RSR Data Updates and Reports
January 2022

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

2021 Changes

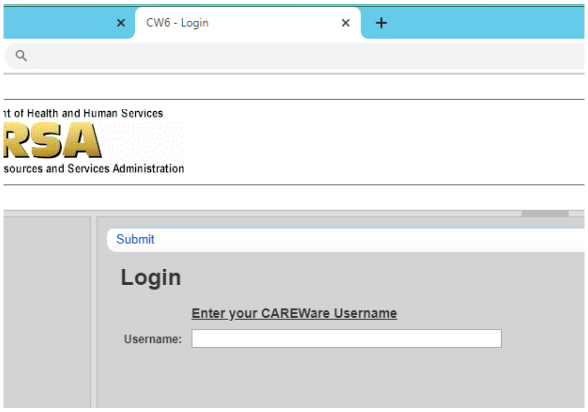
The key changes for the 2021 RSR are:

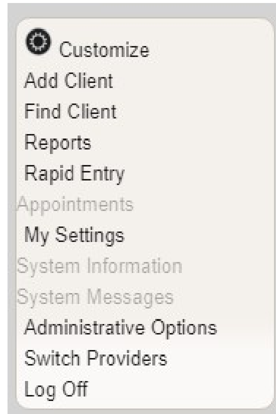
1. All Ryan White HIV/AIDS Program (RWHAP) agencies will be required to complete Eligible Services reporting beginning with the 2021 RWHAP Services Report (RSR).
    a. The new Eligible Services reporting requirement expands Eligible Scope reporting in the RSR to include RWHAP-related funding.
    b. 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 2021 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.

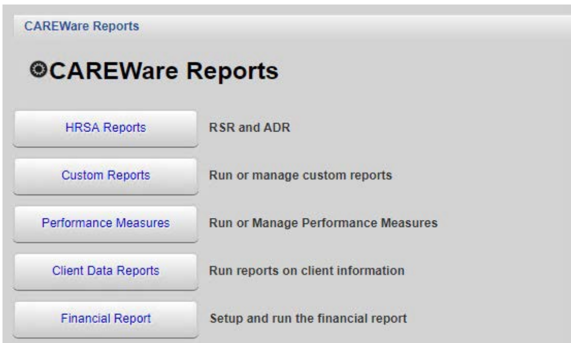




2. Click on “Reports” from the main menu.
3. This will bring up a Reports menu of different types of reports that can be run.

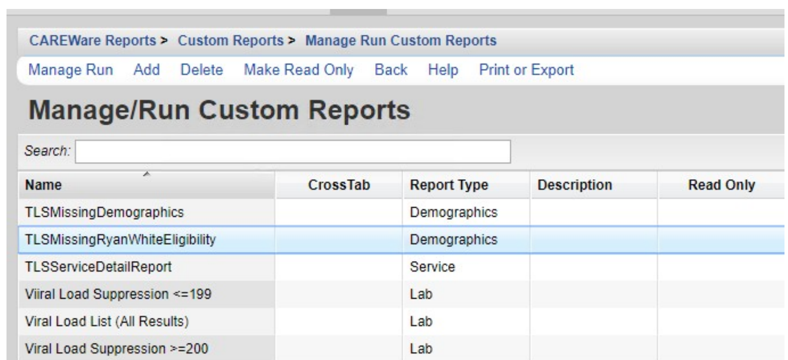
Custom Reports

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

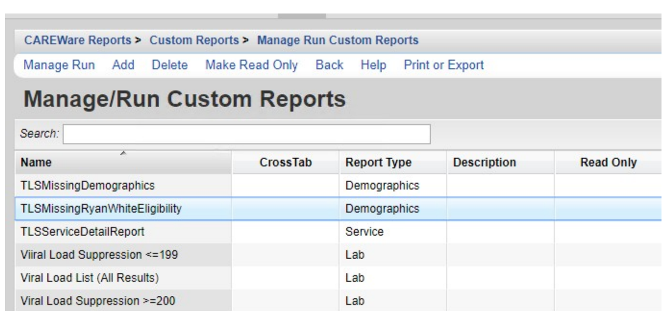
This report shows a list of clients that are not eligible for receiving Ryan White services. If your agency receives funding through the MA Department of Public Health and submits RSR report to HRSA, we recommend running this report before you submit the RSR to make sure it includes all of your Ryan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



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		

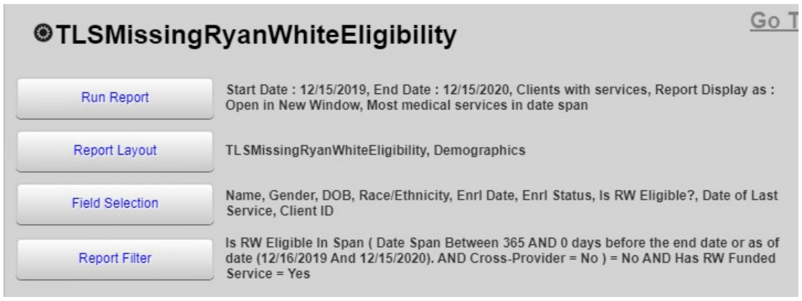
Remember: If your agency receives CARES Act funding, make sure that all clients who are receiving CARES Act-funded services are designated as Ryan White Eligible, and compare the total eligible number of clients to the number you reported in the CDR.

