

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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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.

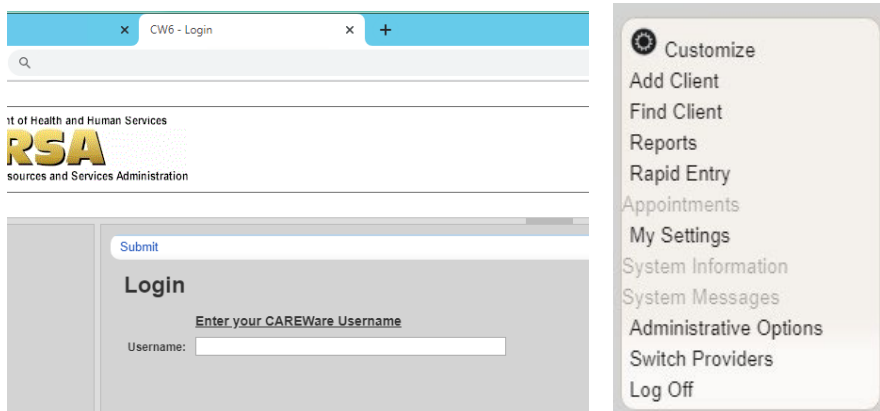
As a reminder, the key changes for the 2021 RSR (last year's) were:

- 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.

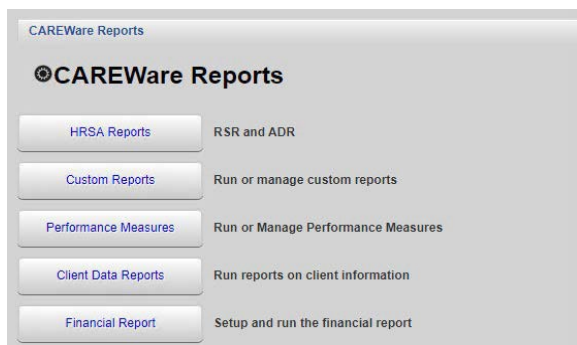


2. Click on “Reports” from the main menu.
3. This will bring up a Reports menu of different types of reports that can be run.



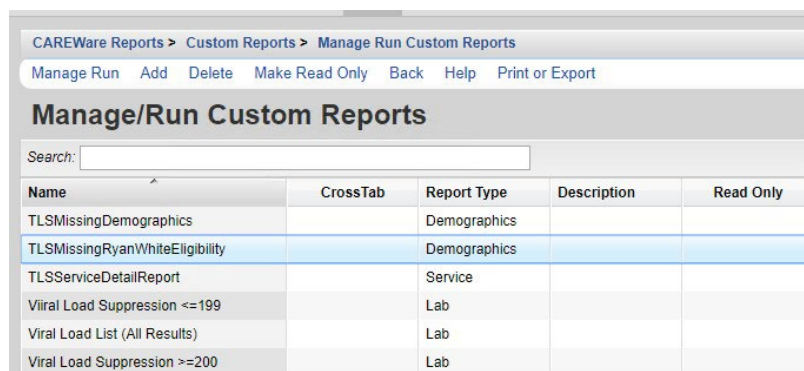
Custom Reports

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).

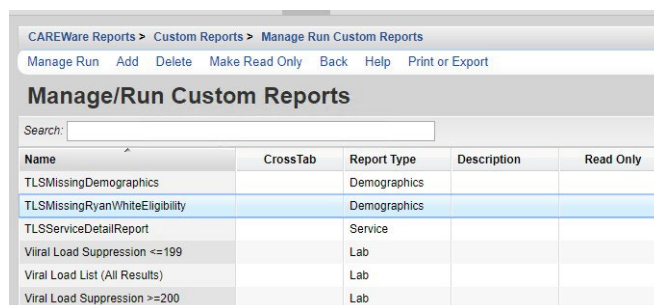


TLS Missing Ryan White Eligibility

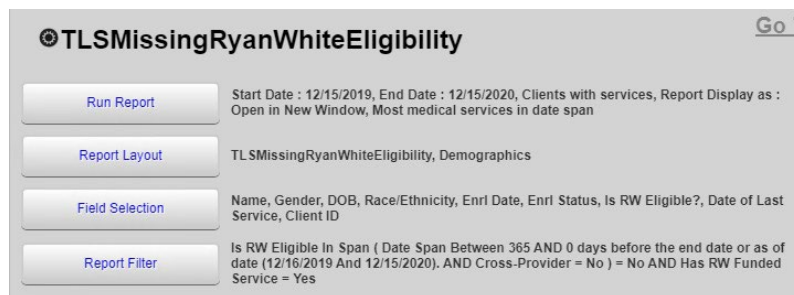
This report shows a list of clients that are not eligible for receiving Ryan White services. If your agency receives funding through the MA Department of Public Health and submits RSR report to HRSA, we recommend running this report before you submit the RSR to make sure it includes all of your Ryan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



