RSR Data Updates and Reports

January 2023

MASSACHUSETTS careware

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

2022 Changes

The key changes for the 2022 RSR are:

1. Two data elements, 'New Client' and 'Received Services', **are only required for providers that receive EHE initiative funding.**
2. **Note:** CARES Act funding was discontinued in 2021. Eligible CARES Act clients and services should NOT be reported on the 2022 RSR.

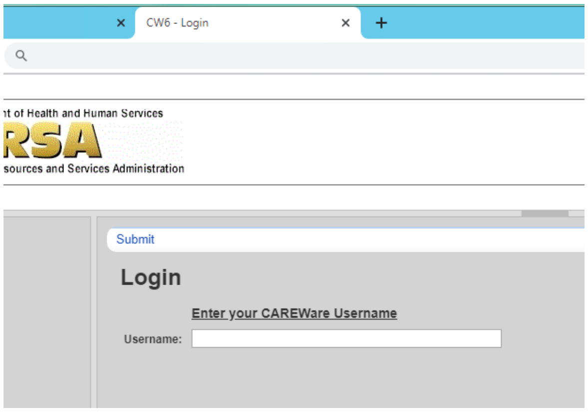
As a reminder, the key changes for the 2021 RSR (last year's) were:

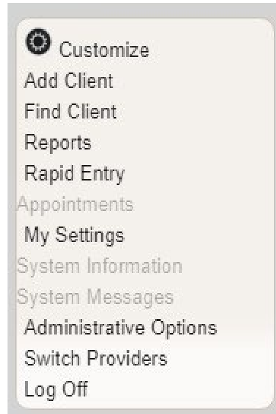
- All Ryan White HIV/AIDS Program (RWHAP) agencies are required to complete Eligible Services reporting.
    - The new Eligible Services reporting requirement expands Eligible Scope reporting in the RSR to include RWHAP-related funding.
    - As of the 2021 data submission, recipients and subrecipients were 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.

For more information, see the [2022 RSR Instruction Manual]() or contact the helpdesk at CAREWareMAHelpdesk@jsi.com.

Navigating to RSR Reports

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

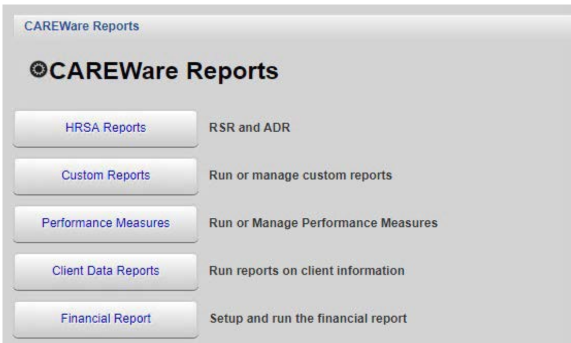




2. Click on “Reports” from the main menu.
3. This will bring up a Reports menu of different types of reports that can be run.

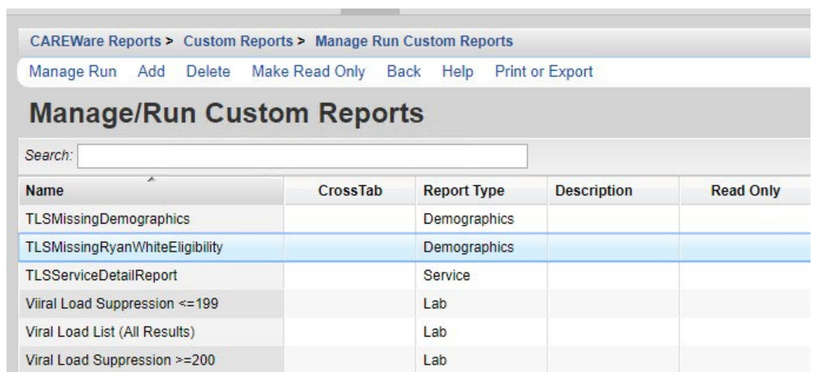
Custom Reports

Several Custom Reports are available in CAREWare MA to help you review for data quality, in preparation for generating the RSR. 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).

