

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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2021 Changes

The key changes for the 2021 RSR are:

- 1. All Ryan White HIV/AIDS Program (RWHAP) agencies will be required to complete Eligible Services reporting beginning with the 2021 RWHAP Services Report (RSR).
 - a. The new Eligible Services reporting requirement expands Eligible Scope reporting in the RSR to include RWHAP-related funding.
 - b. As of the 2021 data submission, recipients and subrecipients 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
- 2. Coronavirus Aid, Relief, and Economic Security (CARES) Act recipients and subrecipients should report eligible RWHAP clients that receive services funded through the CARES Act in the 2021 RSR.
 - a. If your agency receives CARES Act funding, your RSR will include clients receiving services funded through the CARES Act automatically in CAREWare MA.
 - b. The purpose of the COVID-19 Data Report (CDR) is to provide HRSA HAB with an understanding of how CARES Act funds are being used to support Ryan White HIV/AIDS Program (RWHAP) clients.
 - c. For more information, see the <u>2021 RSR Instruction Manual</u> or contact the helpdesk at <u>CAREWareMAHelpdesk@jsi.com</u>.



Navigating to RSR Reports

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

× CW6 - Login × +	
٩	Customize
	Add Client
t of Health and Human Services	Find Client
254	Reports
ources and Services Administration	Rapid Entry
	Appointments
Submit	My Settings
Cushin	System Information
Login	System Messages
Enter your CAREWare Username	Administrative Options
Username:	Switch Providers
	Log Off

- 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	
CAREWare	Reports
HRSA Reports	RSR and ADR
Custom Reports	Run or manage custom reports
Performance Measures	Run or Manage Performance Measures
Client Data Reports	Run reports on client information
Financial Report	Setup and run the financial report



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).

CAREWare Reports		Custom Repo	rts
CAREWare	Reports		
HRSA Reports	RSR and ADR	Manage/Run Custom Reports	Run or manage custom reports
Custom Reports	Run or manage custom reports	Export Custom Reports	Export custom report definitions to a portable xml file
Performance Measures	Run or Manage Performance Measures	Import Custom Reports from	Import custom report definitions from a portable xml file
Client Data Reports	Run reports on client information	an xml file	
Financial Report	Setup and run the financial 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 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

Manage Run Add Delete	Make Read Only Ba	ack Help Print	or Export	
Manage/Run Cus	stom Repor	ts		
Search:				
Name	CrossTab	Report Type	Description	Read Only
TLSMissingDemographics		Demographics		
TLSMissingRyanWhiteEligibility		Demographics		
TLSServiceDetailReport		Service		
Viiral Load Suppression <=199		Lab		
Viral Load List (All Results)		Lab		
Viral Load Suppression >=200		Lab		

clients. That way all of your eligible clients will be reported to HRSA.

Remember: If your agency receives CARES Act funding, make sure that all clients who are receiving CARES Act-funded services are designated as Ryan White Eligible, and compare the total eligible number of clients to the number you reported in the CDR.

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

CAREWare Rep	orte > Custom	Reports > Manage Rur	Custom Reports		
CAREMONE	custom	Neporta - Manage Rai	reusion reports		
Manage Run	Add Delete	Make Read Only B	ack Help Print	or Export	
Manage	/Run Cu	istom Repor	ts		
manage	intani ot	iotom nopol			
Search:					
Name	*	CrossTab	Report Type	Description	Read Only
TLSMissingDemo	ographics		Demographics		
TLSMissingRyan [®]	WhiteEligibility		Demographics		
TLSServiceDetail	IReport		Service		
Viiral Load Suppr	ession <= 199		Lab		
Viral Load List (A	II Results)		Lab		
Viral Load Suppre	ession >=200		Lab		



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.

