/31/2018 if there isn't a specific date where the client became eligible)



Find Client > Search Results > Demographics > Eligibility > Add

Save Cancel

Add

Eligibility Date: 7/1/2019

Is Eligible: Yes

Funding Source: Part B

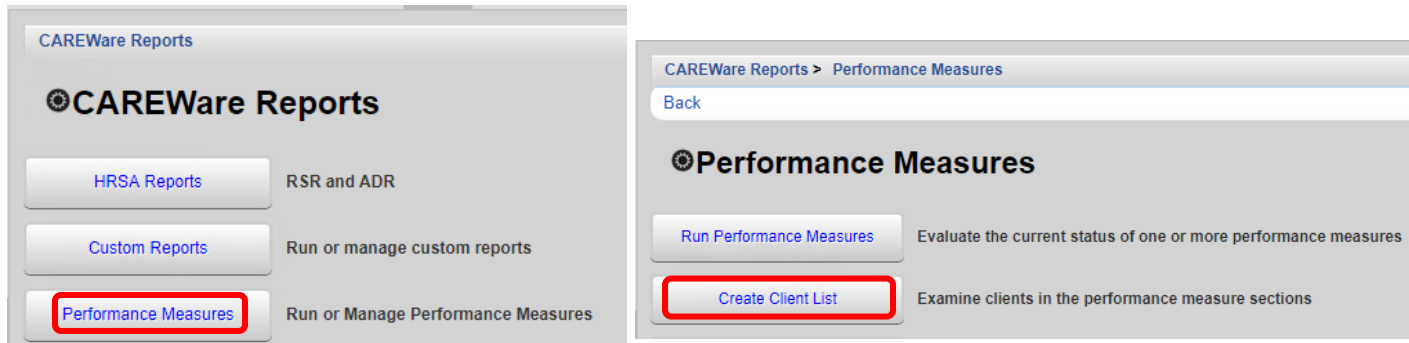
Comment:

4. Select "Part B" for the funding source and "Yes" for "Is Eligible"
5. Click Save

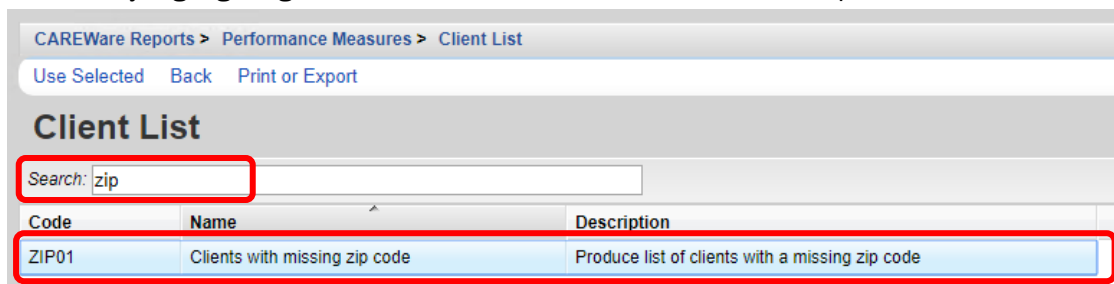
Correcting Missing ZIP Codes

This report shows a list of clients with missing ZIP codes. Run this report before you submit the RSR to make corrections for clients whose ZIP codes were not filled in.

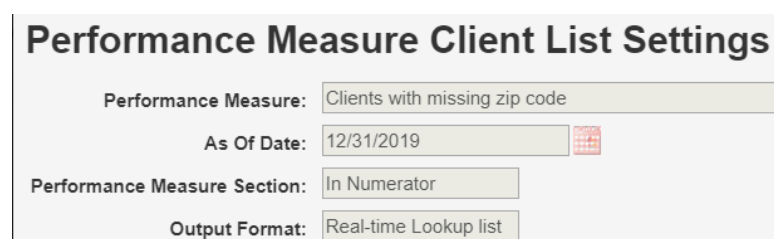
1. Under CAREWare Reports, select Performance Measures then Create Client List.



2. To find the missing ZIP code report, type "zip" into the search bar and the report will appear. Select it by highlighting the row and click Use Selected to run the report.