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

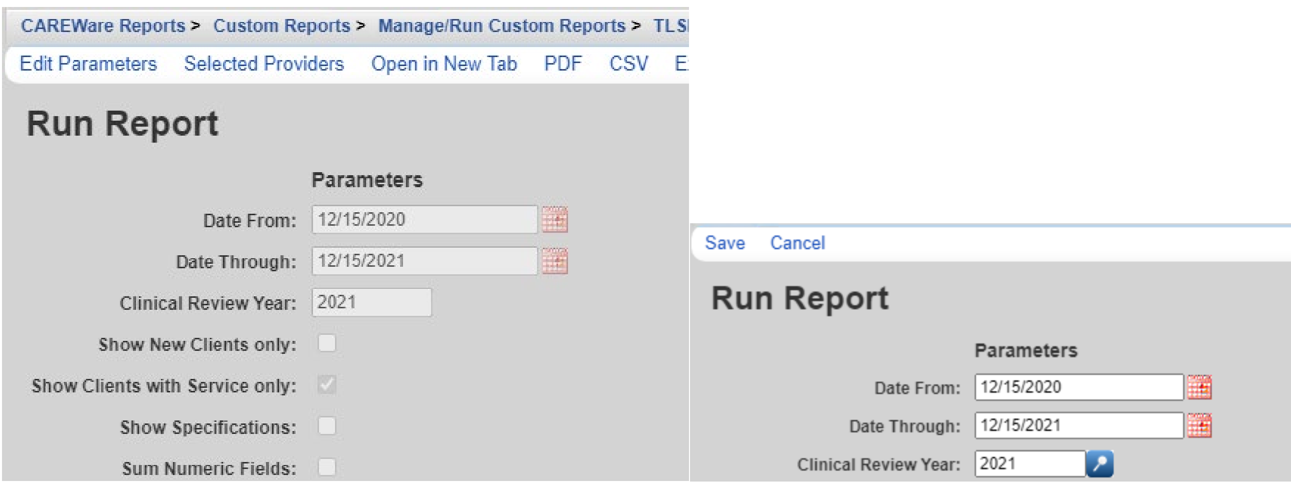


Name	CrossTab	Report Type	Description	Read Only
TLSMissingDemographics		Demographics		
TLSMissingRyanWhiteEligibility		Demographics		
TLSServiceDetailReport		Service		
Viiral Load Suppression <=199		Lab		
Viral Load List (All Results)		Lab		
Viral Load Suppression >=200		Lab		

