

# CAREWare MA Webinar: 2021 Ryan White Services Report (RSR)

February 10, 2022



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# Welcome!

Please chat in your:

- Name
- Pronouns (if you would like to)
- Agency
- Favorite winter Olympic sport



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# Introductions

- Molly Higgins-Biddle (JSI)
- Shelby Ingerick (JSI)
- Becky Milner (JSI)
- Annette Rockwell (MDPH)



# Learning Objectives

By the end of this webinar, participants will be able to:

- Know when their RSR is due
- Understand RSR changes for 2021
- Clean CAREWare data based on data validation checks
- Run Clients by ZIP code report
- Run the RSR client-level XML in CAREWare
- Submit the RSR XML in the HRSA web application



# Agenda

- RSR introduction and timeline
- New for 2021
  - Eligible Services Reporting
  - Reminder: CARES Act Reporting
- Running the RSR in CAREWare
- Running Clients by ZIP code report
- Submitting the Provider Report
- Common questions
- Supporting resources
- Q&A



# Poll

Have you submitted the RSR before?

- Yes
- No
- What's the RSR?



# Definition of Terms

- Ryan White HIV/AIDS Program (RWHAP)  
Recipient:
  - An organization that receives funds directly from HRSA under the RWHAP program.
  - For example: the Massachusetts Department of Public Health (MDPH) Part B program
- RWHAP Subrecipient:
  - A direct service organization that has a contract with a recipient.



# Definition of Terms

- HRSA's web application:
  - This is the online system where all HRSA subrecipients submit the RSR.
- HRSA's Electronic Handbook (EHB):
  - This is the online system where all HRSA recipients submit the RSR.
  - MDPH uses this system to review and approve provider reports.
  - If your agency is a HRSA HAB recipient (e.g. Part C), you will use the EHB to submit the RSR.



# Definition of Terms

- RSR Provider Report:
  - All providers must complete this report.
  - Includes questions about your organization
  - Three questions on medication-assisted treatment (MAT) for opioid use disorder
  - Clients by ZIP code
  - Real-time electronic data network



# Definition of Terms

- RSR Client-level Data Report:
  - Extract of client-level data contained in an XML file and uploaded as part of the Provider Report
  - Casually referred to as “the RSR XML”
  - CAREWare generates this file automatically.
    - *We will go over this in detail during the webinar.*



# Reminder:

## Hold on running the RSR XML

- Please HOLD on running your RSR XML in CAREWare!!
- The CAREWare software developers are updating CAREWare due to an issue with the 2021 report export.
- **Stay tuned:** we will send out an email when it's time to run your RSR XML!





# RSR Timeline

DATE	EVENT
Late January/ early February	JSI checks data quality and follow-up with agencies that need to edit their data.
February 7	Provider Report opens.
February 28	Client-level data RSR XML file must be uploaded to HRSA's web application for MDPH to review.
March 28	All Provider Reports must be complete. MDPH will approve the Provider Reports and client-level RSR XML data files.



NEW FOR THE 2021 RSR



# 2021 Changes:

## Eligible Services Reporting

- All Ryan White HIV/AIDS Program (RWHAP) agencies will be required to complete Eligible Services reporting beginning with the 2021 RWHAP Services Report (RSR).
  - The new Eligible Services reporting requirement expands Eligible Scope reporting in the RSR to include RWHAP-related funding.
  - As of the 2021 data submission, recipients and sub recipients are now required to include data on clients receiving services provided through RWHAP-related funding (**program income and pharmaceutical rebates**) in their Recipient, Provider, and Client-level Data Reports
- Contact the helpdesk ([carewaremahelpdesk@jsi.com](mailto:carewaremahelpdesk@jsi.com)) with questions.



# 2021 Reminder: CARES Act

- Coronavirus Aid, Relief, and Economic Security (CARES) Act Reporting in the RSR
  - CARES Act recipients and subrecipients should report eligible RWHAP clients that receive services funded through the CARES Act in the 2021 RSR.
    - Only a few agencies receive this funding from MDPH.
  - If your agency receives CARES Act funding, the CAREWare will automatically include these clients and services in your XML. This process is the same as last year's
  - Contact the helpdesk ([carewaremahelpdesk@jsi.com](mailto:carewaremahelpdesk@jsi.com)) with questions.



