

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

August 7, 2019

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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/>.

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.

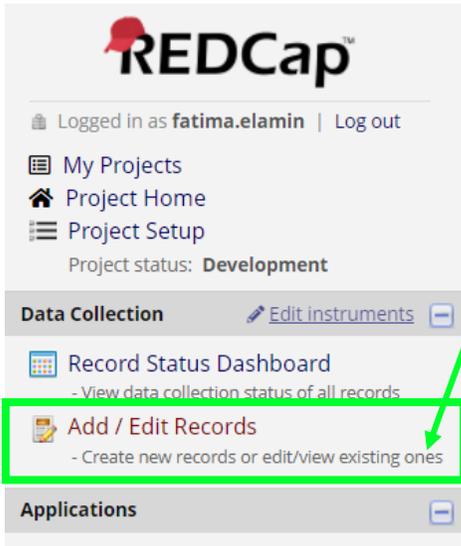
2. Getting access to the DDP REDCap system

- 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 from 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	<input type="radio"/>						
Ryan White ID	<input type="radio"/>						
HIV Status	<input type="radio"/>						
Housing, Income, and Insurance	<input type="radio"/>						
Ryan White Service Encounters		<input type="radio"/>					
CD4 Results			<input type="radio"/>				
Viral Load Results			<input type="radio"/>				
Syphilis Screening			<input type="radio"/>				
Antiretroviral Medication			<input type="radio"/>				
Pregnancy			<input type="radio"/>				
Patient Navigation Enrollment				<input type="radio"/>			
Patient Navigation Client Assessment				<input type="radio"/>			
Patient Navigation Services				<input type="radio"/>			
Patient Navigation Discharge				<input type="radio"/>			
CHARLI Enrollment					<input type="radio"/>		
CHARLI Tracking					<input type="radio"/>		
CHARLI Services					<input type="radio"/>		
CHARLI Appointments					<input type="radio"/>		
CHARLI Discharge					<input type="radio"/>		
Data to Care						<input type="radio"/>	
Prevention							<input type="radio"/>

Total records: 47

Choose an existing Record ID

Data Search

Choose a field to search (excludes multiple choice fields)