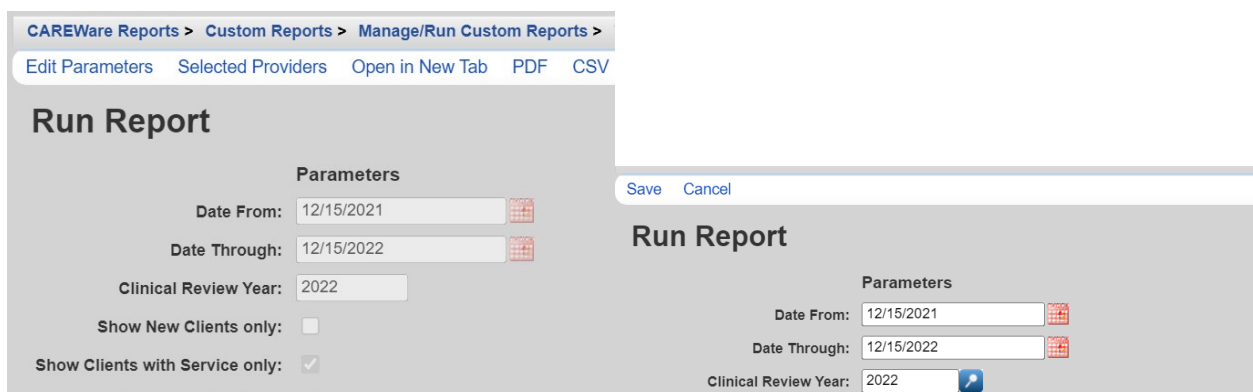
1. Select TLSMissingRyanWhiteEligibility from the list of reports and select Manage Run.



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



- In the Run Report page, select Edit and modify the date range to the desired range. Then save.



- Click on "Run Report".

- The report will look like this:

TLSMissingRyanWhiteEligibility

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

<u>Name:</u>	<u>Gender:</u>	<u>DOB:</u>	<u>Race/Ethnicity:</u>	<u>Enrl Date:</u>	<u>Enrl Status:</u>	<u>Is RW Eligible?:</u>	<u>Last RW Service:</u>
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

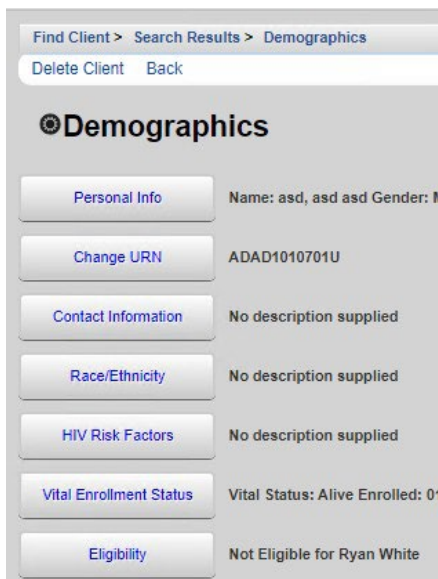
Number of Records : 4

(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".



Find Client > Search Results > Demographics

Delete Client Back

Demographics

Personal Info Name: asd, asd Gender: M

Change URN ADAD1010701U

Contact Information No description supplied

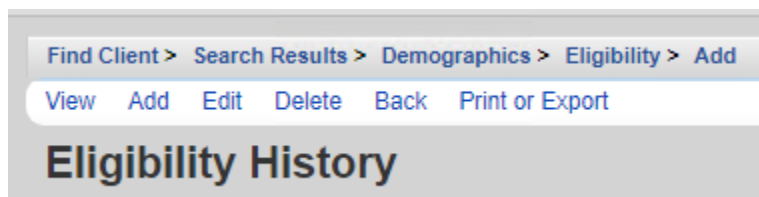
Race/Ethnicity No description supplied

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.

