

MDPH – CAREWare MA Webinar: 2020 Ryan White Services Report (RSR)

February 9, 2021



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careware

Introductions

- Molly Higgins-Biddle (JSI)
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Learning Objectives

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

- Know when their RSR is due
- Understand RSR changes for 2020
- 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 2020
 - CARES Act Reporting
 - New fields
 - EHE Reporting in the RSR
- Running the RSR in CAREWare
- Running Clients by ZIP code report
- Submitting the Provider Report
- Common questions
- Supporting resources
- Q&A

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.
 - 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.*

RSR Timeline

DATE	EVENT
Late January/ early February	JSI checks data quality and follow-up with agencies that need to edit their data.
February 1	Provider Report opens. Start completing yours now!
February 24	Client-level data RSR XML file must be uploaded to HRSA's web application for MDPH to review.
March 29	All Provider Reports must be complete. MDPH will approve the Provider Reports and client-level RSR XML data files.

NEW FOR THE 2020 RSR



2020 Changes: 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 2020 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.
 - Contact the helpdesk (carewaremahelpdesk@jsi.com) with questions.

2020 Changes: New Fields

- New RSR Client Report questions
 - Is the client new to the service provider?
 - If no, did the client receive at least one service last year?
- You do not need to enter additional information into CAREWare. CAREWare will automatically generate this information based on the client enrollment date and service dates.
 - If enrollment date is missing, the first year of service is used.
 - Note: ensure that the client has a Ryan White eligibility record entered prior to the first service date.

2020 Changes: Ending the HIV Epidemic (EHE) Reporting in the RSR

- EHE recipients and subrecipients should report data on all clients who receive services funded through the EHE awards in the 2020 RSR
- New EHE-specific service category: Initiative Services
 - Report EHE-funded services that don't meet the definition of a RWHAP service under Initiative Services
 - Report EHE-funded services that do meet the definition of a RWHAP service under those respective categories

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 Validation Report Settings

Edit Edit Filter Filter By Funding Source Run Help Back

RSR Validation Report Settings

Year: 2020

Provider Name:

Cross Provider Labs:

Cross Provider ART:

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

- 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: 2020

Provider Name:

Cross Provider Labs:

Cross Provider ART:

Apply Filter:

File name: RSR_Export

Save as type: XML Document

Hide Folders

Save Cancel

Step 3: Using the Client Viewer

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 > RSR Viewer > MDPH 2020 RSR

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

MDPH 2020 RSR

Search:

Category	Count	Percent
Total Clients (any service):	3	100%
Clients with Core Medical/CM services:	3	100.0%
Clients with OAHS/CM/Housing services:	3	100.0%
Clients with OAHS/CM services:	3	100.0%
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)	3	

CAREWare Reports > HRSA Reports > RSR Viewer > MDPH 2020 RSR > Total Clients (any service):

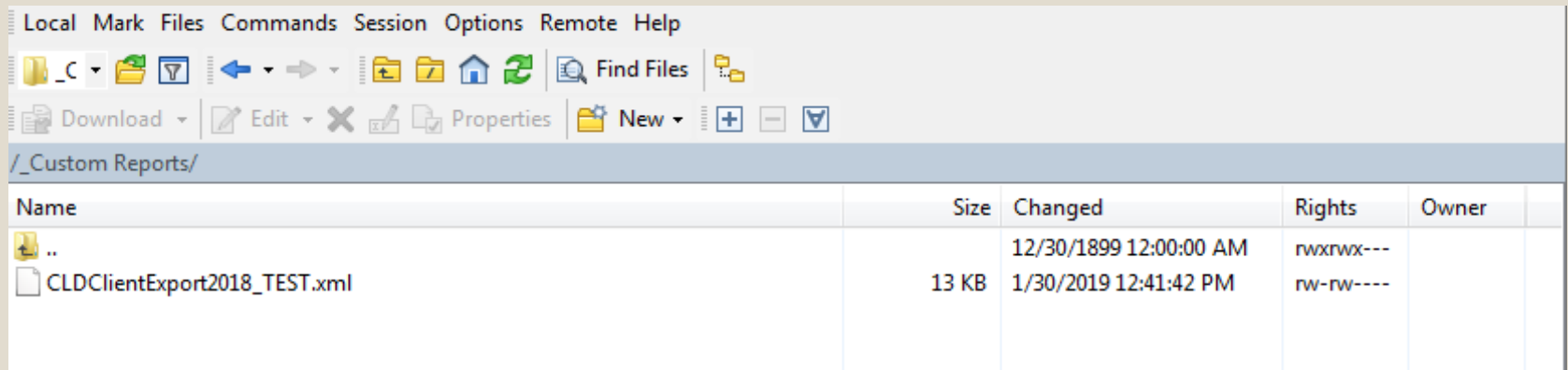
[Go To Client](#) [Back](#) [Print or Export](#)

