User Manual for the Division of Disease Prevention (DDP) REDCap System

August 7, 2019

[Table of Contents](#)

Table of Contents

Introduction

The Division of Disease Prevention’s (DDP) REDCap System will serve as DDP’s interim replacement for the e2Virginia system, which was disabled as of Friday, June 21, 2019. The DDP REDCap system will replace data collection modules previously used in e2Virginia for client intake, Ryan White services, Patient Navigation, CHARLI, Data to Care, and HIV testing information. This manual is designed to supplement training and to serve as a resources for users of the new DDP REDCap System. For questions about any of the information in this manual, please feel free to e-mail DDPREDCap@vdh.Virginia.gov. Additional resources for DDP’s REDCap system can be found at http://www.vdh.virginia.gov/disease-prevention/redcap/.

Table of Contents

Steps to Gain Access to the DDP REDCap System

1. Getting access to REDCap

a. If requesting access to REDCap, you will need to first get access to VDH's REDCap server by completing this form: https://redcap.vdh.virginia.gov/redcap/surveys/?s=HF3LC88WMH. You will need several pieces of information to ensure your access request is processed properly. This information is provided below.

b. Select **"I belong to a VDH partner organization."**

c. Enter your first name, last name, and full e-mail address. Select **Other** as the VDH Work Unit or Partner Organization.

d. Type your Agency's Name when asked to Please Specify Other VDH Work Unit or VDH Partner Organization.

e. Type **"DDP REDCap" for** Name of VDH Supervisor/VDH Sponsor.

f. Type **DDPREDCap@vdh.virginia.gov** for VDH Supervisor's/VDH Sponsor's E-mail.

g. Click the check to submit your request.

2. Getting access to the DDP REDCap system

a. Once you complete the steps above, fill out the DDP REDCap Access Form.

b. Read and sign the Data Security & Confidentiality Guidelines "Verification of Receipt and Assurance of Key Requirements for non-DDP Personnel". For a copy of the Data Security & Confidentiality Guidelines, please go to: http://www.vdh.virginia.gov/content/uploads/sites/10/2017/05/Final-DDP-Security-and-Confidentiality-Policiesand-Procedures-1.pdf .

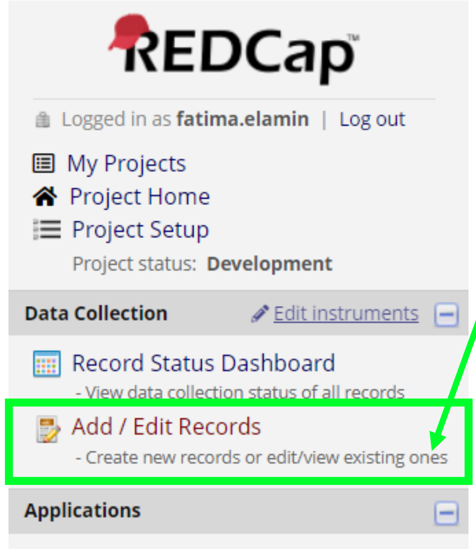
c. Submit the DDP REDCap Access Form and signed Data Security & Confidentiality Guidelines "Verification of Receipt and Assurance of Key Requirements for non-DDP Personnel" via email to DDPREDcap@vdh.virginia.gov or via fax to DDP REDCap Team at 804-864-8053.

3. Setting up your account

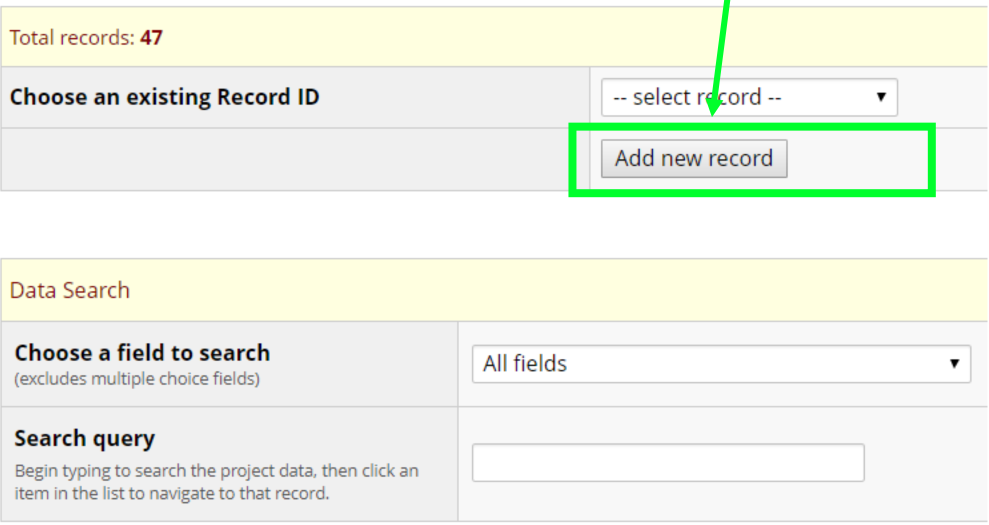
a. You will receive a confirmation e-mail from REDCap@vdh.virginia.gov once your request is processed and approved. This e-mail will have your REDCap username and a prompt for you to make a password. Go ahead and click the link in your e-mail to proceed with setting up a new password. Record your username and password.

b. You will receive a second e-mail form DDPRedCap@vdh.Virginia.gov asking for your username. This is the last piece of information needed to grant you access to the DDP RedCap system.

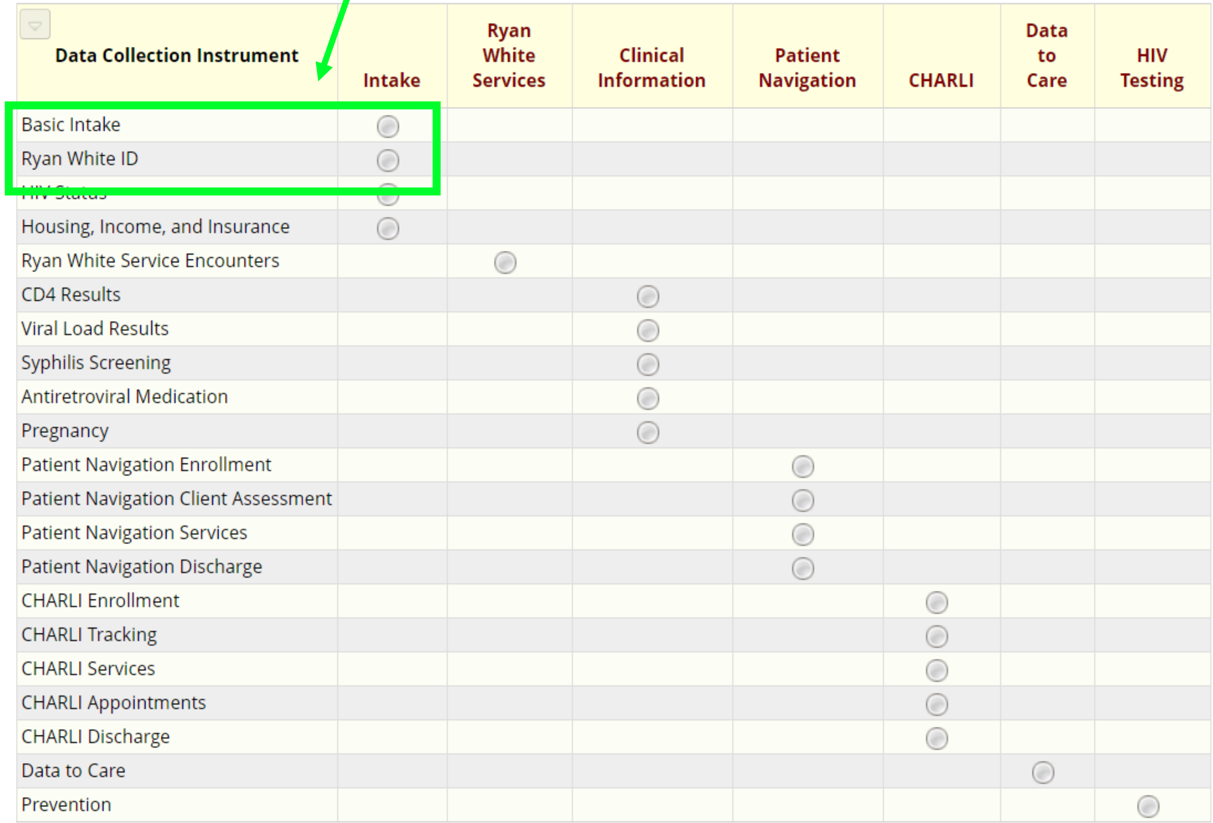
Adding New Clients



1. To add a new client, choose the "Add/Edit Records" option under Data Collection on the left toolbar.
2. From the Add/Edit Records page, select "Add new record" to create a new client record.



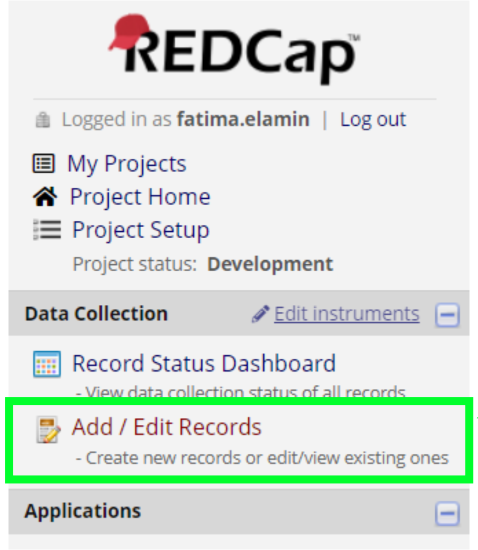
3. After selecting "Add new record" you will be directed to the new client dashboard page. For new clients, you must complete the Basic Intake and Ryan White ID data collection instruments to create your new client record.



Data Collection Instrument	Intake	Ryan White Services	Clinical Information	Patient Navigation	CHARLI	Data to Care	HIV Testing
Basic Intake	○						
Ryan White ID	○						
HIV Status	○						
Housing, Income, and Insurance	○						
Ryan White Service Encounters		○					
CD4 Results			○				
Viral Load Results			○				
Syphilis Screening			○				
Antiretroviral Medication			○				
Pregnancy			○				
Patient Navigation Enrollment				○			
Patient Navigation Client Assessment				○			
Patient Navigation Services				○			
Patient Navigation Discharge				○			
CHARLI Enrollment					○		
CHARLI Tracking					○		
CHARLI Services					○		
CHARLI Appointments					○		
CHARLI Discharge					○		
Data to Care						○	
Prevention							○

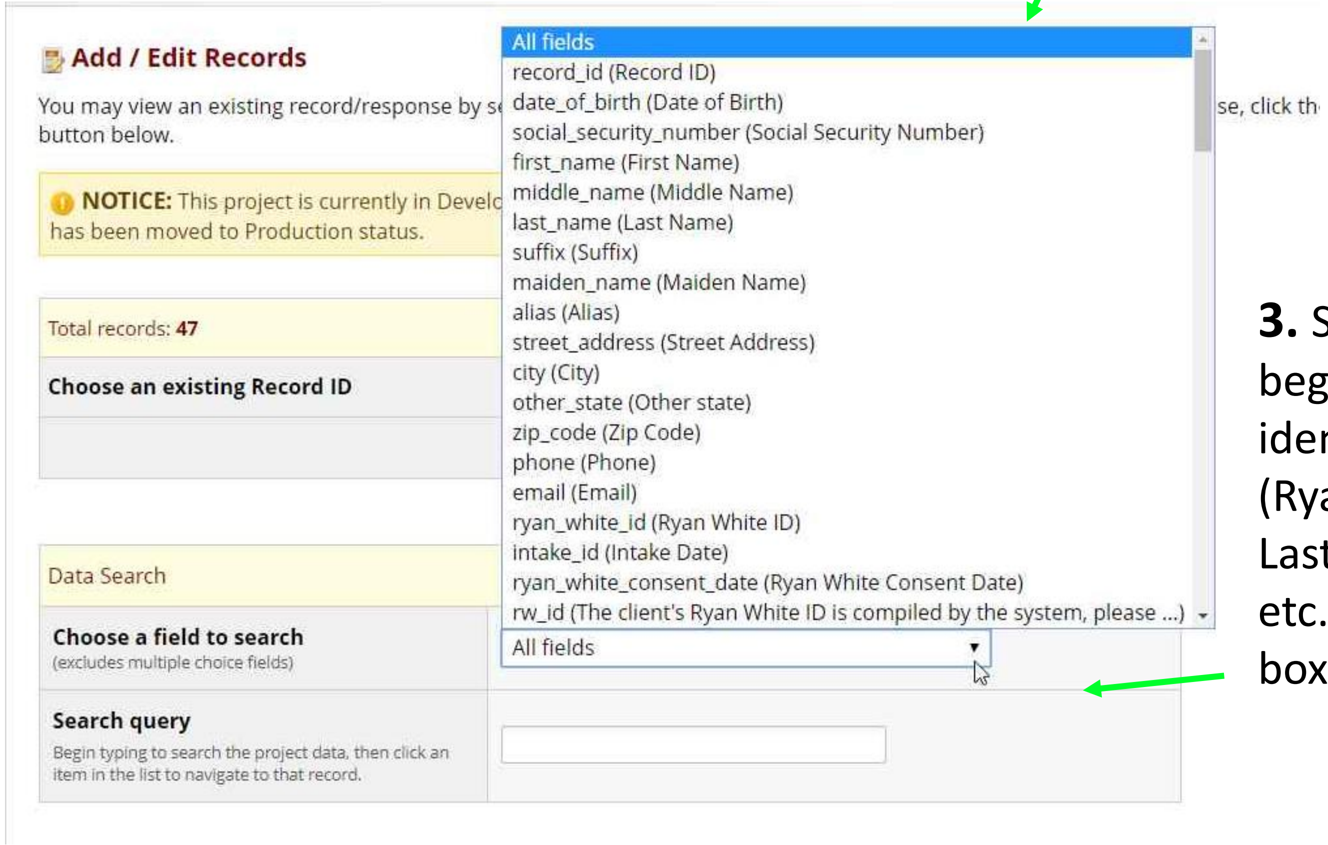
Table of Contents

Searching for Clients



1. To begin searching for an existing client, choose the "Add/Edit Records" option under Data Collection on the left toolbar.

2. From the Add/Edit Records page, you have the option by searching for a client by many fields.



3. Select the field name OR begin typing client-identifying information (Ryan White ID, First Name, Last Name, Date of Birth, etc.) in to the Search query box.

Table of Contents

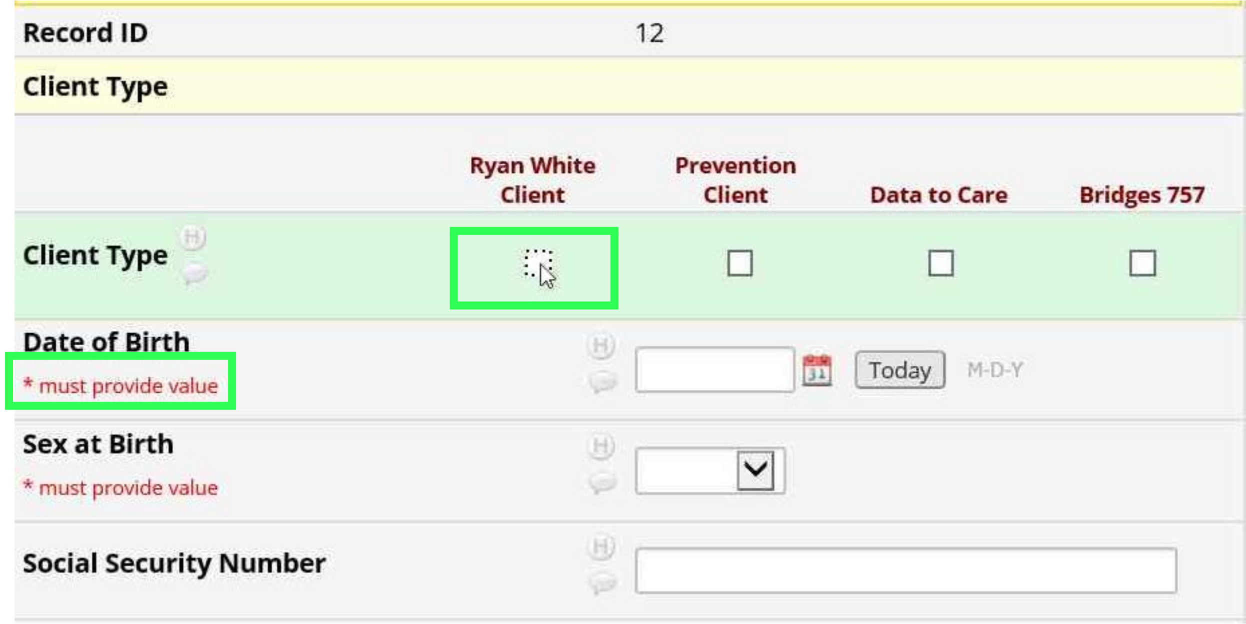
Overview: Intake

Data Collection Instrument	Intake	Ryan White Services	Clinical Information	Patient Navigation	CHARLI	Data to Care	HIV Testing
Basic Intake	● +						
Ryan White ID	●						
HIV Status	● +						
Housing, Income, and Insurance	● +						
Ryan White Service Encounters		○					
CD4 Results			○				
Viral Load Results			○				
Syphilis Screening			○				
Antiretroviral Medication			○				
Patient Navigation Enrollment				○			
Patient Navigation Client Assessment				○			
Patient Navigation Services				○			
Patient Navigation Discharge				○			
CHARLI Enrollment					○		
CHARLI Tracking					○		
CHARLI Services					○		
CHARLI Appointments					○		
CHARLI Discharge					○		
Data to Care						○	
Prevention							○

- All clients must have the following forms completed, and done so in order:
  - Basic Intake- all clients must have this.
  - Ryan White ID- all clients must have this.
- For any clients receiving Ryan White services, two additional forms are required:
  - HIV Status (required for Ryan White only). *This form replaces HIV Status module in e2Virginia.*
  - Housing Income and Insurance (required for Ryan White only). T*his form replaces the H&I Status module in e2Virginia.*

Adding Basic Intake

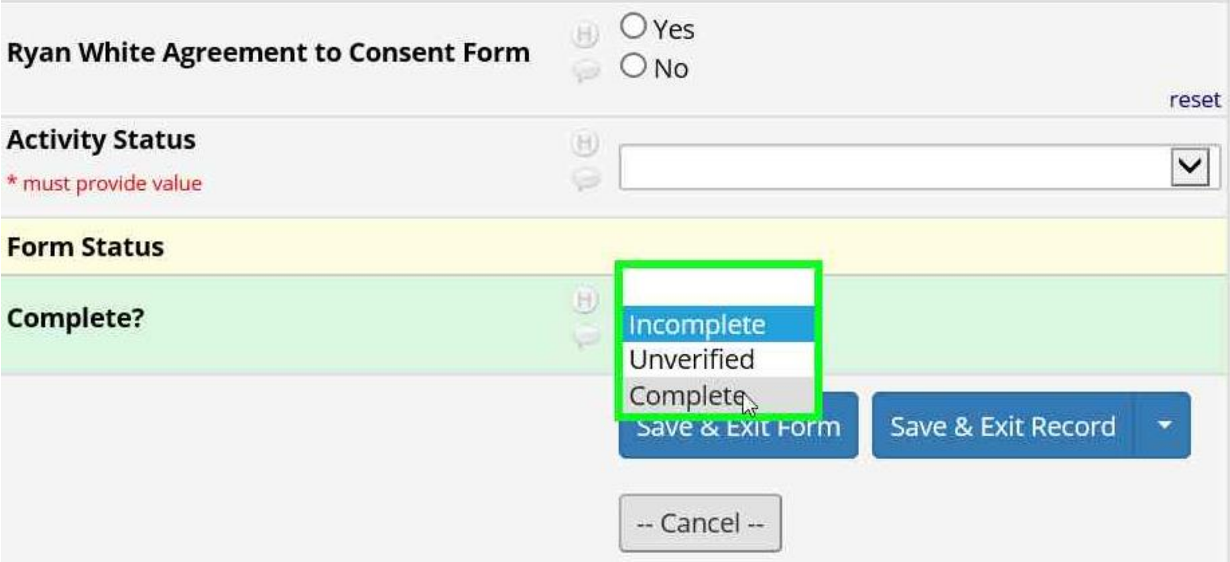
1. From the Record ID page, select the "+" button for Basic Intake to add a new intake record.