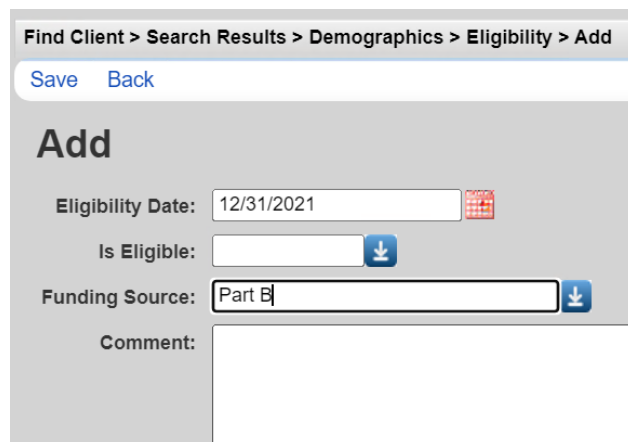


Find Client > Search Results > Demographics > Eligibility > Add

View Add Edit Delete Back Print or Export

Eligibility History

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



Find Client > Search Results > Demographics > Eligibility > Add

Save Back

Add

Eligibility Date: 12/31/2021

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

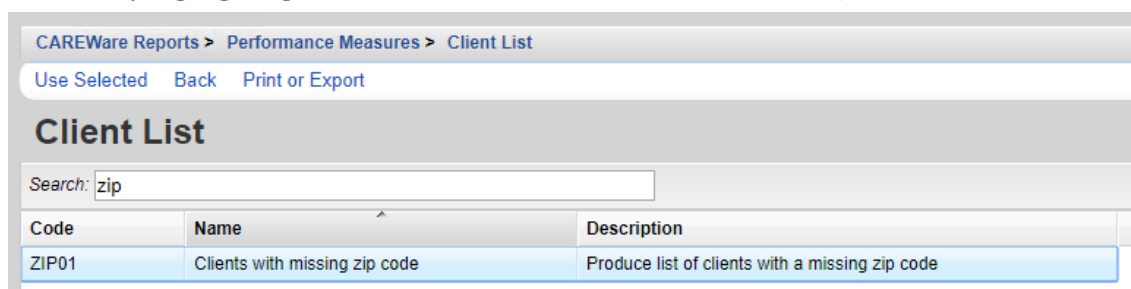
This report shows a list of clients with missing ZIP codes. Run this report before you submit the RSR to make corrections for clients whose ZIP codes were not filled in.

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



The first screenshot shows the 'CAREWare Reports' main menu with three options: 'HRSA Reports' (RSR and ADR), 'Custom Reports' (Run or manage custom reports), and 'Performance Measures' (Run or Manage Performance Measures). The second screenshot shows the 'Performance Measures' section with two options: 'Run Performance Measures' (Evaluate the current status of one or more performance measures) and 'Create Client List' (Examine clients in the performance measure sections).

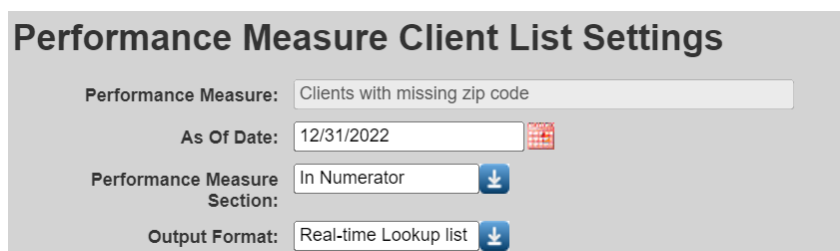
2. To find the missing ZIP code report, type "zip" into the search bar and the report will appear. Select it by highlighting the row and click Use Selected to run the report.



The screenshot shows the 'Client List' search results. The search bar contains 'zip'. The results table has three columns: Code, Name, and Description. The first row is highlighted in blue.

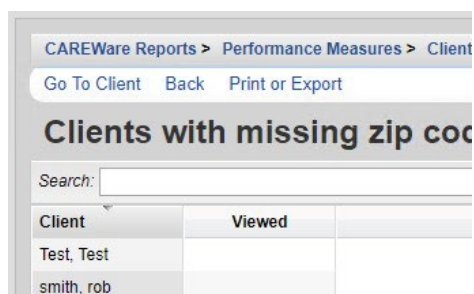
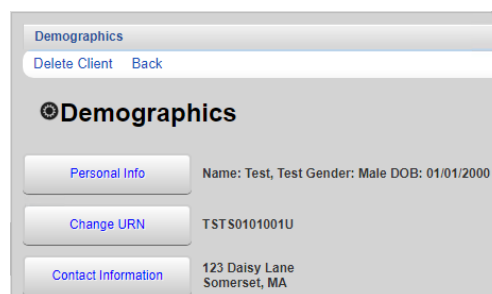
Code	Name	Description
ZIP01	Clients with missing zip code	Produce list of clients with a missing zip code

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



The screenshot shows the 'Performance Measure Client List Settings' form. It has four fields: 'Performance Measure' (Clients with missing zip code), 'As Of Date' (12/31/2022), 'Performance Measure Section' (In Numerator), and 'Output Format' (Real-time Lookup list).