# RUNNING THE RSR XML REPORT IN CAREWARE



# Running the RSR in CAREWare





# Step 1: Data Validation Report

**HRSA Reports**

- RSR Client Report: Create the RSR client level data file
- RSR Viewer: View RSR files
- RSR Validation Report: View the RSR Validation Report**
- ADR Client Export: Create the ADR Client Export
- ADR Viewer: View ADR files
- ADR Validation Report: View the ADR Validation Report

CAREWare Reports > HRSA Reports > RSR Settings

**Edit** Edit Filter Run Help Back

## RSR Settings

Year: 2021

Cross Provider ART: ☐ No sharing set up

Cross Provider Eligibility: ☐ No sharing set up

Cross Provider Labs: ☐ No sharing set up

Apply Filter: ☐

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



# Step 2: Creating the RSR Client Report

**HRSA Reports**

<b>RSR Client Report</b>	Create the RSR client level data file
RSR Viewer	View RSR files
RSR Validation Report	View the RSR Validation Report
ADR Client Export	Create the ADR Client Export
ADR Viewer	View ADR files
ADR Validation Report	View the ADR Validation Report

CAREWare Reports > HRSA Reports > RSR Settings

**Edit** Edit Filter Run Help Back

## RSR Settings


Year: 2021

Cross Provider ART: ☐ No sharing set up

Cross Provider Eligibility: ☐ No sharing set up


Cross Provider Labs: ☐ No sharing set up

Apply Filter: ☐

 **Report complete**

**Download RSR file**

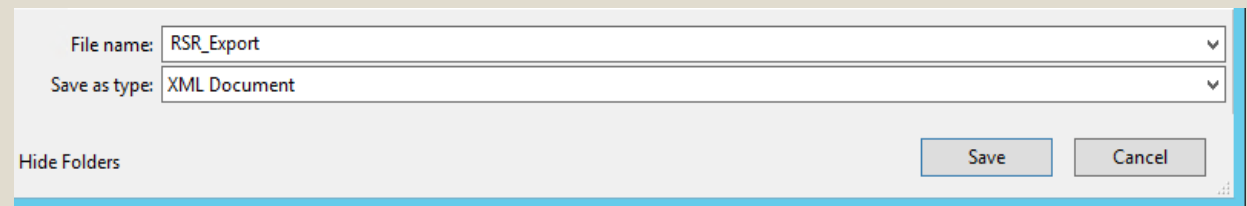
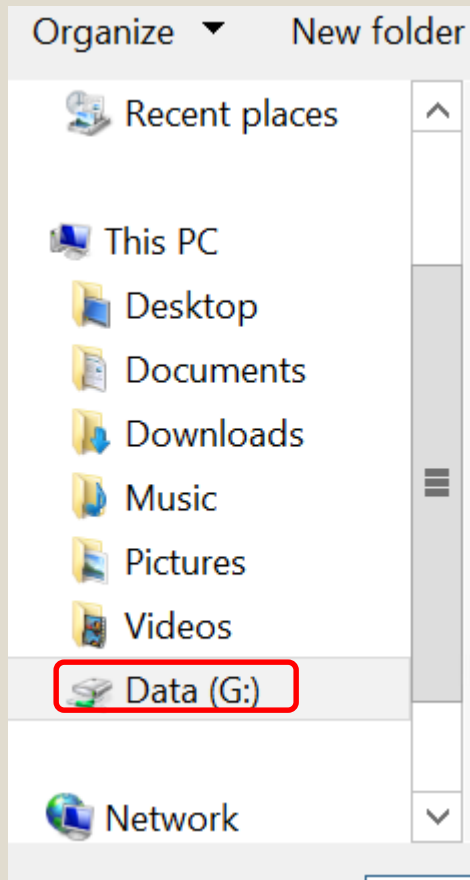
**Restrictions**

 This operation has been cancelled due to restrictions in effect on this computer. Please contact your system administrator.

OK



# Step 3: Downloading the RSR XML from CAREWare





# Step 4: Using the Client Viewer

CAREWare Reports > HRSA Reports

[Help](#) [Back](#)

## HRSA Reports

[RSR Client Report](#) Create the RSR client level data file

[RSR Viewer](#) View RSR files

[RSR Validation Report](#) View the RS

CAREWare Reports > HRSA Reports > RSR Viewer

[View RSR File](#) [Help](#) [Back](#)

## RSR Viewer

RSR File Name:  RSR\_Export12.16.xml

Upload Completed Successfully. (4.63 KB of 4.63 KB)

CAREWare Reports > HRSA Reports >

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

## MDPH 2021 RSR

Search:

### Category

Total Clients (any service):

