RSR Data Updates and Reports

January 2024

This document provides instructions for running data quality reports, making data corrections, and creating the RSR XML and zip code files.

Contents

2023 Changes

The key changes for the 2023 RSR are:

1. All recipients and providers will now use Login.gov and two-factor authentication when logging into the HRSA EHBs. All users must have a valid Login.gov account using the same email address as their HRSA EHBs account to access the RSR.
   a. Link to EHB for providers (service provider):
      https://grants.hrsa.gov/EAuthNS/serviceprovider/account/SignIn
   b. Link to EHB for recipient providers (applicant/grantee):
      https://grants.hrsa.gov/EAuthNS/external/account/SignIn

   Should you need further assistance logging into the EHBs to submit your RSR see the following resources:
   - EHB's Login Process Overview for External User
   - How to Login to EHBs using the Multi-factor Authentication Process Video

2. CAREWare has a new HRSA report called "RSR Zip Code Count Report". This will produce the required CSV Zip code file. In the past, this report has been located under "Custom Reports" in CAREWare.

Navigating to RSR Reports

1. To navigate to the reports you will run as part of the RSR, first log in to the Massachusetts CAREWare system.
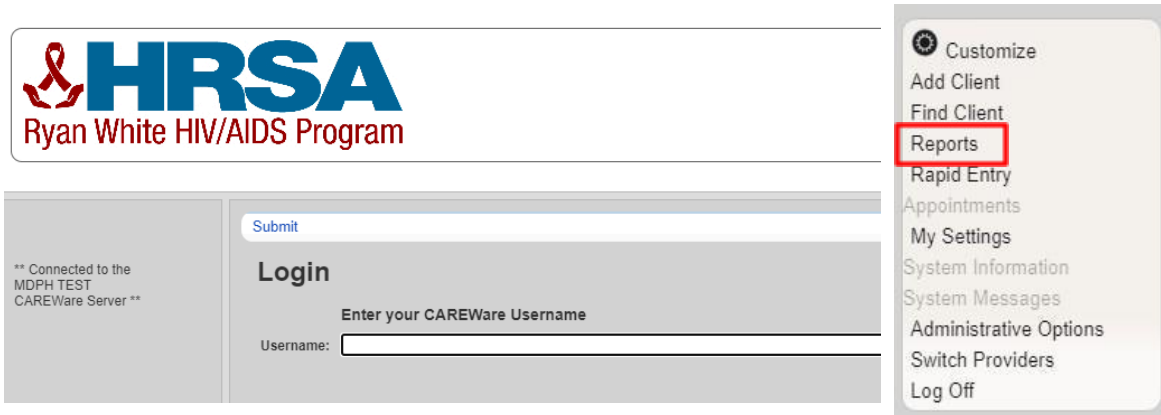

2. Click on "Reports" from the main menu.

3. This will bring up a Reports menu of different types of reports that can be run.
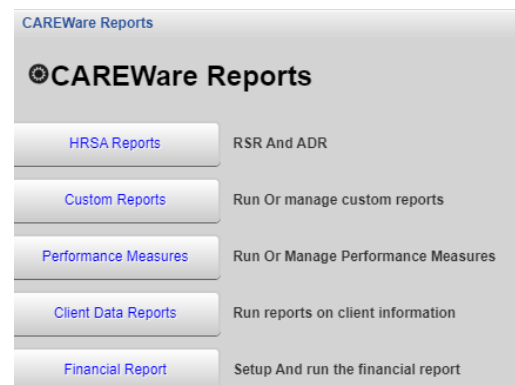
CAREWare Reports for Data Quality

