

CAREWare MA Webinar
2022 Ryan White
HIV/AIDS Program Services Report
(RSR)

February 7, 2022



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Welcome!

Please chat in your:

- Name
- Agency
- Favorite cold-weather food



Introductions



Molly Higgins-Biddle
Co-Lead



MariAnna O'Ree
Co-Lead



Shelby Ingerick
Data & Helpdesk
Coordinator



Becky Milner
Communications
Coordinator



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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 2022
- Clean CAREWare data based on data validation checks
- Run Clients by ZIP code report in CAREWare
- Run the RSR client-level data XML file in CAREWare
- Submit the RSR XML in the HRSA web application or Electronic Handbook (EHB)

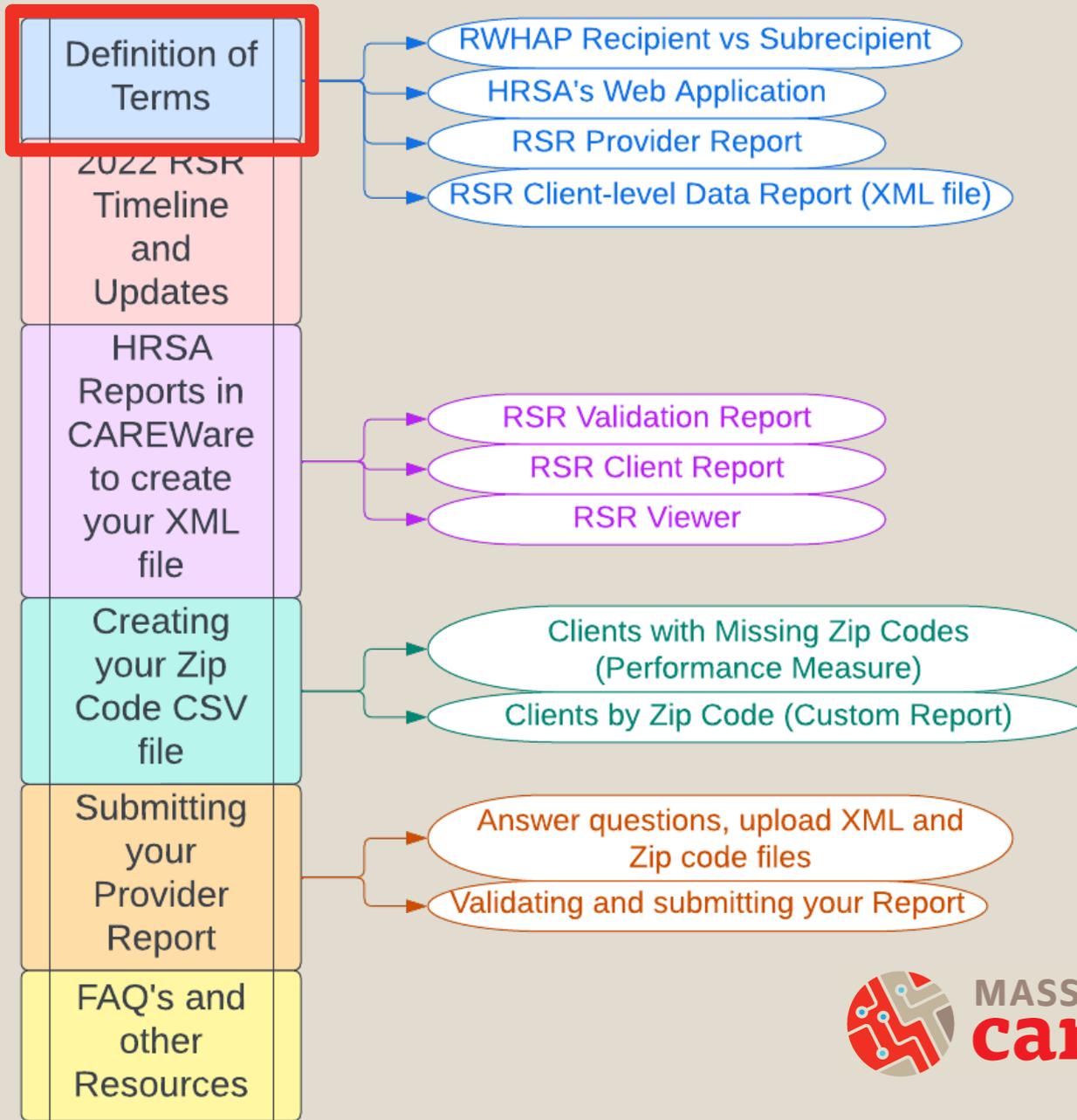
Poll

Have you submitted the RSR before?

- Yes
- No
- What's the RSR?



Agenda



Definition of Terms

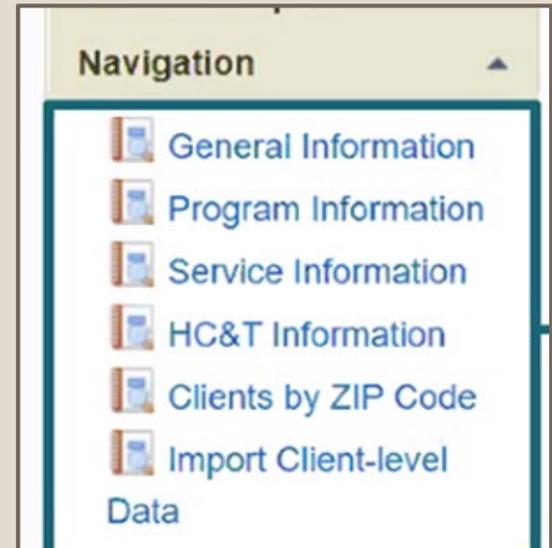
- Ryan White HIV/AIDS Program (RWHAP) Recipient:
 - An organization that receives funds directly from HRSA under the RWHAP program.
 - For example: the Massachusetts Department of Public Health (MDPH) Part B program
- RWHAP Subrecipient:
 - A direct service organization that has a contract with a recipient.