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

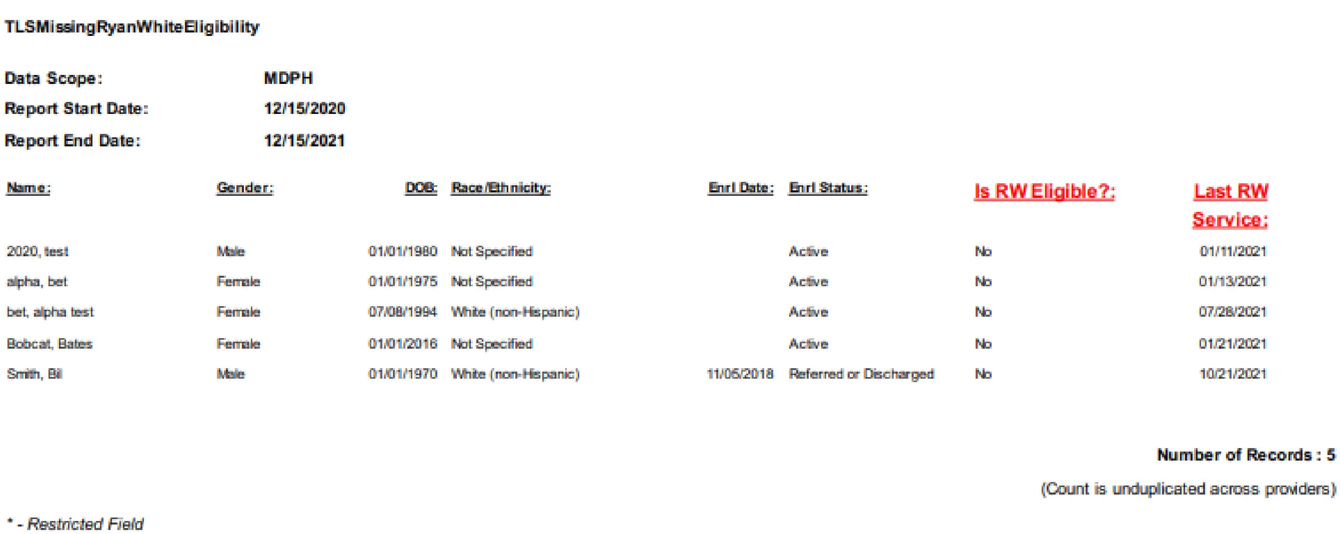


3. In the Run Report page, select Edit and modify the date range to the desired range. Then save.



4. Click on "Run Report".

5. The report will look like this:



TLSMissingRyanWhiteEligibility

Data Scope: MDPH
Report Start Date: 12/15/2020
Report End Date: 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

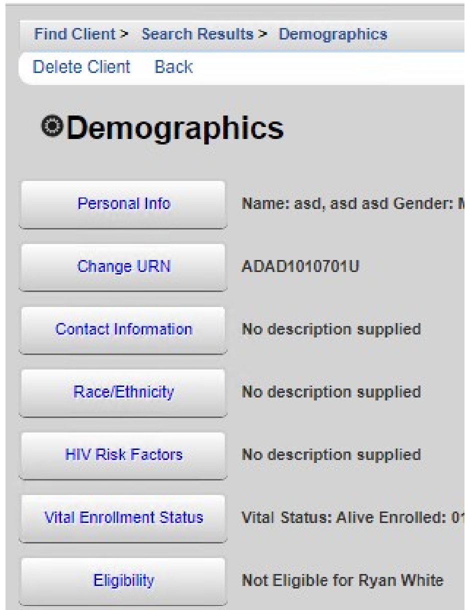
Number of Records : 5
(Count is unduplicated across providers)

* - *Restricted Field*

Correcting Ryan White Eligibility Status

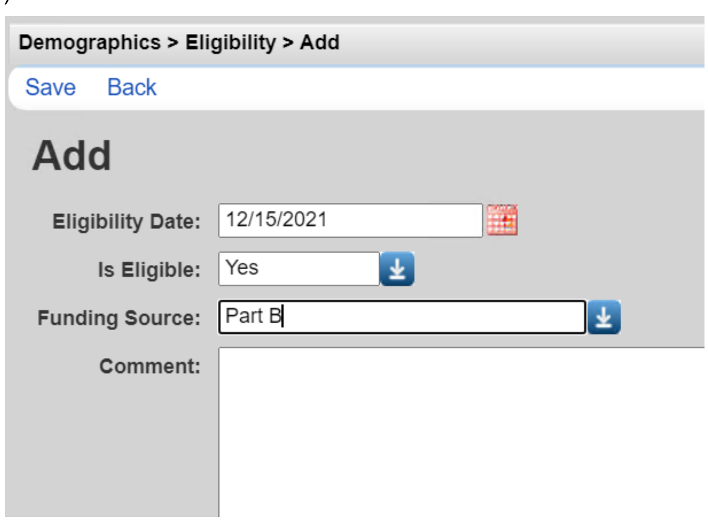
Follow these steps to update a client's Ryan White Eligibility Status:

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



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)