Several reports, including custom reports, are available in CAREWare MA to help you review 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". When running Custom Reports, select the desired report and specify the date span. Finally, click "Run Report", to run the report.
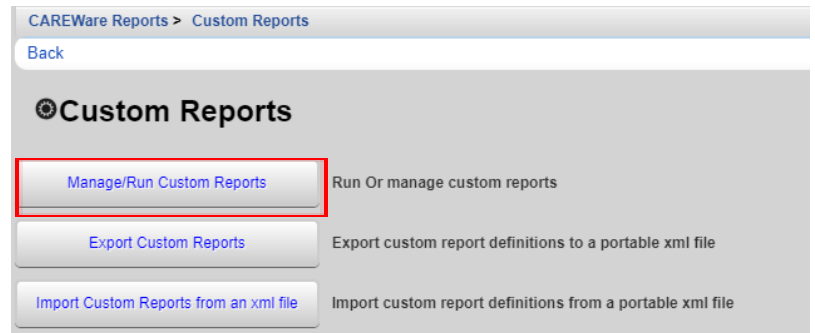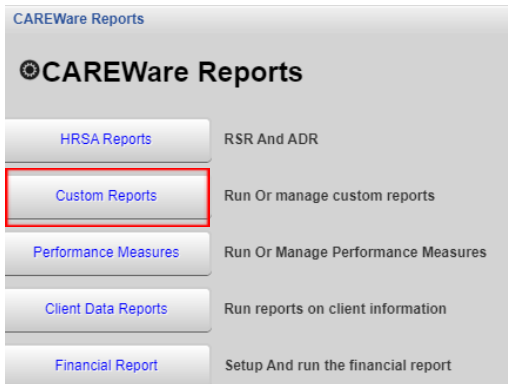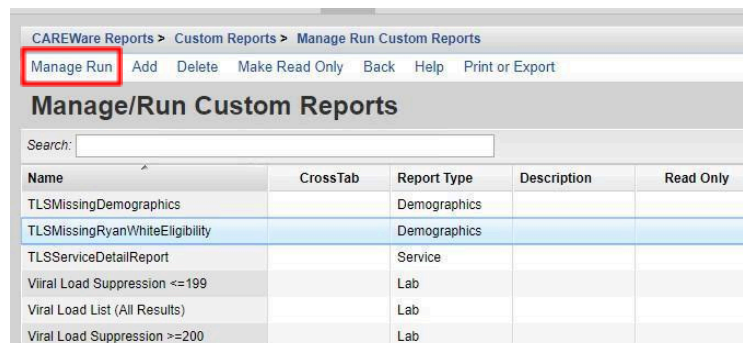

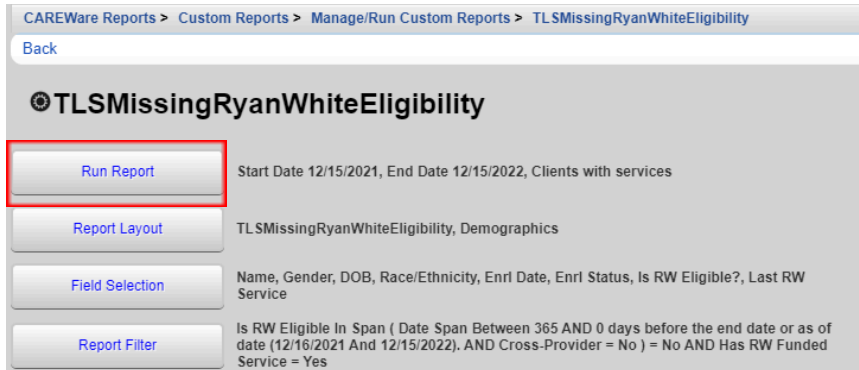### TLS Missing Ryan White Eligibility

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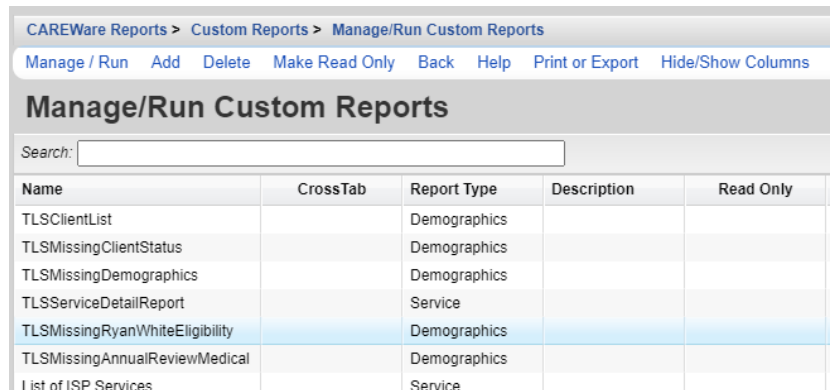
1. Select TLSMissingRyanWhiteEligibility from the list of reports and select "Manage Run".