CAREWare Reports > Custom Re	eports > Manage/Run Cust	om Rep	orts > 1	FLS			
Edit Parameters Selected Prov	viders Open in New Tab	PDF	CSV	E			
Run Report							
	Parameters						
Date From:	12/15/2020						
Date Through:	12/15/2021				Save	Cancel	
Clinical Review Year:	2021				Rur	n Report	
Show New Clients only:							Parameters
Show Clients with Service only:						Date Fron	12/15/2020
Show Specifications:						Date Through	12/15/2021
Sum Numeric Fields:						Clinical Review Yea	r: 2021

- 4. Click on "Run Report".
- 5. The report will look like this:

TLSMissingRyanWhiteEligibility

Data Scope: Report Start Date: Report End Date:	MDPH 12/15/2020 12/15/2021						
Name:	Gender:	DOB:	Race/Ethnicity:	Enrl Date:	Enrl Status:	Is RW Eligible?:	Last RW
							Service:
2020, test	Male	01/01/1980	Not Specified		Active	No	01/11/2021
alpha, bet	Female	01/01/1975	Not Specified		Active	No	01/13/2021
bet, alpha test	Female	07/08/1994	White (non-Hispanic)		Active	No	07/28/2021
Bobcat, Bates	Female	01/01/2016	Not Specified		Active	No	01/21/2021
Smith, Bil	Male	01/01/1970	White (non-Hispanic)	11/05/2018	Referred or Discharged	No	10/21/2021

Number of Records : 5

(Count is unduplicated across providers)

* - Restricted Field



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 Res	sults > Demographics
Delete Client Back	
Demograp	hics
Personal Info	Name: asd, asd asd Gender: N
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: 01
Eligibility	Not Eligible for Ryan White

2. Click the "Add Record" link



3. Edit the date so it's in 2021 (use 12/31/2021 if there isn't a specific date where the client became eligible)

Demographics > Elig	gibility > Add
Save Back	
Add	
Eligibility Date:	12/15/2021
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.

CAREWare Reports				
		CAREWare Reports > Perform	ance Measures	
CAREWare Reports		Back		
HRSA Reports	RSR and ADR	Performance	Measures	
Custom Reports	Run or manage custom reports	Run Performance Measures	Evaluate the current status of one or more performance measures	
Performance Measures	Run or Manage Performance Measures	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.

CAREWare Report	rts > Performance Measures > Client List					
Use Selected E	Back Print or Export					
Client Lis	Client List					
Search: zip						
Code	Name	Description				
ZIP01	Clients with missing zip code	Produce list of clients with a missing zip code				

3. Set the As of Date to 12/31/2021 then Create Client List.

Performance Measure Client List Settings						
Performance Measure:	Clients with missing zip code					
As Of Date:	12/31/2021					
Performance Measure Section:	In Numerator					
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"

CAREWare Rep	orts > Performance Measures > C	Demographics
Go To Client	Back Print or Export	Delete Client Back
Clients	with missing zip c	
Search:		Personal Info Name: Test, Test Gender: Male DOB: 01/01/2000
Client	Viewed	Change URN TST \$0101001U
Test, Test		123 Daisy Lane
smith, rob		Somerset, MA

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.

CAREWare Repor	ts > Custom Re	eports > Manage	Run Custo	m Reports			
Manage Run A	dd Delete	Make Read Only	Back I	Help Print of	or Export		
Manage/Run Custom Reports							
Search: zip							
Name	v	CrossTa	b Rej	oort Type	Description		
Clients by zip code	(RSR)		Der	nographics			
Clients by zip code (RSR)							
Olients by zip code (RSR)							
Run Report	Start Date : 12/7	Start Date : 12/15/2020, End Date : 12/15/2021, Clients with services					
Report Layout	Clients by zip code (RSR), Demographics						
Field Selection	ZipCode, CountOfClients						
Zip code NOT NULL AND Has RW Funded Service in Span (Date Span Between 12 AND 0 months before the end date or as of date (12/16/2020 And 12/15/2021). AND Cross-Provider = No) = Yes AND Is RW Eligible In Span (Date Span Between 12 AND 0 months before the end date or as of date (12/16/2020 And 12/15/2021). AND Cross-Provider = No) = Yes							

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 the desired range. Then save.