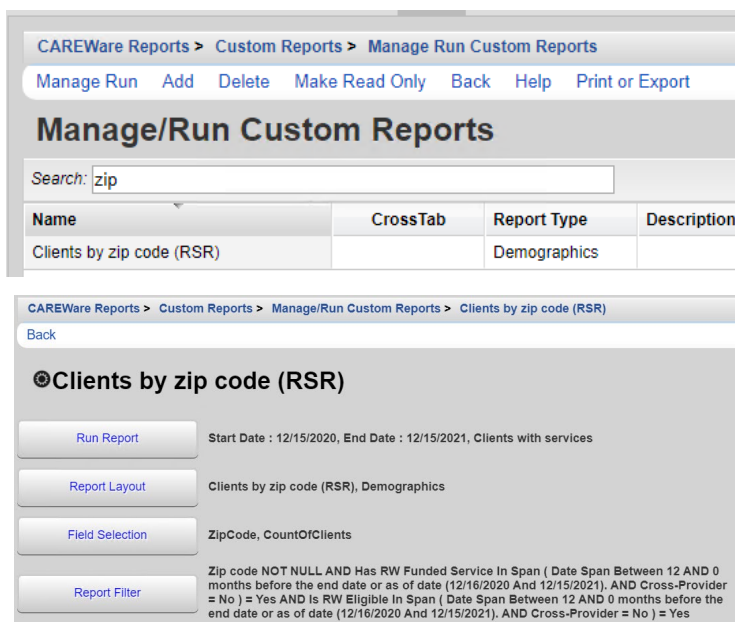
4. A new tab will open with a list of clients. You can select a client by double clicking on their name, or highlighting the row and click Go To Client, which will bring you to the Demographics page of the client record where you can add their ZIP code. For clients with an unknown ZIP Code:
 - a. Use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

Clients by ZIP Code

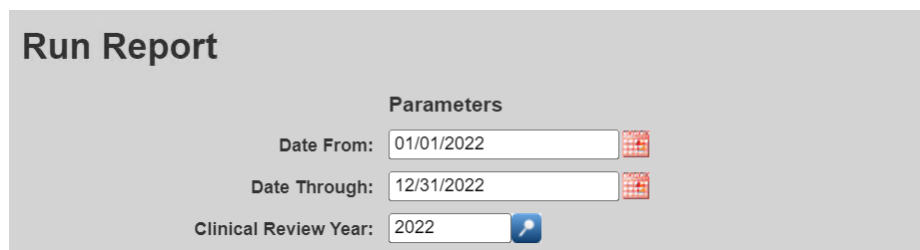
This report will generate a list of clients and their ZIP codes. You will need to download and save this list to upload when submitting the RSR. Most ZIP codes will begin with "0", which will be dropped when it is generated in a CSV. We will walk through how you can correct this.

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 be 1/1/2022 to 12/31/2022. Then save.



Run Report

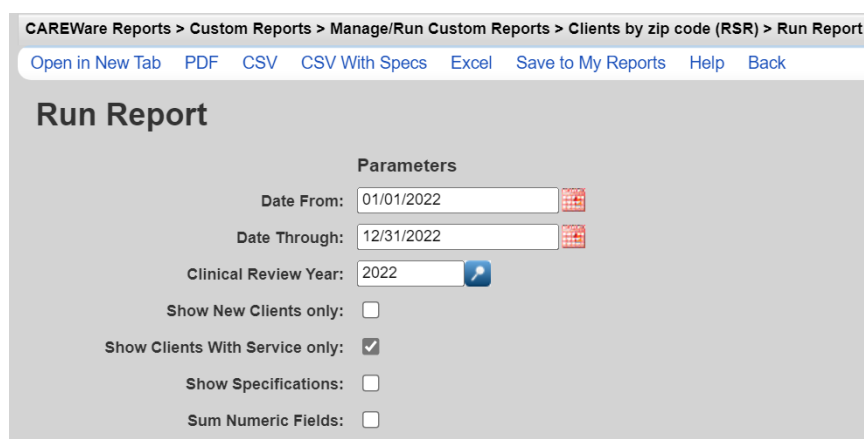
Parameters

Date From: 01/01/2022

Date Through: 12/31/2022

Clinical Review Year: 2022

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



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

[Open in New Tab](#) [PDF](#) [CSV](#) [CSV With Specs](#) [Excel](#) [Save to My Reports](#) [Help](#) [Back](#)