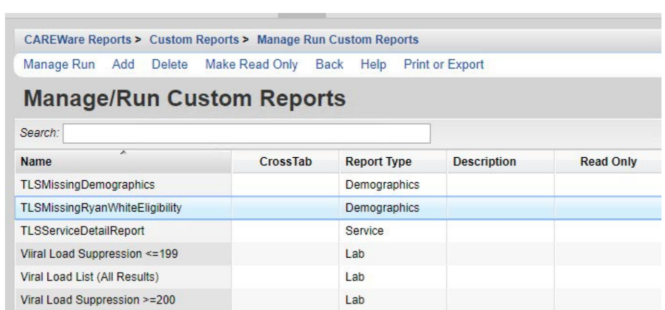


TLS Missing Ryan White Eligibility

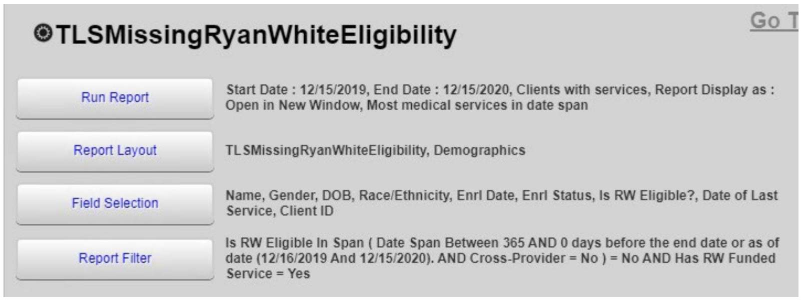
This report shows a list of clients that are not eligible for receiving Ryan White services. If your agency receives funding through the MA Department of Public Health and submits RSR report to HRSA, we recommend running this report before you submit the RSR to make sure it includes all of your Ryan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



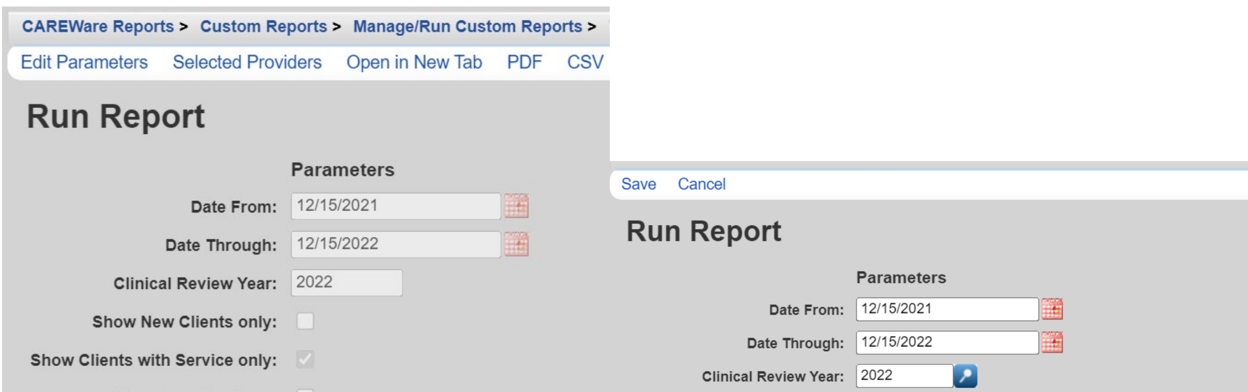
1. Select TLSMissingRyanWhiteEligibility from the list of reports and select Manage Run.



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”.

5. The report will look like this:

TLSMissingRyanWhiteEligibility

Data Scope: **MDPH**
Report Start Date: **12/15/2021**
Report End Date: **12/15/2022**

Name:	Gender:	DOB:	Race/Ethnicity:	Enrl Date:	Enrl Status:	Is RW Eligible?:	Last RW Service:
Bet, Alpha	Female	10/10/1980	White (non-Hispanic)	09/23/2021	Active	No	02/16/2022
Codman, Codman	Female	01/01/2012	Not Specified		Active	No	04/28/2022
Smith, Granny	Female	01/01/1985	More than one race	09/06/2016	Active	No	02/17/2022
Test, Tester	Male	01/01/2000	Not Specified		Active	No	09/02/2022

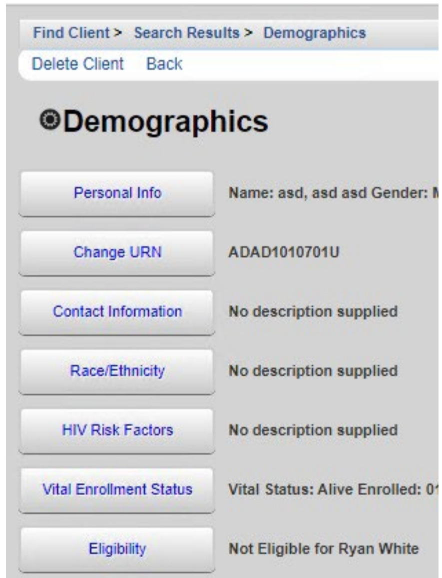
Number of Records : 4

(Count is unduplicated across providers)

Correcting Ryan White Eligibility Status

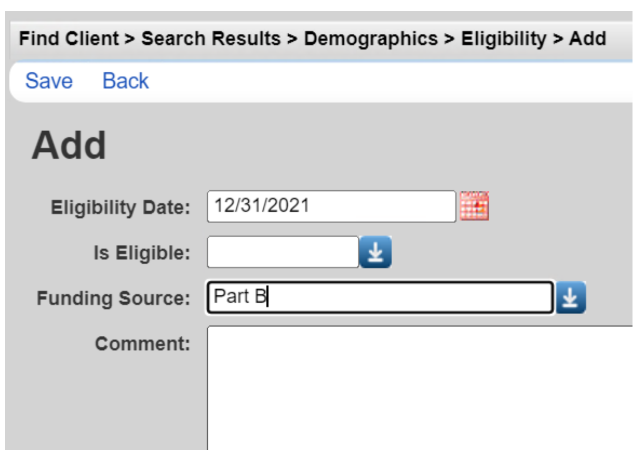
Follow these steps to update a client's Ryan White Eligibility Status:

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



2. Click the "Add Record" link.

3. Edit the date to be 12/31/2021.

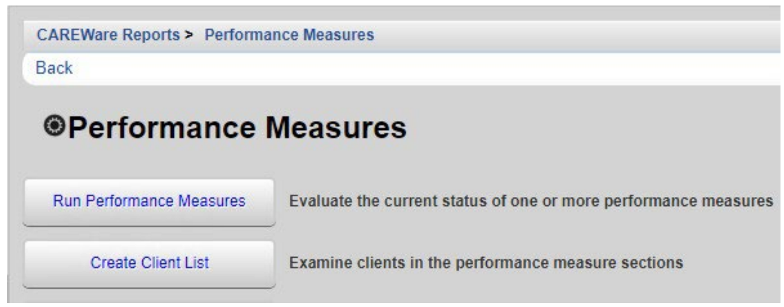


4. Select "Part B" for the funding source and "Yes" for "Is Eligible".
5. Click Save.

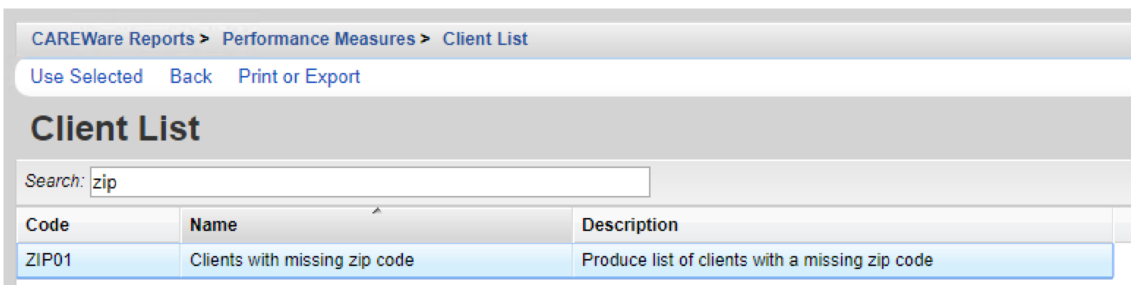
Correcting Missing ZIP Codes

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.

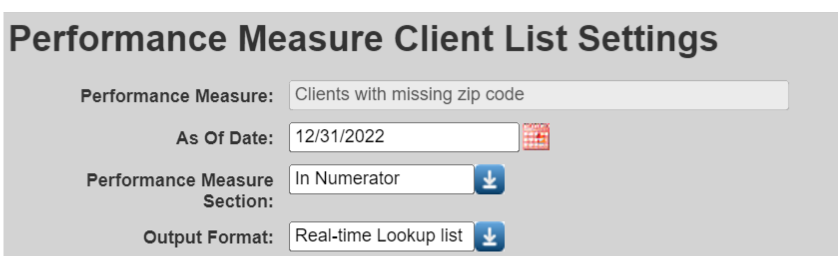
1. Under CAREWare Reports, select Performance Measures then Create Client List.



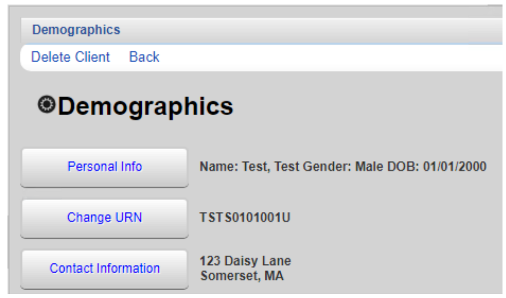
2. To find the missing ZIP code report, type "zip" into the search bar and the report will appear. Select it by highlighting the row and click Use Selected to run the report.



3. Edit the As of Date to 12/31/2022 then select Create Client List.



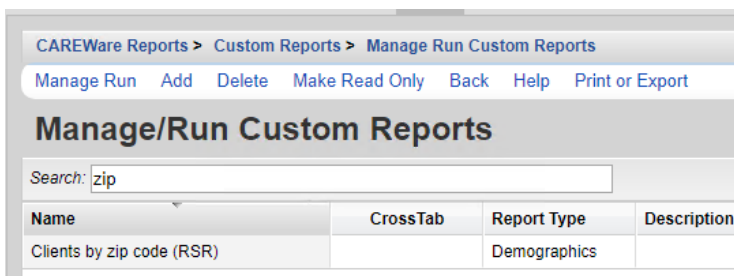
4. A new tab will open with a list of clients. You can select a client by double clicking on their name, or highlighting the row and click Go To Client, which will bring you to the Demographics page of the client record where you can add their ZIP code. For clients with an unknown ZIP Code:
    a. Use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