2. Select the client type at the top, and proceed to enter client data. All fields demarcated with an asterisk are required fields and must be completed.

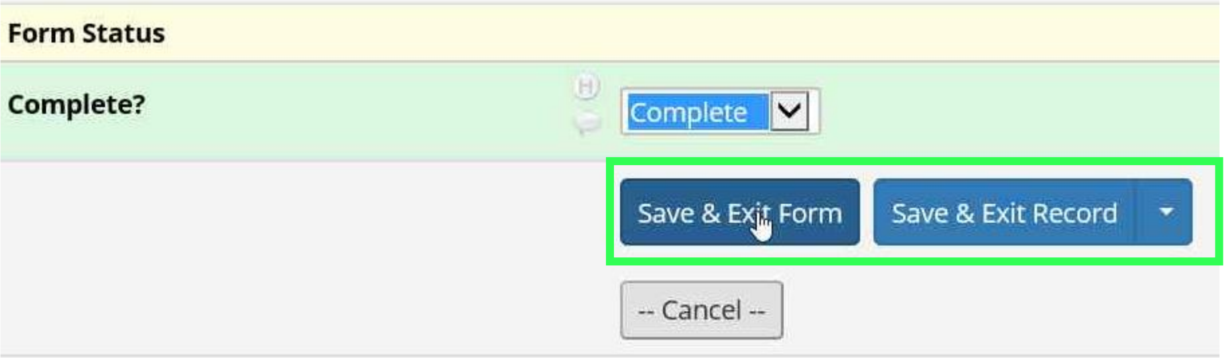
This form is required for ALL clients. All clients entered into REDCap must have the Basic Intake form completed.

Adding Basic Intake



3. Once you have entered in all of your data, and all required fields are completed, select 'Complete' at the bottom of the form. If you need to exit before entering all required fields, select ‘Incomplete’ to return at a later time. This form **must** be completed before entering data into additional forms.

4. Select 'Save & Exit Form' if you have additional information for this client to enter into other forms, or select 'Save & Exit Record' if you are finished with this client



This form is required for ALL clients. All clients entered into REDCap <u>must</u> have the Basic Intake form completed.

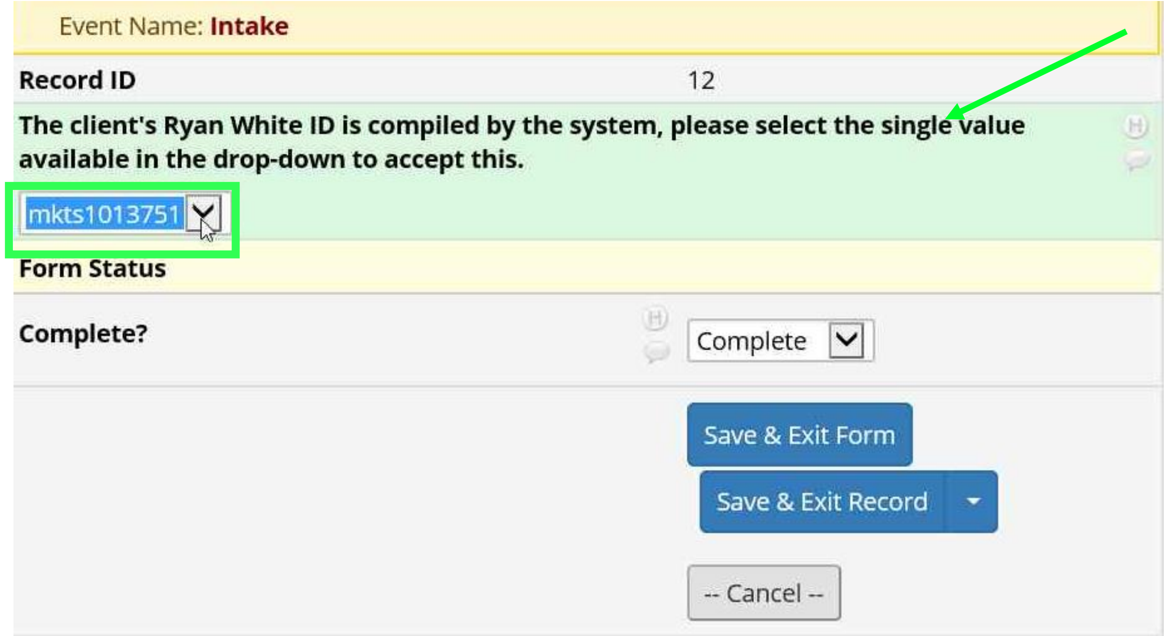
Adding Ryan White ID

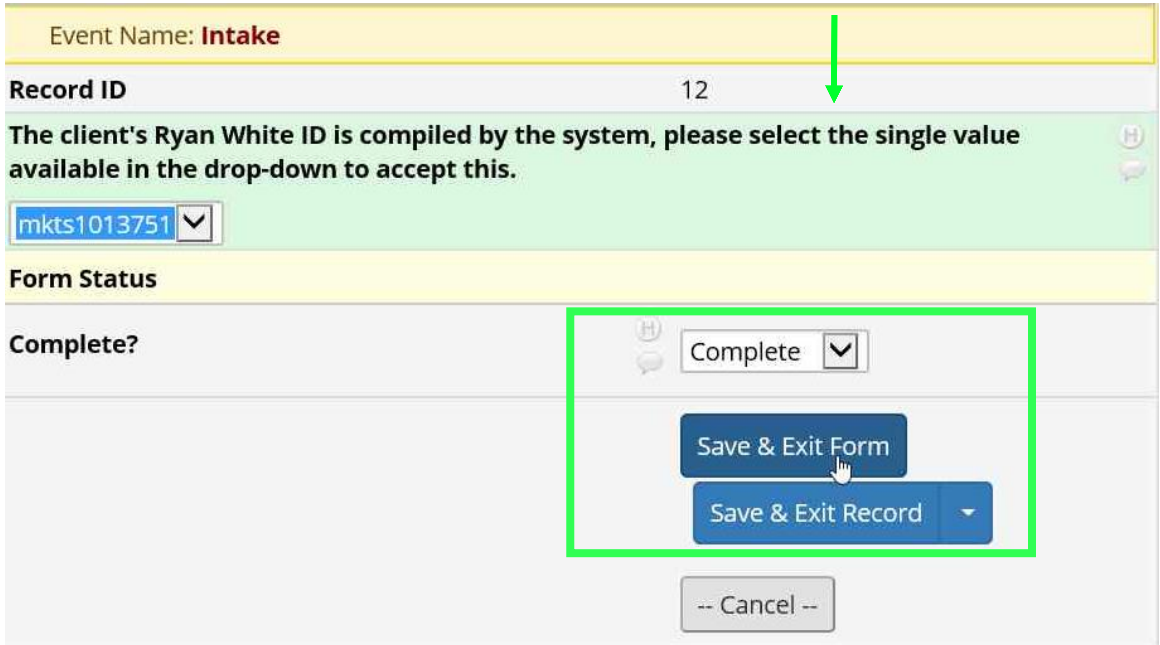
Note: The system will create this value based on information required in the Basic Intake form. **This form is required for ALL clients.** All clients entered into REDCap must have the Basic Intake form completed.

1. From the Record ID page, select the bullet to confirm the Ryan White ID for the client.

2. Select the auto-generated ID listed in the drop-down box.

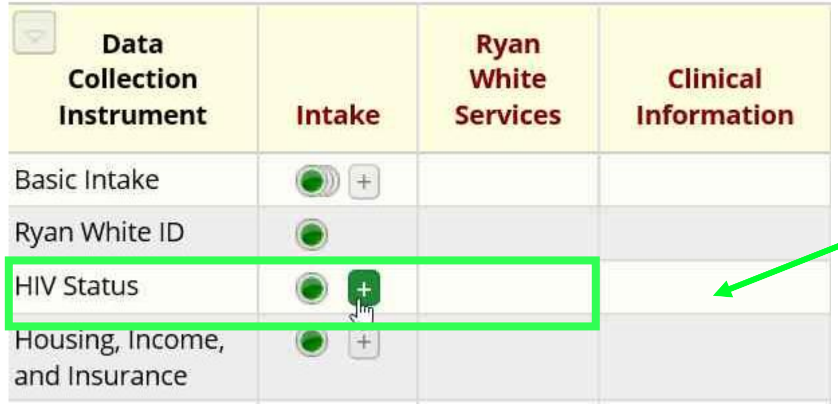
3. Select "Complete" and the appropriate save option.



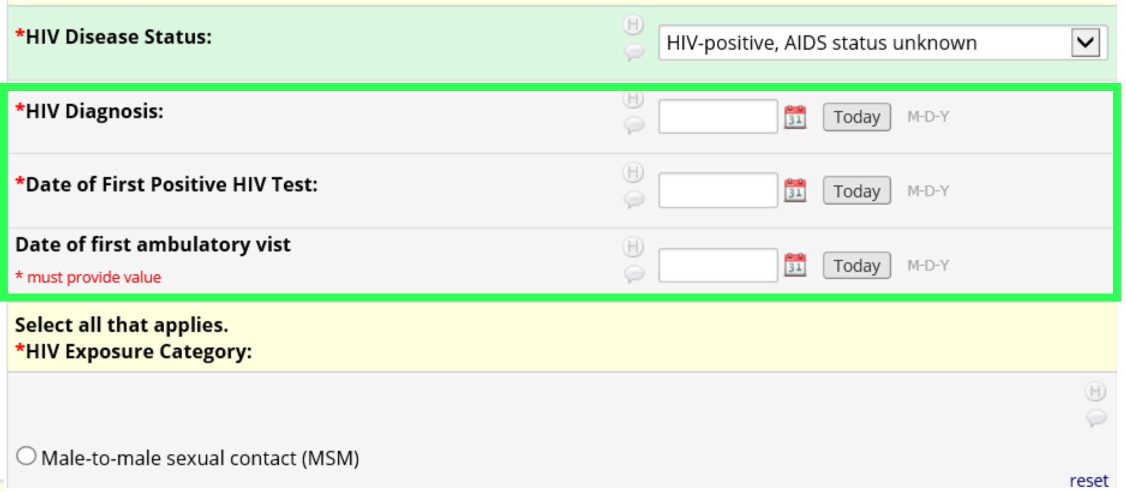


Adding HIV Status

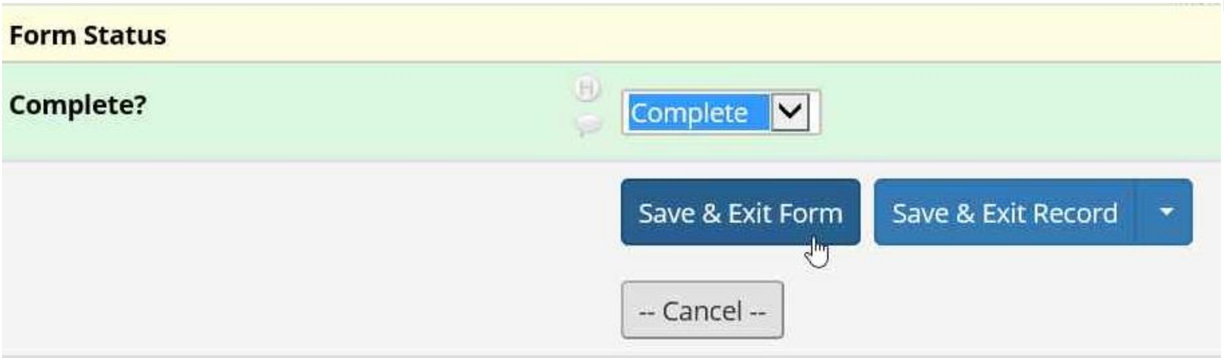
If you only have month and year for any date field, enter "15" as the day.



1. From the Record ID page, select the "+" button for HIV status to add a new record.

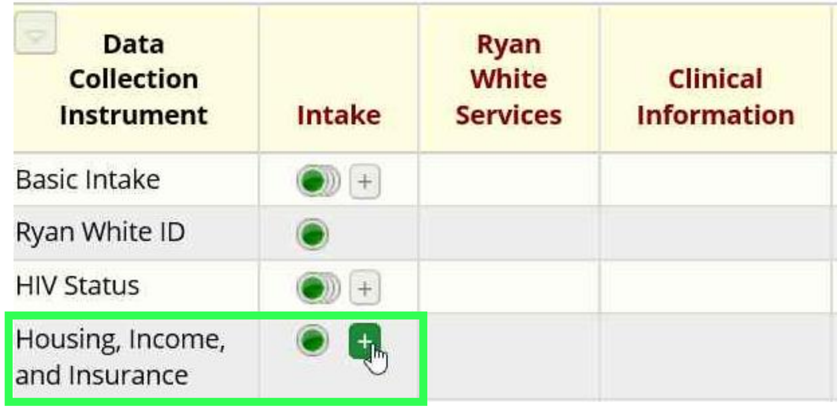


2. Based on the HIV Disease Status selection, you will be prompted to enter additional data as appropriate for your client.

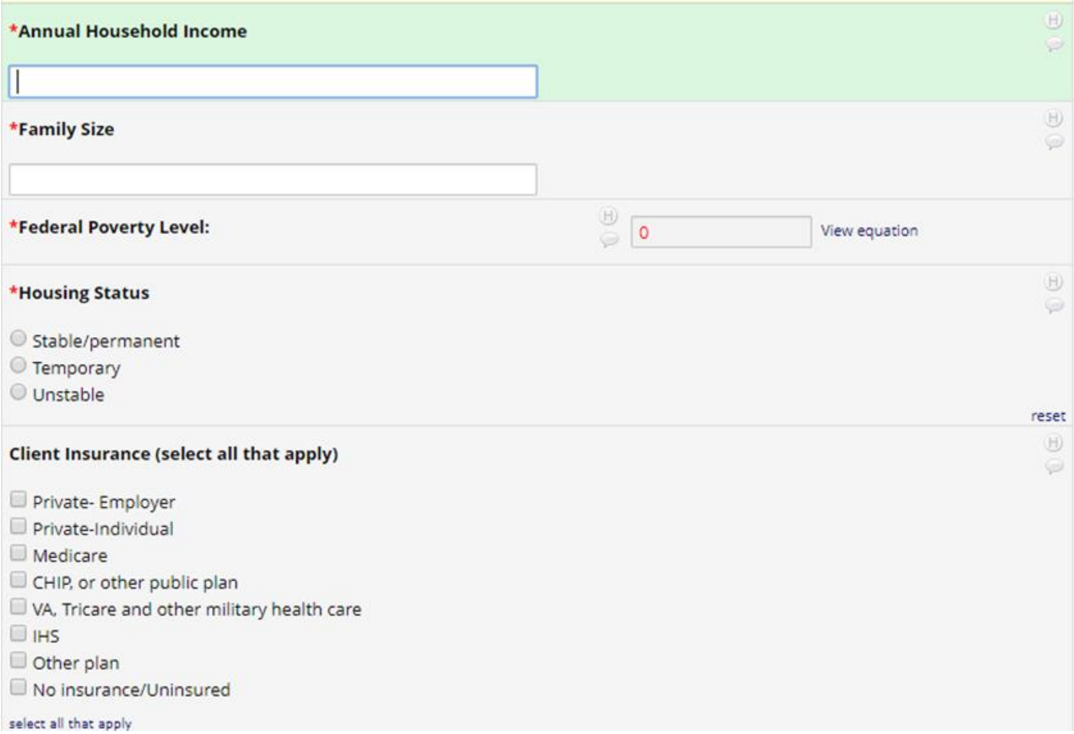


3. Once you are finished entering the required fields, select "Complete" and the appropriate save option.

Adding Housing, Income, and Insurance



1. From the Record ID page, select the "+" button for Housing, Income, and Insurance to add a new record.



2. Complete the required fields and note that the "Client Insurance" section is a multi-choice field.

3. Once you are finished entering the required fields, select "Complete" and the appropriate save option.

Overview: Clinical Information

Data Collection Instrument	Intake	Ryan White Services	Clinical Information	Patient Navigation	CHARLI	Data to Care	HIV Testing
Basic Intake	◯						
Ryan White ID	◯						
HIV Status	◯						
Housing, Income, and Insurance	◯						
Ryan White Service Encounters		◯					
CD4 Results			◯				
Viral Load Results			◯				
Syphilis Screening			◯				
Antiretroviral Medication			◯				
Pregnancy			◯				
Patient Navigation Enrollment				◯			
Patient Navigation Client Assessment				◯			
Patient Navigation Services				◯			
Patient Navigation Discharge				◯			
CHARLI Enrollment					◯		
CHARLI Tracking					◯		
CHARLI Services					◯		
CHARLI Appointments					◯		
CHARLI Discharge					◯		
Data to Care						◯	
Prevention							◯

Providers that provide outpatient ambulatory care to RW clients are required to complete these 4 forms (or 5, if client is female or transgender male):

- CD4 Results
- Viral Load Results
- Syphilis Screening
- Antiretroviral Medication
- Pregnancy

These forms replace E2Virginia's Clinical Information tab's sub-tabs:

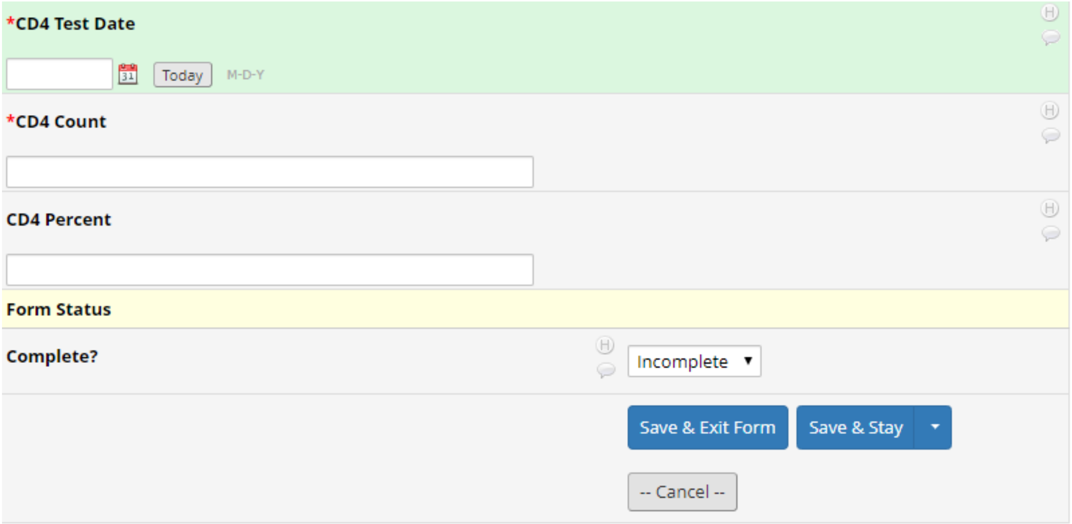
- CD4 and Viral Load
- STI
- Medications
- Pregnancy

Adding CD4 Results

Data Collection Instrument	Intake	Ryan White Services	Clinical Information
Basic Intake	○		
Ryan White ID	○		
HIV Status	○		
Housing, Income, and Insurance	○		
Ryan White Service Encounters		○	
CD4 Results			○
Viral Load Results			○
Syphilis Screening			○
Antiretroviral Medication			○
Pregnancy			○

1. From the Record ID page, select the bullet or "+" button for CD4 Results to add a new record.

2. Once you are finished entering the required fields, CD4 test date and CD4 count, select "Complete" and the appropriate save option.