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

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > TLSMissingRyanWhiteEligibility
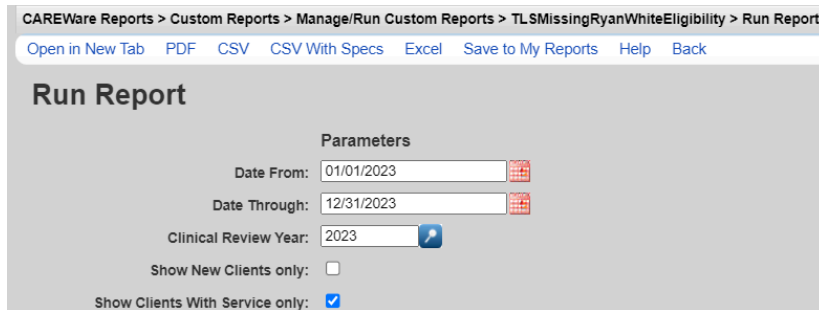
Back

⊙TLSMissingRyanWhiteEligibility

Run Report	Start Date 12/15/2021, End Date 12/15/2022, Clients with services
Report Layout	TLSMissingRyanWhiteEligibility, Demographics
Field Selection	Name, Gender, DOB, Race/Ethnicity, Enrl Date, Enrl Status, Is RW Eligible?, Last RW Service
Report Filter	Is RW Eligible In Span (Date Span Between 365 AND 0 days before the end date or as of date (12/16/2021 And 12/15/2022). AND Cross-Provider = No) = No AND Has RW Funded Service = Yes

3. Modify the date range to the desired range.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > TLSMissingRyanWhiteEligibility > Run Report

Open in New Tab   PDF   CSV   CSV With Specs   Excel   Save to My Reports   Help   Back

Run Report

Parameters	
Date From:	01/01/2023
Date Through:	12/31/2023
Clinical Review Year:	2023
Show New Clients only:	☐
Show Clients With Service only:	☑

4. Run the report by clicking on the desired format (Open in a New Tab, PDF, CSV Excel). Click on "Run Report".

5. The report will look like this:

TLSMissingRyanWhiteEligibility

Data Scope:	MDPH
Report Start Date:	01/01/2023
Report End Date:	12/31/2023
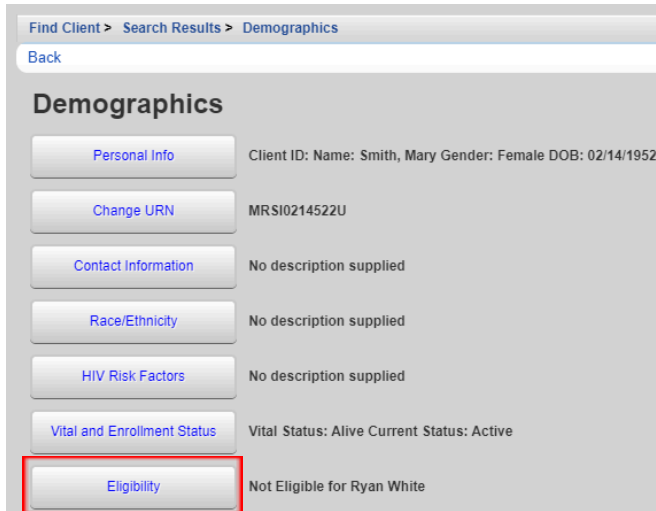
Name:	Gender:	DOB:	Race/Ethnicity:	Enrl Date:	Enrl Status:	Is RW Eligible?:	Last RW Service:
Huber, Jakob	Male	03/01/1967	Black or African-American	03/10/2022	Active	No	12/07/2023
Mouse, Mickey	Male	03/01/1989	More than one race		Active	No	12/07/2023
Wazowski, Mike	Male	09/01/1978	Black or African-American		Active	No	12/07/2023

Number of Records : 3

(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. Select "Start".