Search query

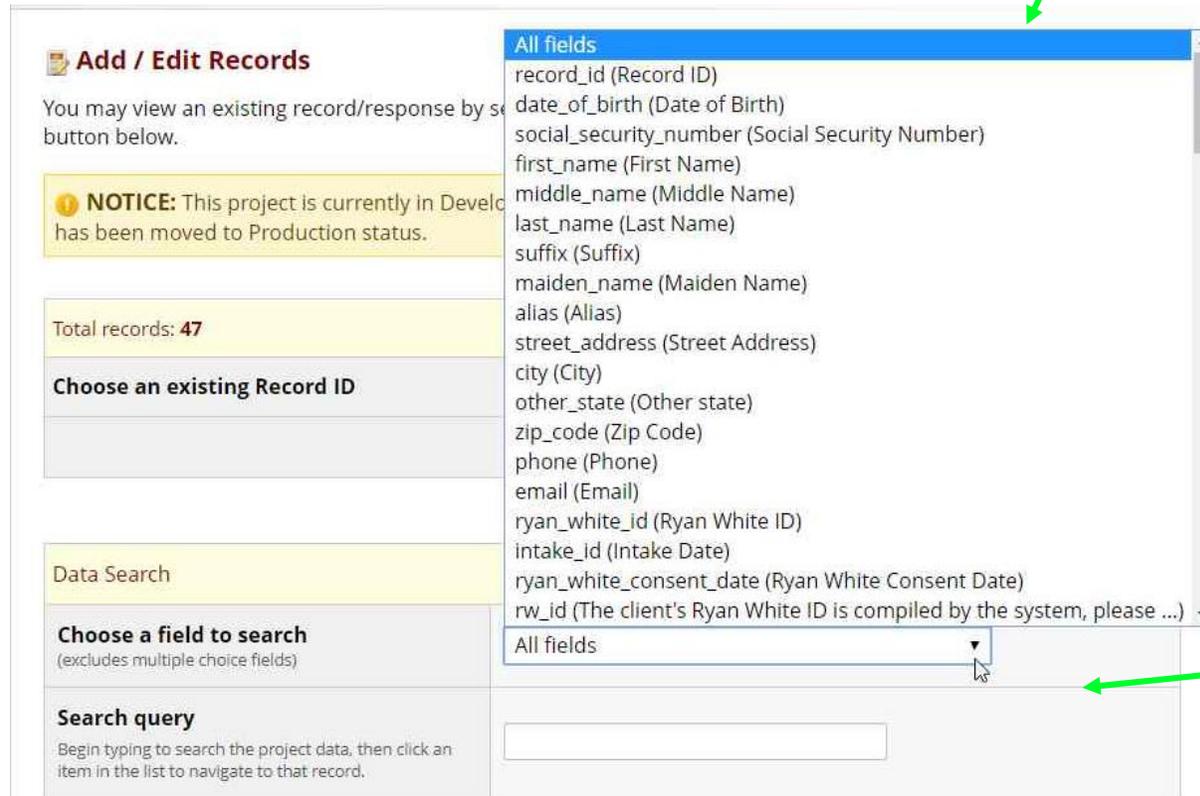
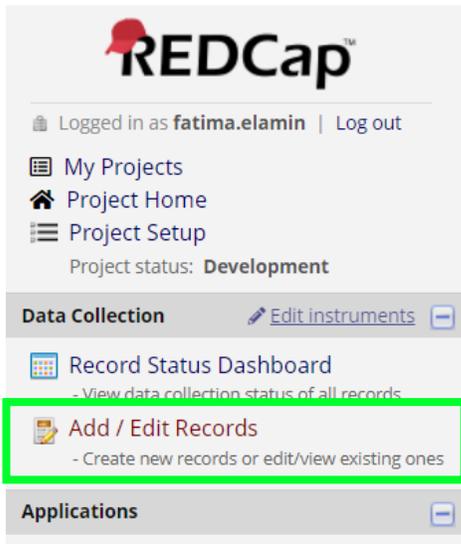
Begin typing to search the project data, then click an item in the list to navigate to that record.

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.



Overview: Intake

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

- 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). *This form replaces the H&I Status module in e2Virginia.*

Adding Basic Intake

Data Collection Instrument	Intake	Ryan White Services	Clinical Information	Patient Navigation
Basic Intake	<input type="radio"/> <input checked="" type="radio"/>			
Ryan White ID	<input type="radio"/>			
HIV Status	<input type="radio"/> +			
Housing, Income, and Insurance	<input type="radio"/> +			

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

Record ID	12			
Client Type				
	Ryan White Client	Prevention Client	Data to Care	Bridges 757
Client Type	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Date of Birth	<input type="text"/> Today M-D-Y			
* must provide value				
Sex at Birth	<input type="text"/>			
* must provide value				
Social Security Number	<input type="text"/>			

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

Ryan White Agreement to Consent Form Yes No reset

Activity Status * must provide value

Form Status

Complete? Incomplete Unverified Complete

Save & Exit Form Save & Exit Record

-- Cancel --

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

Form Status

Complete? Complete

Save & Exit Form Save & Exit Record

-- Cancel --

This form is required for ALL clients. All clients entered into REDCap must 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.

Data Collection Instrument	Intake	Ryan White Services	Clinical Information	Patient Navigation
Basic Intake	<input checked="" type="radio"/> +			
Ryan White ID	<input checked="" type="radio"/>			
HIV Status	<input checked="" type="radio"/> +			
Housing, Income, and Insurance	<input checked="" type="radio"/> +			

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.

Event Name: **Intake**

Record ID 12

The client's Ryan White ID is compiled by the system, please select the single value available in the drop-down to accept this.

mkts1013751

Form Status

Complete? Complete

Save & Exit Form

Save & Exit Record

-- Cancel --

Event Name: **Intake**

Record ID 12

The client's Ryan White ID is compiled by the system, please select the single value available in the drop-down to accept this.

mkts1013751

Form Status

Complete? Complete

Save & Exit Form

Save & Exit Record

-- Cancel --

Adding HIV Status

Data Collection Instrument	Intake	Ryan White Services	Clinical Information
Basic Intake	<input type="radio"/> +		
Ryan White ID	<input type="radio"/>		
HIV Status	<input type="radio"/> +		
Housing, Income, and Insurance	<input type="radio"/> +		

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

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

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

*HIV Disease Status:

*HIV Diagnosis: Today M-D-Y

*Date of First Positive HIV Test: Today M-D-Y

Date of first ambulatory visit * must provide value Today M-D-Y

Select all that applies.