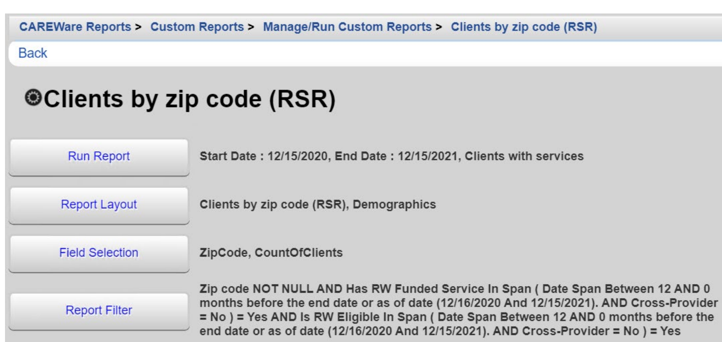


Clients by ZIP Code

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.

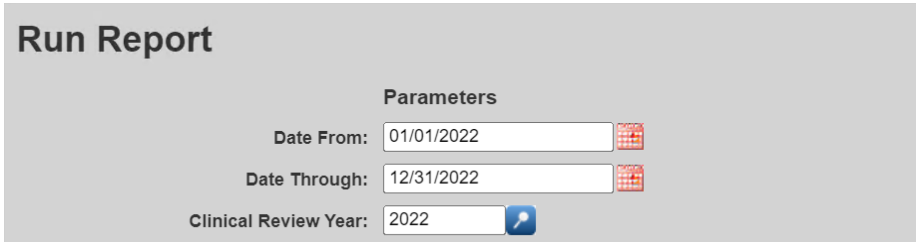
1. Select Clients by ZIP code (RSR) from the list of reports and select Manage Run.



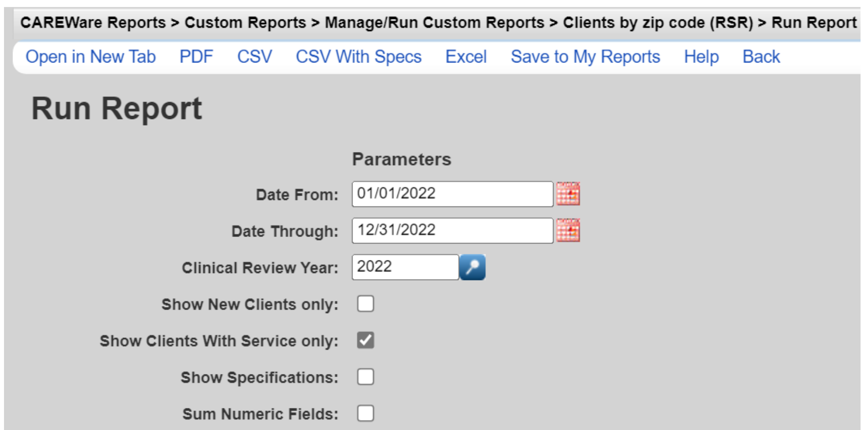


2. Under the report page for Clients by ZIP code, select Run Report.

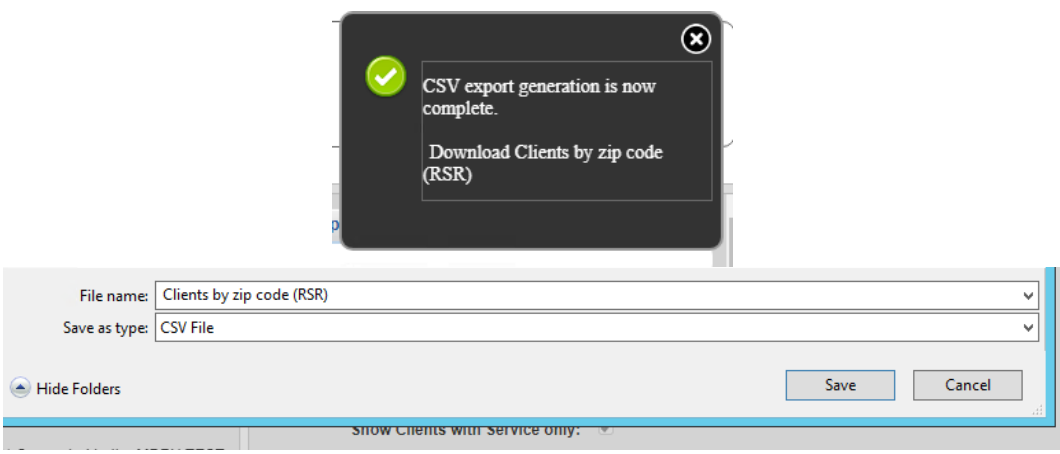
3. In the Run Report page, select Edit and modify the date range to be 1/1/2022 to 12/31/2022. Then save.