Clients with Core Medical/CM services:

Clients with OAHS/CM/Housing services:

Clients with OAHS/CM services:

Clients with OAHS services:

HIV+ Clients with OAHS:

Female HIV+ Clients with OAHS:

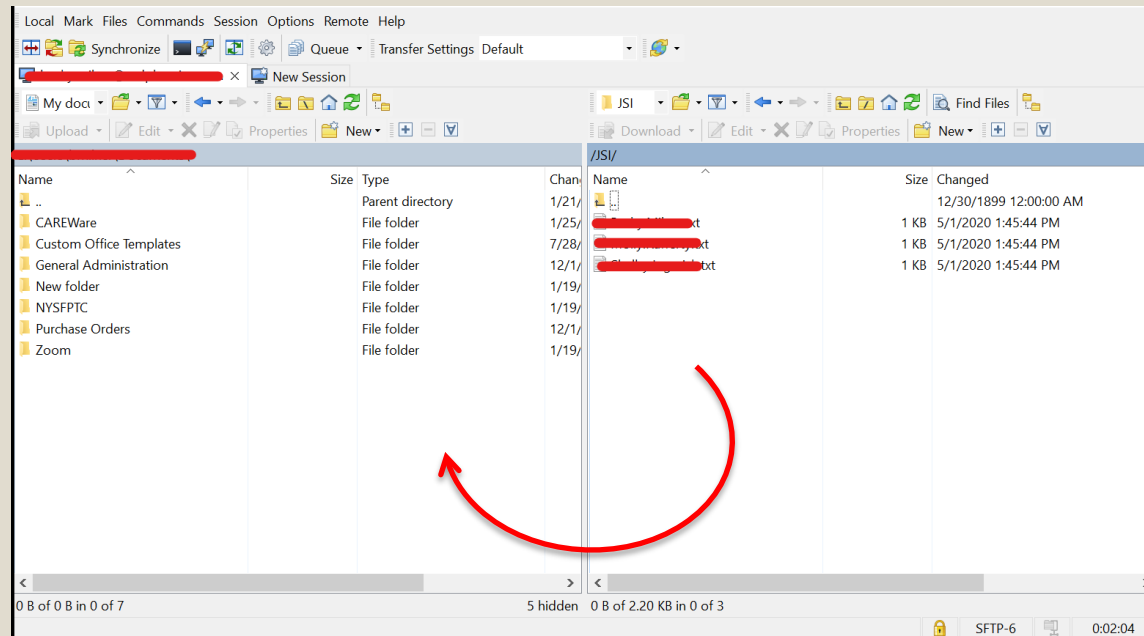
Count	Percent
3	100%
2	66.7%
3	100.0%
1	33.3%
0	0.0%
0	0.0%
0	0.0%



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# Step 5: Accessing the RSR XML file from your computer



- Use the SFTP instructions document
  - Email [carewaremahelpdesk@jsi.com](mailto:carewaremahelpdesk@jsi.com) for a copy
- Download WinSCP (free)
- After logging in, select the XML file in the right window and drag it to the left window to the location on your computer to which you'd like to save the file



# CLIENTS BY ZIP CODES



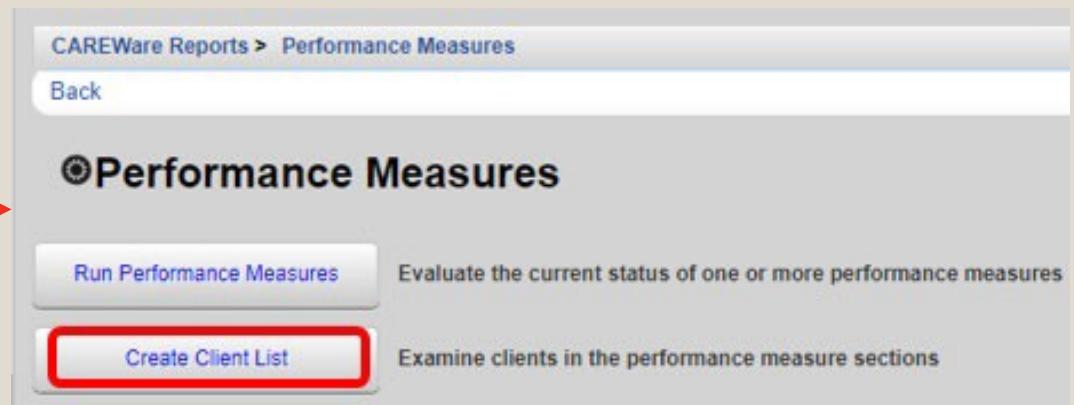
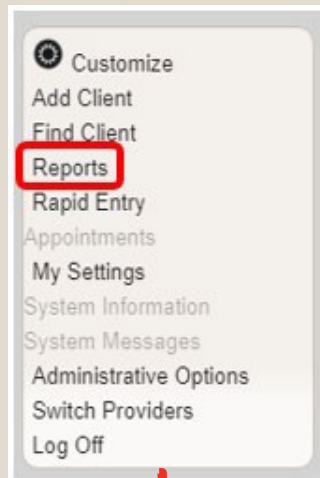
# Steps