*HIV Exposure Category:

Male-to-male sexual contact (MSM) reset

Form Status

Complete?

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

Adding Housing, Income, and Insurance

Data Collection Instrument	Intake	Ryan White Services	Clinical Information
Basic Intake			
Ryan White ID			
HIV Status			
Housing, Income, and Insurance			

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

*Annual Household Income

*Family Size

*Federal Poverty Level: View equation

*Housing Status

Stable/permanent
 Temporary
 Unstable

Client Insurance (select all that apply)

Private- Employer
 Private-Individual
 Medicare
 CHIP, or other public plan
 VA, Tricare and other military health care
 IHS
 Other plan
 No insurance/Uninsured

select all that apply

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.

Form Status

Complete?

Overview: Clinical Information

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

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	<input type="radio"/>		
Ryan White ID	<input type="radio"/>		
HIV Status	<input type="radio"/>		
Housing, Income, and Insurance	<input type="radio"/>		
Ryan White Service Encounters		<input type="radio"/>	
CD4 Results			<input type="radio"/>
Viral Load Results			<input type="radio"/>
Syphilis Screening			<input type="radio"/>
Antiretroviral Medication			<input type="radio"/>
Pregnancy			<input type="radio"/>

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.



*CD4 Test Date Today M-D-Y

*CD4 Count

CD4 Percent

Form Status

Complete?

Save & Exit Form Save & Stay

-- Cancel --

Adding Viral Load Results

Data Collection Instrument	Intake	Ryan White Services	Clinical Information
Basic Intake	<input type="radio"/>		
Ryan White ID	<input type="radio"/>		
HIV Status	<input type="radio"/>		
Housing, Income, and Insurance	<input type="radio"/>		
Ryan White Service Encounters		<input type="radio"/>	
CD4 Results			<input type="radio"/>
Viral Load Results			<input type="radio"/>
Syphilis Screening			<input type="radio"/>
Antiretroviral Medication			<input type="radio"/>
Pregnancy			<input type="radio"/>

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.

*Viral Load Test Date Today M-D-Y

*Viral Load Value

Viral Load Undetectable

Form Status

Complete?

Save & Exit Form Save & Stay

-- Cancel --

Adding Syphilis Screening

Data Collection Instrument	Intake	Ryan White Services	Clinical Information
Basic Intake	<input type="radio"/>		
Ryan White ID	<input type="radio"/>		
HIV Status	<input type="radio"/>		
Housing, Income, and Insurance	<input type="radio"/>		
Ryan White Service Encounters		<input type="radio"/>	
CD4 Results			<input type="radio"/>
Viral Load Results			<input type="radio"/>
Syphilis Screening			<input type="radio"/>
Antiretroviral Medication			<input type="radio"/>
Pregnancy			<input type="radio"/>

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.

*Was the client screened for syphilis?

*Date

Form Status

Complete?

Save & Exit Form

Save & Exit Record

-- Cancel --

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	<input type="radio"/>		
Ryan White ID	<input type="radio"/>		
HIV Status	<input type="radio"/>		
Housing, Income, and Insurance	<input type="radio"/>		
Ryan White Service Encounters		<input type="radio"/>	
CD4 Results			<input type="radio"/>
Viral Load Results			<input type="radio"/>
Syphilis Screening			<input type="radio"/>
Antiretroviral Medication			<input type="radio"/>
Pregnancy			<input type="radio"/>

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.

Does client receive antiretroviral therapy?

* must provide value

Yes
 No

*Start Date

Today M-D-Y

End Date

Today M-D-Y

Form Status

Complete?