CAREWare Reports > Custom Report	orts > Manage/Run Custom Reports > Clients by zip code (RSR) > Run Report > Edit
Save Cancel	
Run Report	
	Parameters
Date From:	12/15/2020
Date Through:	12/15/2021
Clinical Review Year:	2021

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

CAREWare Reports > Custom Re	ports > Manage/Run Cust	om Reports >	Clients by	zip cod	e (RSR) > Run Rep	port
Edit Parameters Selected Provi	iders Open in New Tab	PDF CS	/ Excel	Help	Back	
Run Report						
	Parameters					
Date From:	12/15/2020					
Date Through:	12/15/2021					
Clinical Review Year:	2021					
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.

	CSV export generation is now complete. Download Clients by zip code (RSR)	
File name:	Clients by zip code (RSR)	~
Save as type:	CSV File	~
Hide Folders	Show Chefits with Service only:	Cancel
	snow clients with Service only:	



For the next step, you will need to retrieve the file from the SFTP site. For instructions on how to log in to the SFTP site, please see page 14 of this guide.

6. For ZIP codes starting with "O" 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.

4	А	В	С	ſ	Format Ce	lls	-						2
1	ZipCode	CountOfC	lients							1			
2	1610	1			Numbe	Alignment	Font	Border	Fill	Protectio	n		
3	1852	2		1	Catego Genera	ry:	Sample						
4	2110	1			Numbe	er 🌔	ZipCod	de					
5	2141	1			Accour	nting	<u>T</u> ype:						
6	2389	1			Time		Zip Cod	le le + 4					
7	2657	1			Percen Fractio	tage n	Phone I	Number	nher				
8				1	Scienti Text	fic	Social S	ecunty Nul	libei				
					Custor	n • formats are usef	Locale (In English	ocation): (United Sta king list an	ates) d databas	e values.			
											0	ĸ	Cance

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."

	А	В
1	ZipCode	CountOfClie
2	01610	1
3	01852	2
4	02110	1
5	02141	1
6	02389	1
7	02657	1
0		



HRSA Reports

Click on "HRSA Reports" to get started.

CAREWare Reports		
CAREWare	Reports	
HRSA Reports	RSR and ADR	
Custom Reports	Run or manage custom reports	
Performance Measures	Run or Manage Performance Measures	
Client Data Reports	Run reports on client information	
Financial Report	Setup and run the financial report	

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".

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					



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.

CAREWare Report	CAREWare Reports > HRSA Reports > RSR Validation Report Settings > RSR Validation Report					
View Client List	Back Print or Export					
RSR Vali	dation 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			

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.

CAREWare Repor	ts > HRSA Reports > F
Go To Client Ba	ack Print or Export
Clients m	nissing Pove
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".

HRSA Repo	rts
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

2. Make sure the Report Year is 2021 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.

re Reports > HRSA F	Reports > RSR Validation Report Se	t j			
Cancel					
R Validatio	n Report Settings		\bigcirc	Report complete	
Year:	2021				
Provider Name:				Download RSR file	
ross Provider ART:	No sharing set up				
Provider Eligibility:	No sharing set up				
oss Provider Labs:	No sharing set up				- 1 C
	re Reports > HRSA Cancel R Validatio Year: Provider Name: ross Provider ART: Provider Eligibility: oss Provider Labs:	re Reports > HRSA Reports > RSR Validation Report Se Cancel K Validation Report Settings Year: 2021 Provider Name:	re Reports > HRSA Reports > RSR Validation Report Set Cancel R Validation Report Settings Year: 2021 2 Provider Name: ross Provider ART: No sharing set up Provider Eligibility: No sharing set up oss Provider Labs: No sharing set up	re Reports > HRSA Reports > RSR Validation Report Set Cancel R Validation Report Settings Year: 2021 2 Provider Name: ross Provider ART: No sharing set up Provider Eligibility: No sharing set up oss Provider Labs: No sharing set up	re Reports > HR\$A Reports > R\$R Validation Report Set Cancel R Validation Report Settings Year: 2021 Provider Name: ross Provider ART: No sharing set up Provider Eligibility: No sharing set up Soss Provider Labs: No sharing set up

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.