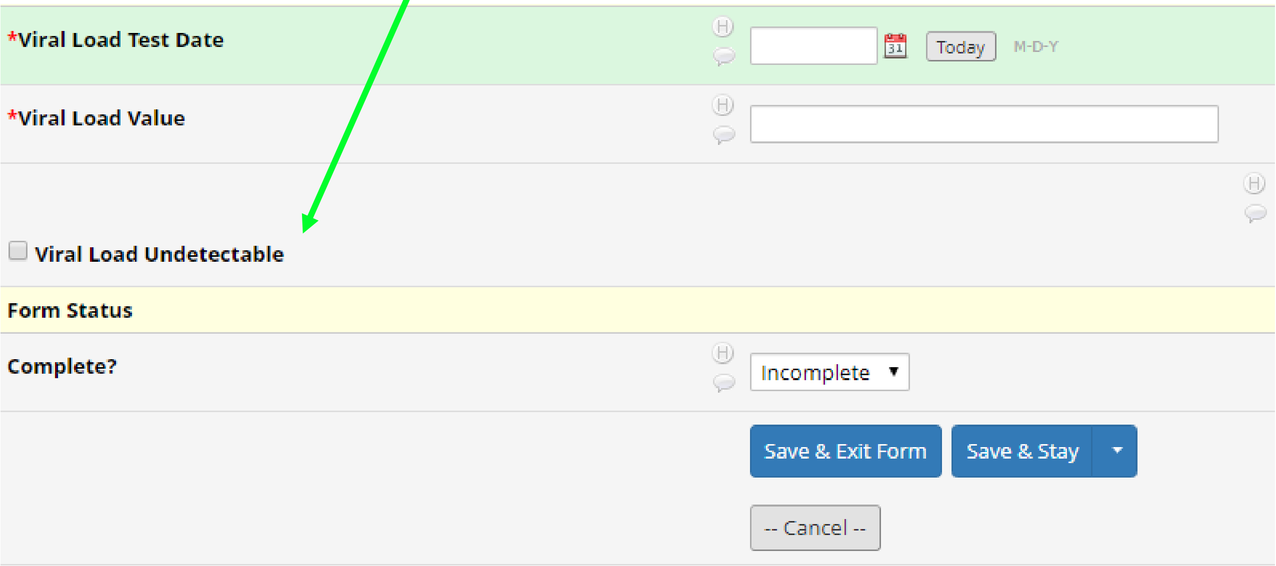


Adding Viral Load Results

Data Collection Instrument	Intake	Ryan White Services	Clinical Information
Basic Intake	○		
Ryan White ID	○		
HIV Status	○		
Housing, Income, and Insurance	○		
Ryan White Service Encounters		○	
CD4 Results			○
Viral Load Results			○
Syphilis Screening			○
Antiretroviral Medication			○
Pregnancy			○

1. From the Record ID page, select the bullet or "+" button for Viral Load Results to add a new record.

Note: If the viral load value is undetectable, check the "Viral Load Undetectable" box.



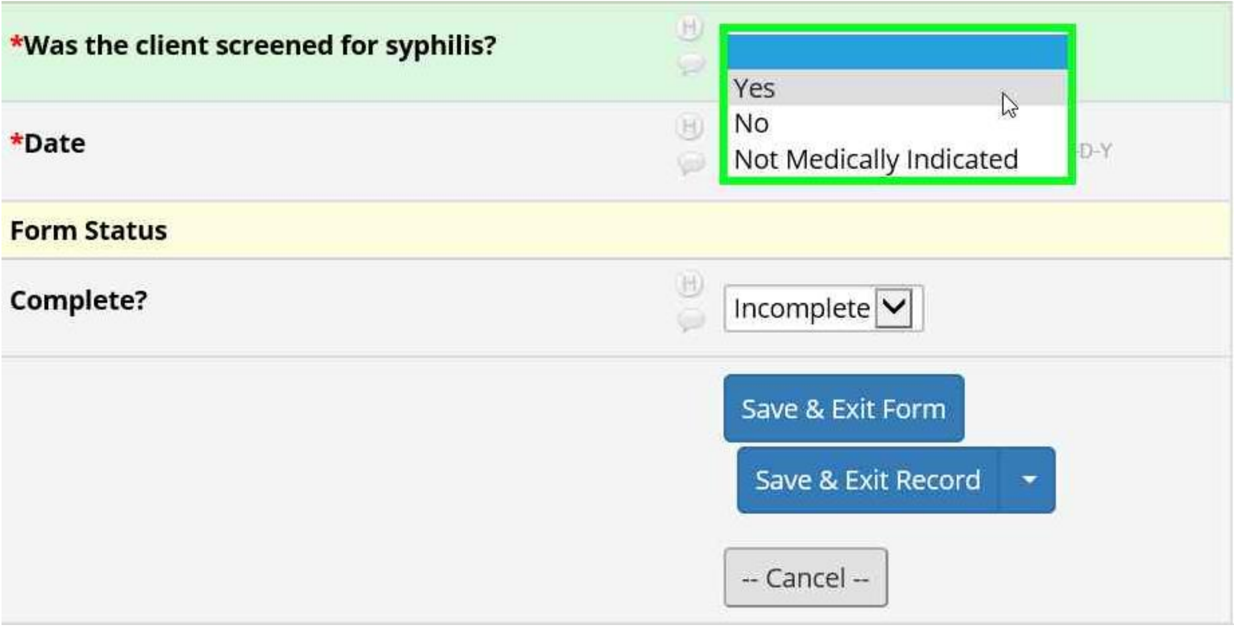
2. Once you are finished entering the required fields, Viral Load Test Date and Viral Load Value or have checked the Undetectable box, select "Complete" and the appropriate save option.

Adding Syphilis Screening

Data Collection Instrument	Intake	Ryan White Services	Clinical Information
Basic Intake	○		
Ryan White ID	○		
HIV Status	○		
Housing, Income, and Insurance	○		
Ryan White Service Encounters		○	
CD4 Results			○
Viral Load Results			○
Syphilis Screening			○
Antiretroviral Medication			○
Pregnancy			○

1. From the Record ID page, select the bullet or "+" button for Syphilis Screening to add a new record.

2. Select the appropriate option from the drop-down menu, and enter the date the client was screened or the date of outpatient appointment at which the client was not screened.



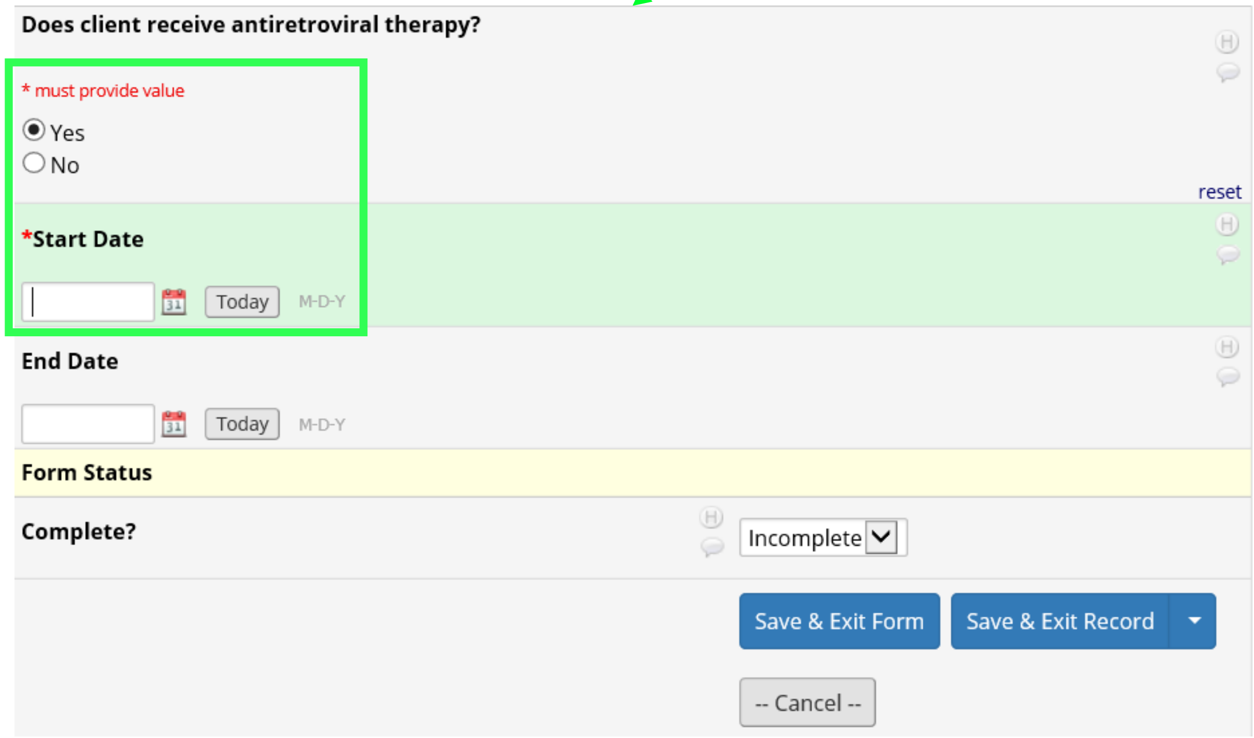
3. Once you are finished entering the required fields, select "Complete" and the appropriate save option.

Adding Antiretroviral Medication

Data Collection Instrument	Intake	Ryan White Services	Clinical Information
Basic Intake	○		
Ryan White ID	○		
HIV Status	○		
Housing, Income, and Insurance	○		
Ryan White Service Encounters		○	
CD4 Results			○
Viral Load Results			○
Syphilis Screening			○
Antiretroviral Medication			○
Pregnancy			○

1. From the Record ID page, select the bullet or "+" button for Antiretroviral Medication to add a new record.

2. Select yes or no. If "yes" is selected, you will be prompted to enter the start and end date of medication. You must enter a start date before proceeding.



3. Once you are finished entering the required fields, select "Complete" and the appropriate save option.

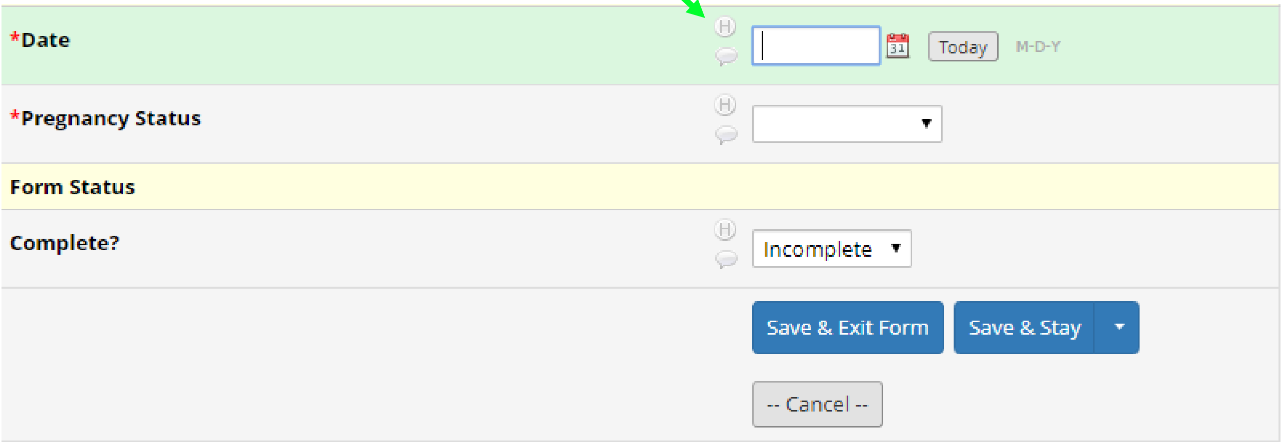
Adding Pregnancy

Data Collection Instrument	Intake	Ryan White Services	Clinical Information
Basic Intake	○		
Ryan White ID	○		
HIV Status	○		
Housing, Income, and Insurance	○		
Ryan White Service Encounters		○	
CD4 Results			○
Viral Load Results			○
Syphilis Screening			○
Antiretroviral Medication			○
Pregnancy			○

1. From the Record ID page, select the bullet button for Pregnancy to add a new record.

This form is only applicable to female or transgendered male clients.

2. Enter the appointment date, then select yes or no from the drop-down list.



3. Once you are finished entering the required fields, select “Complete” and the appropriate save option.

Overview: Ryan White Service Encounters

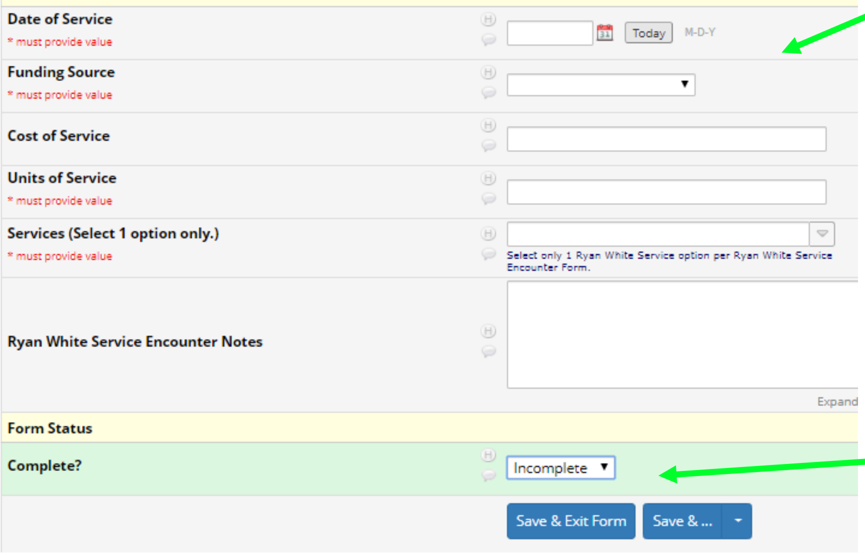
Data Collection Instrument	Intake	Ryan White Services	Clinical Information	Patient Navigation	CHARLI	Data to Care	HIV Testing
Basic Intake							
Ryan White ID							
HIV Status							
Housing, Income, and Insurance							
Ryan White Service Encounters							
CD4 Results							
Viral Load Results							
Syphilis Screening							
Antiretroviral Medication							
Patient Navigation Enrollment							
Patient Navigation Client Assessment							
Patient Navigation Services							
Patient Navigation Discharge							
CHARLI Enrollment							
CHARLI Tracking							
CHARLI Services							
CHARLI Appointments							
CHARLI Discharge							
Data to Care							
Prevention							

The Ryan White Service Encounters form replaces the "Service" tab in e2Virginia. This should be used by all Ryan White providers to record client service encounters. Enter the Ryan White services your agency is funded to provide only. Patient Navigation and CHARLI programs funded by Ryan White should NOT use this form. Instead, CHARLI and Patient Navigation data should be recorded using the forms in the CHARLI and/or Patient Navigation programs.

Table of Contents   In this section: Adding Ryan White Service Encounters

Adding Ryan White Service Encounters

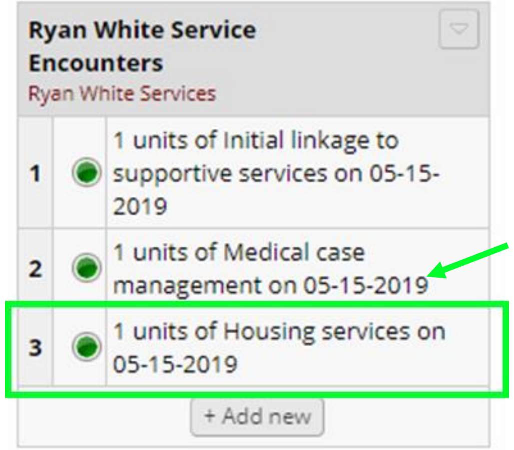
1. From the Record ID page, select the "+" button for Ryan White Service Encounters to add a new service encounter.



2. Once in the Ryan White Service Encounters form, you will be able to enter date of service, cost of service, units of service, and the service name.

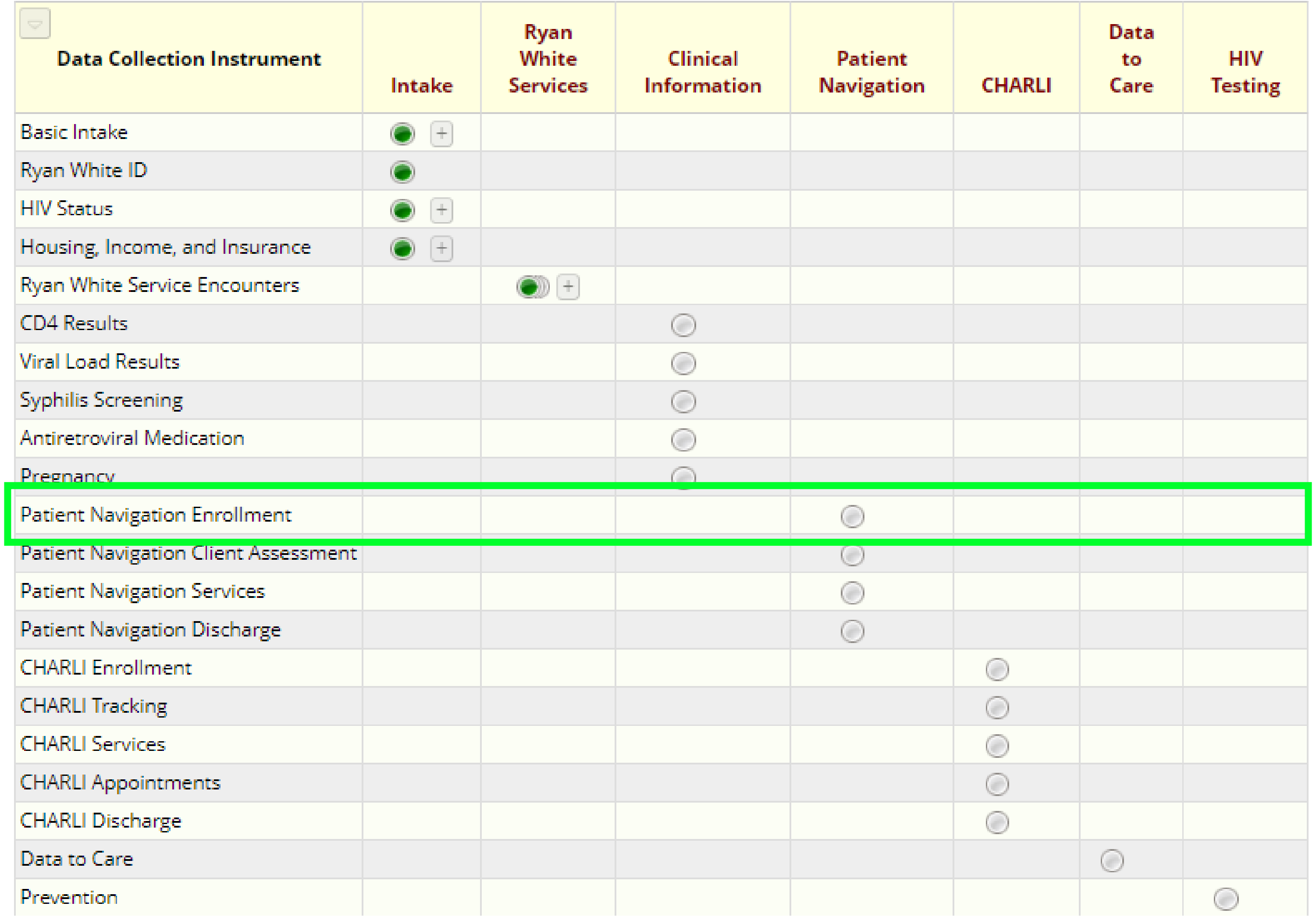
3. If all fields are complete and accurate, change the "Complete?" status to "Complete."