Save & Exit Form Save & Exit Record -- Cancel --

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	<input type="radio"/>		
Ryan White ID	<input type="radio"/>		
HIV Status	<input type="radio"/>		
Housing, Income, and Insurance	<input type="radio"/>		
Ryan White Service Encounters		<input type="radio"/>	
CD4 Results			<input type="radio"/>
Viral Load Results			<input type="radio"/>
Syphilis Screening			<input type="radio"/>
Antiretroviral Medication			<input type="radio"/>
Pregnancy			<input type="radio"/>

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.

*Date Today M-D-Y

*Pregnancy Status

Form Status

Complete? Incomplete

Save & Exit Form Save & Stay

-- Cancel --

Overview: Ryan White Service Encounters

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

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.

Adding Ryan White Service Encounters

Record ID 12 mkts1013751

Data Collection Instrument	Intake	Ryan White Services	Clinical Information
Basic Intake	<input checked="" type="checkbox"/>		
Ryan White ID	<input checked="" type="checkbox"/>		
HIV Status	<input checked="" type="checkbox"/>		
Housing, Income, and Insurance	<input checked="" type="checkbox"/>		
Ryan White Service Encounters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
CD4 Results			
Viral Load Results			

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

The screenshot shows a dropdown menu with the following options: Save & Stay, Save & Add New Instance, Save & Exit Record, and Save & Go To Next Record. The 'Save & Add New Instance' option is highlighted with a green box and a green arrow pointing to it.

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.

Date of Service
* must provide value

Funding Source
* must provide value

Cost of Service

Units of Service
* must provide value

Services (Select 1 option only.)
* must provide value

Ryan White Service Encounter Notes

Form Status

Complete? Incomplete

Save & Exit Form Save & ...

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.”

Ryan White Service Encounters	
Ryan White Services	
1	1 units of Initial linkage to supportive services on 05-15-2019
2	1 units of Medical case management on 05-15-2019
3	1 units of Housing services on 05-15-2019

+ Add new

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	<input checked="" type="radio"/> +						
Ryan White ID	<input checked="" type="radio"/>						
HIV Status	<input checked="" type="radio"/> +						
Housing, Income, and Insurance	<input checked="" type="radio"/> +						
Ryan White Service Encounters		<input checked="" type="radio"/> +					
CD4 Results			<input type="radio"/>				
Viral Load Results			<input type="radio"/>				
Syphilis Screening			<input type="radio"/>				
Antiretroviral Medication			<input type="radio"/>				
Pregnancy			<input type="radio"/>				
Patient Navigation Enrollment				<input type="radio"/>			
Patient Navigation Client Assessment				<input type="radio"/>			
Patient Navigation Services				<input type="radio"/>			
Patient Navigation Discharge				<input type="radio"/>			
CHARLI Enrollment					<input type="radio"/>		
CHARLI Tracking					<input type="radio"/>		
CHARLI Services					<input type="radio"/>		
CHARLI Appointments					<input type="radio"/>		
CHARLI Discharge					<input type="radio"/>		
Data to Care						<input type="radio"/>	
Prevention							<input type="radio"/>

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

The screenshot shows a web form for adding patient navigation enrollment. The form is divided into several sections. The top section contains three date fields: 'Date CCSA Form Signed', 'Date Client Referred to Patient Navigator', and 'Date Patient Navigator Contacted Client'. Each date field is set to '07-24-2019' and includes a calendar icon, a 'Today' button, and an 'M-D-Y' format indicator. A green box highlights these three date fields. Below the date fields is a 'Referral Source (Choose one answer.)' dropdown menu with 'DIS/Local Health Department' selected. A green box highlights this dropdown. Below that is a 'Referral Source Other' text input field. Below that is a 'Medical Provider Referred To (Choose One Answer.)' dropdown menu with 'UVA ID Clinic' selected. A green box highlights this dropdown. The bottom section is titled 'Form Status' and contains a 'Complete?' dropdown menu with 'Complete' selected. A green box highlights this dropdown. Below the 'Complete?' dropdown are three buttons: 'Save & Exit Form', 'Save & ...', and '-- Cancel --'. A green box highlights the 'Save & Exit Form' button. Green arrows point from the numbered instructions on the right to these highlighted elements.