3. Edit the date the client became eligible for Ryan White Services. Use 12/31/2022 if there is not a specific eligibility date.
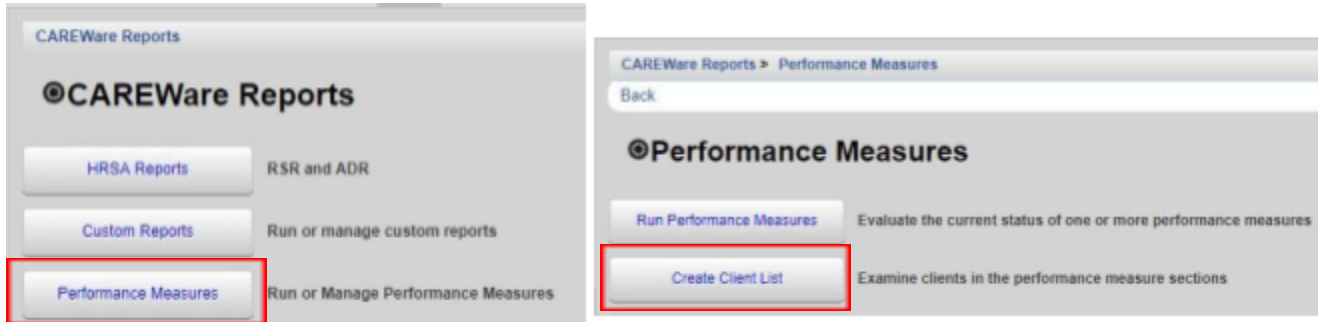

4. Select "Part B" for the funding source.
5. Click "Save".

Clients with Missing Zip Code Report & 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.
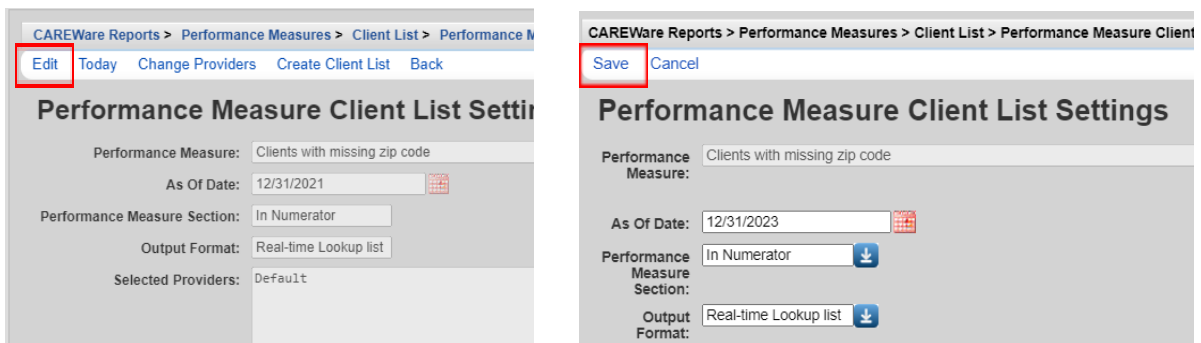
1. Under CAREWare Reports, select "Performance Measures" then "Create Client List."
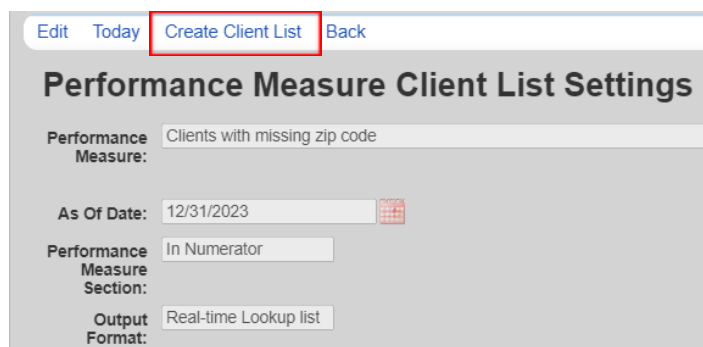