Total Clients (any service):

Search:

Client	Viewed
	X
	X
	X
	X

Step 4: Accessing the RSR XML file from your computer



Name	Size	Changed	Rights	Owner
..		12/30/1899 12:00:00 AM	rw-rwx---	
CLDClientExport2018_TEST.xml	13 KB	1/30/2019 12:41:42 PM	rw-rw----	

- Use the SFTP instructions document
 - Email carewaremahelpdesk@jsi.com for a copy
- Download WinSCP (free)
- After logging in, copy the file to your computer or secure drive

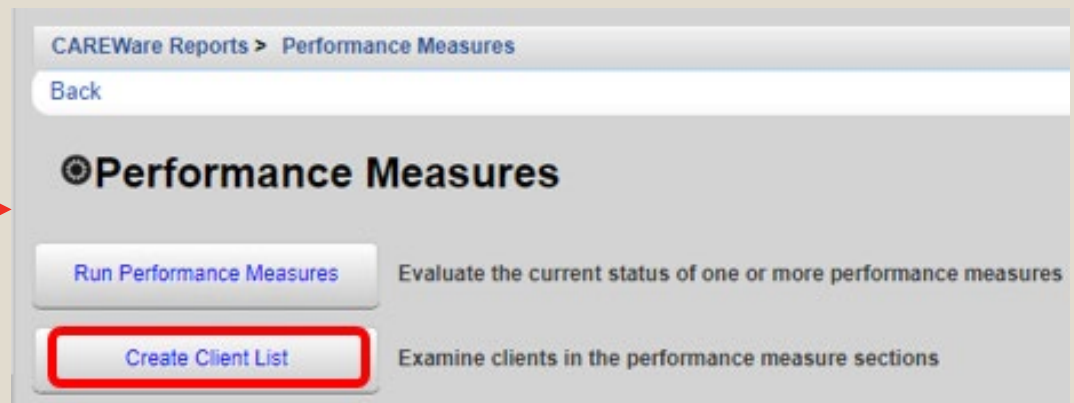
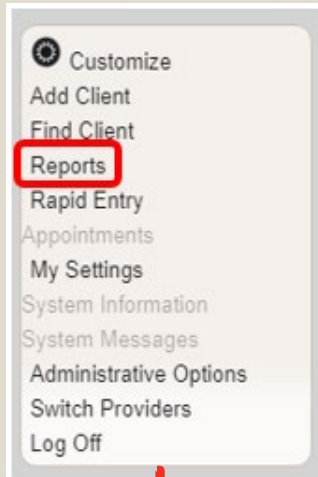
CLIENTS BY ZIP CODES

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



CAREWare Reports > Performance Measures > Client List > Performance Measure Client List Settings

Edit Today Create Client List Back

Performance Measure Client List Settings

Performance Measure:

As Of Date:

Performance Measure Section:

Output Format:



CAREWare Reports > Performance Measures > Client List

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

CAREWare Reports

CAREWare Reports

[HRSA Reports](#) RSR and ADR

[Custom Reports](#) Run or manage custom reports

[Performance Measures](#) Run or Manage Performance Measures

CAREWare Reports > Custom Reports > Manage Run Custom Reports

Manage Run Add Delete Make Read Only Back Help Print or Export

Manage/Run Custom Reports

Search:

Name	CrossTab	Report Type	Description
Clients by zip code (RSR)		Demographics	

Date From:

Date Through:

Clinical Review Year:

Output Display:

Show New Clients only:

Show Clients with Service only:

Show Specifications:

Sum Numeric Fields:



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/login.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.

Completing the 2020 RSR Provider Report

Watch later Share

Reviewing the Provider Report Sections

NAVIGATION

- Inbox
 - Recipient Report
 - Provider Report
 - Check your XML
- Provider Report
- Navigation
 - General Information
 - Program Information
 - Service Information
 - HC&T Information
 - Clients by ZIP Code
 - Import Client-level Data

1. General Information
2. Program Information
3. Service Information
4. HIV Counseling & Testing Information (HC&T)
5. Clients By Zip Code
6. Import Client-level Data

24

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.
- 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 2020 or prior**, 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 2020 for the data to be included in the RSR. Add a new entry with a 2020 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.

Common Questions

- How do I report the ZIP Code of a client who has moved during the reporting period?
- If a client has changed ZIP Codes during the reporting period, report the most recent known ZIP Code for that client.

Common Questions

- How do I report the ZIP Code of clients experiencing homelessness?
- When a ZIP Code location is unavailable for a client experiencing homelessness, providers should use the service location ZIP Code as a proxy.

Common Questions

- How do I report a client in the Clients by ZIP Code section if his or her ZIP Code is unknown?
- Providers should use the service location ZIP Code as a proxy. For the small number of clients for whom residence is not known or for whom a proxy is not available, report the client's ZIP Code as "99999" to indicate that the residence is unknown.

SUPPORTING RESOURCES

RSR Data Updates and Reports

RSR Data Updates and Reports

January 2021



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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Report Instructions

2020

Instructions for Data Reports

June 2020, v2.1

Yellow highlights indicate changes since the last version.



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This document describes the different data reports that are available in the Massachusetts CAREWare system, and provides instructions on how to run them.