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 RWHAP recipient (e.g., Part C), you will use the EHB.

Definition of Terms

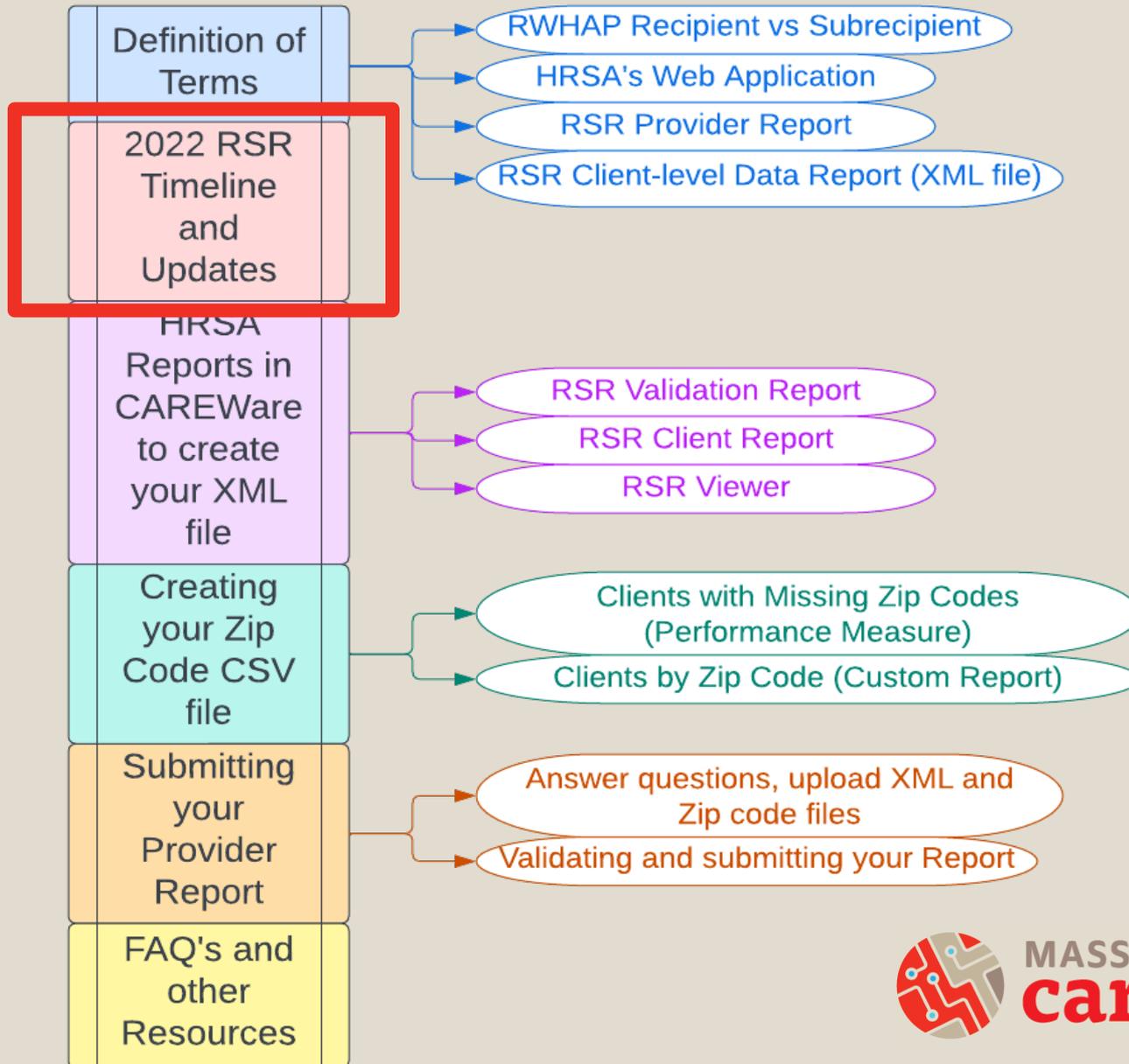
- RSR Provider Report:
 - All providers must complete this report
 - Includes questions about your organization
 - Clients by ZIP code
 - Client-Level Data XML File