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

The screenshot shows a web-based form for a Patient Navigation Assessment. The form is divided into several sections:

- Assessment Date:** A date picker showing "06-12-2019" with a calendar icon and a "Today" button. A "Save & Go To Next Form" button is also present.
- Challenges and Barriers (Select all that apply.):** A list of 17 checkboxes with the following options:
 - Afraid others will know HIV status
 - Believe that HIV treatment will not work
 - Feel depressed, anxious, or has other mental health concerns
 - Feels healthy
 - Confused about how to schedule appointments
 - Child care is not available/affordable
 - Forgot about HIV appointment
 - Going to appointments is a reminder of having HIV
 - Have to work during clinic hours
 - Limited or no income
 - Living situation is unstable
 - Need more reliable form of transportation
 - Too busy to go to appointments
 - Using drugs/alcohol
 - Want to see different medical provider
 - Uninsured
 - OtherA "Check all that apply." label is at the bottom of the list.
- Type of Assessment:** A dropdown menu with "Enrollment Assessment" selected.
- Form Status:** A dropdown menu with "Enrollment Assessment" selected.
- Complete?:** A dropdown menu with "Enrollment Assessment" selected.
- Buttons:** "Save & Exit Form" (highlighted with a green box), "Save & Go To Next Form", and "-- Cancel --".

Green arrows point from the numbered instructions on the right to the corresponding elements in the form: 1. to the "Save & Go To Next Form" button; 2. to the "Assessment Date" field; 3. to the "Challenges and Barriers" list; 4. to the "Type of Assessment" dropdown; 5. to the "Complete?" dropdown; 6. to the "Save & Exit Form" button.

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

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

- 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.

Add new instance

Adding Patient Navigation Services, Continued

The screenshot shows a web form for adding patient navigation services. The form is divided into several sections:

- Patient Navigation Service Date:** A date picker showing 06-12-2019, with a calendar icon and 'Today' button.
- Service Duration in Minutes:** A text input field containing the number 60.
- Contact Method (Choose one.):** A dropdown menu with 'In Person' selected.
- Services Provided (Select all that apply.):** A list of checkboxes with the following options:
 - Assisted with financial, insurance or other benefits
 - Confirmed or attended HIV medical appointments
 - Provided assistance with HIV medication
 - Provided at-home HIV test kit
 - Provided education/risk reduction counseling
 - Provided housing assistance
 - Provided transportation assistance
 - Provided referral for health care/supportive services
 - Other, please specify.
- PN Comments:** A text input field.
- Form Status:** A section header.
- Complete?:** A dropdown menu with 'Incomplete' selected.
- Buttons:** 'Save & Exit Form', 'Save & Go To Next Form', and '-- Cancel --'.

Green boxes highlight the date, duration, contact method, 'In Person' option, 'Assisted with financial...' and 'Provided education...' checkboxes, the 'Incomplete' dropdown, and the 'Save & Exit Form' button. Green arrows point from the instructions on the right to these highlighted elements.

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

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

- 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

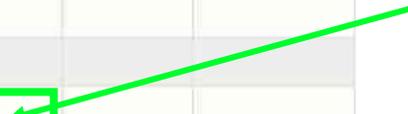
The screenshot shows a web-based form for adding a patient navigation discharge. The form is divided into several sections, each with a title and a set of input fields. The sections are: Discharge Date, Housing Status at Discharge, Discharge Reason, Discharge Reason "Other", Insurance Status at Discharge, Discharge Service Level, PN Discharge Notes, Form Status, and Complete?. The Discharge Date field is a calendar tool showing 06-12-2019. The Housing Status at Discharge field is a drop-down menu with "Stable/Permanent" selected. The Discharge Reason field is a list of checkboxes with "Services Completed" and "Client deceased" checked. The Discharge Reason "Other" field is a text box. The Insurance Status at Discharge field is a list of checkboxes with "Private or Marketplace" checked. The Discharge Service Level field is a list of checkboxes with "Self Management" checked. The PN Discharge Notes field is a text box. The Form Status field is a drop-down menu with "Complete" selected. The Complete? field is a drop-down menu with "Complete" selected. The Save & Exit Form button is highlighted with a green box. The Save & Stay button is also visible. The -- Cancel -- button is at the bottom.