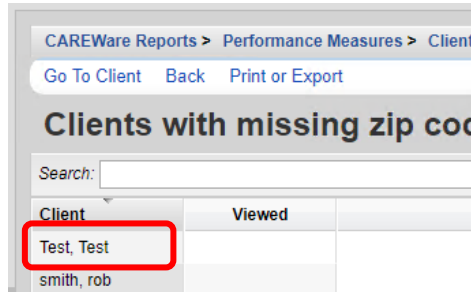
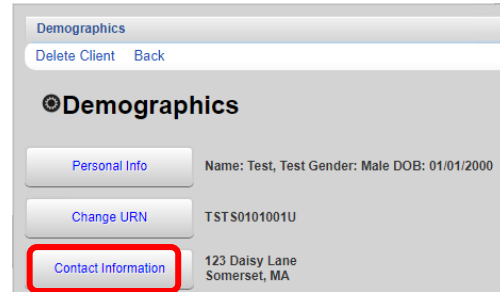
3. Set the As of Date to 12/31/2019 then Create Client List.



The image shows the 'Performance Measure Client List Settings' form. The 'Performance Measure' is set to 'Clients with missing zip code'. The 'As Of Date' is set to '12/31/2019'. The 'Performance Measure Section' is set to 'In Numerator'. The 'Output Format' is set to 'Real-time Lookup list'.

Performance Measure:	Clients with missing zip code
As Of Date:	12/31/2019
Performance Measure Section:	In Numerator
Output Format:	Real-time Lookup list

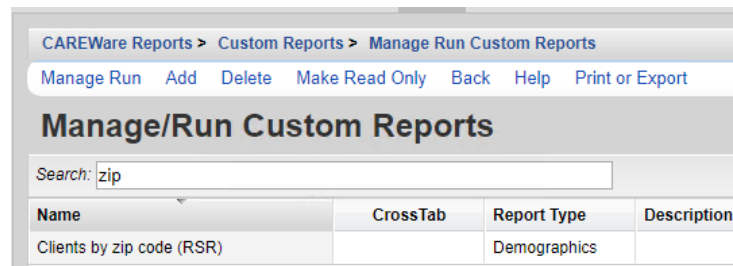
4. A new tab will open with a list of clients. You can select a client by double clicking on their name, or highlighting the row and click Go To Client, which will bring you to the Demographics page of the client record where you can add their ZIP code. For clients with an unknown ZIP Code:
 - a. Use ZIP Code of service location as proxy
 - b. If that is unavailable, report client's ZIP Code as "99999"

Clients by ZIP Code

This report will generate a list of clients and their ZIP codes. You will need to download and save this list to upload when submitting the RSR. Most ZIP codes will begin with "0", which will be dropped when it is generated in a CSV. We will walk through how you can correct this.

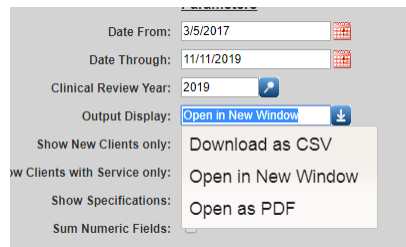
1. Select Clients by ZIP code (RSR) from the list of reports and select Manage Run.



2. Under the report page for Clients by ZIP code, select Run Report.



3. In the Run Report page, select Edit and modify the date range to the desired range. In the Output Display, choose Download as CSV. Then save.



Parameters

Date From: 3/5/2017

Date Through: 11/11/2019

Clinical Review Year: 2019

Output Display: Open in New Window

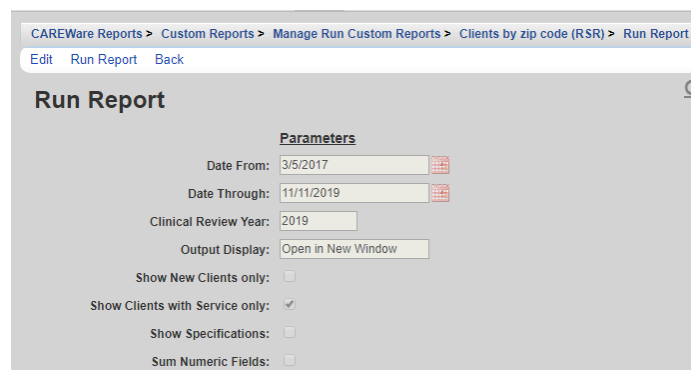
Show New Clients only: Download as CSV

Show Clients with Service only: Open in New Window

Show Specifications: Open as PDF

Sum Numeric Fields:

4. Click on "Run Report".



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by zip code (RSR) > Run Report

Edit Run Report Back

Run Report

Parameters

Date From: 3/5/2017

Date Through: 11/11/2019

Clinical Review Year: 2019

Output Display: Open in New Window

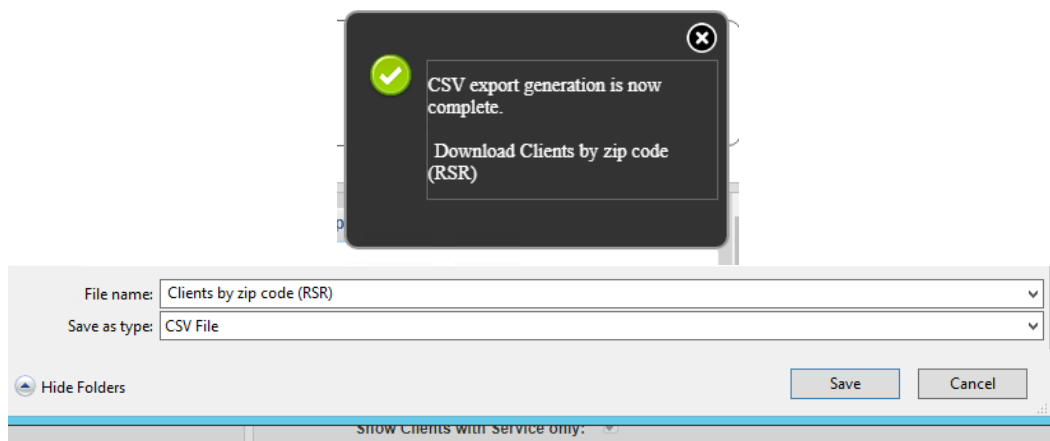
Show New Clients only: ☐

Show Clients with Service only: ☒

Show Specifications: ☐

Sum Numeric Fields: ☐

5. Click Download Clients by ZIP code (RSR) in the pop-up window and save the file to your agency folder.



CSV export generation is now complete.

Download Clients by zip code (RSR)

File name: Clients by zip code (RSR)

Save as type: CSV File

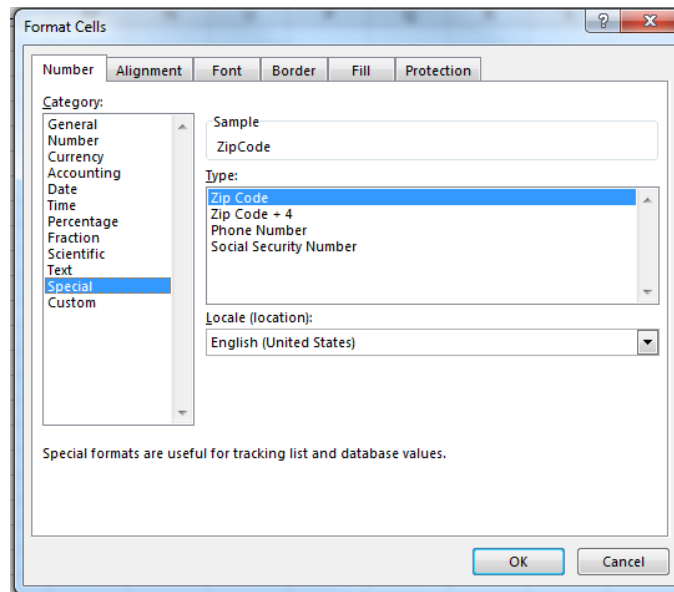
Hide Folders

Save Cancel

For the next step, you will need to retrieve the file from the SFTP site. For instructions on how to log in to the SFTP site, please see page 14 of this guide.