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.*

2022 RSR Timeline and Updates



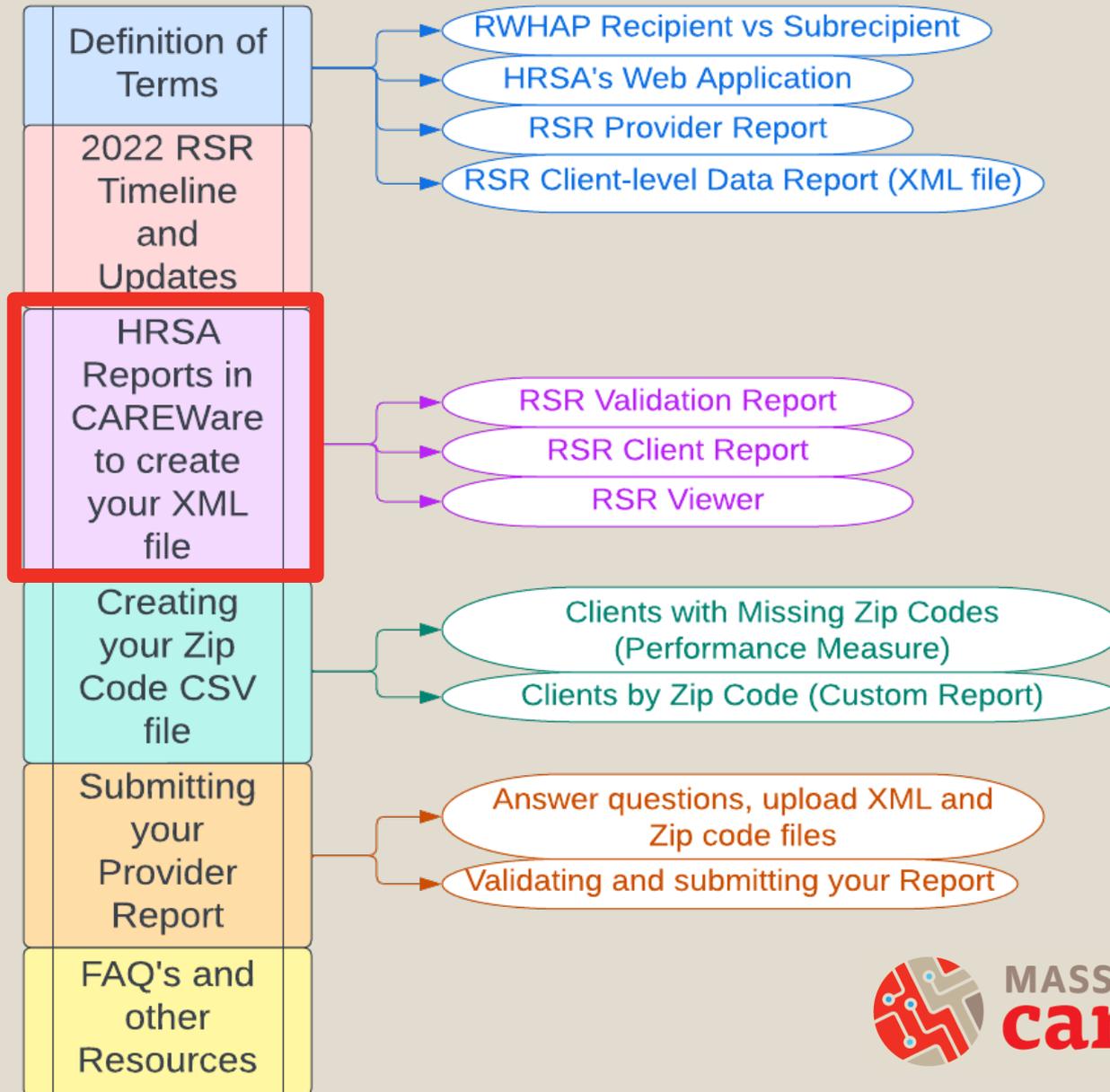
RSR Timeline

DATE	EVENT
Early February	JSI checks data quality and follow-up with agencies that need to edit their data.
February 6	Provider Report opens.
February 22	Provider Report (including the client-level data RSR XML file) must be uploaded to HRSA's web application for MDPH to review.
March 27	All Provider Reports must be complete. MDPH will approve the Provider Reports and client-level RSR XML data files.

2022 RSR Changes

- CARES Act funding was discontinued in 2021.
 - Eligible CARES Act clients and services should NOT be reported on the 2022 RSR.
 - **No action needed:** contracts in CAREWare are set up to account for this.

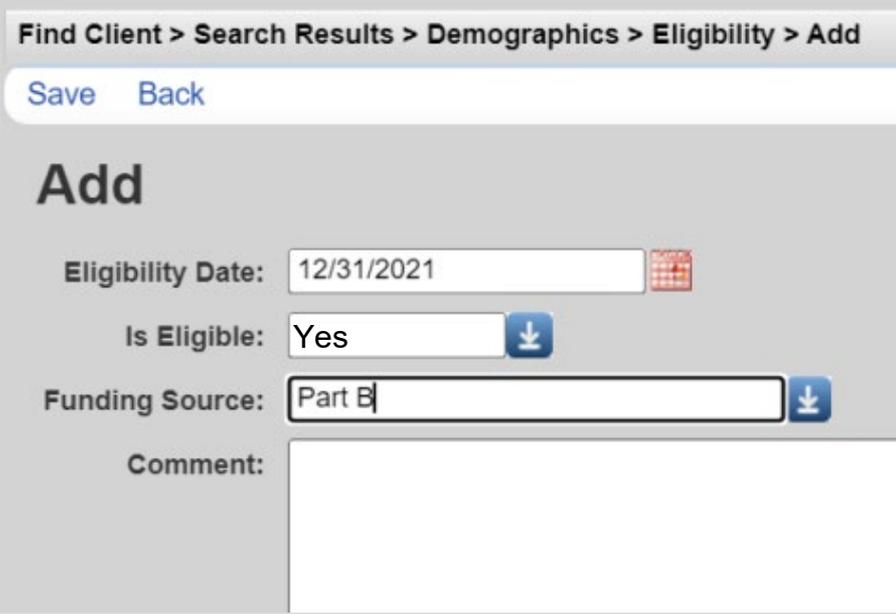
Running the RSR XML Report in CAREWare



Which clients will be included in the XML file?

Clients who:

- received a RWHAP-funded service during the reporting period (calendar year 2022)
- AND are designated as “Ryan White eligible” in CAREWare



The screenshot shows a web interface for adding client eligibility information. The breadcrumb trail at the top reads: Find Client > Search Results > Demographics > Eligibility > Add. Below the breadcrumb are 'Save' and 'Back' buttons. The main heading is 'Add'. The form contains the following fields:

- Eligibility Date:** A text input field containing '12/31/2021' with a calendar icon to its right.
- Is Eligible:** A dropdown menu with 'Yes' selected and a blue arrow button to its right.
- Funding Source:** A text input field containing 'Part B' with a blue arrow button to its right.
- Comment:** A large, empty text area for entering additional information.