4. To add another service encounter, click the arrow beside "Save and Stay" and select "Save and Add New Instance." This will save the current record and open a new blank Ryan White Service Encounters form for the next service. Click "Save & Exit Form" to go back to the Record Page.



5. When you return to the Record ID page, you will see the service you just added is now part of the Ryan White Service Encounters summary. Note that you can enter more service encounters by clicking the "+Add new" button.

Overview: Patient Navigation



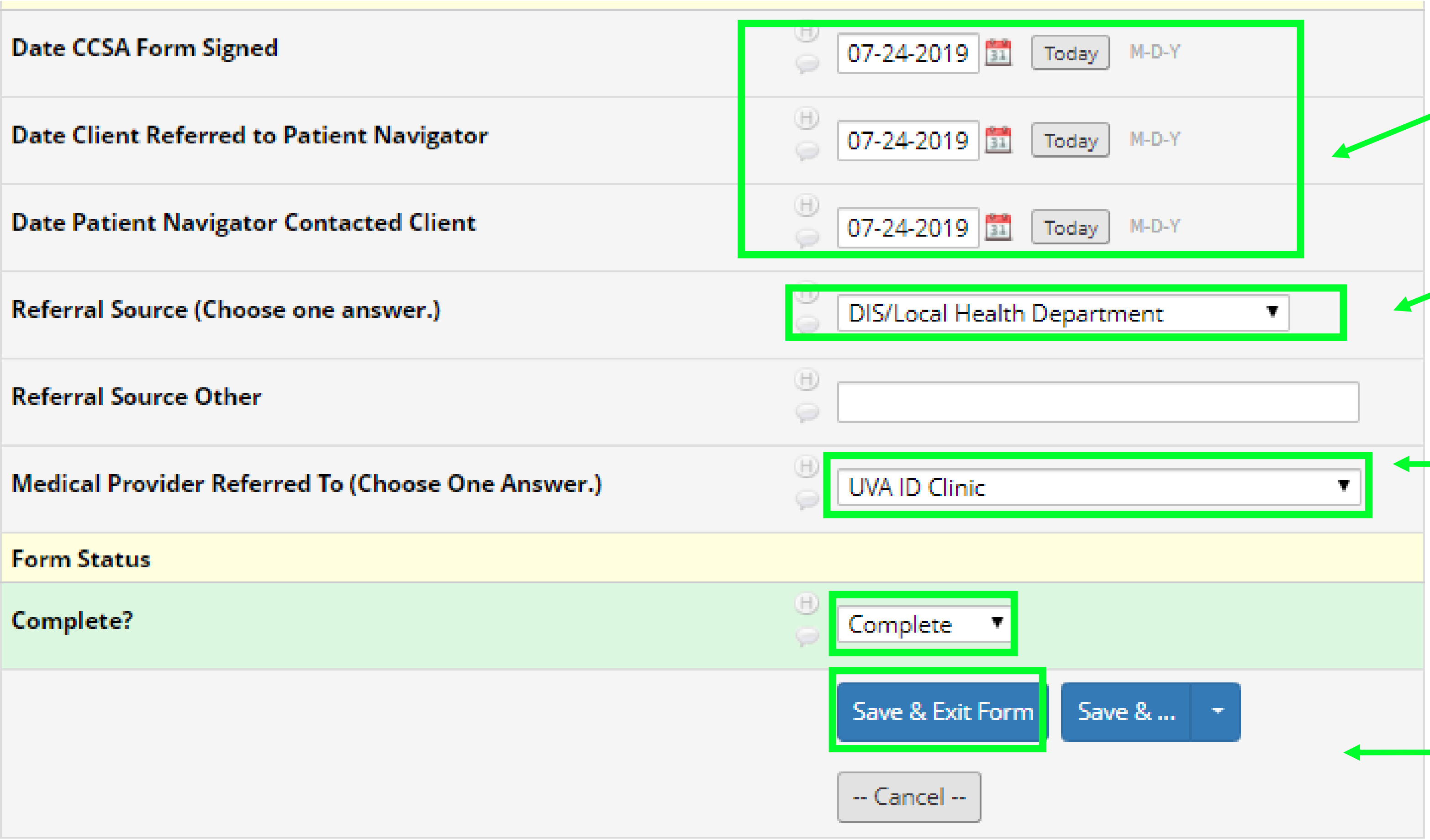
Data Collection Instrument	Intake	Ryan White Services	Clinical Information	Patient Navigation	CHARLI	Data to Care	HIV Testing
Basic Intake							
Ryan White ID							
HIV Status							
Housing, Income, and Insurance							
Ryan White Service Encounters							
CD4 Results							
Viral Load Results							
Syphilis Screening							
Antiretroviral Medication							
Pregnancy							
Patient Navigation Enrollment							
Patient Navigation Client Assessment							
Patient Navigation Services							
Patient Navigation Discharge							
CHARLI Enrollment							
CHARLI Tracking							
CHARLI Services							
CHARLI Appointments							
CHARLI Discharge							
Data to Care							
Prevention							

1. The Patient Navigation Enrollment screen should be used for all Patient Navigation clients and replaces this screen in e2Virginia.

2. Please enter enrollment information in this form prior to entering Client Assessment, Patient Navigation Services or Client Discharge data.

3. From the Record ID page, select the button for Patient Navigation Enrollment to add a new enrollment record.

Adding Patient Navigation Enrollment


Date CCSA Form Signed 07-24-2019 Today M-D-Y
Date Client Referred to Patient Navigator 07-24-2019 Today M-D-Y
Date Patient Navigator Contacted Client 07-24-2019 Today M-D-Y
Referral Source (Choose one answer.) DIS/Local Health Department
Referral Source Other
Medical Provider Referred To (Choose One Answer.) UVA ID Clinic
Form Status
Complete? Complete
Save & Exit Form
Save & ...
-- Cancel --

1. Once in the Patient Navigation Enrollment form, you will be enter all data.

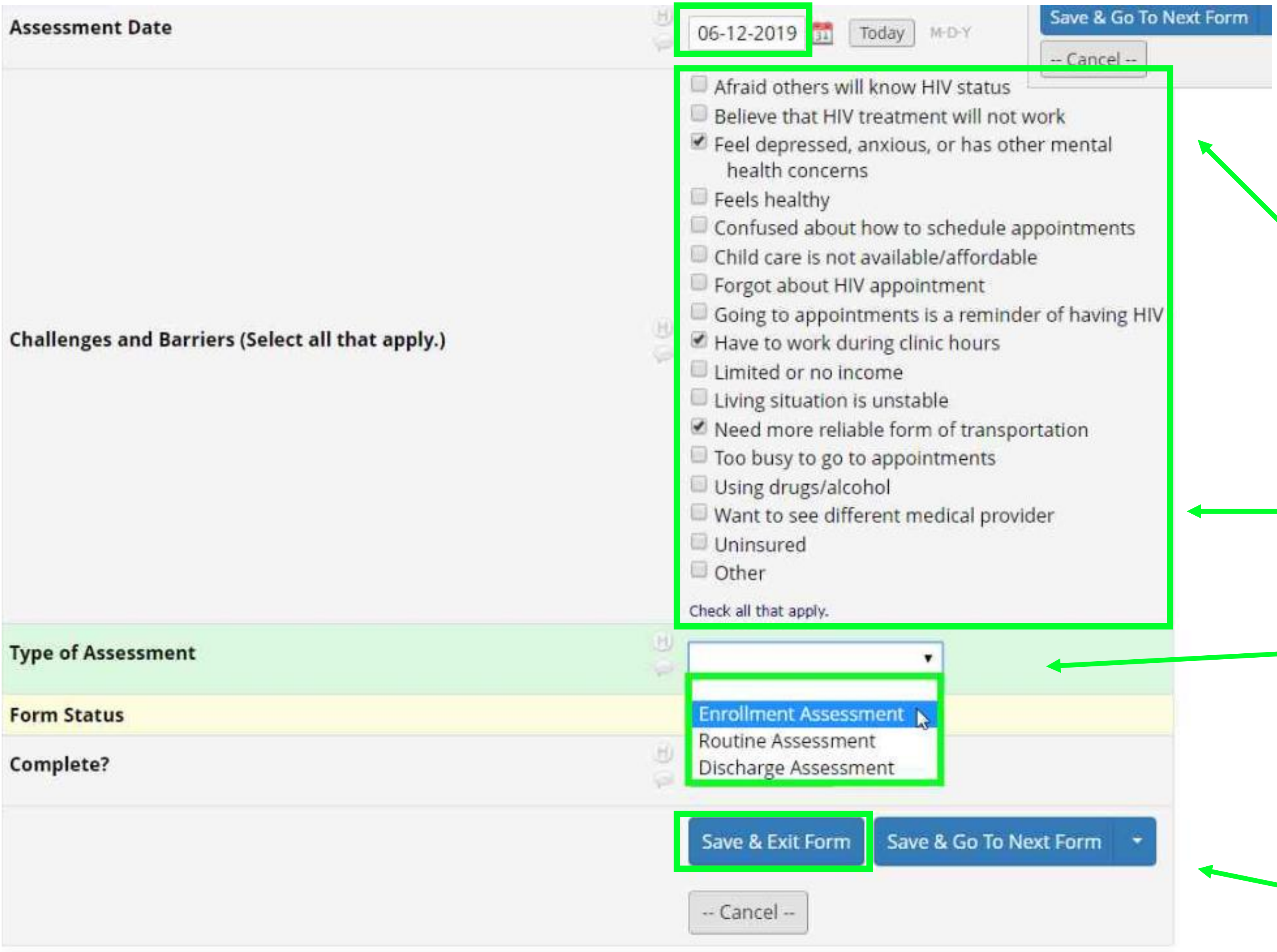
2. Please select from the calendar tools to enter date fields.

3. Select from the appropriate drop down menus for Referral Source and Medical Provider. Referral Source Other may be typed directly in the text box.

4. If the form is complete, please mark it as “complete” under Form Status.

5. Press “Save & Exit Form” to save the record.

Adding Patient Navigation Assessment



1. The Client Assessment Form is used to assess client barriers before, during, and to transition clients from services. Multiple records of this form may be filled out and saved.

2. Please select from the calendar tools to the Assessment Date.

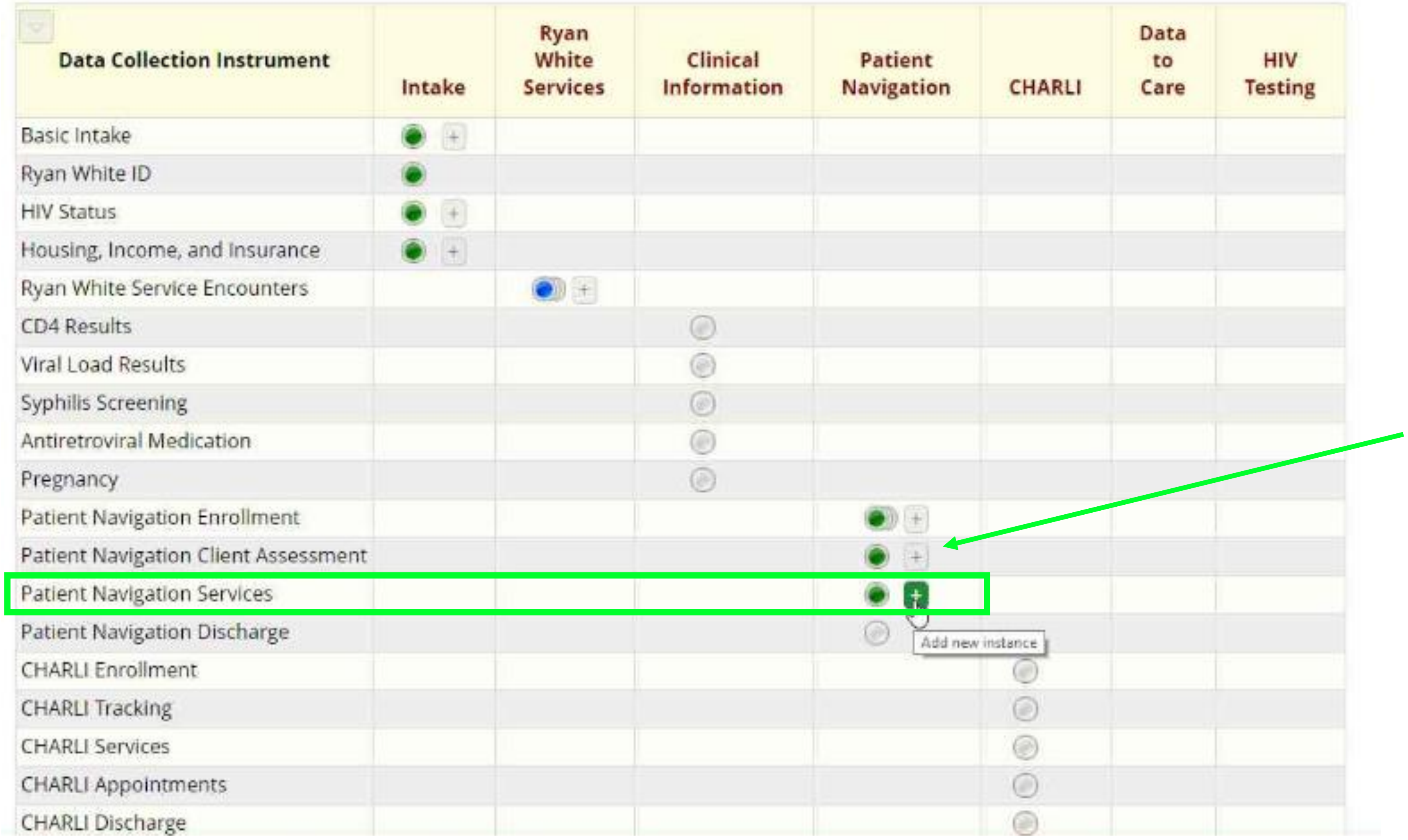
3. Select the appropriate boxes for Challenges and Barriers. More than one box may be selected.

4. Use the drop down menu to select the Type of Assessment.

5. If the form is "complete", select complete.

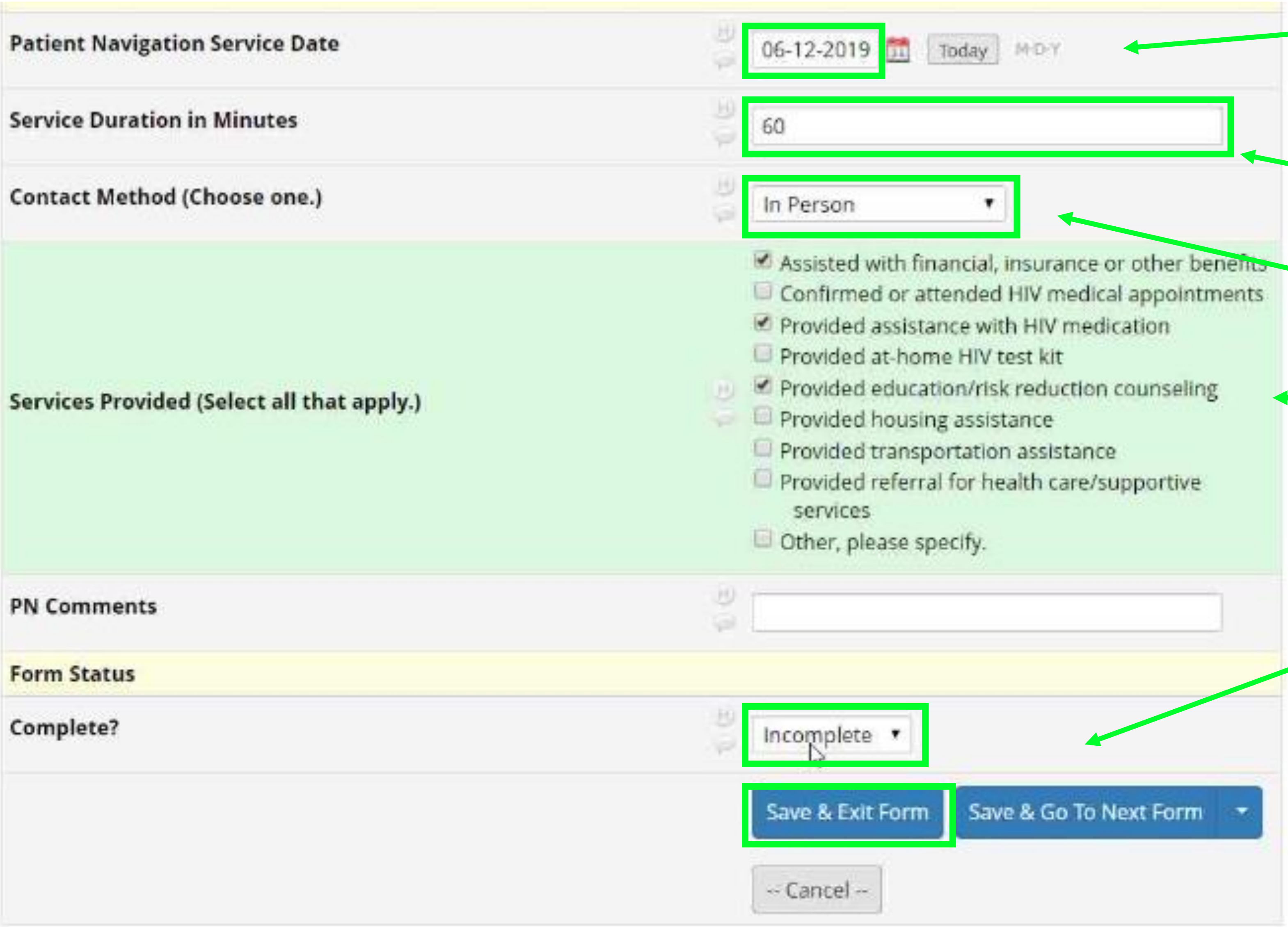
6. Press "Save & Exit Form" to save the record.

Adding Patient Navigation Services



- The Patient Navigation Services screen should be used to record PN services provided to the client. Multiple records of this form may be saved for each client.
- From the Record ID page, select the “+” button for Patient Navigation Services to add a new enrollment record.
- You will then be directed to the Patient Navigation Services Data Entry Form.