- For ZIP codes starting with “0” you will need to reformat the column before you upload the RSR. To do this, open the file in Excel, then highlight the column with the ZIP codes and right-click within the highlighted area to select Format Cells.

	A	B	C
1	ZipCode	CountOfClients	
2	1610	1	
3	1852	2	
4	2110	1	
5	2141	1	
6	2389	1	
7	2657	1	
8			



- In the formatting window that opens, select Special and then choose “Zip Code” from the list. Then save. Your Zip Code column should now include the leading “0.”

	A	B
1	ZipCode	CountOfClie
2	01610	1
3	01852	2
4	02110	1
5	02141	1
6	02389	1
7	02657	1
8		

HRSA Reports

Click on “HRSA Reports” to get started.



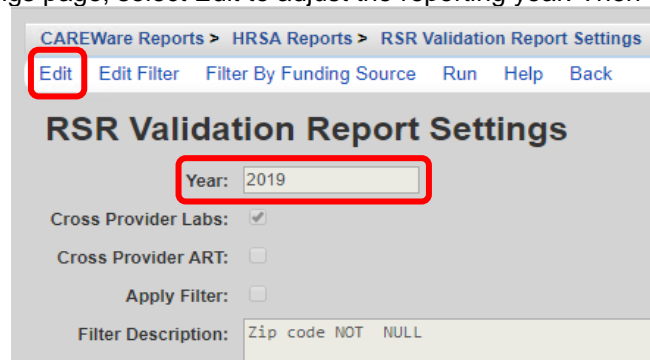
RSR Validation Report

The RSR Validation report provides a list of all errors, warnings and alerts that are built into HRSA’s Electronic Handbook (EHB). Warnings and alerts indicate areas where data may be incorrect or missing. However, not all warnings or alerts may need to be corrected. Warnings must have a comment explaining the data in the EHB.

1. From the HRSA Reports menu, click on “RSR Validation Report”.



2. From the RSR Settings page, select Edit to adjust the reporting year. Then click Save and Run.



- Click View RSR Validation Report from the pop-up to open the report table. From the table, you can click any row with errors that need correcting by highlighting the row and clicking View Client List or double clicking the highlighted row.

CAREWare Reports > HRSA Reports > RSR Validation Report Settings > RSR Validation Report

[View Client List](#) [Back](#) [Print or Export](#)

RSR Validation Report

Search:

Category	Validation Rule	Severity	# Errors
Demographics	Clients missing Housing Status	Warning	9
Demographics	Clients missing Poverty Level	Warning	8
Demographics	Clients missing Medical Insurance	Warning	11

- Choose the client of interest and then click “Go to Selected Client” to be brought directly to their record. Errors must be fixed before the RSR can be submitted.

CAREWare Reports > HRSA Reports > RSR Validation Report

[Go To Client](#) [Back](#) [Print or Export](#)

Clients missing Poverty Level

Search:

Client	Viewed
smith, rob	
MDPH, Testing	
Jacks, Apple	
Nazarian, Greg G	
Haste, Holly	
Edwards, Alyssa	
Test, Test	
fred, rogers patrick	

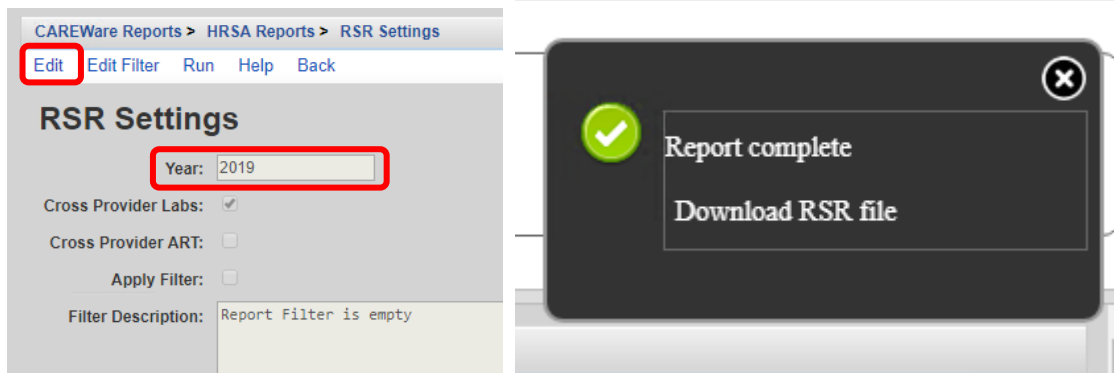
RSR Client Report Viewer

The Client Report Viewer shows frequencies of the data included in the RSR file, including a count of missing data.