1. Check for missing ZIP codes
2. Run the Clients by ZIP code report  
(to upload to HRSA web application)
3. Format the ZIP code column in the CSV file
4. Upload to Provider Report

The total number of clients in the Clients by ZIP code report should match the number of clients in the RSR XML file.



# Step 1: Running the Missing ZIP Codes Report





# Step 2: Correcting Missing ZIP Codes

CAREWare Reports > Performance Measures > Client List

[Use Selected](#) [Back](#) [Print or Export](#)

## Client List

Search:

Code	Name	Description
ZIP01	Clients with missing zip code	Produce list of clients with a missing zip code

## Performance Measure Client List Settings

Performance Measure:

As Of Date:

Performance Measure Section:

Output Format:

CAREWare Reports > Performance Measures > Client

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

## Clients with missing zip code

Search:

Client	Viewed
Test, Test	
smith, rob	

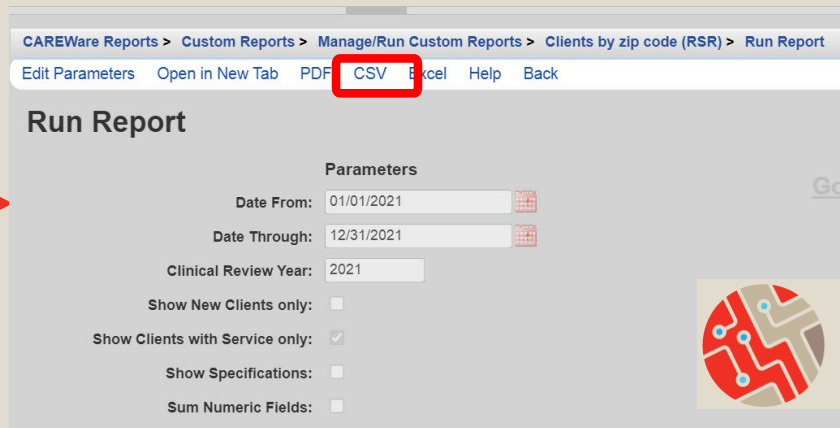
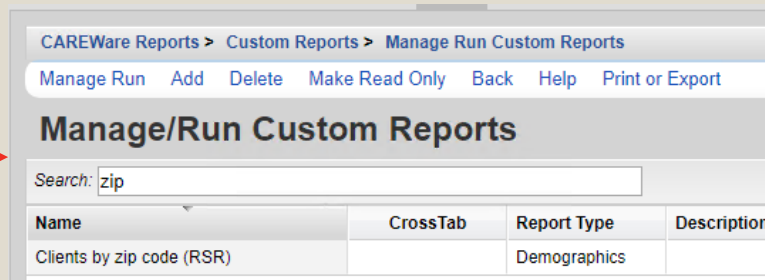


# Correcting Missing ZIP Codes

- If the client has moved during the reporting period:
  - use the most recent ZIP code
- If the client is experiencing homelessness:
  - use the ZIP code of the service location
- If the ZIP code is missing:
  - enter 99999



# Step 3: Running the Clients by ZIP Code Report





# Step 4: Reformatting 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			

Format Cells

Number Alignment Font Border Fill Protection

Category:

General Number Currency Accounting Date Time Percentage Fraction Scientific Text **Special** Custom

Sample

ZipCode

Type:

Zip Code  
Zip Code + 4  
Phone Number  
Social Security Number

Locale (location):

English (United States)

Special formats are useful for tracking list and database values.