File name:	RSR_Export	~
Save as type:	XML Document	~
Hide Folders	Save Cancel	



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.

CAREWare Reports > HRSA Reports > RSR Viewer	
View RSR File Help Back	
RSR Viewer	
RSR File Name: Choose File 2019_RSR_Export.xml	Upload Completed Successfully. (25.38 KB of 25.38 KB)

5. Once the file has finished uploading, click View RSR File. A new window will open whereyou 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.

CAREWare Reports > HRSA Reports >	RSR Viewer > MI	OPH 2020 RSR
View Client List Back Print or Exp	ort	
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	

 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.

	Viewed
CAREWare Reports > HRSA Reports > RSR Viewer > MD	PH 2020 RSR > Total Clients (any service): X
Go To Client Back Print or Export	
Total Clients (any service):	Х
Search	X
Client Viewer	X
Client	



Running the RSR

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

HRSA Report	rts
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

2. Make sure the Report Year is 2021 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.

CAREWare Reports > HRSA	Reports > RSR Validation Report Set	t	
Save Cancel			
RSR Validatio	on Report Settings		Report complete
Year:	2021		
Provider Name:			Download RSR file
Cross Provider ART:	No sharing set up		
Cross Provider Eligibility:	No sharing set up		
Cross Provider Labs:	No sharing set up		
	_		

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

File name:	RSR_Export	~
Save as type:	XML Document	~
Hide Folders	Save	Cancel

 Once the file has been transferred from the SFTP to your machine, the XML file will need to be uploaded to the HRSA EHB. <u>Click here</u> 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).

🚅 New Site	Session <u>F</u> ile proto SFTP	ocol:	
	<u>H</u> ost nam	ne:	Port number:
	mdphcw	.ixn.com	22 🛋
	<u>U</u> ser nam	ne: <u>P</u> assw	vord:
			•••••
	Sa	ive 🔽	Advanced

- 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.

Local Mark Files Commands Sessio	on Options Remote Help					
🖶 🔁 🤕 Synchronize 🔳 🧬 💽	🛞 🎒 Queue 🔹 Transfer Settings Default		• <i>💋</i> •			
	🔛 New Session					
🖹 My doci 🔹 🗂 • 🕎 • 🛛 🖛 • ⇒	- 🗈 🗈 🏠 🗶 🖫		📕 JSI 🛛 🕶 🚰 🕶 🕎 🗸 🦛	• 🔶 • 💼 🗖 🏠 🎜	🖻 Find Files	
📓 Upload 🔹 📝 Edit 🔹 🗙 📝 🕞	Properties 🎬 New 🔹 🛨 🖃 🗹		Edit • 3	K 📝 🕞 Properties 📑	New - 🛨 🗖 🗹	
			/JSI/			
Name	Size Type	Chan	Name	Size	Changed	
📕	Parent directory	1/21/	₽ .		12/30/1899 12:00:00 AM	
CAREWare	File folder	1/25/	Andrew State	1 KB	5/1/2020 1:45:44 PM	
Custom Office Templates	File folder	7/28/	C	1 KB	5/1/2020 1:45:44 PM	
General Administration	File folder	12/1/	California and a state t xt	1 KB	5/1/2020 1:45:44 PM	
New folder	File folder	1/19/				
NYSFPTC	File folder	1/19/				
Purchase Orders	File folder	12/1/				
Zoom	File folder	1/19/				
<		>	<			3
JB of 0B in 0 of 7		5 hidden	0 B of 2.20 KB in 0 of 3			
					SETP-6	0.02.04

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.