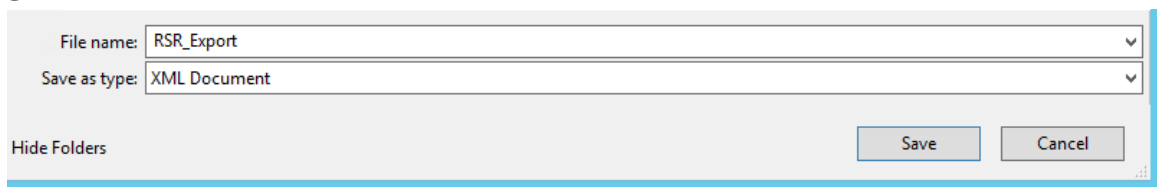
1. From the HRSA Reports menu, click on “RSR Client Report”.



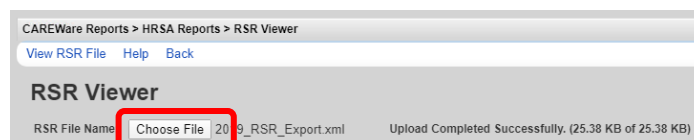
2. Make sure the Report Year is 2019 and click “Run” to generate the report. Once it is finished, click Download RSR file in the pop-up window in the top right corner of the page.



3. A new download folder will open prompting you to save the RSR export file. Save this file to your agency’s designated folder on the G drive where you will need to access it later in this guide.



4. From the HRSA Reports page, select RSR Viewer, then click Choose File to upload the RSR export file saved in your agency’s folder.



- Once the file has finished uploading, click View RSR File. A new window will open where you can view the components of the RSR. To select a category, highlight the row and click View Client List, or just double click the row.

CAREWare Reports > HRSA Reports > RSR Viewer > MDPH 2019 RSR

[View Client List](#) [Back](#) [Print or Export](#)

MDPH 2019 RSR

Search:

Category	Count	Percent
Total Clients (any service):	28	100%
Clients with Core Medical/CM services:	27	96.4%
Clients with OAHS/CM/Housing services:	27	96.4%
Clients with OAHS/CM services:	27	96.4%
Clients with OAHS services:	0	0.0%
HIV+ Clients with OAHS:	0	0.0%
Female HIV+ Clients with OAHS:	0	0.0%
2. Vital Status (OAHS/CM)	27	
2. Alive:	24	88.9%

- Within the category field you clicked, you can select the client record you wish to review. Once you have viewed the client, an X will appear under the Viewed column to reflect which clients have been reviewed.

CAREWare Reports > HRSA Reports > RSR Viewer > MDPH 2019 RSR > Total Clients (any service):

[Go To Client](#) [Back](#) [Print or Export](#)

Total Clients (any service):

Search:

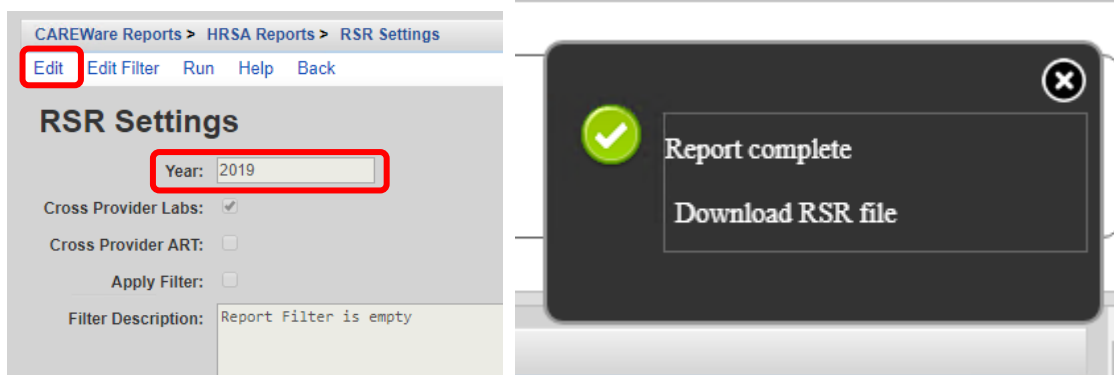
Client	Viewed
	X
	X
	X
	X

Running the RSR

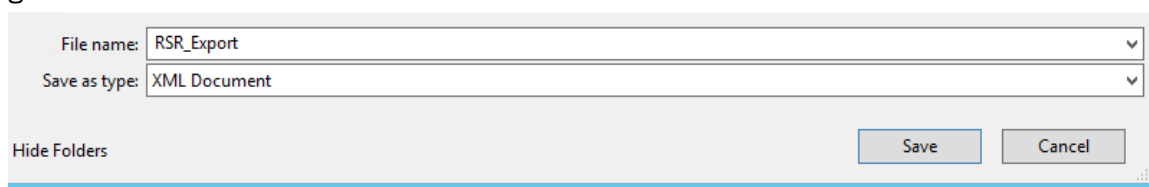
1. From the HRSA Reports menu, click on “RSR Client Report”.



2. Make sure the Report Year is 2019 and click “Run” to generate the report. Once it is finished, click Download RSR file in the pop-up window in the top right corner of the page.

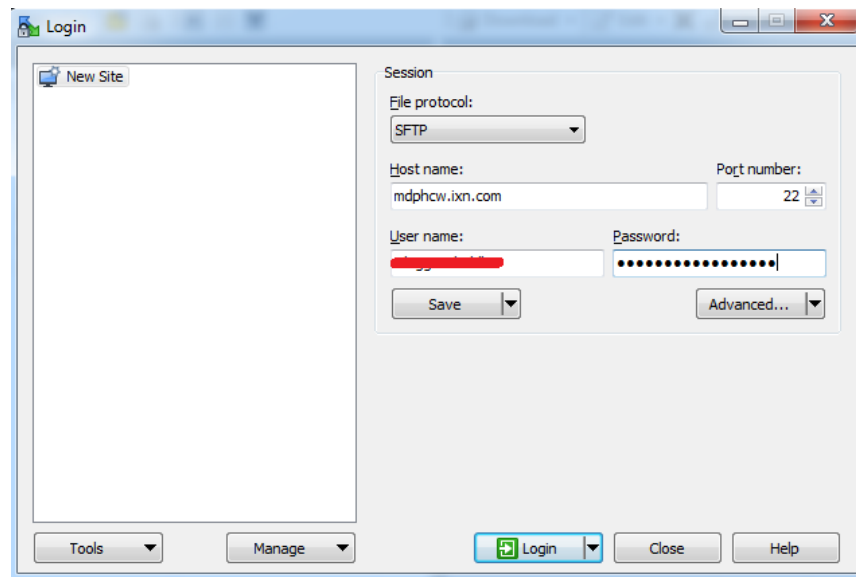


3. A new download folder will open prompting you to save the RSR export file. Save this file to your agency’s designated folder on the G drive where you will need to access it later in this guide.



Connect to Secure File Transfer Protocol (SFTP) Site

1. Download WinSCP (<https://winscp.net/eng/download.php>) and install it on your computer
2. A login screen will appear.
 - a. For the host name, enter “mdphcw.ixn.com”
 - b. The port number should be 22 by default. Do not change it.
 - c. Enter your username and password for the CAREWare remote server (*not* the CAREWare application itself).



- d. Click “Login”
3. Your computer’s documents folder will be shown in the window on the **left** side of the screen. On the **right** side, you will see white space or any files that you’ve saved to the D drive from CAREWare. Only users at your agency and JSI will be able to view these files.
4. To transfer files onto the server, navigate to your file in the left window. Select it, then drag it to your to the right window.
5. To transfer files from the server to your machine, select the file in the right window and drag it to the left window where you’d like to save the file.
6. That’s it! Click the X in the upper right corner of the window to disconnect.