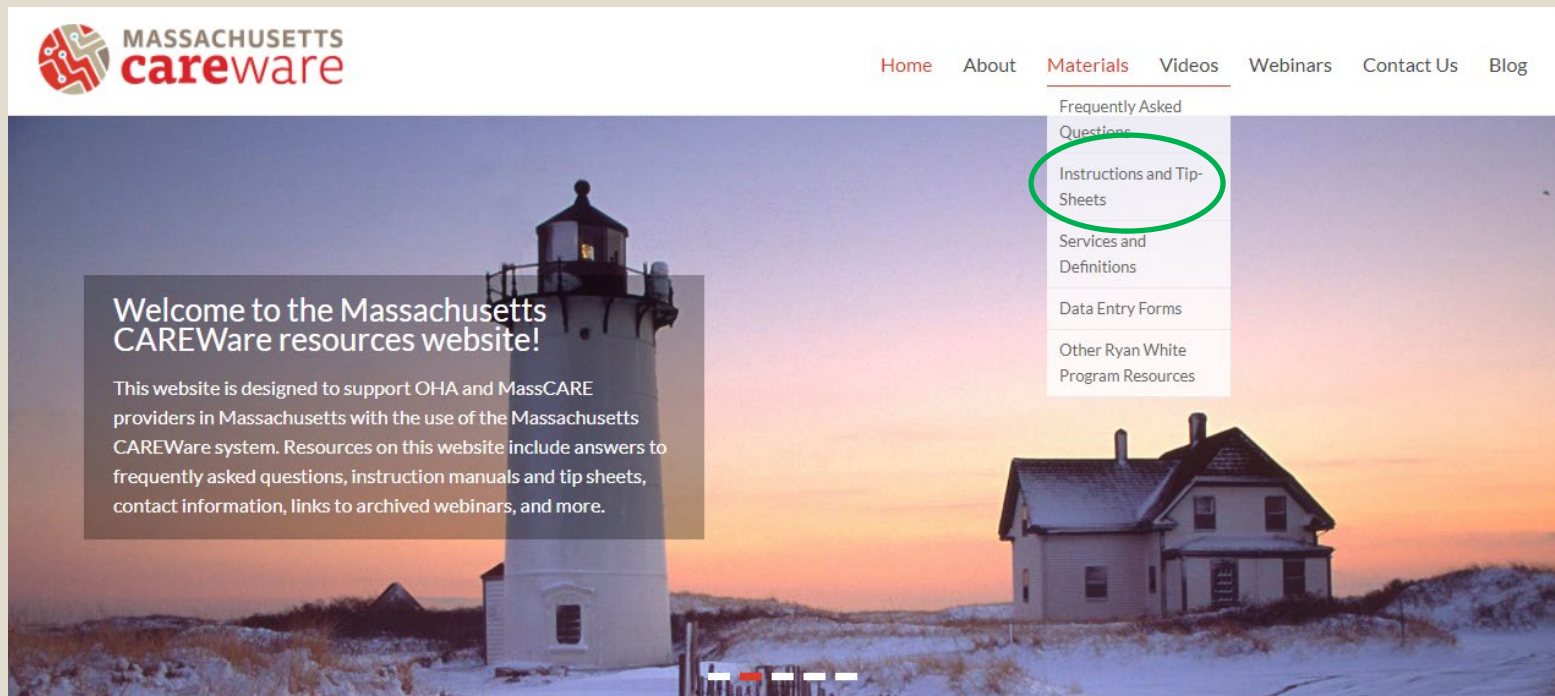
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How to find these resources

Find this and other resources at

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



The screenshot shows the homepage of the Massachusetts CAREWare website. The header includes the logo and navigation links: Home, About, Materials, Videos, Webinars, Contact Us, and Blog. The 'Materials' link is highlighted with a red underline, and a dropdown menu is open, listing several options. The 'Instructions and Tip-Sheets' option is circled in green. The main content area features a large image of a lighthouse and a house in a snowy landscape, with a text box on the left.

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Home About **Materials** Videos Webinars Contact Us Blog

- Frequently Asked Questions
- Instructions and Tip-Sheets**
- Services and Definitions
- Data Entry Forms
- Other Ryan White Program Resources

Welcome to the Massachusetts CAREWare resources website!

This website is designed to support OHA and MassCARE providers in Massachusetts with the use of the Massachusetts CAREWare system. Resources on this website include answers to frequently asked questions, instruction manuals and tip sheets, contact information, links to archived webinars, and more.

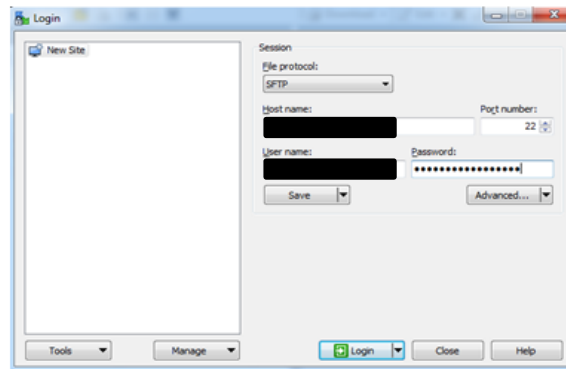
SFTP Transfer Instructions

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) (<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
- Email us anytime at: CAREWareMAhelpdesk@jsi.com
- Call 617-385-3991
- Fax 617-482-0617