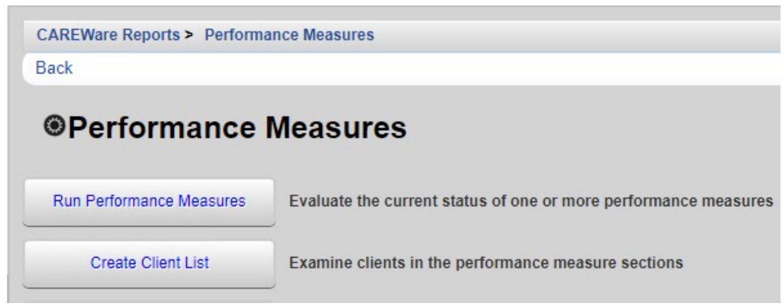


4. Select "Part B" for the funding source and "Yes" for "Is Eligible"
5. Click Save

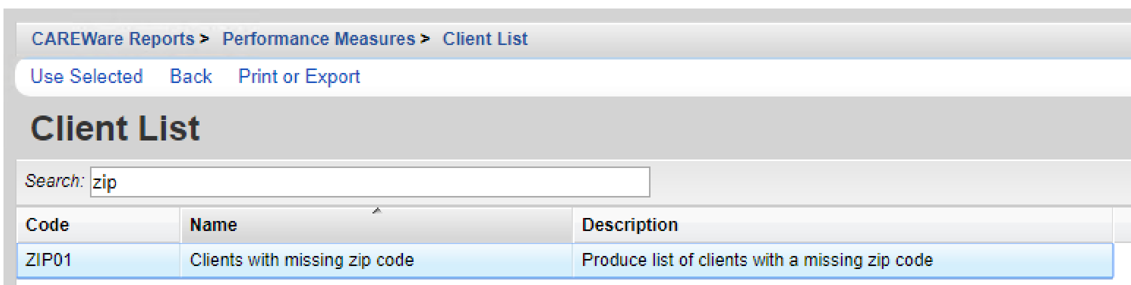
Correcting Missing ZIP Codes

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.

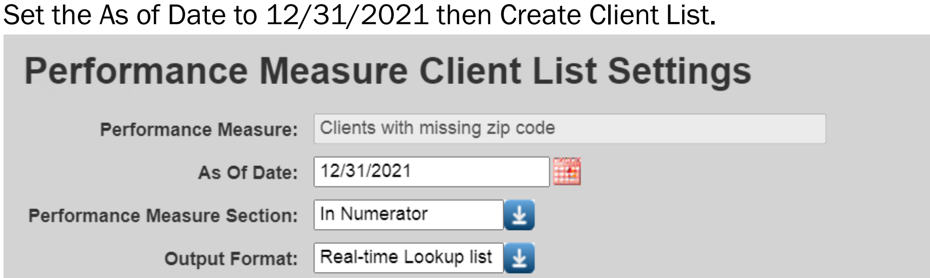
1. Under CAREWare Reports, select Performance Measures then Create Client List.



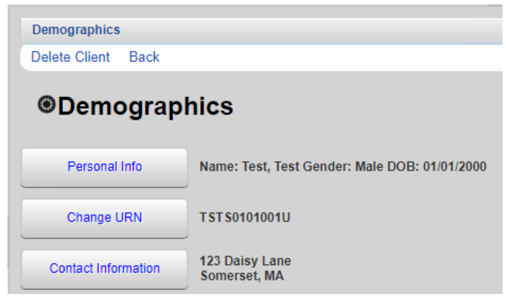
2. To find the missing ZIP code report, type “zip” into the search bar and the report will appear. Select it by highlighting the row and click Use Selected to run the report.



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



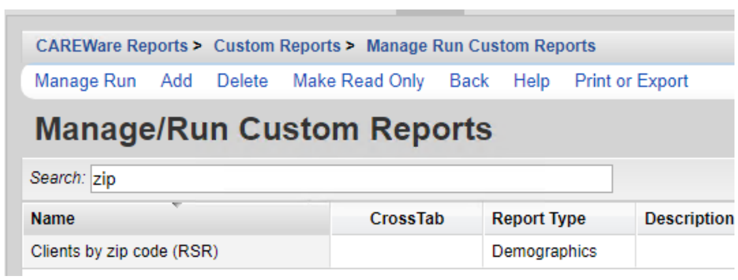
4. A new tab will open with a list of clients. You can select a client by double clicking on their name, or highlighting the row and click Go To Client, which will bring you to the Demographics page of the client record where you can add their ZIP code. For clients with an unknown ZIP Code:
    a. Use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

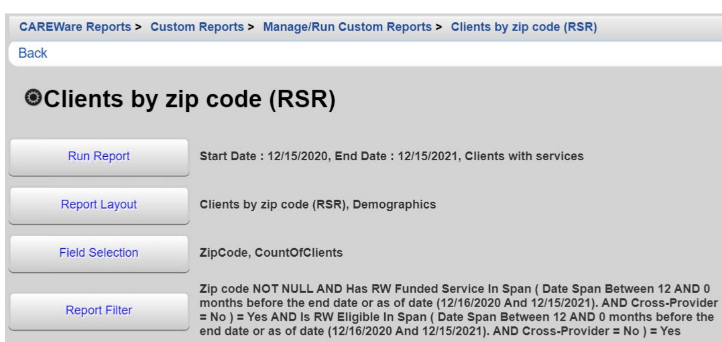


Clients by ZIP Code

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.