Running the RSR in CAREWare

- Customize
- Add Client
- Find Client
- Reports**
- Rapid Entry
- Appointments
- My Settings
- System Information
- System Messages
- Administrative Options
- Switch Providers
- Log Off



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

Step 1: RSR 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

[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



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



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Step 2: Creating the RSR Client Report (XML)

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

Save Cancel

RSR Settings

Year: 2022

Provider Name:

Cross Provider ART: No sharing set up

Cross Provider Eligibility: No sharing set up

Cross Provider Labs: No sharing set up

 **Report complete**

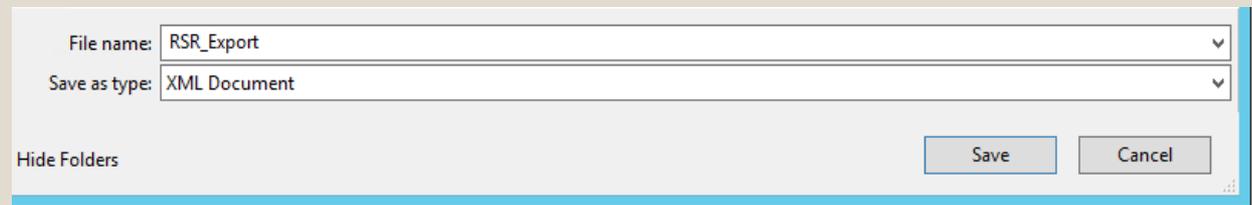
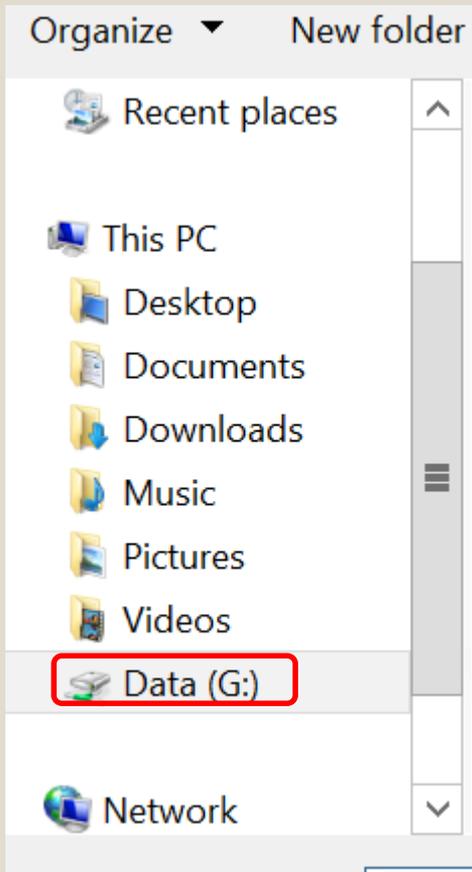
Download RSR file

Restrictions

 This operation has been cancelled due to restrictions in effect on this computer. Please contact your system administrator.

OK

Step 2b: Downloading the RSR Client Report (XML)



Step 3: Using the RSR Viewer

CAREWare Reports > HRSA Reports
Help Back

HRSA Reports

RSR Client Report

Create the RSR client level data file

RSR Viewer

View RSR files

RSR Validation Report

View the RSR

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)

CAREWare Reports > HRSA Reports > RSR

View Client List Back Print or Export

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%



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Viewing Clients within HRSA Reports

CAREWare Reports > HRSA Reports > RSR Validation Report Settings > RSR Validation Report For Year: 2022

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

RSR Validation Report For Year: 2022

Search:

Category	Check #	Validation Rule	Severity	# Errors
Demographic	96	Clients missing Poverty Level	Warning	3
Demographic	97	Clients missing Housing Status	Warning	3
Demographic	216	Clients missing Housing Status Collected Date	Warning	3
Demographic	99	Clients missing Medical Insurance	Warning	3
Demographic	236	Clients with no HIV/AIDS Status where client	Warning	3

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

Clients missing Poverty Level

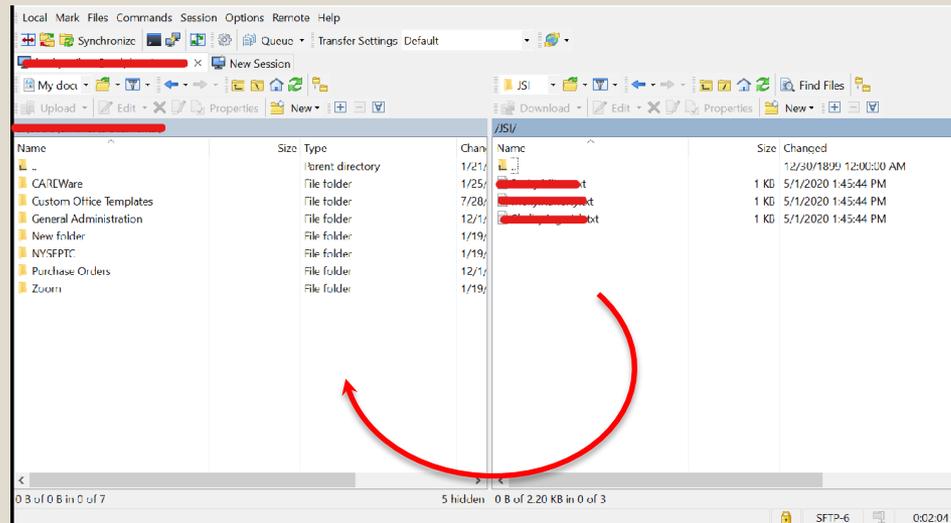
Search:

Client	Viewed
Doe, Jane	X
Doe, John	

Within the RSR Validation Report and the RSR Viewer:

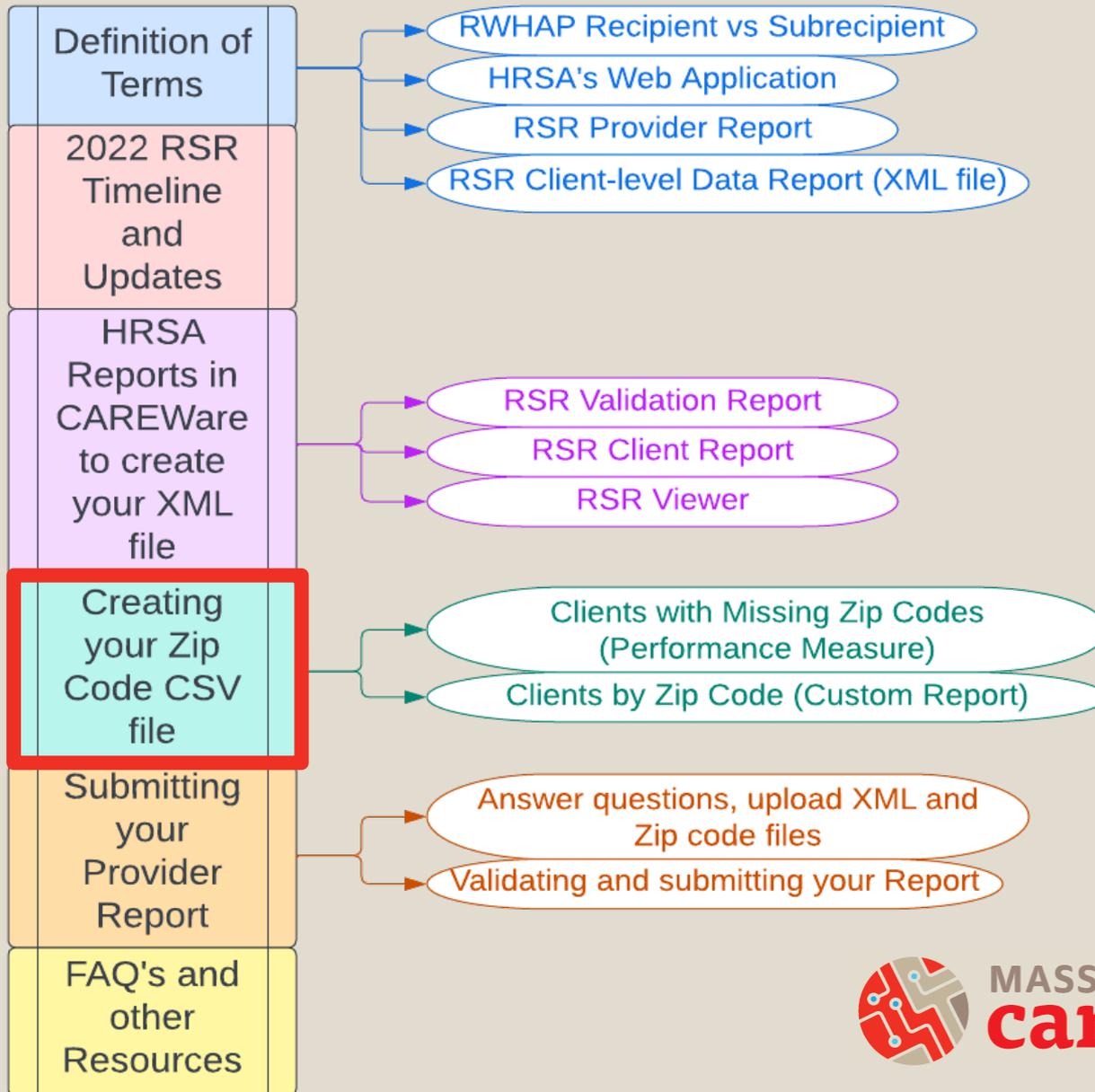
- 1) Select View Client List
- 2) Select Go To Client

Step 4: Accessing the RSR XML file from your computer



- Use the SFTP instructions document
 - Email carewaremahelpdesk@jsi.com for a copy
- Download WinSCP (free)
- After logging in, select the XML file in the right window and drag it to the left window to the location on your computer to which you'd like to save the file

Clients by ZIP Codes

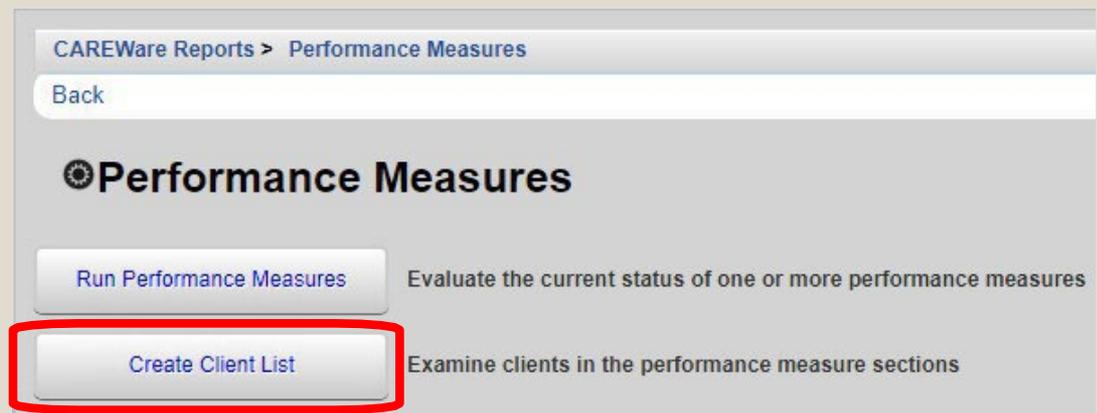
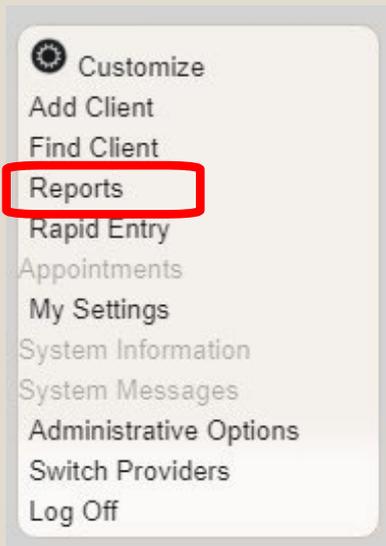