2. To find the missing ZIP code report, type "zip" into the search bar and the report will appear. Select it by highlighting the row and click "Use Selected" to run the report.
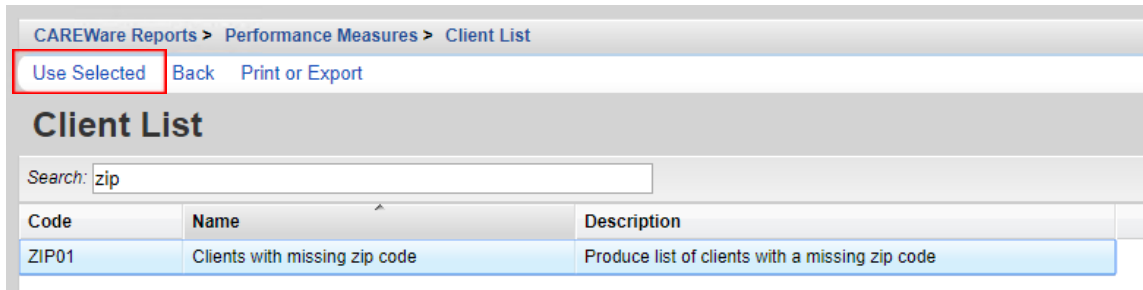
3. Select "Edit". Edit the "As of Date" to 12/31/2023 then select "Save".

4. Select "Create Client List".

5. 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"

HRSA Reports

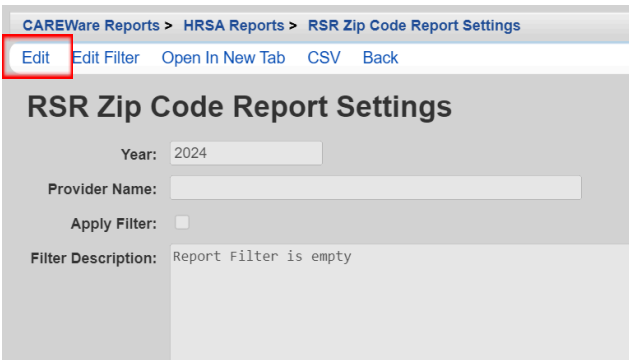Click on "HRSA Reports" to get started.
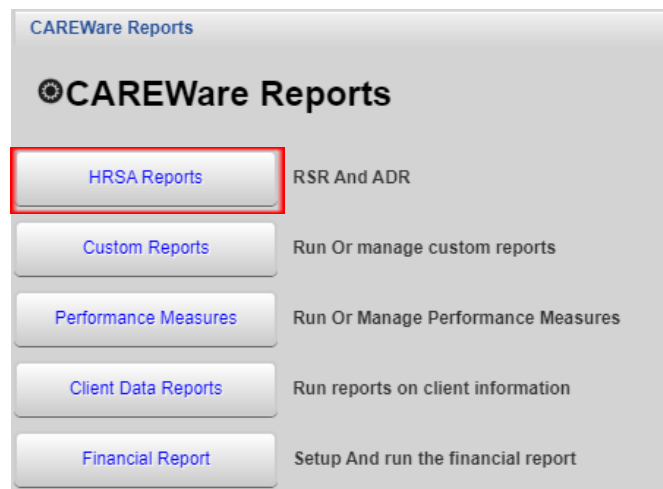
RSR ZIP Code Count Report

This report will generate a list of clients and their ZIP codes. You will need to download and save this as a CSV to upload when submitting the RSR.

1. Select "RSR Zip Code Count Report".

2. Select "Edit" to modify the year to 2023. Then "Save."
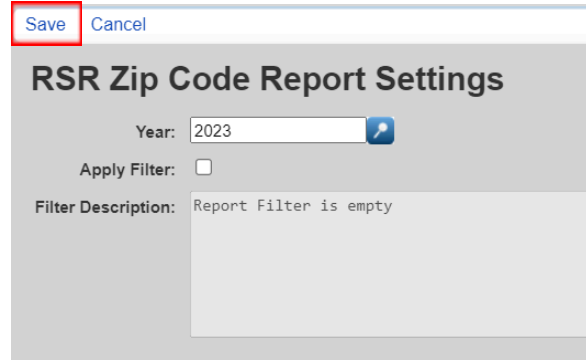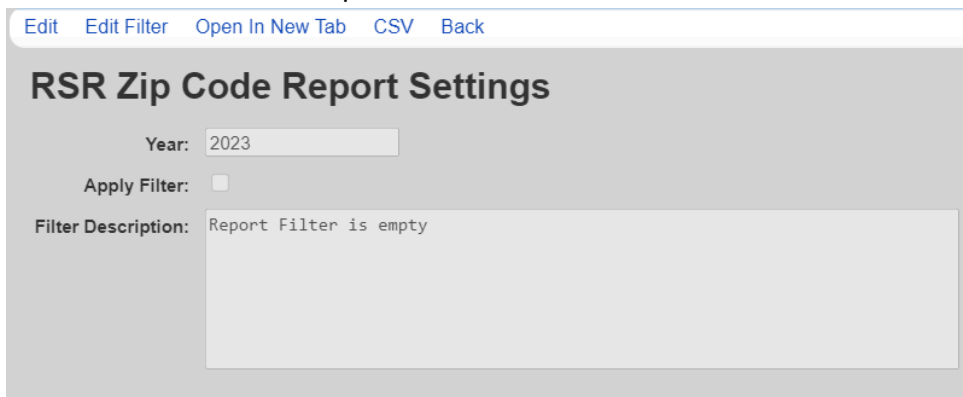
3. Click on "CSV" to run the report.