4. Click on 'CSV' to run the report.



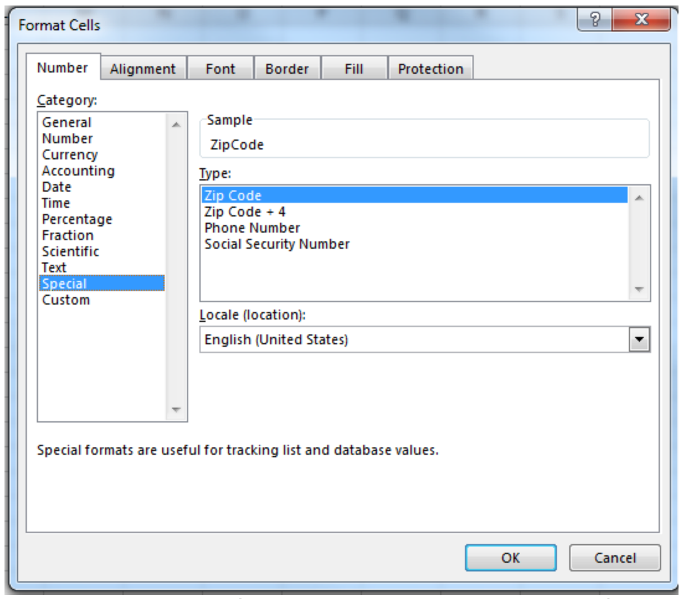
5. Click Download Clients by ZIP code (RSR) in the pop-up window and save the file toyour agency folder.



For the next step, you will need to retrieve the file from the SFTP site. To log in to the SFTP site, please see the instructions at the bottom of this guide labeled "Connect to Secure File Transfer Protocol (SFTP) Site".

6. 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			



7. 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." *****Note that when your CSV is saved, closed, and reopened again, the 0's will not appear. This is okay! Once the CSV is uploaded in the EHB, the 0's will appear. The EHB will ONLY allow you to submit a CSV file, not an excel file.*****

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

HRSA Reports

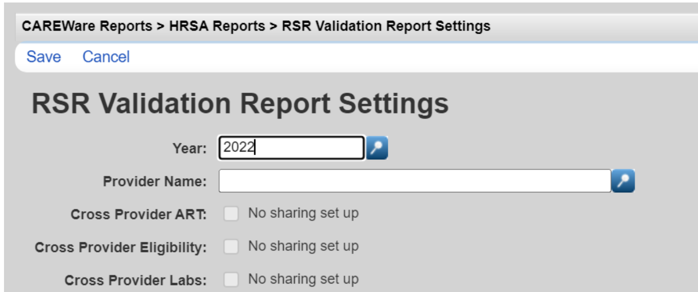
Click on “HRSA Reports” to get started.

RSR Validation Report

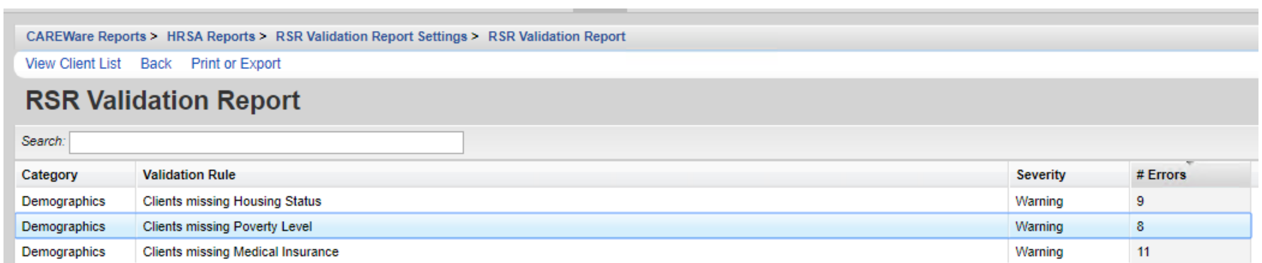
The RSR Validation report provides a list of all errors, warnings and alerts that are built into HRSA’s Electronic Handbook (EHB). Warnings and alerts indicate areas where data may be incorrect or missing. However, not all warnings or alerts may need to be corrected. Warnings must have a comment explaining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

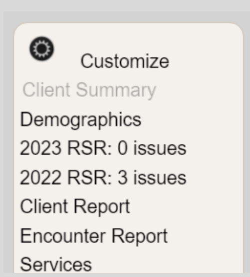


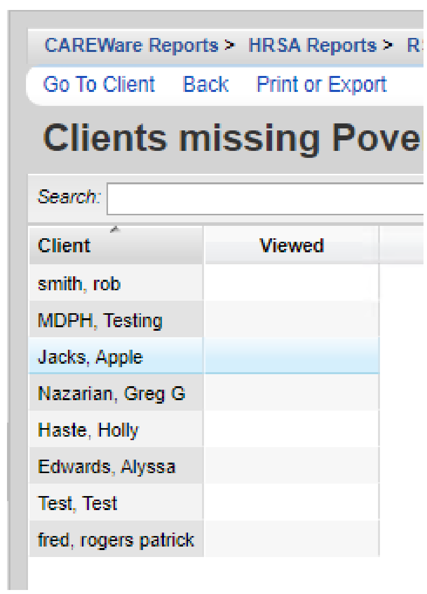
3. Click View RSR Validation Report from the pop-up to open the report table. From the table, you can click any row with errors that need correcting by highlighting the row and clicking View Client List or double clicking the highlighted row.