Run Report

Parameters

Date From: 01/01/2022

Date Through: 12/31/2022

Clinical Review Year: 2022

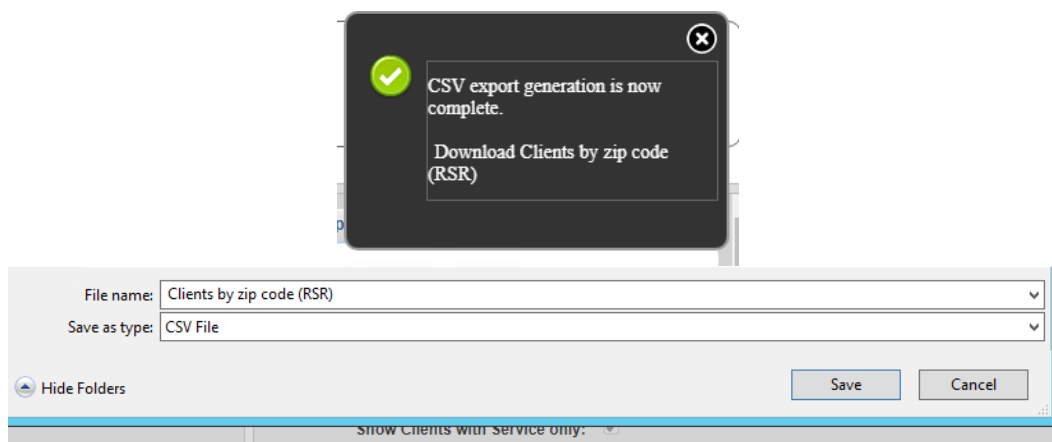
Show New Clients only: ☐

Show Clients With Service only: ☒

Show Specifications: ☐

Sum Numeric Fields: ☐

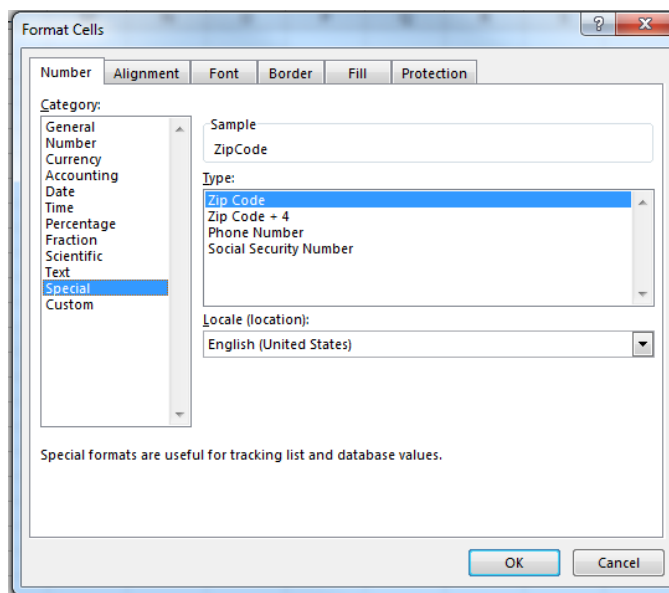
5. Click Download Clients by ZIP code (RSR) in the pop-up window and save the file to your agency folder.



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”.