Adding Patient Navigation Services, Continued



1. Please select from the calendar tool to enter the Service Date.

2. Enter the duration of the service encounter in minutes (not service units).

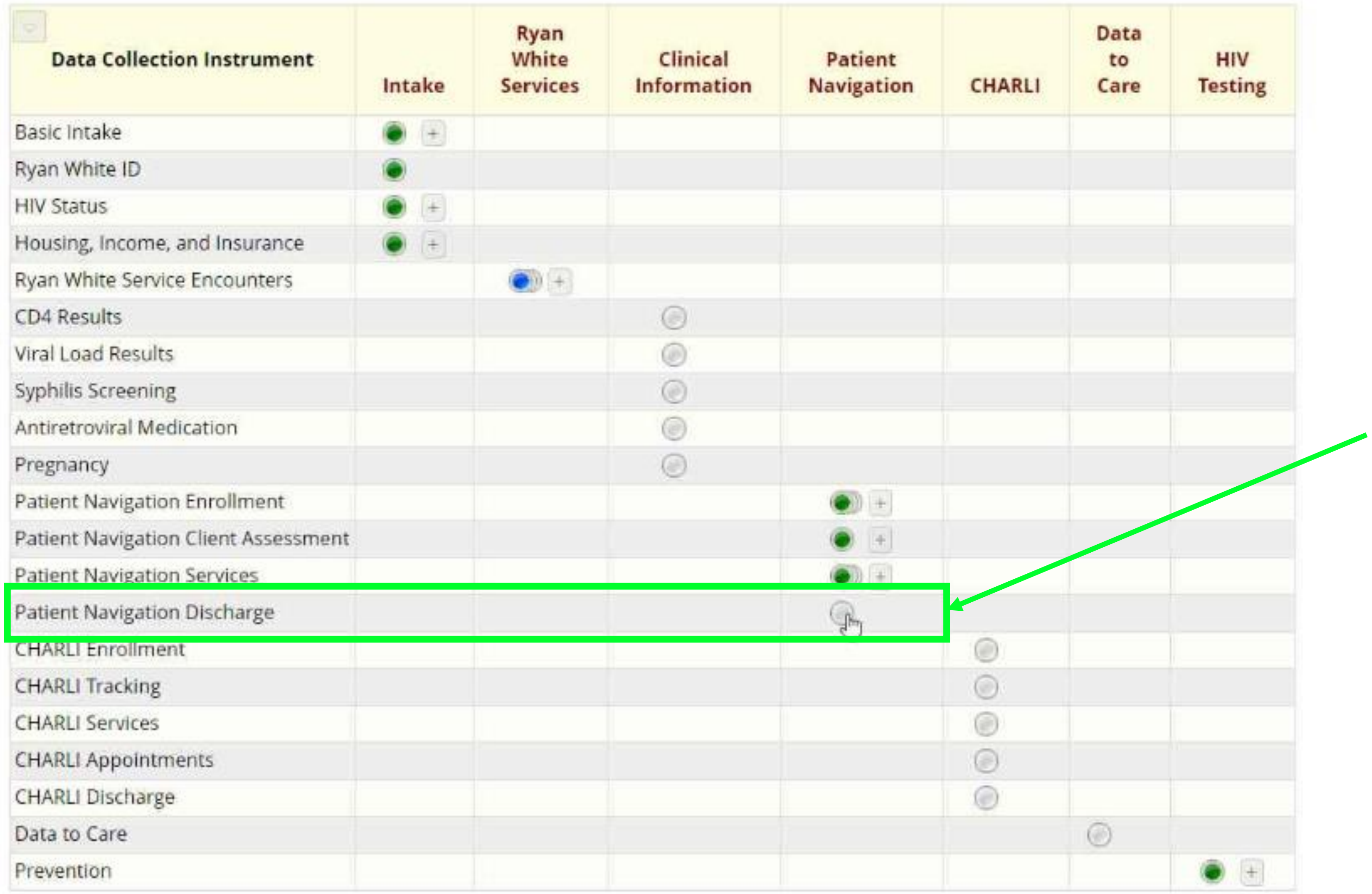
3. Select a contact method from the drop down menu.

4. Check the boxes for all services provided during that encounter. You may select more than one service.

5. If the form is complete, please select “complete” under Form Status.

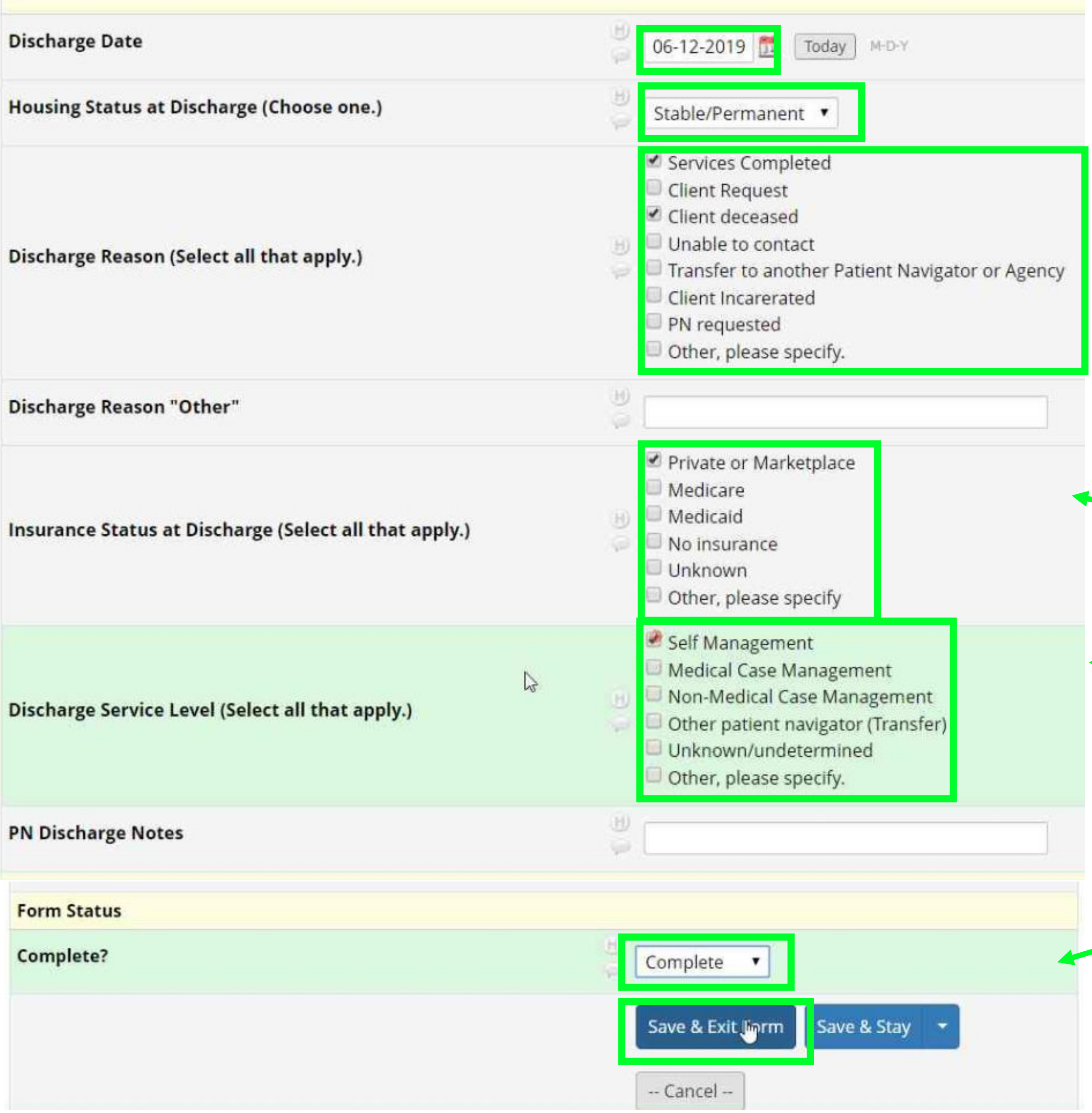
6. Press “Save & Exit Form” to save the record.

Overview: Patient Navigation Discharge



- The Patient Navigation Discharge screen should be used to document discharge from PN services.
- From the Record ID page, select the "+" button for Patient Navigation Enrollment to add a new enrollment record.

Adding Patient Navigation Discharge


Discharge Date 06-12-2019 Today M-D-Y
Housing Status at Discharge (Choose one.) Stable/Permanent
Discharge Reason (Select all that apply.)
Services Completed
Client Request
Client deceased
Unable to contact
Transfer to another Patient Navigator or Agency
Client Incarcerated
PN requested
Other, please specify.
Discharge Reason "Other"
Insurance Status at Discharge (Select all that apply.)
Private or Marketplace
Medicare
Medicaid
No insurance
Unknown
Other, please specify
Discharge Service Level (Select all that apply.)
Self Management
Medical Case Management
Non-Medical Case Management
Other patient navigator (Transfer)
Unknown/undetermined
Other, please specify.
PN Discharge Notes
Form Status
Complete? Complete
Save & Exit Form
Save & Stay
-- Cancel --

1. Please select from the calendar tool to enter the Service Date.

2. Select the Housing Status from the drop down menu options. Check only one.

3. Select the Discharge Reason. You may select more than one reason. If you select “Other”, please enter a reason in the text box.

4. Select the Insurance Status. You may select more than one option.

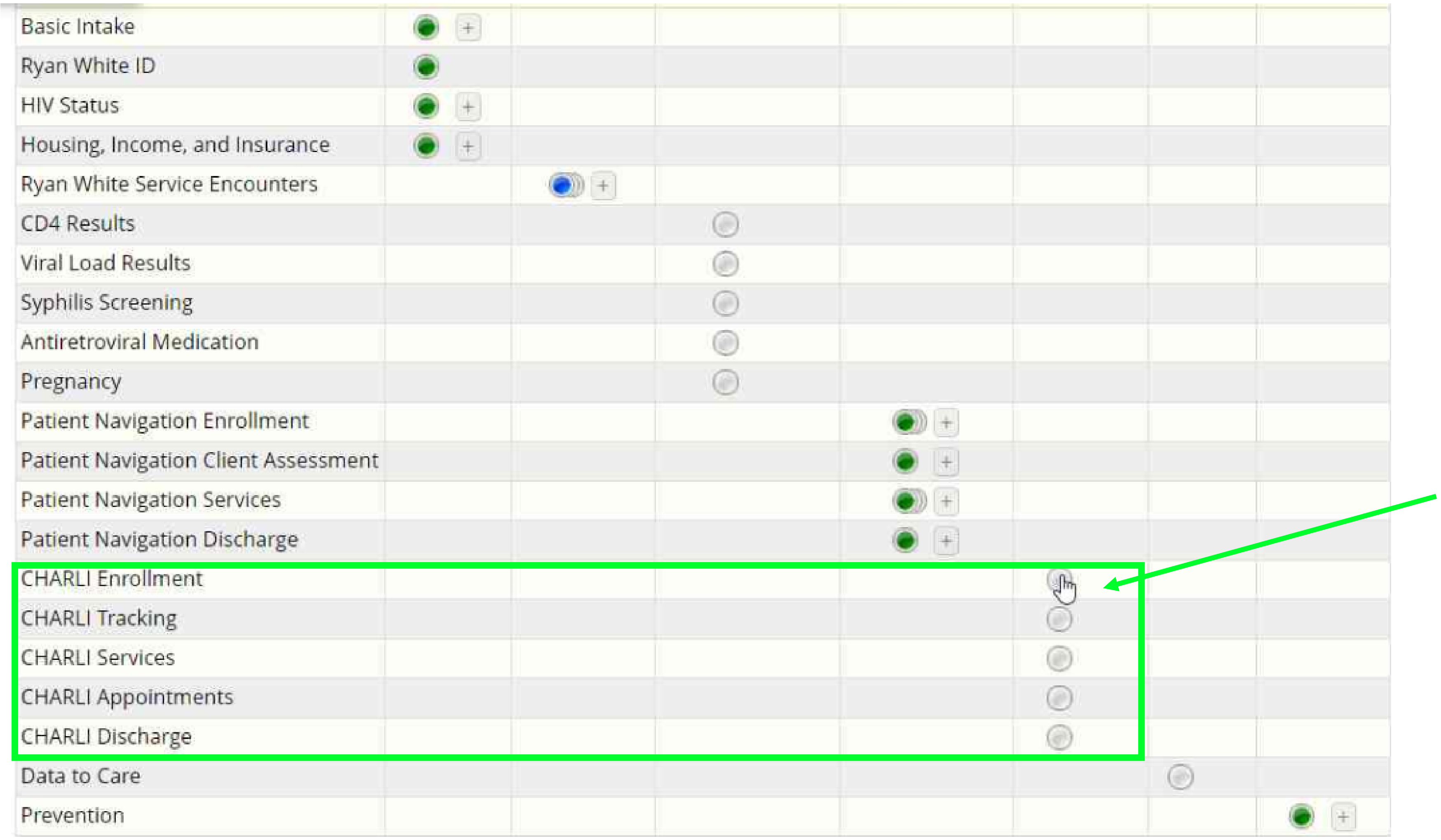
5. Select the Discharge Service Level from the drop down options. You may select more than one option.

6. You may add notes in the section labeled PN Discharge Notes.

7. If the form is complete, please press “complete”.

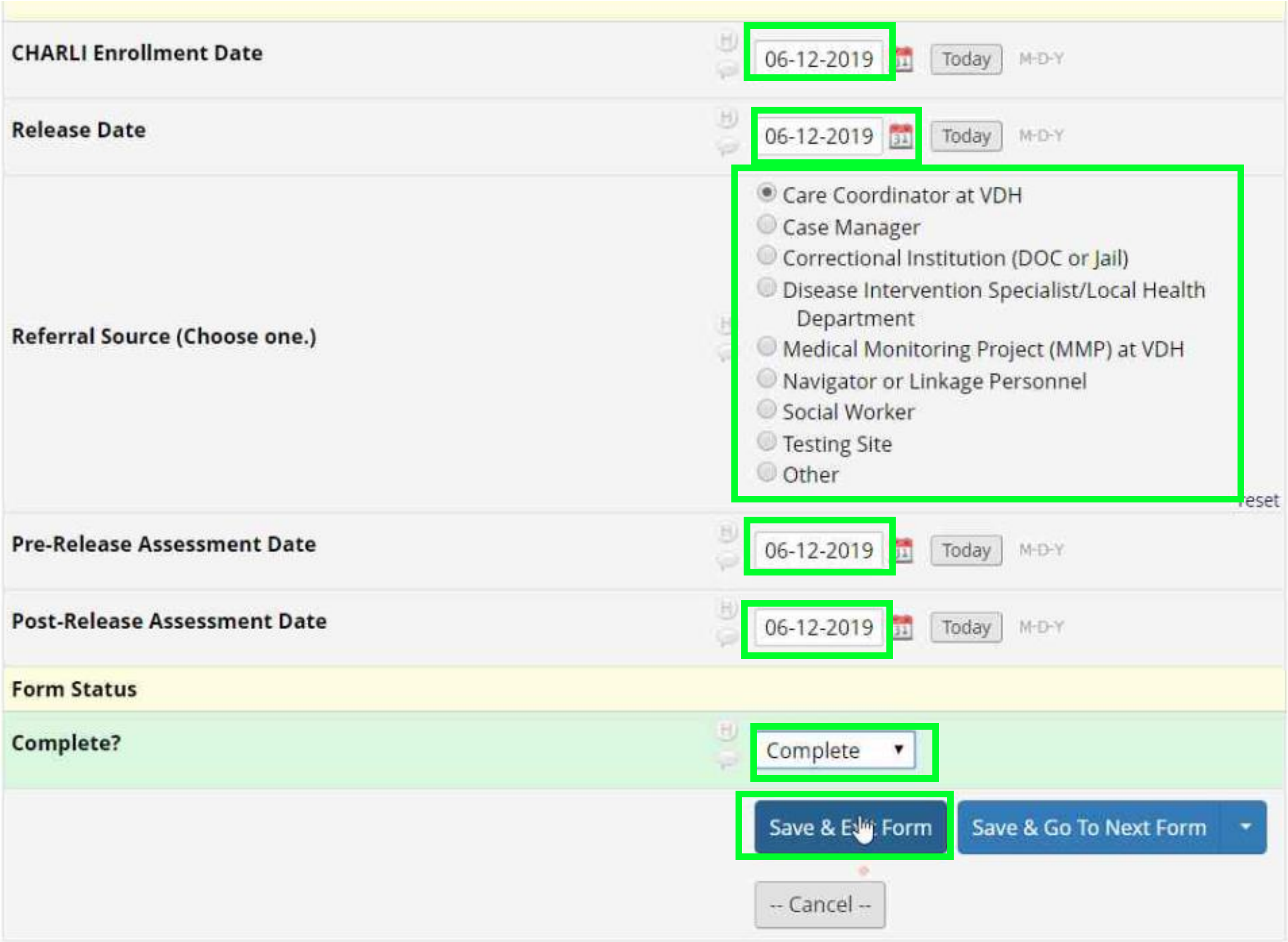
8. Press “Save & Exit Form” to save the record.

Overview: CHARLI



- The CHARLI screen should be used for all CHARLI clients and replaces the CHARLI tab in e2Virginia. This CHARLI module includes the following forms: Enrollment, Tracking, Services, Appointments, and Discharge.
- To begin, enter enrollment information in the “CHARLI Enrollment” form prior to completing the other CHARLI data entry forms.
- From the Record ID page, select the “+” button for CHARLI Enrollment to add a new enrollment record.

Adding CHARLI Enrollment



1. Once in the CHARLI form, you will be enter all data.

2. Please select from the calendar tools to enter date fields.

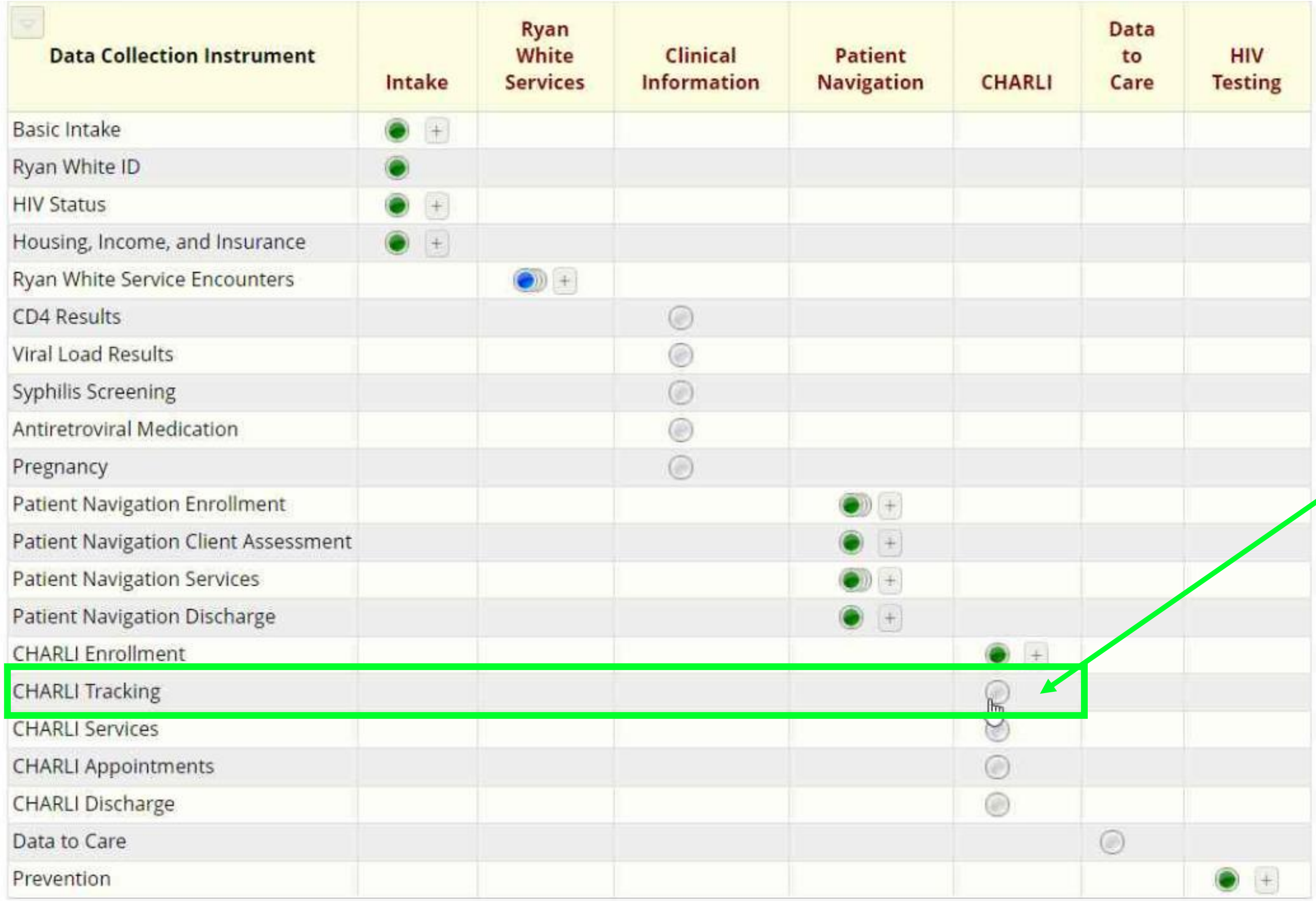
3. Select from the appropriate drop down menus for Referral Source.