4. 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.

Helpful Tip: Any RSR issues for specific clients will also show on the left tab of their client record. These can be corrected while in the client's chart throughout the year.

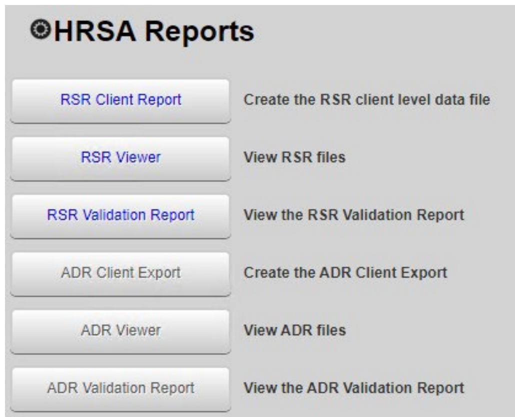




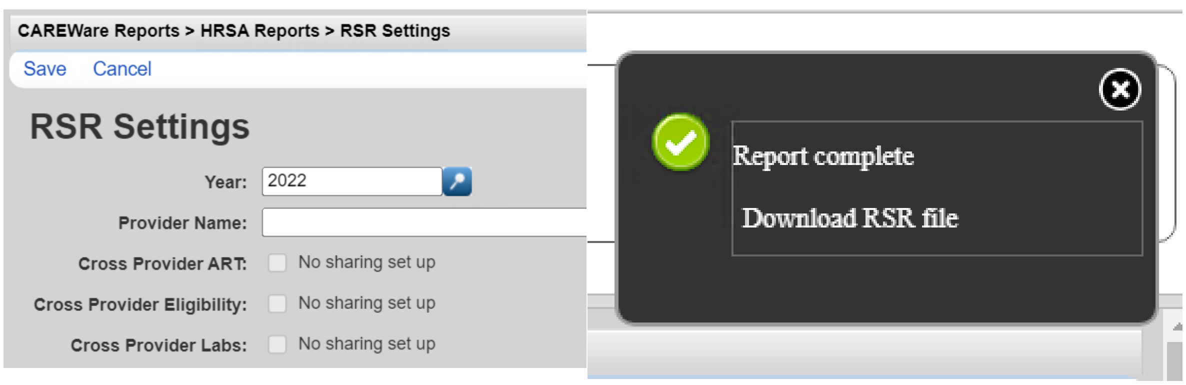
RSR Client Report Viewer

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

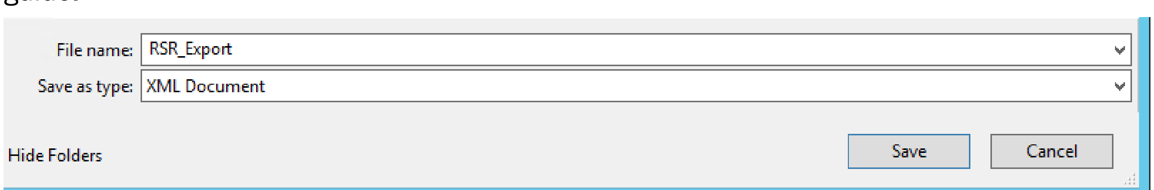
1. From the HRSA Reports menu, click on "RSR Client Report".



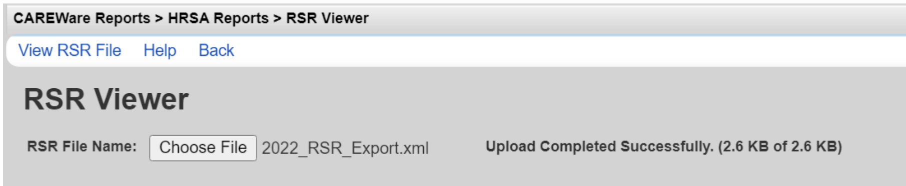
2. Make sure the Report Year is 2022 and click "Run" to generate the report. Once it is finished, click Download RSR file in the pop-up window in the top right corner of the page.