4. Click "Download RSR Zip Code Count Report" and save to a secure folder on your computer.
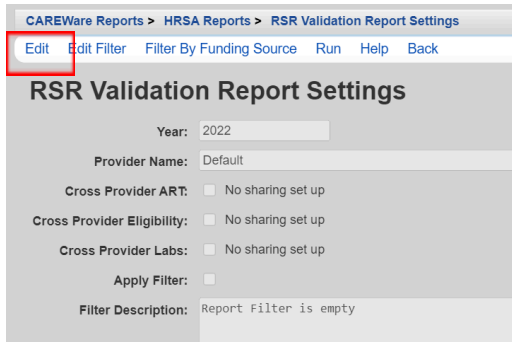
RSR Validation Report

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 Validation Report Settings" page, select "Edit" to adjust the reporting year to 2023. Then click "Save" and "Run".

3. Click "View RSR Validation Report" from the pop-up that appears to view 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.
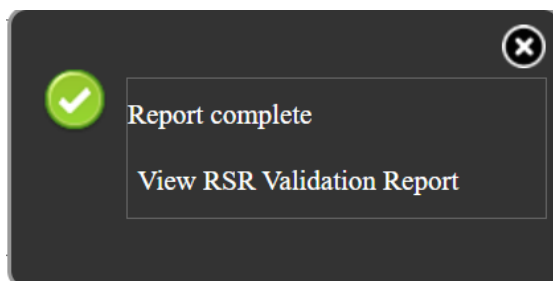
4. Choose the client of interest and then click "Go to Client" to be brought directly to their record. Errors must be fixed before the RSR can be submitted.
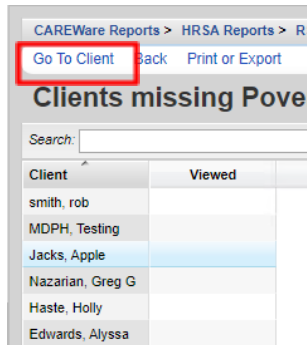
RSR Client Report (Running the RSR XML File)

The Client Report Viewer allows you to view the data included in the RSR file, including a count of missing data. This will help you make sure your XML is complete before it is uploaded to the EHB.

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

2. Make sure the "Year" is 2023 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.
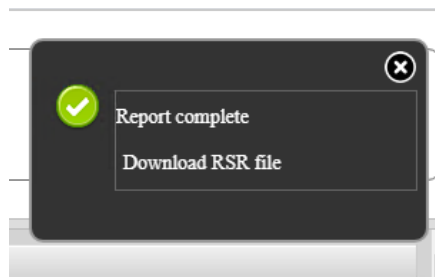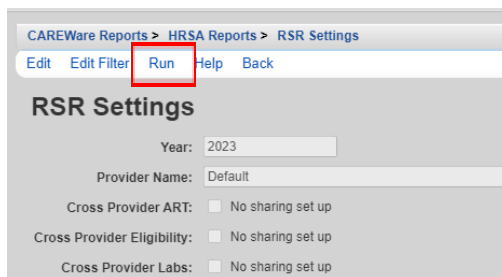
3. Save the RSR file to a secure folder on your computer. This is the RSR XML that you need to access in the next section of this guide.
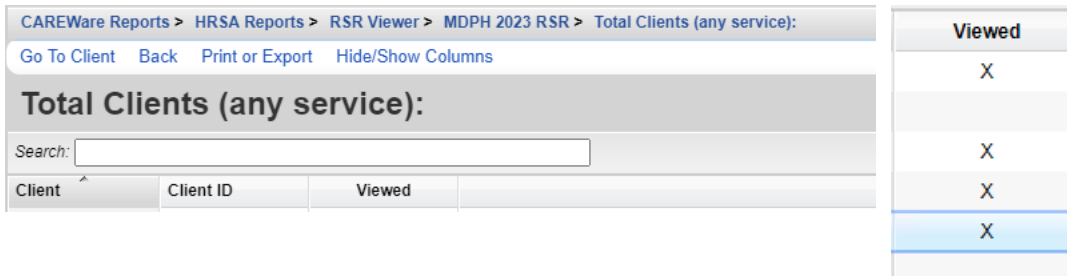
RSR Viewer (Viewing the RSR XML file)