4. Enter the Pre Release Assessment and Post Release Assessment dates from the calendar tool.

5. If the form is complete, please mark it as “complete” under Form Status.

6. Press “Save & Exit Form” to save the record.

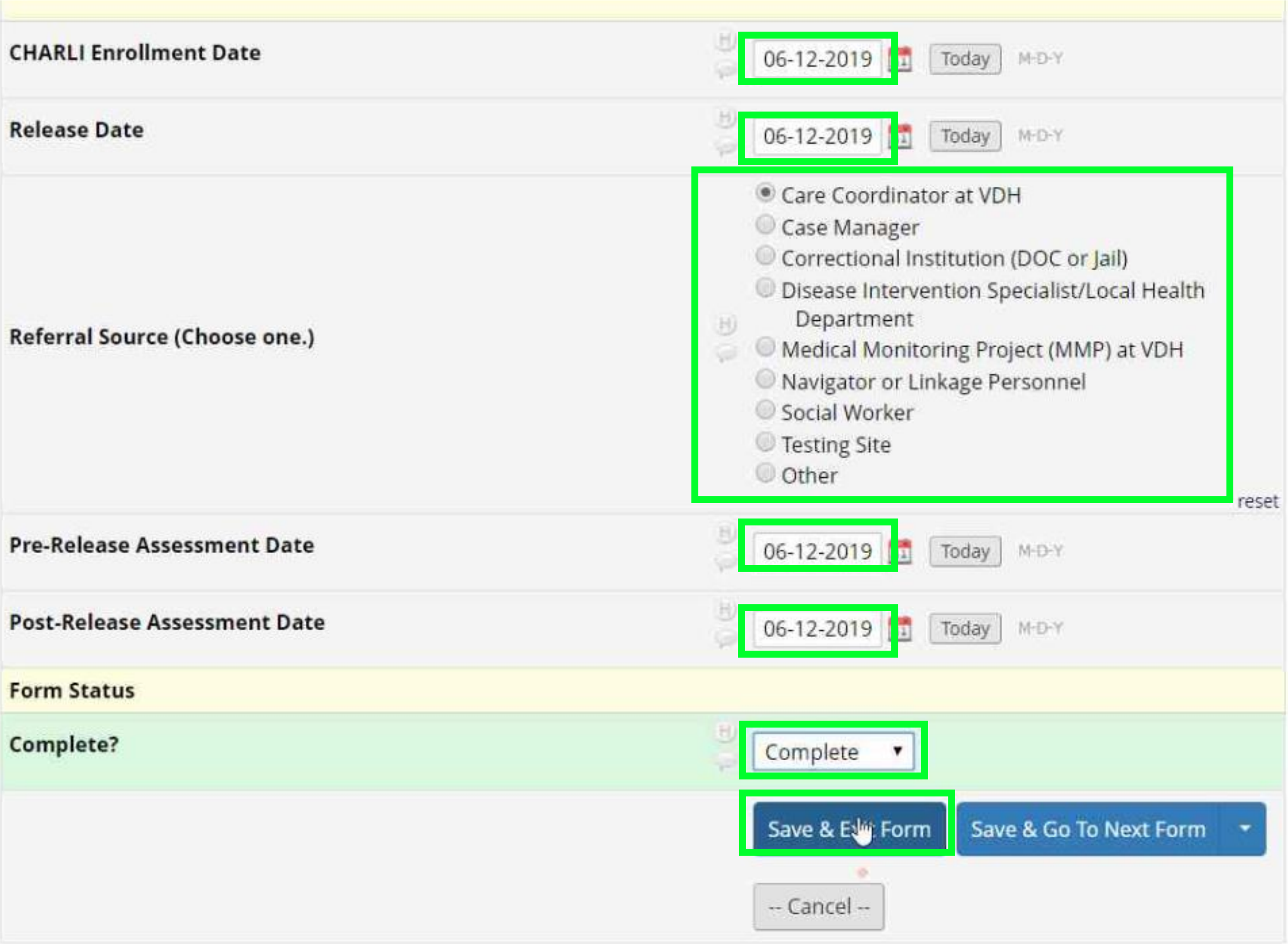
Overview: CHARLI Tracking



- The CHARLI Tracking screen should be used for all CHARLI clients and replaces this screen in e2Virginia.

- From the Record ID page, select the "+" button for CHARLI Tracking to add a new enrollment record.

Overview: CHARLI Tracking



1. The CHARLI tracking form can be used to track CHARLI client statuses.

2. Please select from the calendar tools to select the Enrollment Date and Release Date.

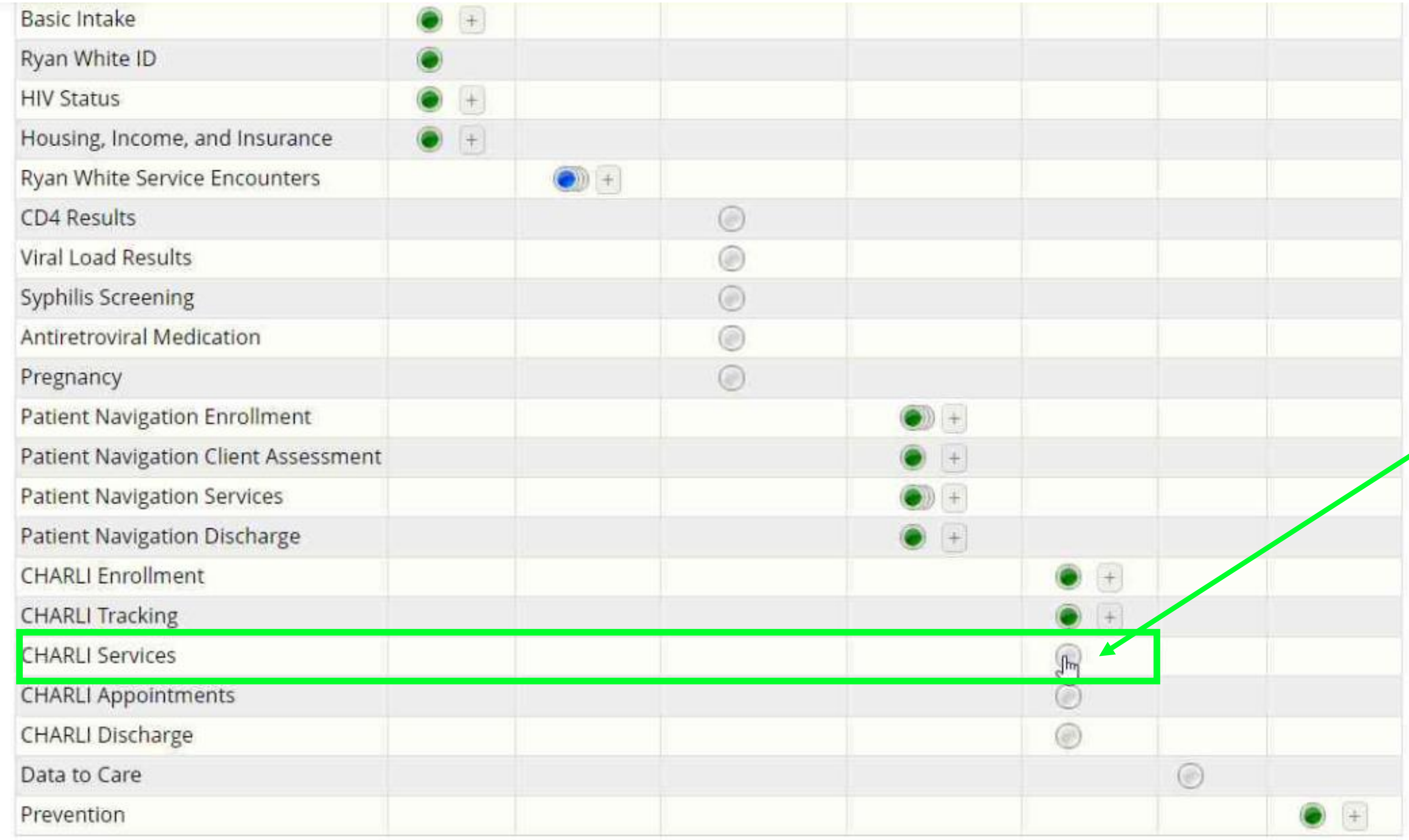
3. Select the Referral Source (choose only one).

4. Select the Pre-Release and Post-Release Assessment Dates using the calendar tool.

5. If the form is “complete”, select complete.

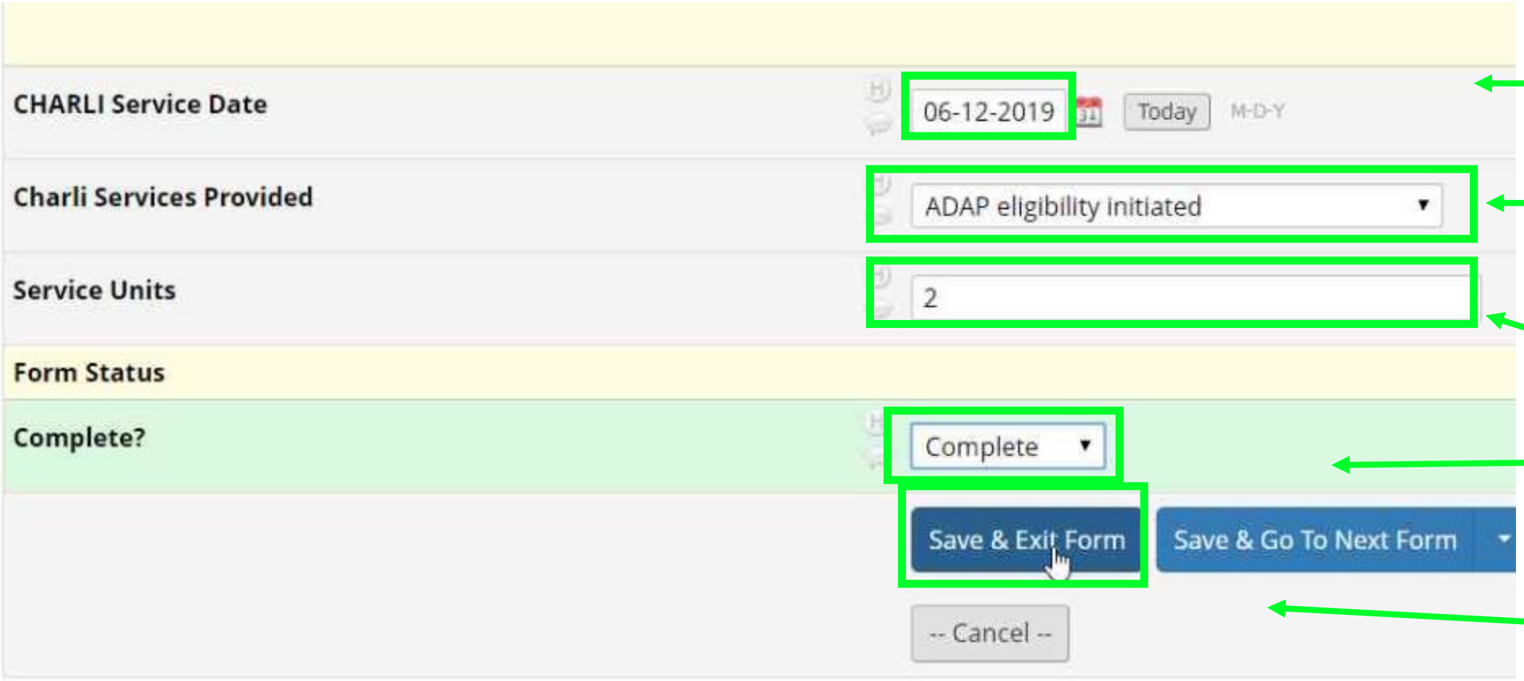
6. Press “Save & Exit Form” to save the record.

Overview: CHARLI Services



- The CHARLI Services screen should be used for all CHARLI clients and replaces this screen in e2Virginia.
- From the Record ID page, select the "+" button for CHARLI Services to add a new enrollment record.

Overview: CHARLI Services



1. Please select from the calendar tool to enter the Service Date.

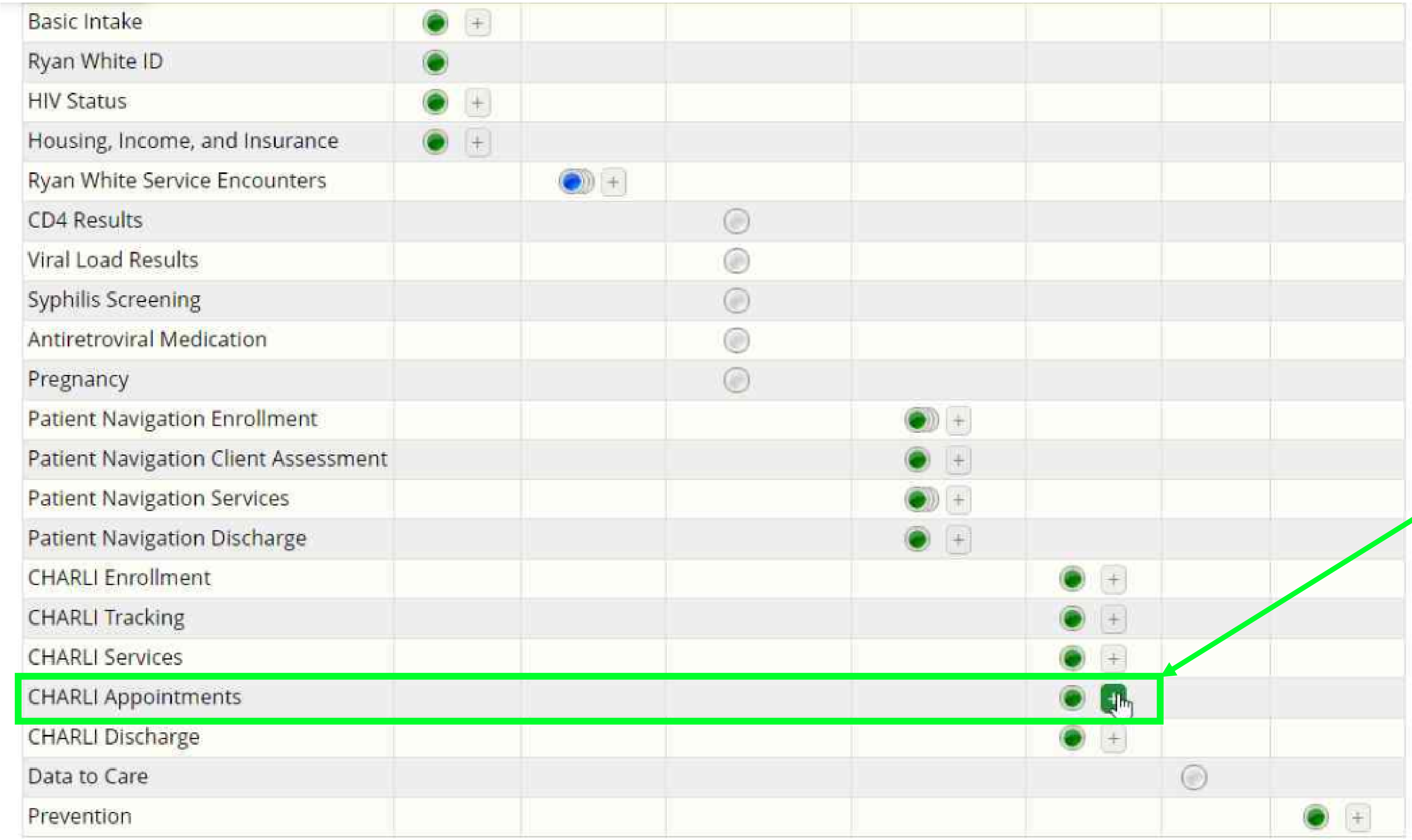
2. Select from the drop down menu to record the "CHARLI Services Provided".

3. Select the number of service units (1 unit=15 minutes).

4. If the form is complete, please select "complete" under Form Status.

5. Press "Save & Exit Form" to save the record.

Overview: CHARLI Appointments



- The CHARLI Appointments screen should be used to document appointments for CHARLI Clients.
- From the Record ID page, select the "+" button for CHARLI Appointments to add a new record.