- 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			

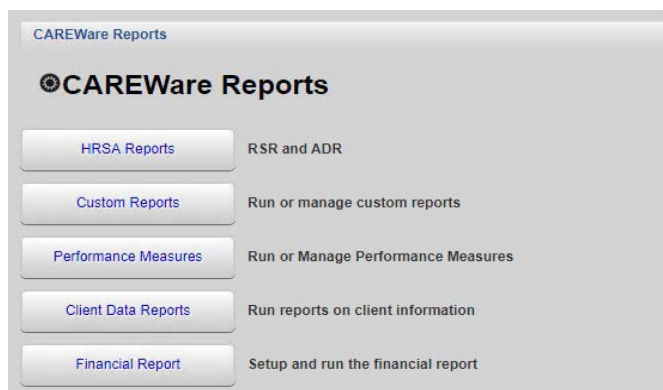


- In the formatting window that opens, select Special and then choose “Zip Code” from the list. Then save. Your Zip Code column should now include the leading “0.” *****Note that when your CSV is saved, closed, and reopened again, the 0's will not appear. This is okay! Once the CSV is uploaded in the 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	CountOfClients
2	01610	1
3	01852	2
4	02110	1
5	02141	1
6	02389	1
7	02657	1

HRSA Reports

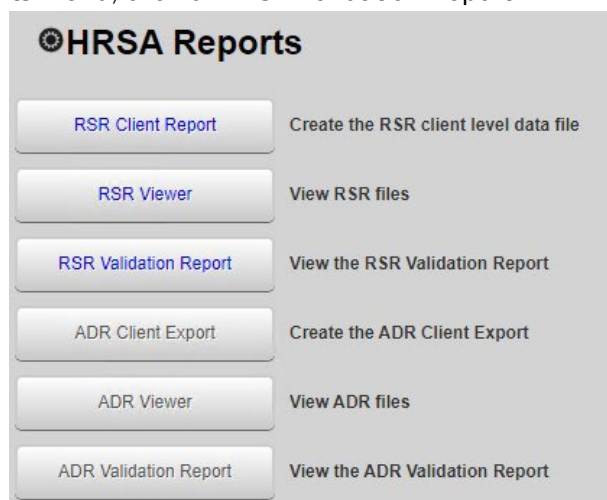
Click on “HRSA Reports” to get started.



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”.



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

CAREWare Reports > HRSA Reports > RSR Validation Report Settings

[Save](#) [Cancel](#)

RSR Validation Report Settings

Year:

Provider Name:

Cross Provider ART: ☐ No sharing set up

Cross Provider Eligibility: ☐ No sharing set up

Cross Provider Labs: ☐ No sharing set up

- 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.

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.

 Customize
Client Summary
Demographics
2023 RSR: 0 issues
2022 RSR: 3 issues
Client Report
Encounter Report
Services

CAREWare Reports > HRSA Reports > RSR Validation Report

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

Clients missing Poverty Level

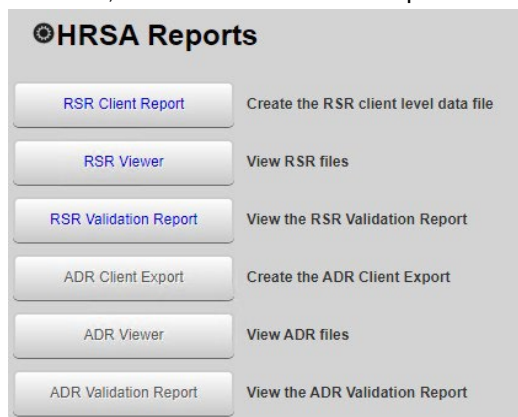
Search:

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

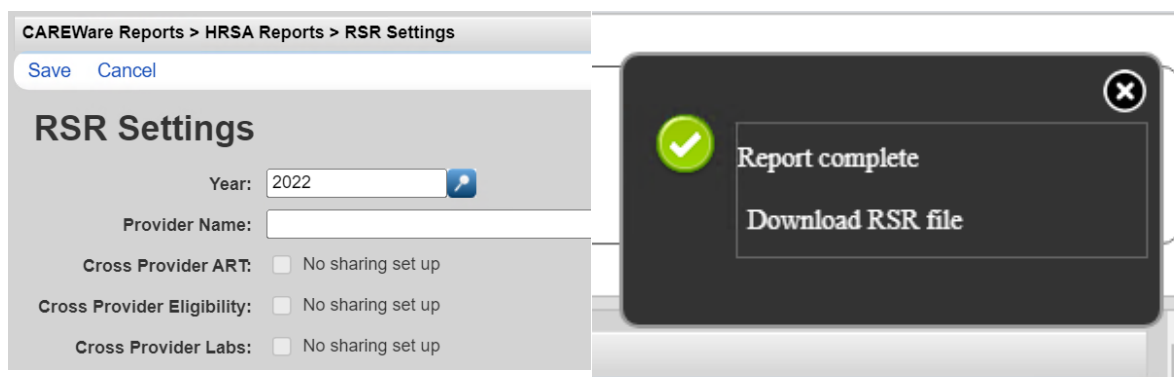
RSR Client Report Viewer

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

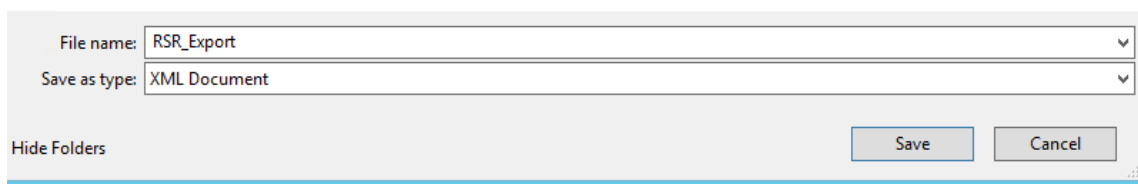
1. From the HRSA Reports menu, click on “RSR Client Report”.



2. Make sure the Report Year is 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.



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

CAREWare Reports > HRSA Reports > RSR Viewer

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

RSR Viewer

RSR File Name: 2022_RSR_Export.xml Upload Completed Successfully. (2.6 KB of 2.6 KB)

- 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.*****

CAREWare Reports > HRSA Reports > RSR Viewer > MDPH 2022 RSR

[View Client List](#) [Back](#) [Print or Export](#) [Hide/Show Columns](#)

MDPH 2022 RSR

Search:

Category	Count	Percent
Total Clients (any service):	2	100%
Clients with Core Medical/CM services:	2	100.0%
Clients with OAHS/CM/Housing services:	2	100.0%
Clients with OAHS/CM services:	2	100.0%
Clients with OAHS services:	0	0.0%
HIV+ Clients with OAHS:	0	0.0%
Female HIV+ Clients with OAHS:	0	0.0%

Rows: 10 of 16 Page 1 of 16 Displaying 1 to 10 of at least 152 items

- 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 2022 RSR > Total Clients (any service):

[Go To Client](#) [Back](#) [Print or Export](#) [Hide/Show Columns](#)

Total Clients (any service):

Search:

Client	Viewed
	X
	X
	X
	X

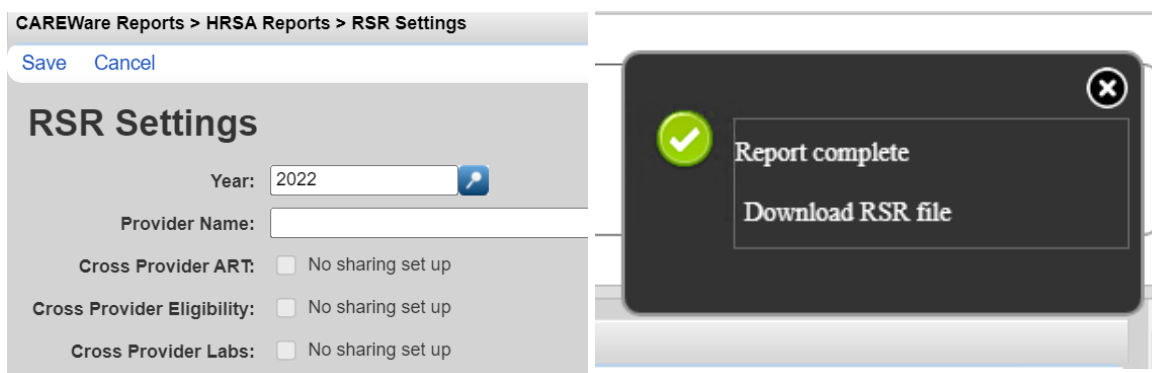
Running the RSR XML File

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).

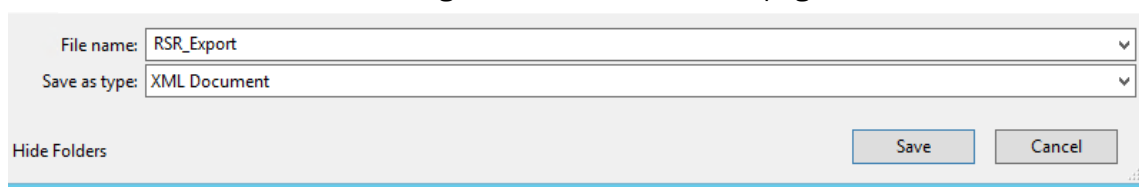
1. From the HRSA Reports menu, click on “RSR Client Report”.