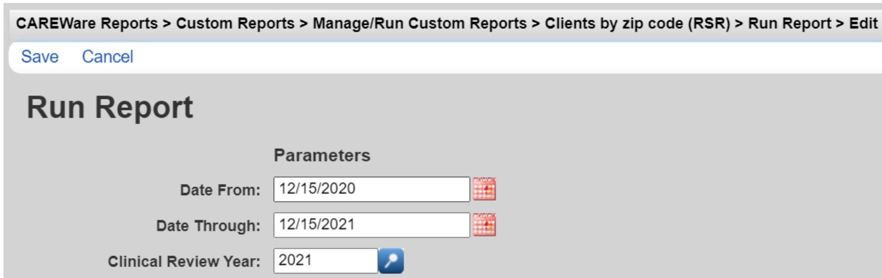
1. Select Clients by ZIP code (RSR) from the list of reports and select Manage Run.



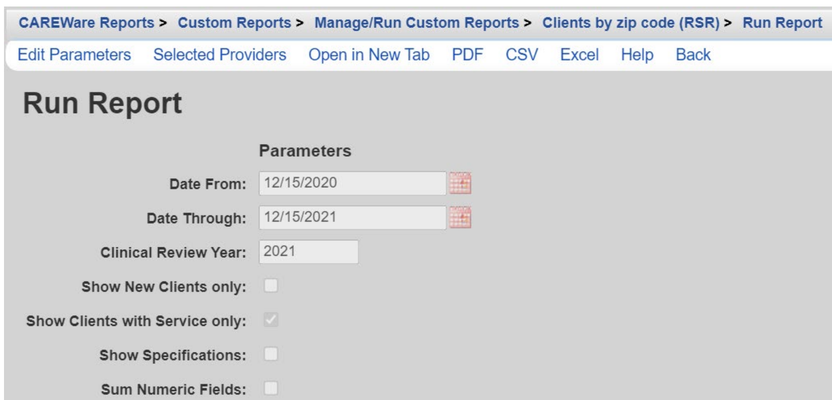


2. Under the report page for Clients by ZIP code, select Run Report.

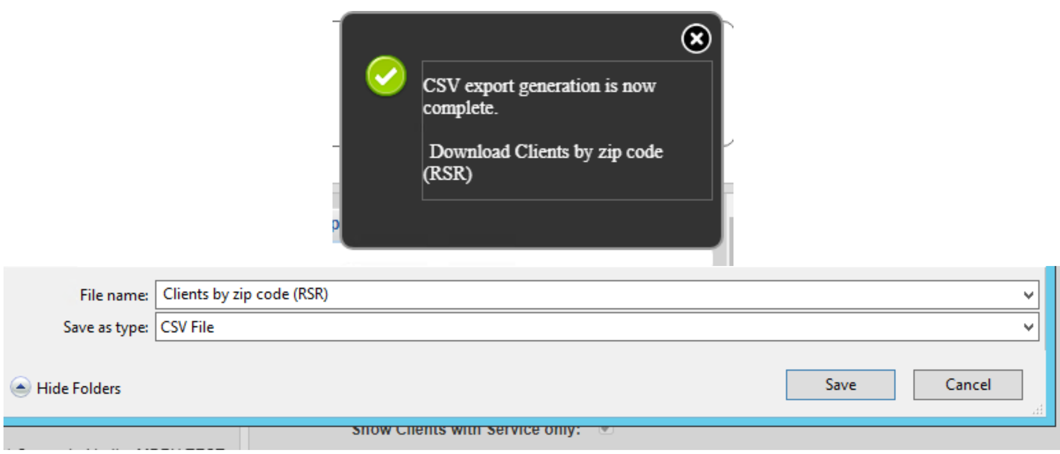
3. In the Run Report page, select Edit and modify the date range to the desired range. Then save.



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



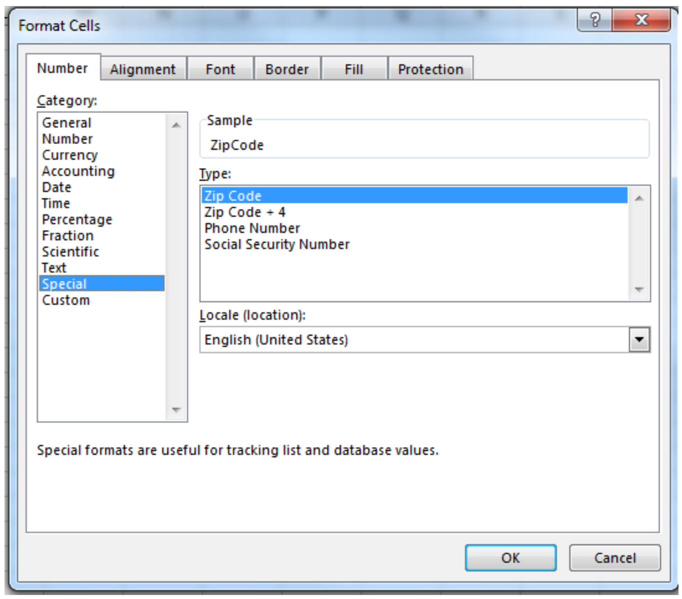
5. Click Download Clients by ZIP code (RSR) in the pop-up window and save the file toyour agency folder.