Overview: CHARLI Appointments

1. Select the Provider Referred to Care from the drop down menu of providers.

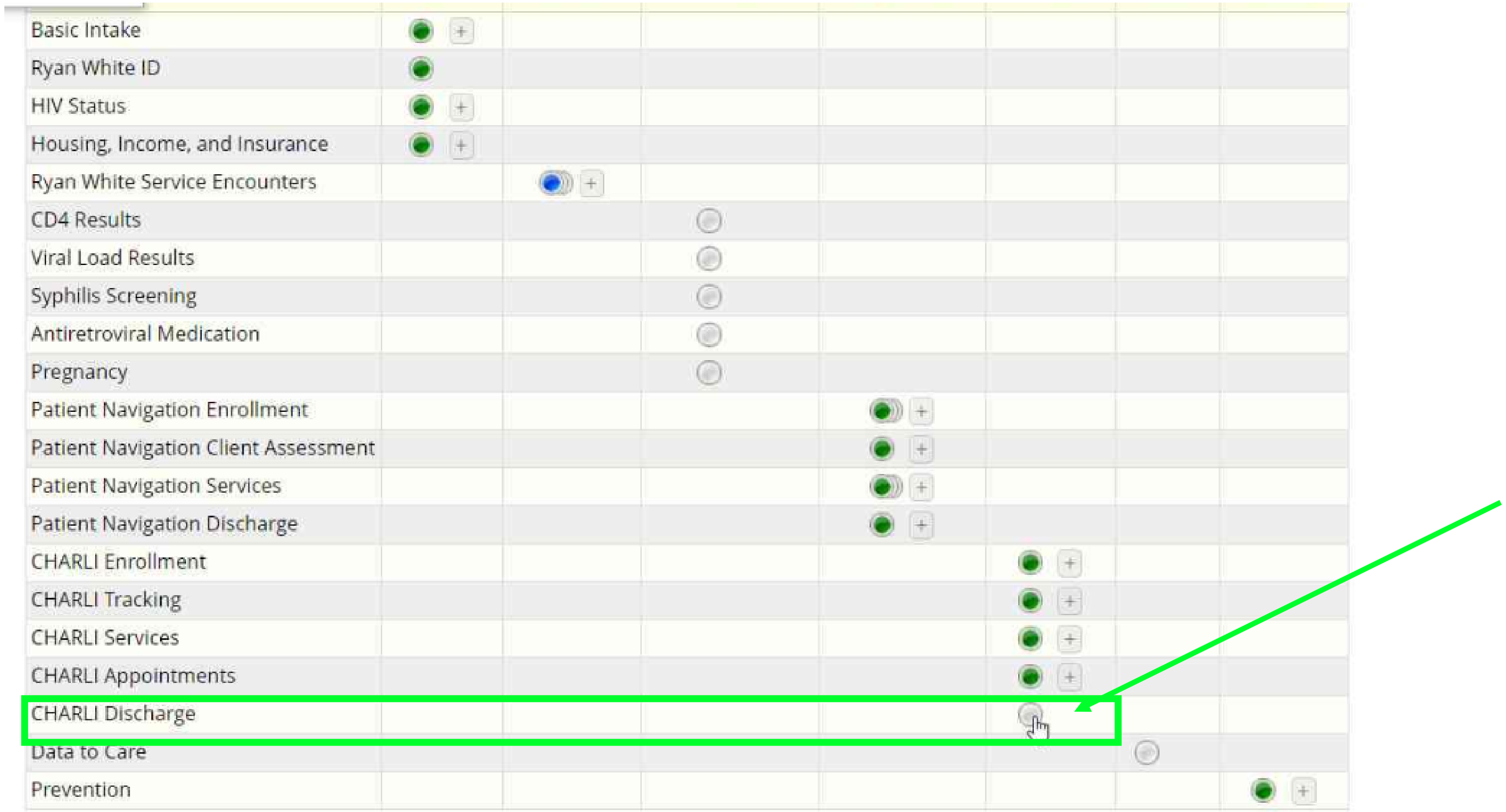
2. Select the Date of Referral and Date of Appointment using the calendar tools.

3. Select Client Attended Appointment from the drop down menu of responses.

4. If the form is complete, please press "complete".

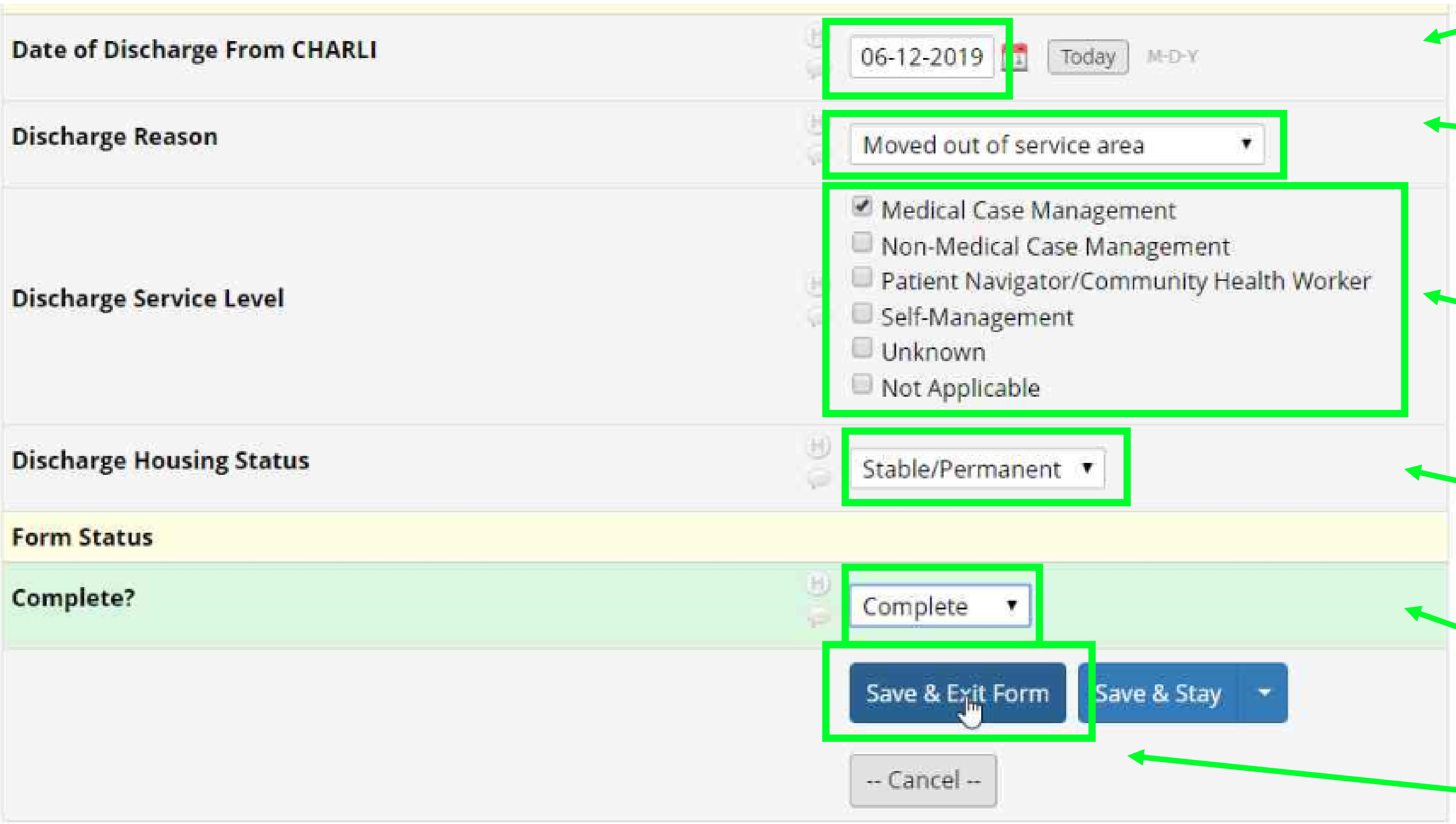
5. Press "Save & Exit Form" to save the record.

Overview: CHARLI Discharge



- The CHARLI Discharge screen should be used for all CHARLI clients being discharged from the program and replaces this screen in e2Virginia.
- From the Record ID page, select the button for CHARLI Discharge to add a new discharge record.

Overview: CHARLI Discharge



1. Enter the Date of Discharge from CHARLI program by using the calendar tool.

2. Select the Discharge Reason from the drop down menu of Reponses. Choose only one option.

3. Select the Discharge Service Level. You may select all that apply.

4. Select the Discharge Housing Status from the drop down menu of response options.

5. If the form is complete, please press “complete”.

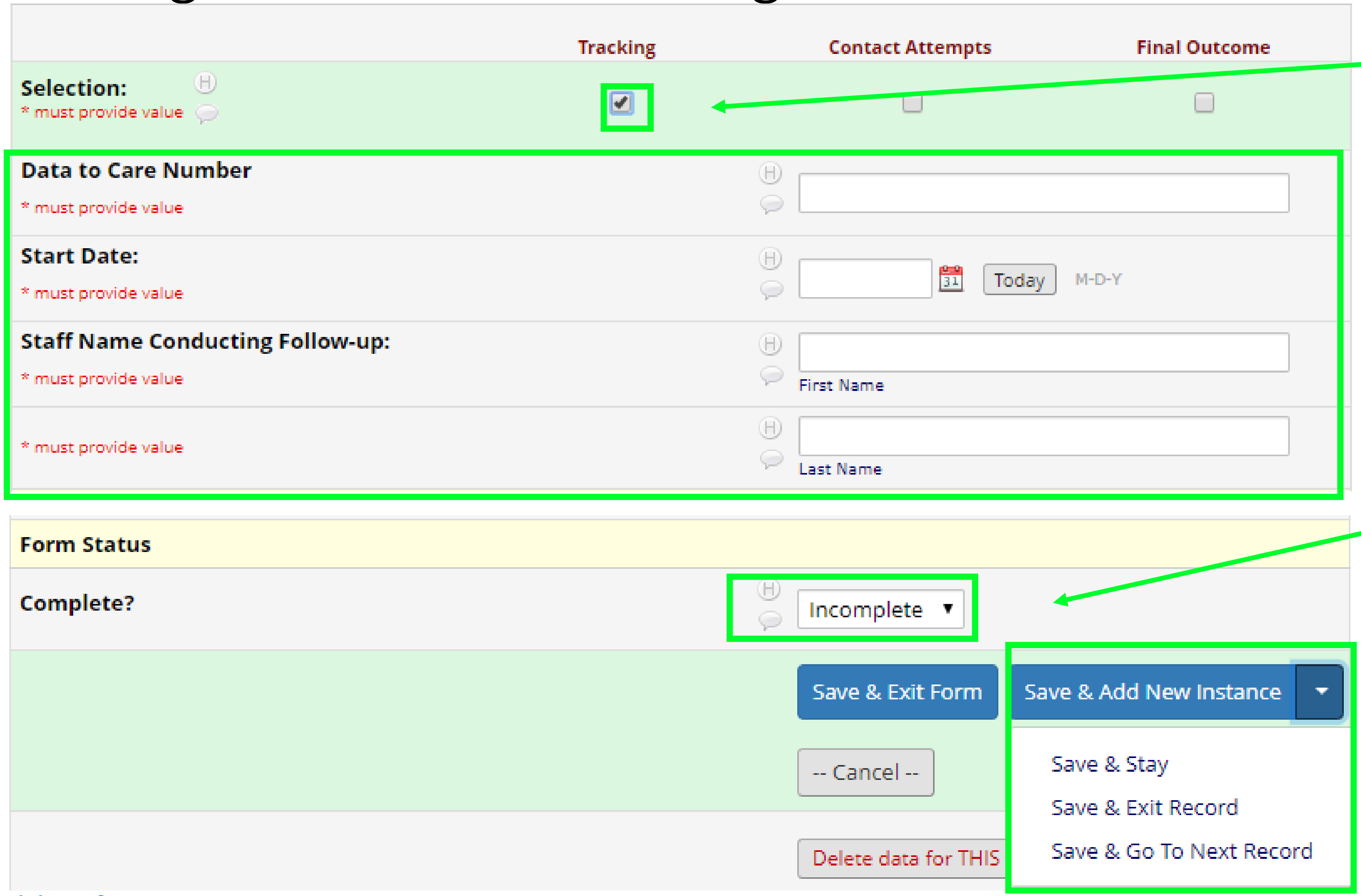
6. Press “Save & Exit Form” to save the record.

Overview: Data to Care (DtC)

Data Collection Instrument	Intake	Ryan White Services	Clinical Information	Patient Navigation	CHARLI	Data to Care	HIV Testing
Basic Intake	● +						
Ryan White ID	●						
HIV Status	○						
Housing, Income, and Insurance	○						
Ryan White Service Encounters		○					
CD4 Results			○				
Viral Load Results			○				
Syphilis Screening			○				
Antiretroviral Medication			○				
Pregnancy			○				
Patient Navigation Enrollment				○			
Patient Navigation Client Assessment				○			
Patient Navigation Services				○			
Patient Navigation Discharge				○			
CHARLI Enrollment					○		
CHARLI Tracking					○		
CHARLI Services					○		
CHARLI Appointments					○		
CHARLI Discharge					○		
Data to Care						○	
Prevention							○

1. From the Record ID page, select the radio button for "Data to Care" to document Data to Care activities.

Adding Data to Care Tracking Information



1. To create a new tracking entry, click on the "Tracking" radio button.

2. Fill in all required fields denoted with a red asterisk. The Data to Care Number is provided to you on the Out-of-Care list.

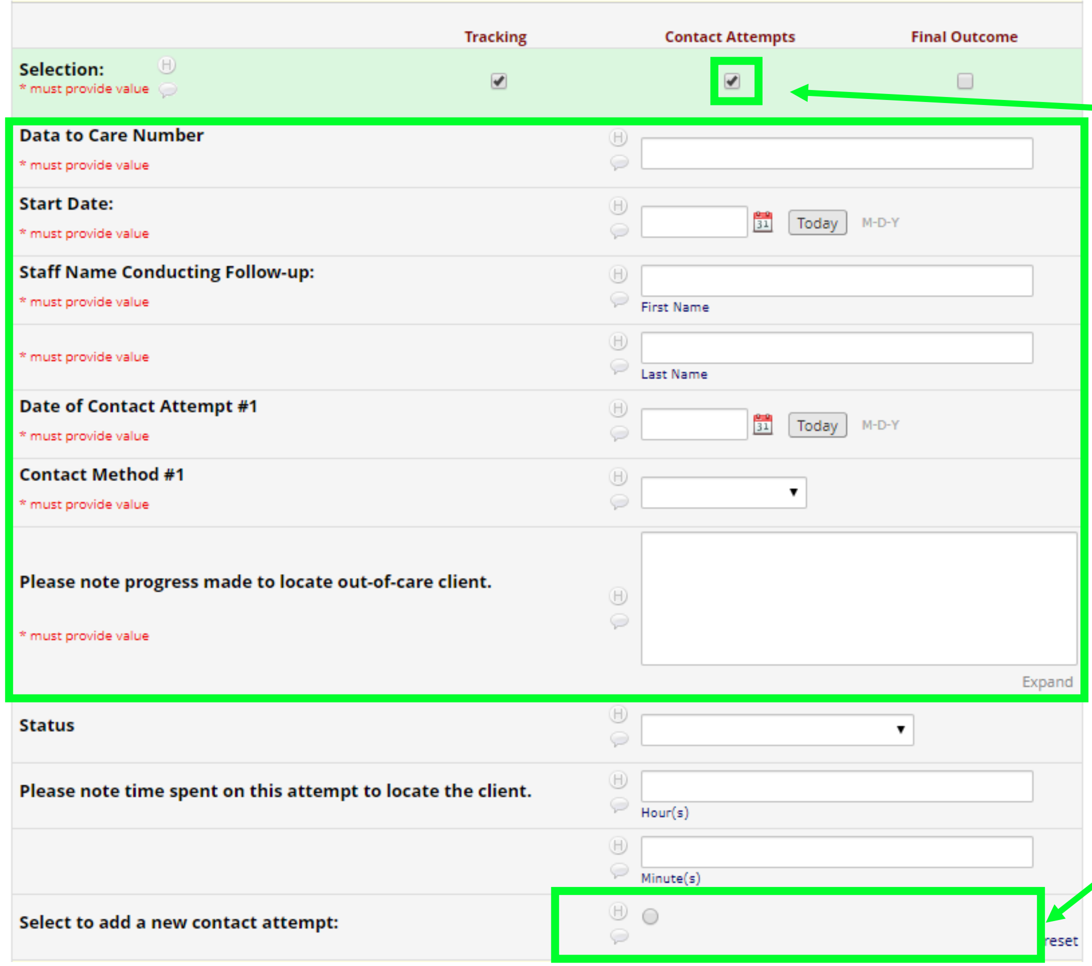
3. Leave "Complete?" Status as "Incomplete" until Final Outcome has been selected .

4. If only entering tracking information, select "Save & Exit Record". If continuing to contact attempts, select "Save & Stay".

[Table of Contents]

In this section: [DtC Overview] [Tracking] [Contact Attempts] [Final Outcome] ([In Care], [Not in Care], [Relocated/Deceased], [Incarcerated/Unable to Contact/Discharged])

Adding Data to Care Contact Attempts

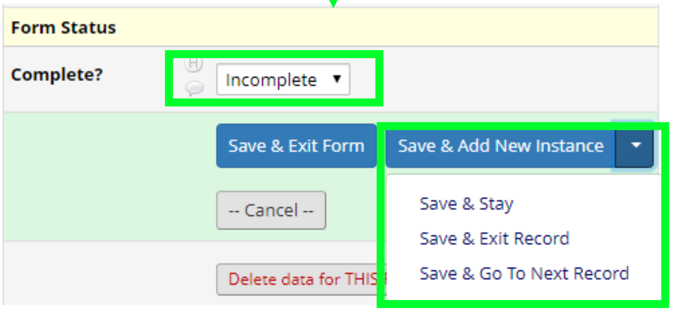


1. To create a contact attempts entry, click on the "Contact Attempts" radio button.

2. Fill in all required fields denoted with a red asterisk.

3. To enter additional contact attempt, select the radio button and fill in all required fields. To unselect this option, click "reset".

4. Leave "Complete?" Status as "Incomplete" until Final Outcome has been selected .



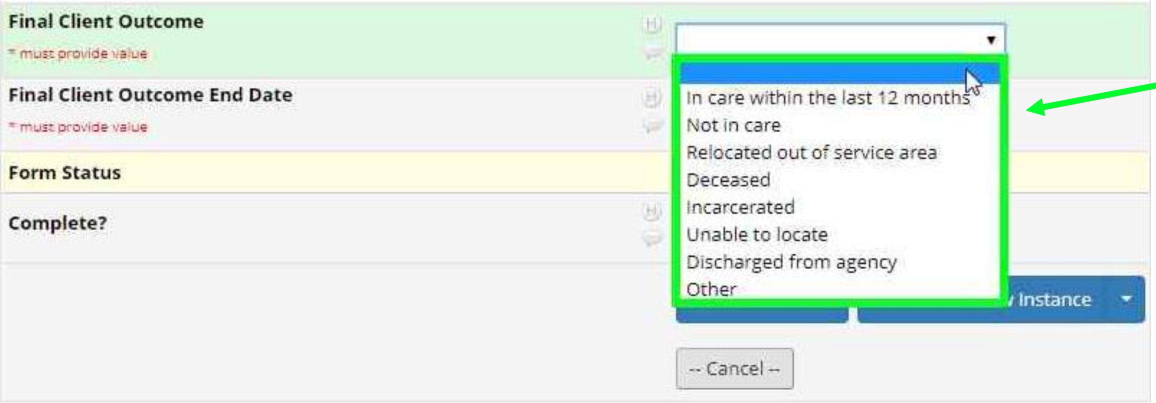
5. If only entering contact attempts, select "Save & Exit Record". If continuing to Final Outcome, select "Save & Stay".

Table of Contents

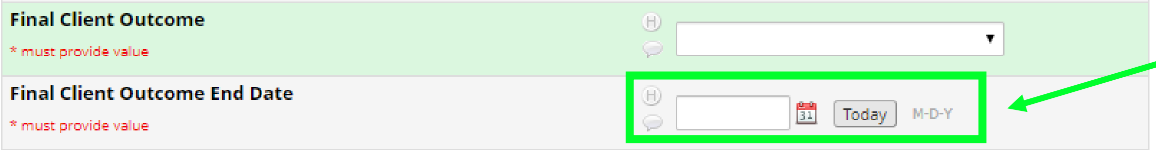
In this section: DtC Overview Tracking Contact Attempts Final Outcome (In Care, Not in Care, Relocated/Deceased, Incarcerated/Unable to Contact/Discharged)

Adding Data to Care Final Outcome

1. To select a Final Client Outcome, click on the "Final Outcome" radio button.



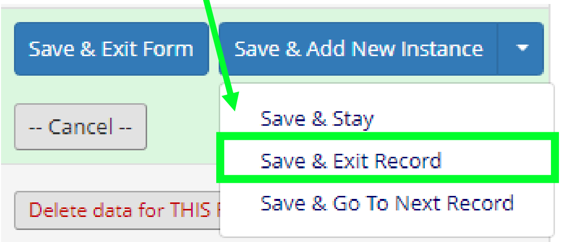
2. Select the Final Client Outcome and enter in additional fields as applicable (see additional slides for more detailed information on Final Client Outcomes).