Steps

1. Check for missing ZIP codes by running the Missing Zip Codes report
2. Run the Clients by ZIP code report
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 1b: 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

Performance Measure Client List Settings

Performance Measure:

As Of Date: 

Performance Measure Section: 

Output Format: 

CAREWare Reports > Performance Measures > Client

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 2: 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	

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:

Date Through:

Clinical Review Year:

Show New Clients only:

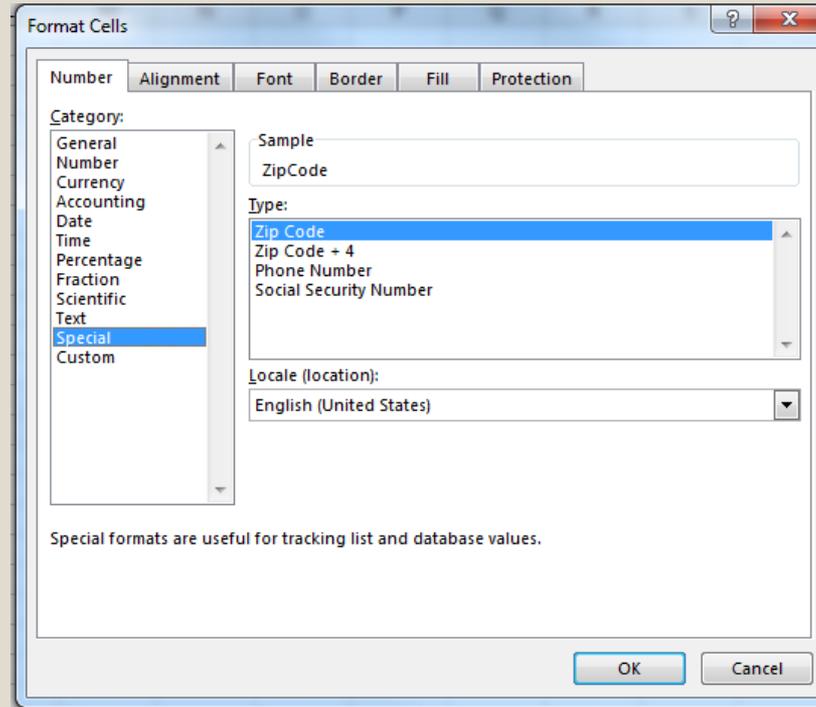
Show Clients With Service only:

Show Specifications:

Sum Numeric Fields:

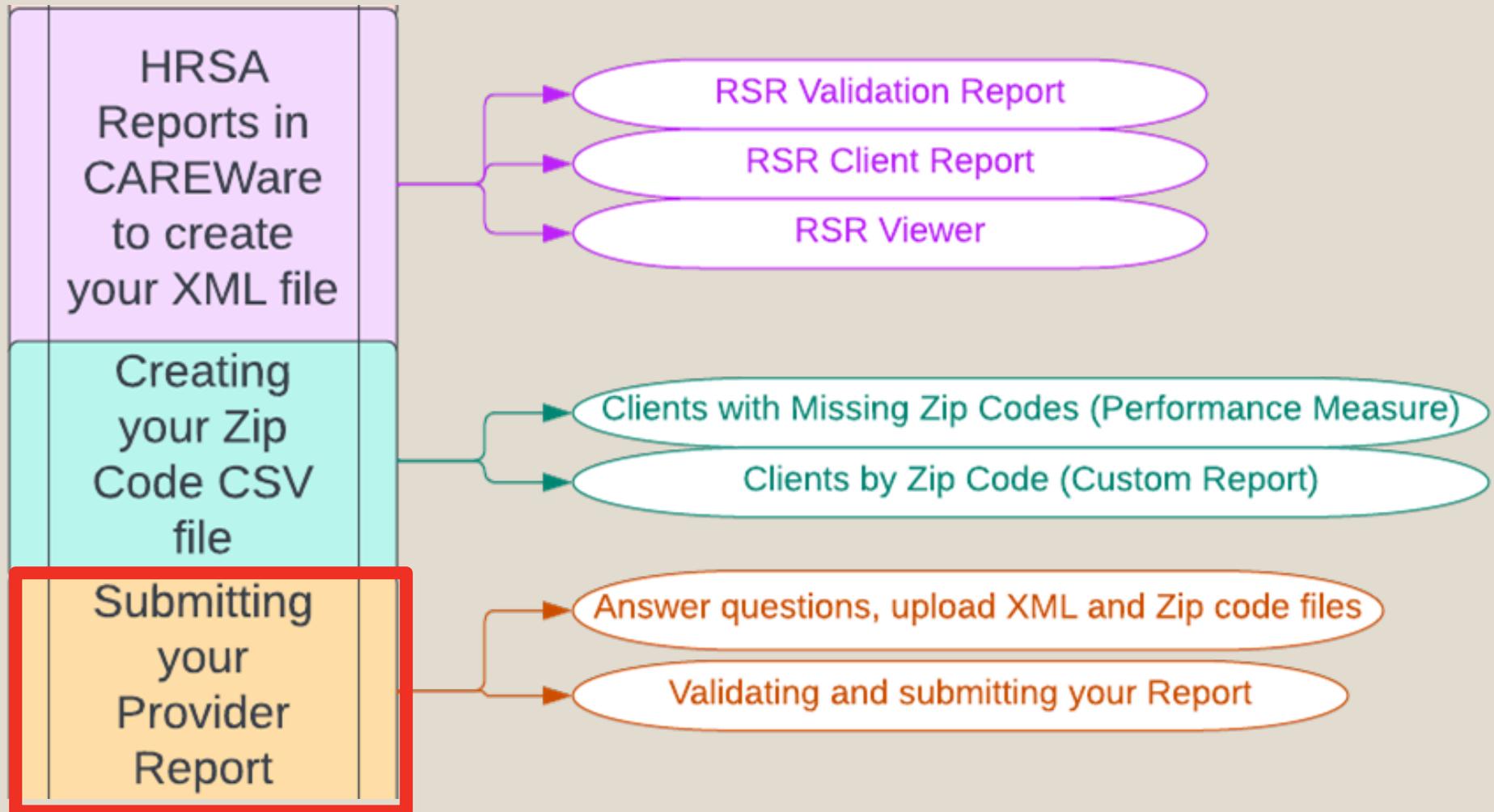
Step 3: Reformatting Cells

	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			



	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/2010/WebEPSEExternal/Interface/Common/AccessControl/Login.aspx>
- If you're a subrecipient, go to the web application:
 - <https://grants.hrsa.gov/2010/WebEPSEExternal/ServiceProvider/Interface/Common/AccessControl/Login.aspx>

Questions on the Provider Report

- 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
- Race/ethnicity 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

DISQ Team Webinar

Visit <https://targethiv.org/calendar/completing-2022-rsr-provider-report>



Completing the 2022 RSR Provider Report

Wednesday, February 1st, 2023

2:00 – 3:00 PM EST

Resource Documents

- [2022 RSR Instruction Manual](#)
- [2022 RSR Data Validations](#)
- [RSR Merge Rules](#)
- [RSR Data Dictionary and XML Schema Implementation Guide](#)

Other Links

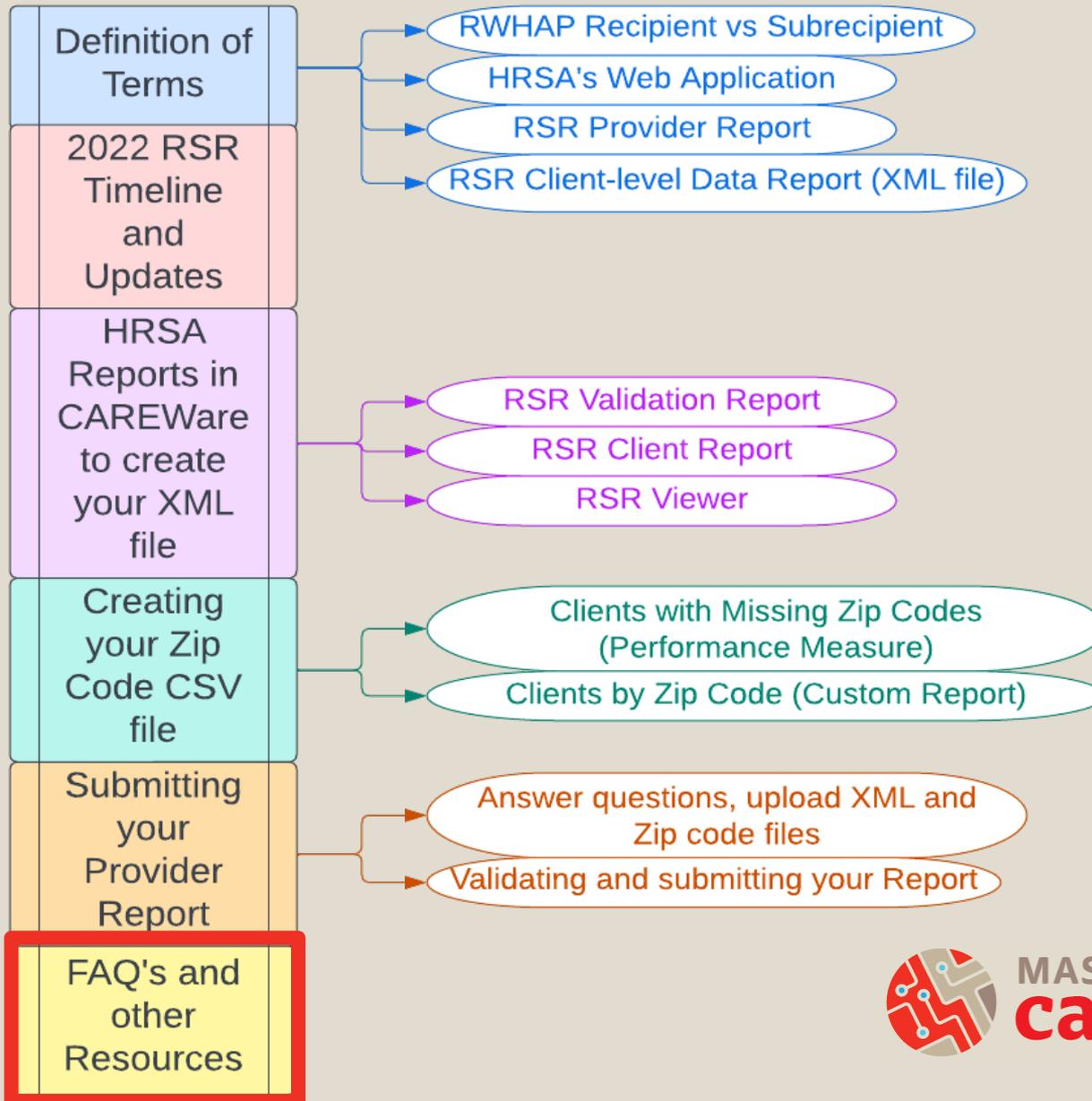
- [HRSA EHBs Select Role Page](#)
- [RSR UCR Training Module](#)
- [Learn more about HRSA](#)

Webinars

- [Upcoming and Archived Data Webinars](#)
- Register (Feb. 8, 2023): [Reviewing your Data at Upload: Tools Within the RSR Web System](#)
- Register (May 17, 2023): [RSR Town Hall](#)
- Recording: [Creating the RSR Client-level Data File webinar](#)
- Recording: [Prepping for RSR Submission: Key Steps for High-Quality Data webinar](#)



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:
 - RWHAP Part A (Boston Public Health Commission) and/or
 - RWHAP Part D (MassCARE)
- 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 RWHAP Part B funded services must be designated as “Ryan White eligible” in CAREWare.
- Demographics tab > click Eligibility > Add record > Add a date for December of 2021, 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 2022 for the data to be included in the RSR.
- Add a new entry with a 2022 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.