OK Cancel

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



# SUBMITTING THE PROVIDER REPORT



# Submitting the Provider Report

- MDPH keeps track of who has opened their Provider Report. Start filling in key information now, even if your RSR file isn't ready!
- If you're a recipient, go to the EHB:
  - <https://grants.hrsa.gov/webexternal>
- If you're a subrecipient, go to the web application:
  - <https://grants6.hrsa.gov/hab/regloginapp/admin/Register.aspx>



# Questions about...

- Organization information (Tax ID, DUNS, address)
- Organization type (e.g., hospital, community-based organization)
- Section 330 funding (for community health centers)
- Ownership type (public, private)
- Faith-based organization
- Racial/ethnic characteristics of staff
- FTEs



# Validating the Provider Report

- Upload the Clients by ZIP code file and the client-level XML file
- Validate your Provider Report by clicking “Validate” on the left navigation panel in the “Provider Report Actions” section.
- This is where the errors, warnings, and alerts may appear.
  - Remember, errors must be corrected before you can submit, and warnings require comments.
- After validating, click “Submit” on the left navigation panel.



# Submitting the Provider Report

- Your report will be in “Review” status.
- MDPH will review your report and either:
  - Approve → you’re done!
  - Return for changes → you will need to:
    - delete your RSR client-level file from the Provider Report,
    - make corrections, and
    - re-upload and re-submit



# Additional webinar

- The DISQ team Provider Report submission webinar.

Preparing for 2021 RSR Submission Understanding Reporting Changes

## Overview

- Eligible Services Reporting Requirement
- Fiscal Year 2020 (FY 2020) Coronavirus Aid, Relief, and Economic Security Act (CARES Act) and Ending the HIV Epidemic in the U.S. Reporting
- Changes to the Recipient Report and Provider Report
- Review of Client-Level Data Elements & Updates
- Submission Timeline, Upcoming Webinars, and TA Resources

2:29 / 32:41 • Today's Webinar is Presented by > Scroll for details



# COMMON QUESTIONS/ISSUES



# Common Questions

- Do providers receiving funding from multiple RWHAP Parts complete multiple Provider Reports?
- No. Each provider will submit only one Provider Report including data from all RWHAP Parts under which the agency is funded.
- Note: it is possible to submit more than one client-level XML file if necessary.



# Common Questions

- How do I report a service that I delivered that does not appear in my Provider Report?
- If you receive RWHAP funds to deliver a service that is not populated in your Provider Report, contact us at [carewaremahelpdesk@jsi.com](mailto:carewaremahelpdesk@jsi.com).
- If you did not receive RWHAP funds to deliver the service, do not mark it in your Provider Report.



# Common Questions

- MDPH has approved my Provider Report but it's still in review status. Why?
- If you receive funding from Part A (Boston Public Health Commission) and/or Part D (MassCARE), in addition to Part B, they will also need to approve your report.



# Common Questions

- Why are all of my clients not showing up in my RSR XML file in CAREWare?
- All clients receiving Part B funded services must be designated as “Ryan White eligible” in CAREWare.
- Demographics tab > click Eligibility > Add record > Add a date for December of 2020, Part B funding, and eligibility status = Yes



# Common Questions

- The Data Validation screen in CAREWare says clients are missing poverty level, housing, and insurance status, but there are records entered for these fields.
- The entry must be for calendar year 2021 for the data to be included in the RSR. Add a new entry with a 2021 date for each client.



# Common Questions

- My agency is a Part C funded recipient that maintains its own CAREWare. Do I have to run the RSR in the state CAREWare system?
- If all of your Part B services are contained within your own agency's CAREWare, you can run one XML file and submit it. If not, then you need to submit two files: one from your system, and one from the state system.



# SUPPORTING RESOURCES



# RSR Data Updates and Reports

RSR Data Updates and Reports  
January 2022



*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.*

## Contents

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# Report Instructions

RSR Data Updates and Reports  
January 2022



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*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.*