3. Enter the date the follow-up was completed.

4. Change "Complete?" to "Complete".

5. Select "Save & Exit Record".



[Table of Contents]

In this section: [DtC Overview] [Tracking] [Contact Attempts] [Final Outcome] ([In Care], [Not in Care], [Relocated/Deceased], [Incarcerated/Unable to Contact/Discharged])

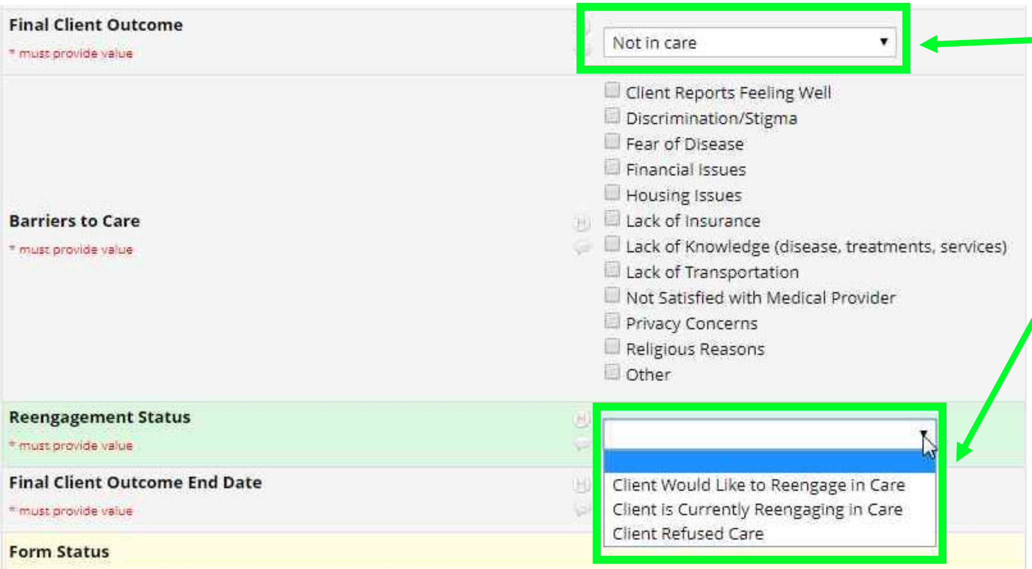
Final Client Outcome: In Care


Final Client Outcome
* must provide value
In care within the last 12 months
Provider Name
Agency Name
* must provide value
Date of Last Appointment
* must provide value
Today M-D-Y
Date of Upcoming Appointment
Today M-D-Y
Final Client Outcome End Date
* must provide value
Today M-D-Y

1. Select "In care within the last 12 months" as Final Client Outcome.

2. Fill in all required fields denoted with a red asterisk.

Final Client Outcome: Not in care

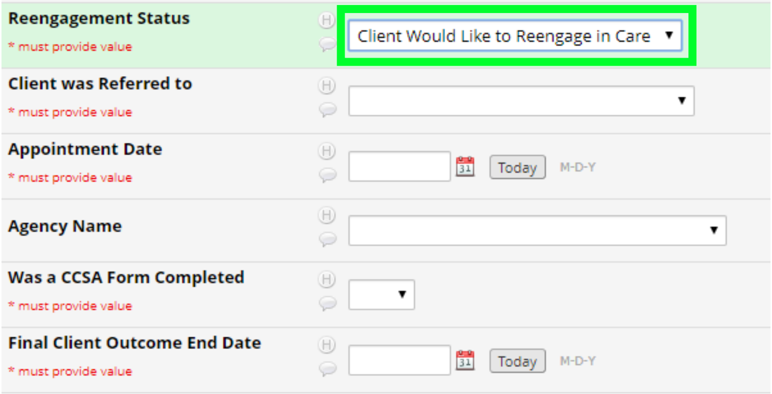


1. Select "Not in care" as Final Client Outcome.

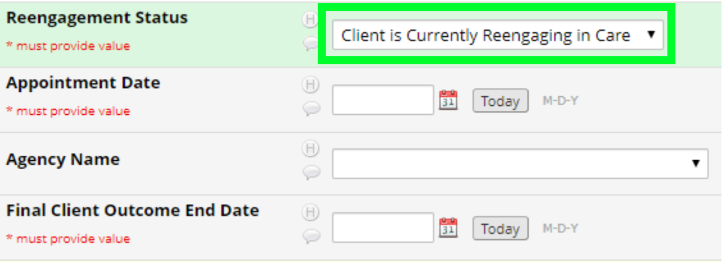
2. Fill in all required fields denoted with a red asterisk.

3. Select the "Reengagement Status" most applicable to your client and fill out additional information, as applicable (see below for all options).

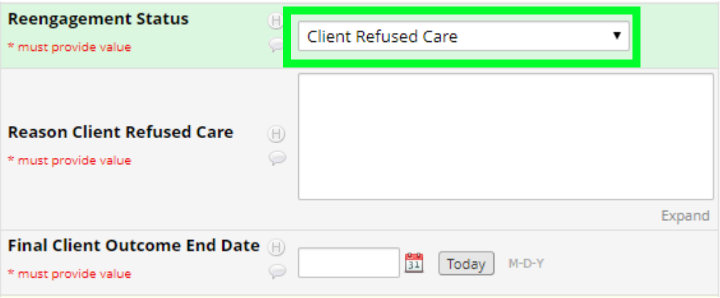
> Client Would like to Reengage in Care



> Client is Currently Reengaging in Care



> Client Refused Care

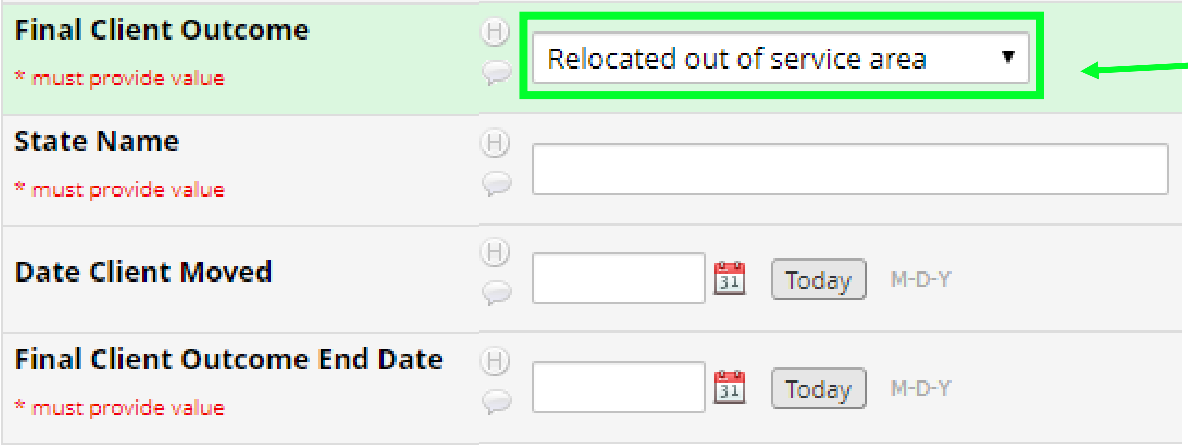


[Table of Contents](#)

In this section: [DtC Overview](#) [Tracking](#) [Contact Attempts](#) [Final Outcome](#) ([In Care](#), [Not in Care](#), [Relocated/Deceased](#), [Incarcerated/Unable to Contact/Discharged](#))

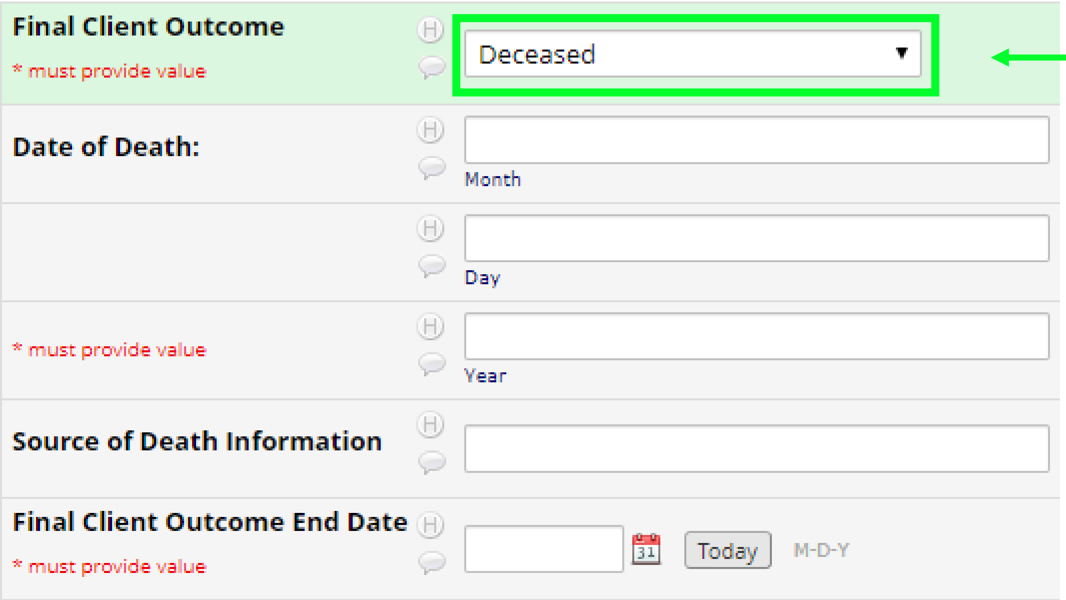
Final Client Outcome: Relocated or Deceased

> Relocated



1. Select "Relocated out of service area" as Final Client Outcome. Fill in all required fields denoted with a red asterisk.

> Deceased



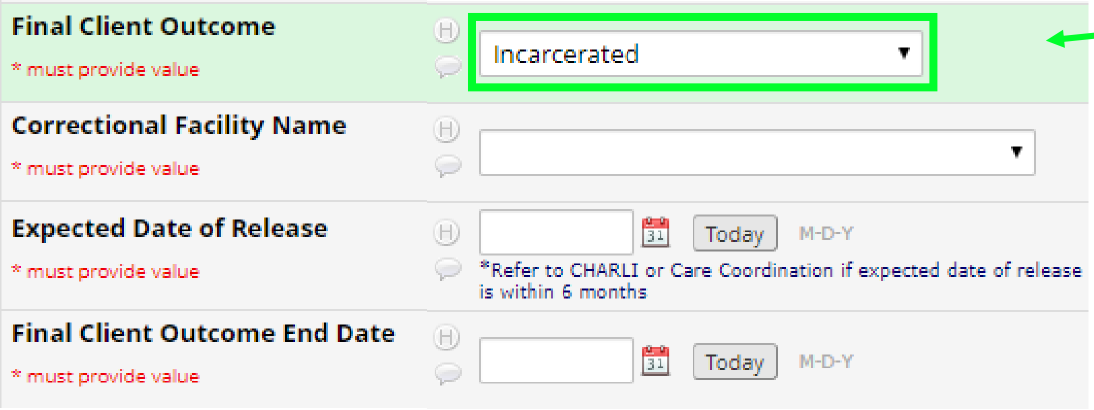
2. If the client's final outcome is "Deceased", select "Deceased" as Final Client Outcome. Fill in all required fields denoted with a red asterisk.

Table of Contents

In this section: DtC Overview Tracking Contact Attempts Final Outcome (In Care, Not in Care, Relocated/Deceased, Incarcerated/Unable to Contact/Discharged)

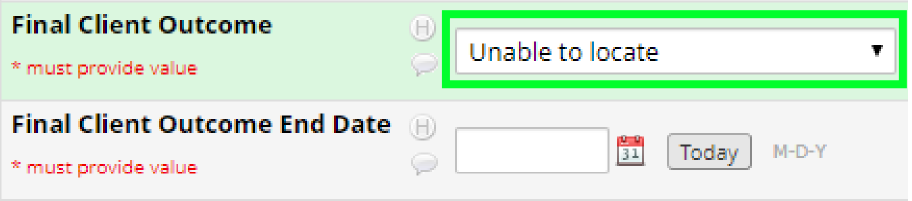
Final Client Outcome: Incarcerated, Unable to locate or Discharged from agency

> Incarcerated



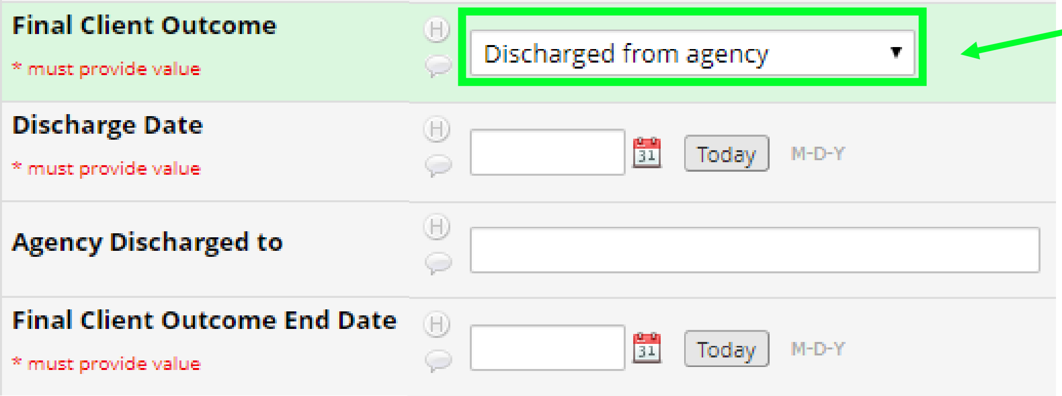
1. If the client's final outcome is "Incarcerated" , select "Incarcerated" from the Final Client Outcome drop-down menu. Fill in all required fields denoted with a red asterisk

> Unable to locate



2. If you have not been able to locate the client, select "Unable to locate" from the Final Client Outcome drop-down menu. Fill in all required fields denoted with a red asterisk

> Discharged from agency



3. If the client has been discharged from your Agency, select "Discharged from agency" from the Final Client Outcome drop-down menu. Fill in all required fields denoted with a red asterisk

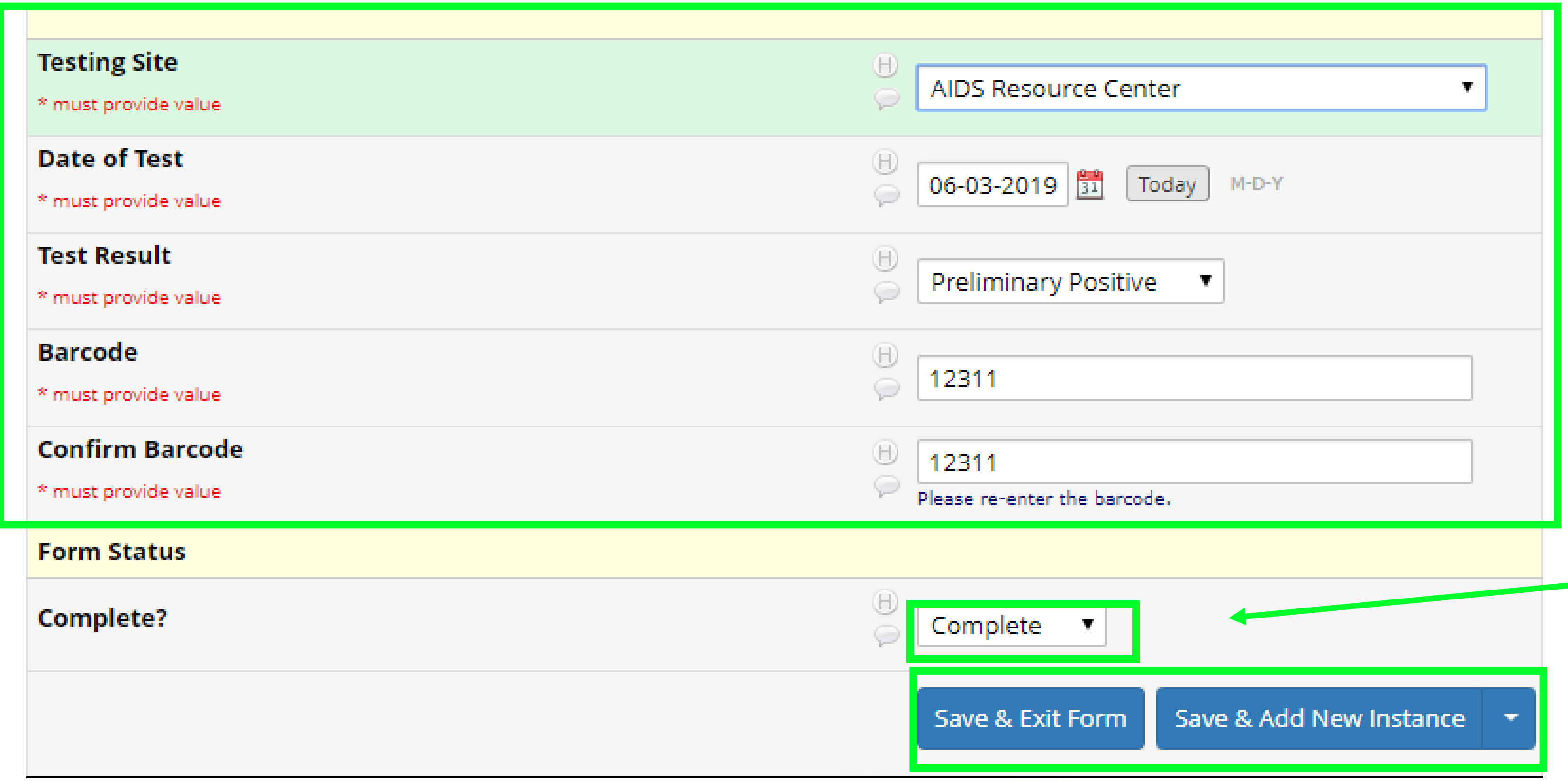
Overview: HIV Testing

Data Collection Instrument	Intake	Ryan White Services	Clinical Information	Patient Navigation	CHARLI	Data to Care	HIV Testing
Basic Intake	+						
Ryan White ID							
HIV Status	+						
Housing, Income, and Insurance	+						
Ryan White Service Encounters		+					
CD4 Results							
Viral Load Results							
Syphilis Screening							
Antiretroviral Medication							
Pregnancy							
Patient Navigation Enrollment							
Patient Navigation Client Assessment							
Patient Navigation Services							
Patient Navigation Discharge							
CHARLI Enrollment							
CHARLI Tracking							
CHARLI Services							
CHARLI Appointments							
CHARLI Discharge							
Data to Care							
Prevention							+

From the Record ID page, select the '+' button for Prevention to add a new instance.

Table of Contents In this section: HIV Testing Overview Adding HIV Testing Record

Adding HIV Testing Record



1. Once in the Prevention form, you will be able to enter; Testing site, Date of Test, Test result, Barcode, and confirm barcodeclient type, date of birth, sex at birth, social security number, current gender, First Name, Middle Name, Last Name, Suffix, Maiden Name, and Alias if applicable.

2. If the form is complete with all fields accurate, change the "Complete" status to "Complete."

3. Once the form is complete, "Save & Exit Form." If there is another instance to add select "Save & Add New Instance."