1. From the HRSA Reports page, select "RSR Viewer", then click "Choose File" to upload the RSR export file saved in your agency's folder.
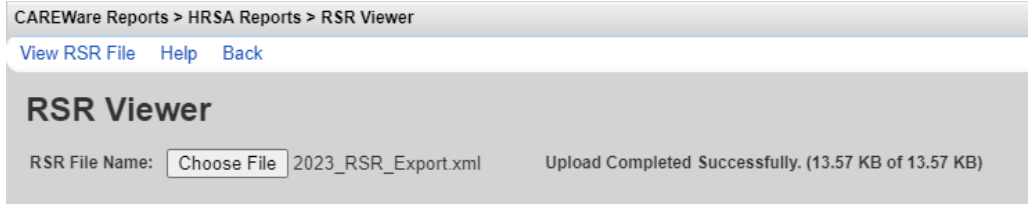
2. Once the file has finished uploading, click "View RSR File". A new window will open showing the components of the RSR. To select a category, highlight the row and click "View Client List", or just double click the row.
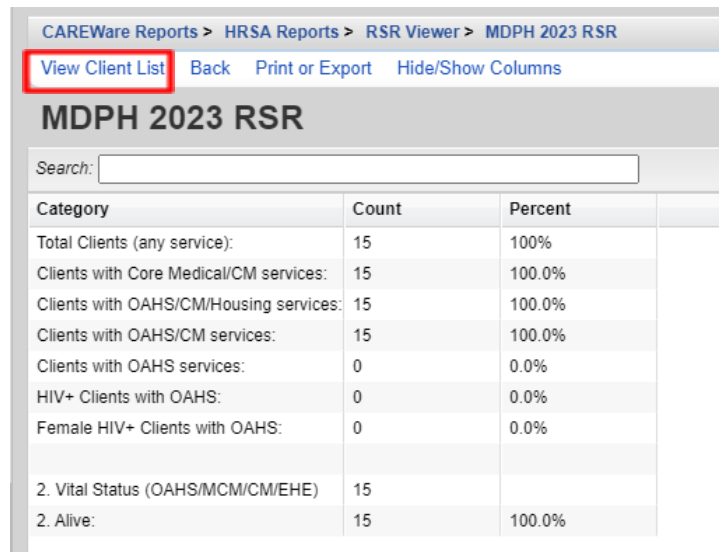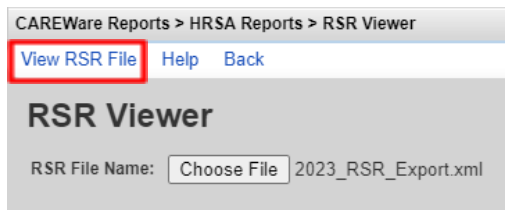
3. Within the category field you clicked, you can select the client record you wish to review. Once you have viewed the client, an X will appear under the "Viewed" column to reflect which clients have been reviewed.

Submitting the RSR

1. Once you have reviewed the RSR XML file , you will need to upload it to the HRSA web application along with the RSR ZIP Code Count Report. Click here to access the HRSA web application and complete your RSR submission.

Should you need further assistance logging into the EHBs to submit your RSR see the following resources:
- EHB's Login Process Overview for External User
- How to Login to EHBs using the Multi-factor Authentication Process Video

For more information, see the 2023 RSR Instruction Manual or contact the helpdesk at CAREWareMAHelpdesk@jsi.com.