## Contents

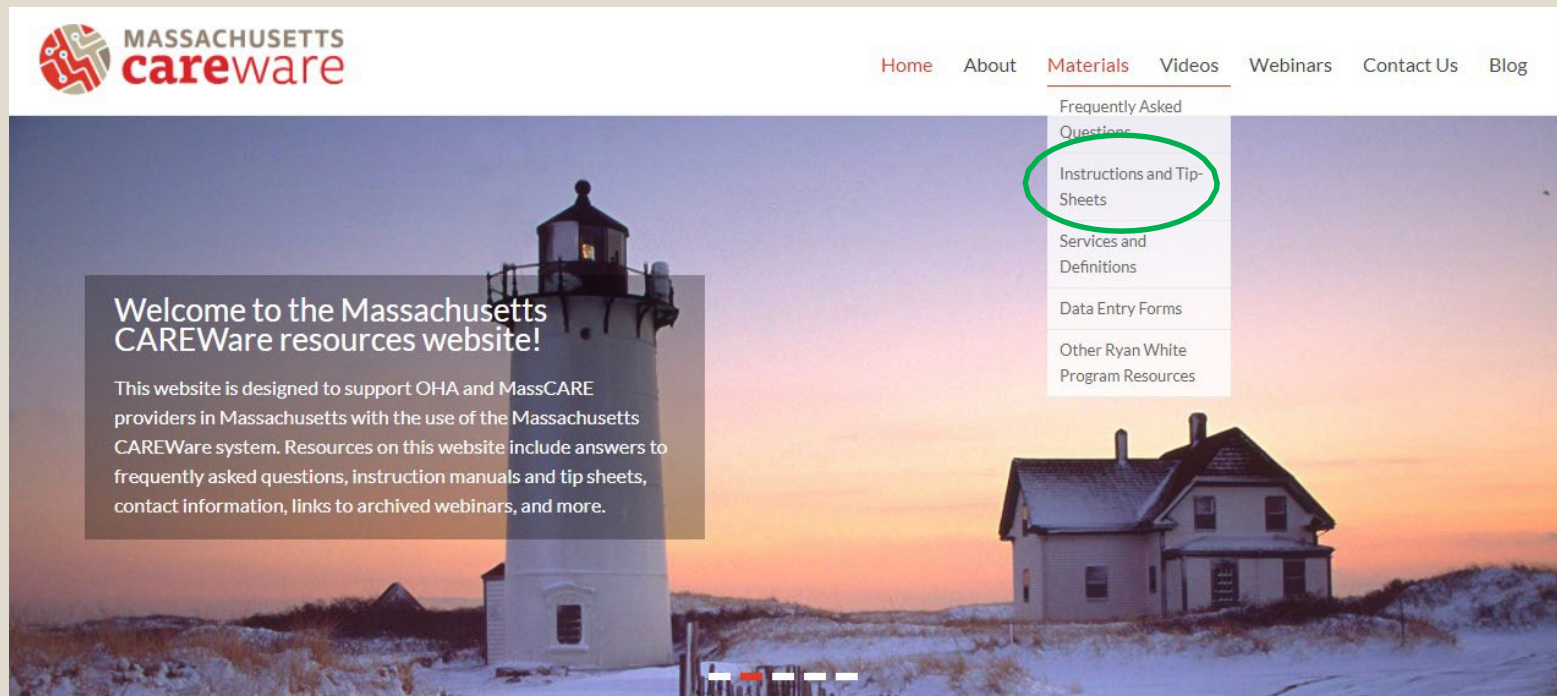
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# How to find these resources

Find this and other resources at

<http://carewarema.jsi.com/> under “Materials.”





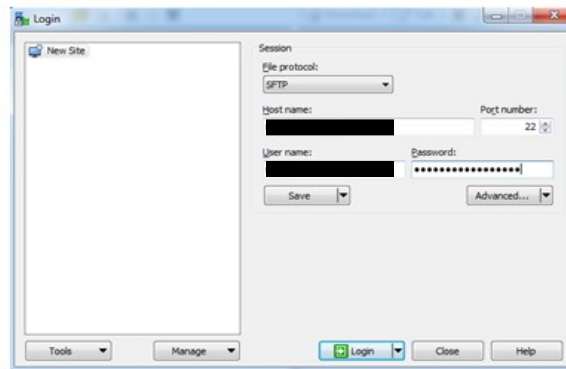
# SFTP Transfer Instructions

## Connect to Secure File Transfer Protocol (SFTP) Site



Follow these steps to connect to the 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 [REDACTED]
  - b. The port number should be [REDACTED]. 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.



# TargetHIV.org

- For RSR additional resources, including archived webinars, go to:  
<https://targethiv.org/library/topics/rsr>
- The RSR Instruction Manual includes detailed instructions on the submission process and the client-level data elements.



# QUESTIONS



# Thank you!

- Please complete the webinar evaluation after today's session.
- A recording of today's call will be available at: [CAREWareMA.jsi.com](http://CAREWareMA.jsi.com)
- Email us anytime at: [CAREWareMAhelpdesk@jsi.com](mailto:CAREWareMAhelpdesk@jsi.com)
- Call 617-385-3991
- Fax 617-482-0617