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

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."

	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

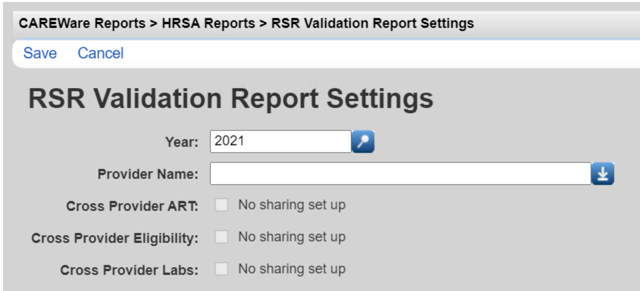
Click on “HRSA Reports” to get started.

RSR Validation Report

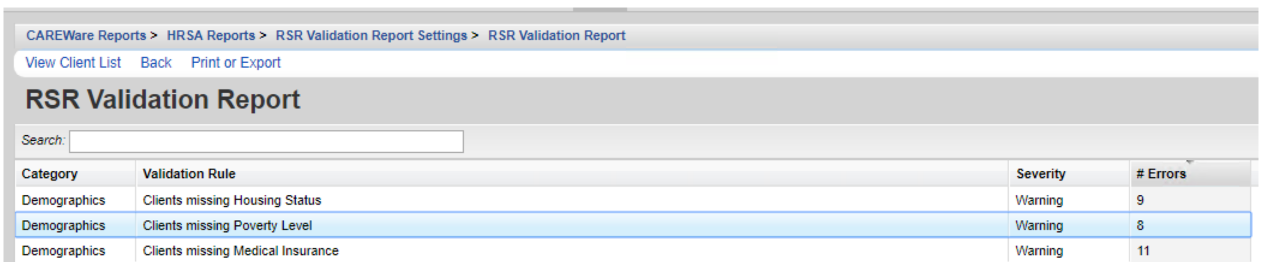
The RSR Validation report provides a list of all errors, warnings and alerts that are built into HRSA’s Electronic Handbook (EHB). Warnings and alerts indicate areas where data may be incorrect or missing. However, not all warnings or alerts may need to be corrected. Warnings must have a comment explaining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

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

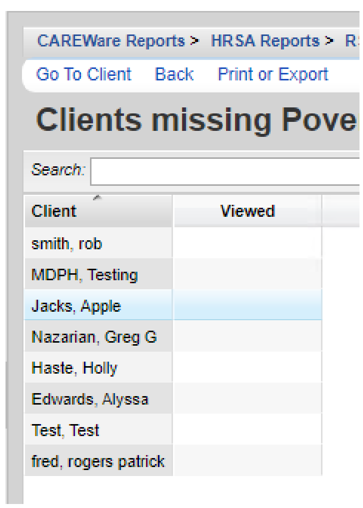
2. From the RSR Settings page, select Edit to adjust the reporting year. Then click Save and Run.



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.

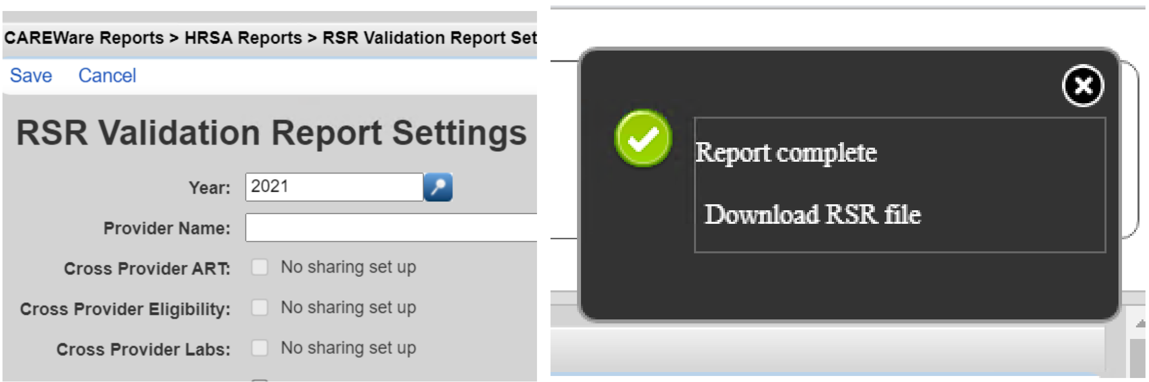


RSR Client Report Viewer

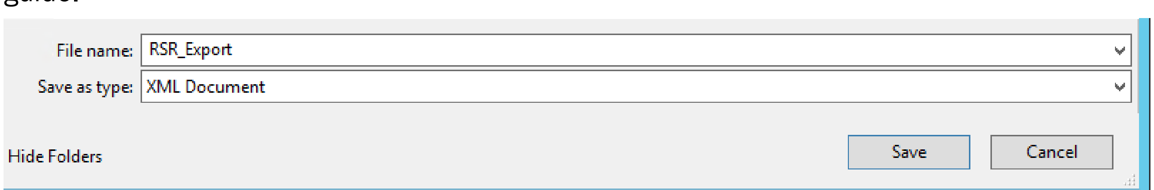
The Client Report Viewer shows frequencies of the data included in the RSR file, including a count of missing data.