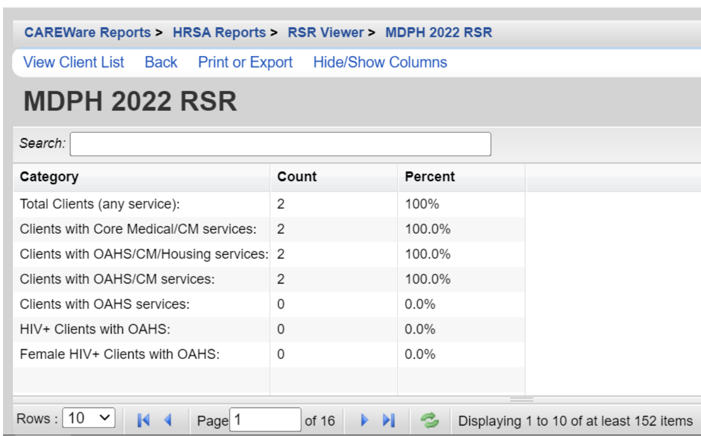
3. A new download folder will open prompting you to save the RSR export file. Save this file to your agency's designated folder on the G drive where you will need to access it later in this guide.



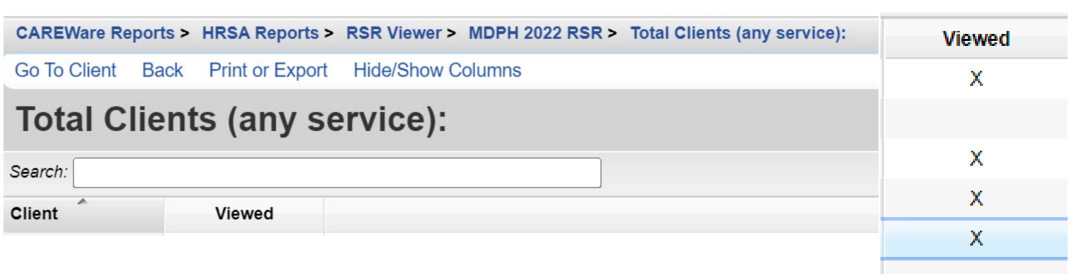
4. From the HRSA Reports page, select RSR Viewer, then click Choose File to upload the RSR export file saved in your agency's folder.



5. 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. ****Note: There will be many pages of RSR components to click through. Please be sure to look through each of them using the arrows at the bottom of the viewer.*****



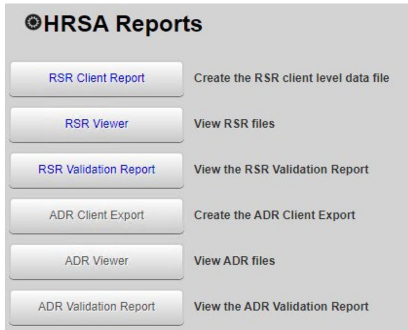
6. Within the category field you clicked, you can select the client record you wish to review. Once you have viewed the client, an X will appear under the Viewed column to reflect which clients have been reviewed.



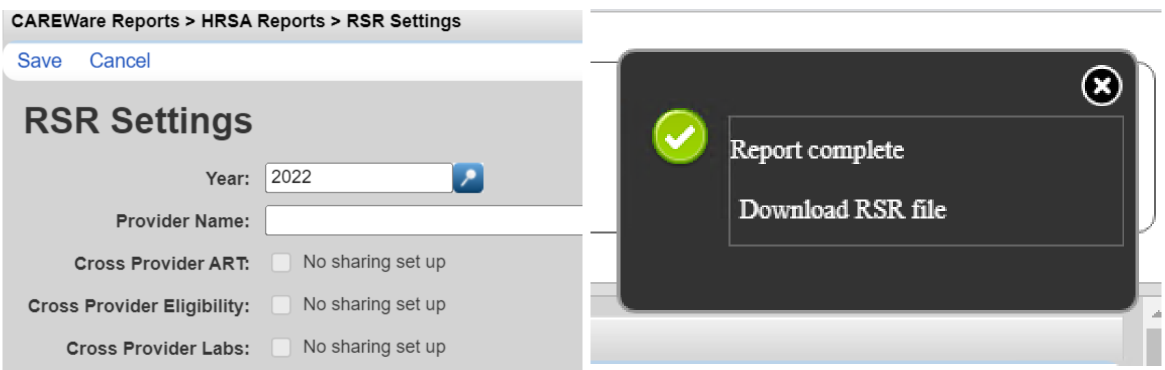
Running the RSR XML File

After you have used the RSR Client Viewer to review and correct any missing or incomplete data, run the RSR XML File. This is the file you will upload to the HRSA Electronic Handbook (EHB).

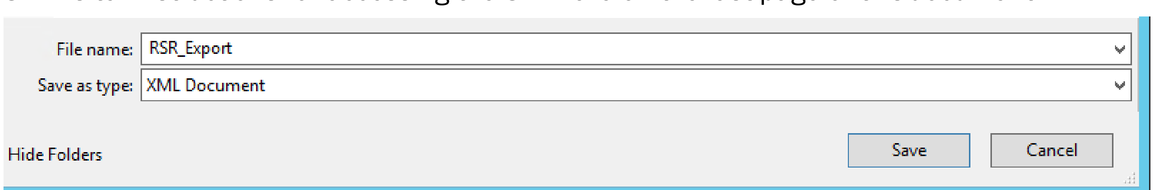
1. From the HRSA Reports menu, click on “RSR Client Report”.