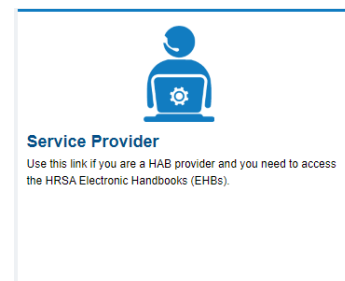
2. Make sure the Report Year is 2022 and click “Run” to generate the report. Once it is finished, click Download RSR file in the pop-up window in the top right corner of the page.



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.

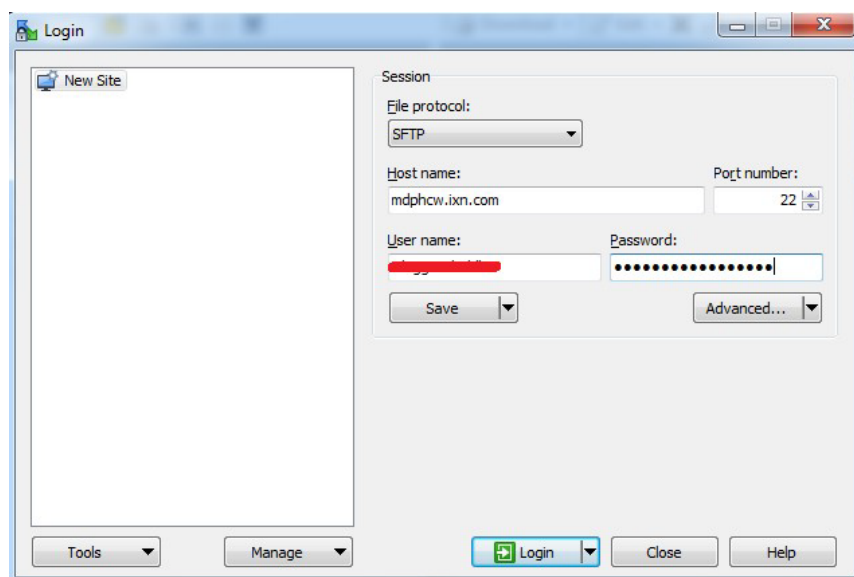


4. Once the file has been transferred from the SFTP to your machine, the XML file will need to be uploaded to the HRSA EHB. [Click here](#) to access the HRSA EHB, and click on “Service Provider”.



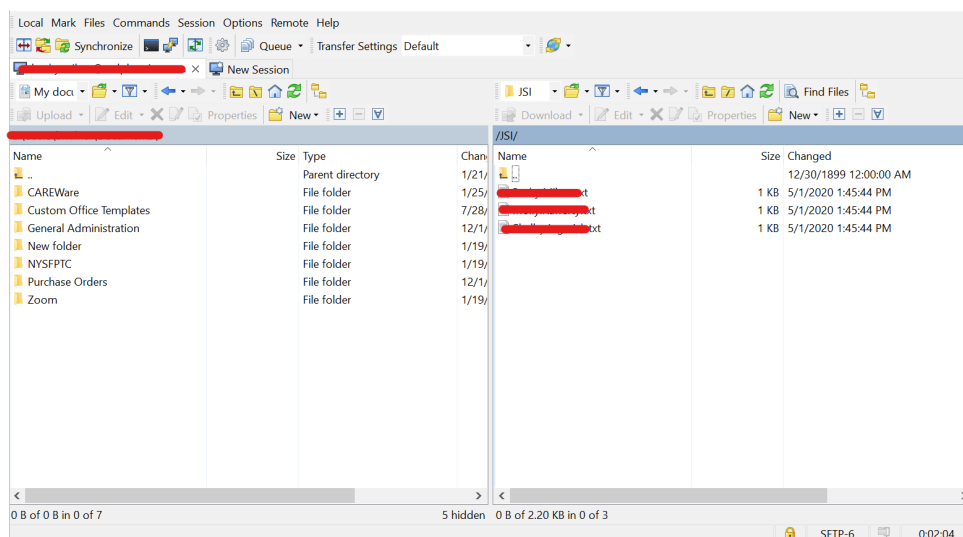
Connect to Secure File Transfer Protocol (SFTP) Site

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.

- 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.



- That's it! Click the X in the upper right corner of the window to disconnect.
- You can now find the saved file in the file manager on your own computer.