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

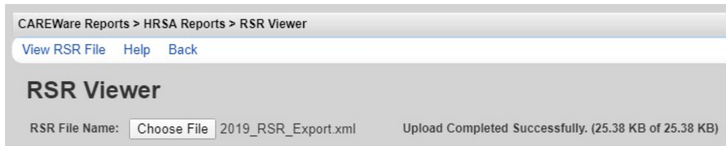
2. Make sure the Report Year is 2021 and click “Run” to generate the report. Once it is finished, click Download RSR file in the pop-up window in the top right corner of the page.



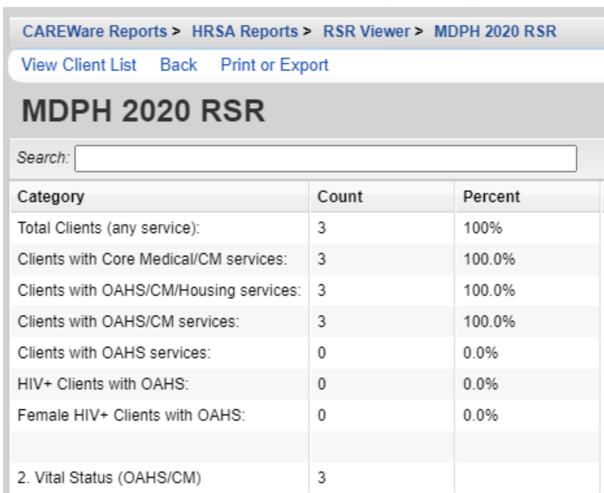
3. A new download folder will open prompting you to save the RSR export file. Save this file to your agency’s designated folder on the G drive where you will need to access it later in this guide.



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.



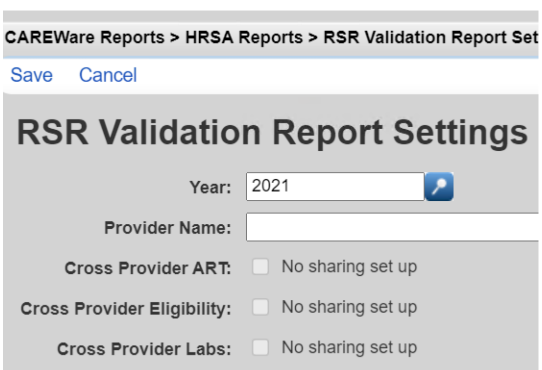
Category	Count	Percent
Total Clients (any service):	3	100%
Clients with Core Medical/CM services:	3	100.0%
Clients with OAHS/CM/Housing services:	3	100.0%
Clients with OAHS/CM services:	3	100.0%
Clients with OAHS services:	0	0.0%
HIV+ Clients with OAHS:	0	0.0%
Female HIV+ Clients with OAHS:	0	0.0%
2. Vital Status (OAHS/CM)	3	

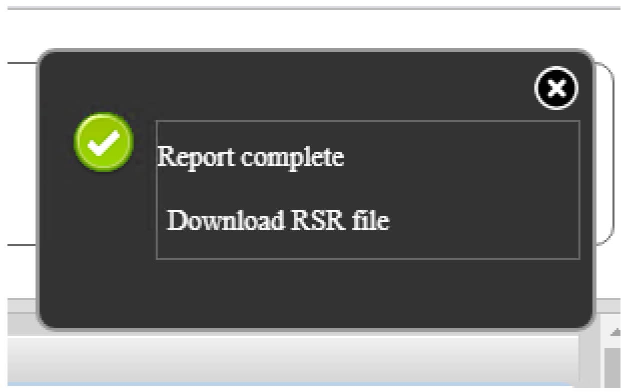
6. Within the category field you clicked, you can select the client record you wish to review. Once you have viewed the client, an X will appear under the Viewed column to reflect which clients have been reviewed.