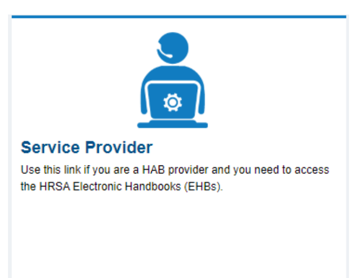
2. Make sure the Report Year is 2022 and click “Run” to generate the report. Once it is finished, click Download RSR file in the pop-up window in the top right corner of the page.



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 through the SFTP site. Instructions for accessing the SFTP are on the last page of this document.

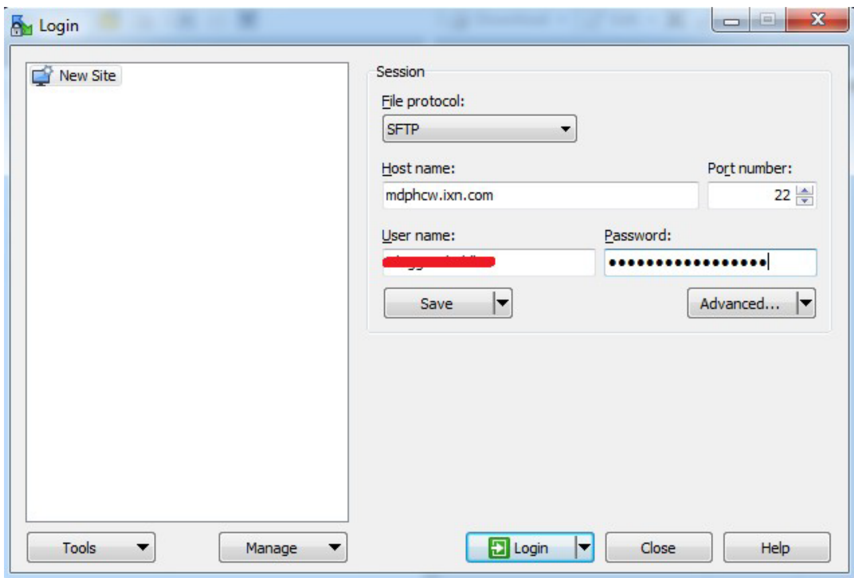


4. Once the file has been transferred from the SFTP to your machine, the XML file will need to be uploaded to the HRSA EHB. [Click here](#) to access the HRSA EHB, and click on “Service Provider”.



Connect to Secure File Transfer Protocol (SFTP) Site

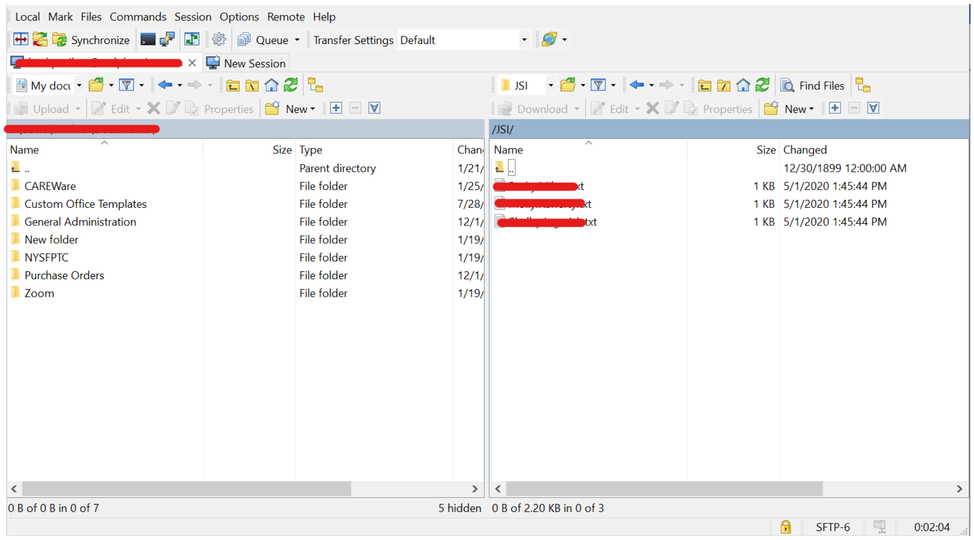
1. Download WinSCP (https://winscp.net/eng/download.php) and install it on your computer
2. A login screen will appear.
   a. For the host name, enter “mdphcw.ixn.com”
   b. The port number should be 22 by default. Do not change it.
   c. Enter your username and password for the CAREWare remote server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

7. You can now find the saved file in the file manager on your own computer.