Supporting Resources

- RSR Data Updates and Reports
- Report Instructions
- SFTP Document
- Our website: <http://carewarema.jsi.com/>

RSR Data Updates and Reports

RSR Data Updates and Reports
January 2023



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

Instructions for Data Reports

July 2022, v2.4

Yellow highlights indicate changes since the last version.



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

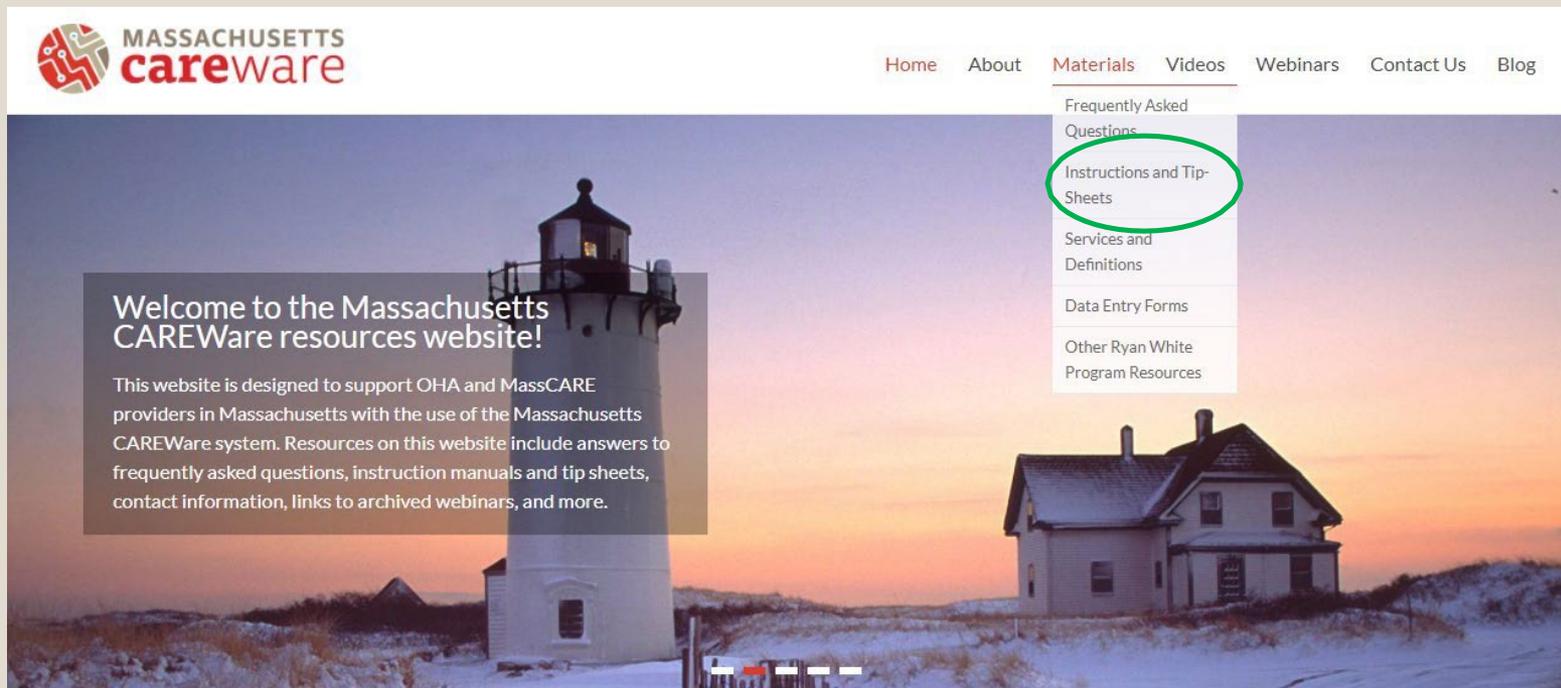
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How to find these resources

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 for MASSACHUSETTS careware and a navigation menu with links for Home, About, Materials, Videos, Webinars, Contact Us, and Blog. The 'Materials' dropdown menu is open, and the option 'Instructions and Tip-Sheets' is circled in green. The main content area features a large image of a lighthouse and a house in a snowy landscape. A text box on the left reads: '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.'

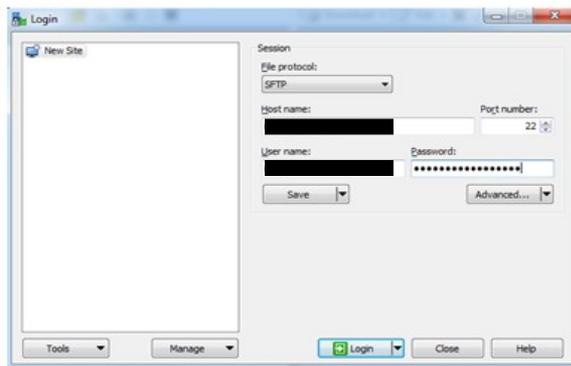
SFTP Transfer Instructions

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