Running the RSR

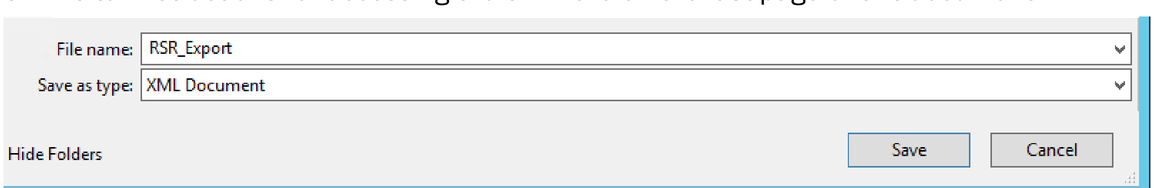
1. From the HRSA Reports menu, click on “RSR Client Report”.

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.

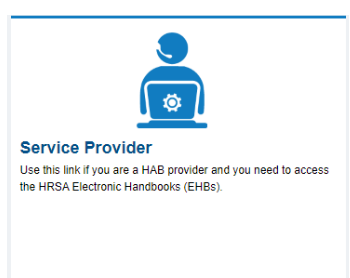




3. A new download folder will open prompting you to save the RSR export file. Save this file to your agency’s designated folder on the G drive where you will need to access it through the SFTP site. Instructions for accessing the SFTP are on the last page of this document.



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

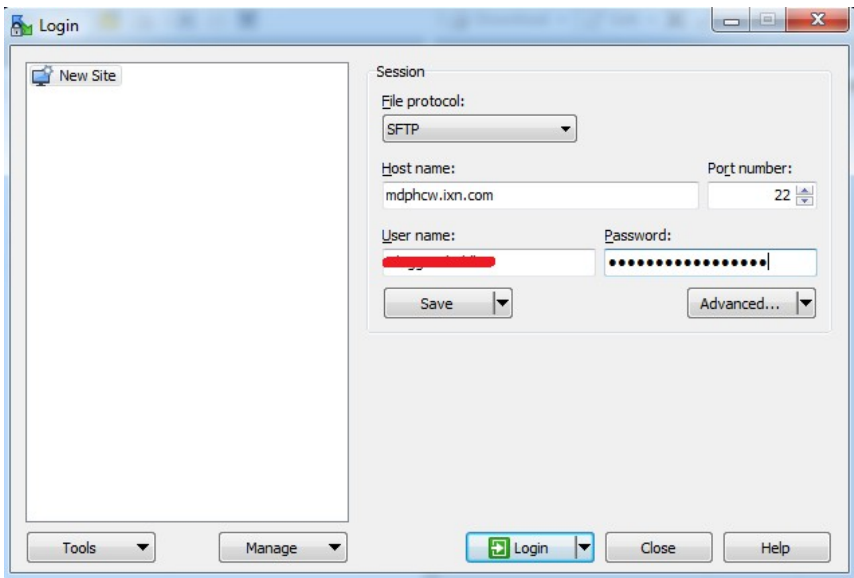
1. Download WinSCP (https://winscp.net/eng/download.php) and install it on your computer

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).

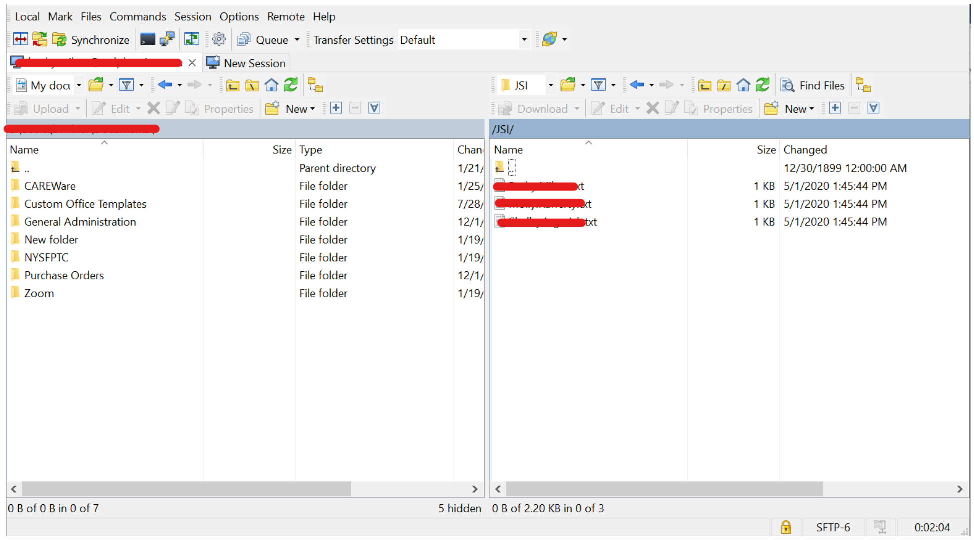


    d. Click “Login”

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.