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

Basic Intake	<input checked="" type="checkbox"/>	+							
Ryan White ID	<input checked="" type="checkbox"/>								
HIV Status	<input checked="" type="checkbox"/>	+							
Housing, Income, and Insurance	<input checked="" type="checkbox"/>	+							
Ryan White Service Encounters			<input checked="" type="checkbox"/>	+					
CD4 Results			<input type="checkbox"/>						
Viral Load Results			<input type="checkbox"/>						
Syphilis Screening			<input type="checkbox"/>						
Antiretroviral Medication			<input type="checkbox"/>						
Pregnancy			<input type="checkbox"/>						
Patient Navigation Enrollment	<input checked="" type="checkbox"/>	+							
Patient Navigation Client Assessment	<input checked="" type="checkbox"/>	+							
Patient Navigation Services	<input checked="" type="checkbox"/>	+							
Patient Navigation Discharge	<input checked="" type="checkbox"/>	+							
CHARLI Enrollment								<input checked="" type="checkbox"/>	
CHARLI Tracking								<input type="checkbox"/>	
CHARLI Services								<input type="checkbox"/>	
CHARLI Appointments								<input type="checkbox"/>	
CHARLI Discharge								<input type="checkbox"/>	
Data to Care								<input type="checkbox"/>	
Prevention	<input checked="" type="checkbox"/>	+							

- 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

The screenshot shows the CHARLI Enrollment form with the following fields and options:

- CHARLI Enrollment Date:** 06-12-2019 (highlighted with a green box)
- Release Date:** 06-12-2019 (highlighted with a green box)
- Referral Source (Choose one.):** A dropdown menu with the following options: Care Coordinator at VDH (selected), Case Manager, Correctional Institution (DOC or Jail), Disease Intervention Specialist/Local Health Department, Medical Monitoring Project (MMP) at VDH, Navigator or Linkage Personnel, Social Worker, Testing Site, and Other. The entire dropdown menu is highlighted with a green box.
- Pre-Release Assessment Date:** 06-12-2019 (highlighted with a green box)
- Post-Release Assessment Date:** 06-12-2019 (highlighted with a green box)
- Form Status:** A yellow highlighted section.
- Complete?:** A dropdown menu with the option "Complete" (highlighted with a green box).
- Buttons:** "Save & Exit Form" (highlighted with a green box), "Save & Go To Next Form", and "-- Cancel --".

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

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

- 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

The screenshot shows a web form for CHARLI tracking. The fields and their values are as follows:

- CHARLI Enrollment Date:** 06-12-2019
- Release Date:** 06-12-2019
- Referral Source (Choose one.):** Care Coordinator at VDH (selected)
- Pre-Release Assessment Date:** 06-12-2019
- Post-Release Assessment Date:** 06-12-2019
- Form Status:** Complete
- Buttons:** Save & Exit Form (highlighted), Save & Go To Next Form, -- Cancel --

Green boxes highlight the date fields, the referral source dropdown menu, the 'Complete' dropdown, and the 'Save & Exit Form' button. Green arrows point from the numbered instructions on the right to these specific elements.

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

Basic Intake	<input checked="" type="checkbox"/>	+							
Ryan White ID	<input checked="" type="checkbox"/>								
HIV Status	<input checked="" type="checkbox"/>	+							
Housing, Income, and Insurance	<input checked="" type="checkbox"/>	+							
Ryan White Service Encounters			<input checked="" type="checkbox"/>	+					
CD4 Results					<input type="checkbox"/>				
Viral Load Results					<input type="checkbox"/>				
Syphilis Screening					<input type="checkbox"/>				
Antiretroviral Medication					<input type="checkbox"/>				
Pregnancy					<input type="checkbox"/>				
Patient Navigation Enrollment					<input checked="" type="checkbox"/>	+			
Patient Navigation Client Assessment					<input checked="" type="checkbox"/>	+			
Patient Navigation Services					<input checked="" type="checkbox"/>	+			
Patient Navigation Discharge					<input checked="" type="checkbox"/>	+			
CHARLI Enrollment					<input checked="" type="checkbox"/>	+			
CHARLI Tracking					<input checked="" type="checkbox"/>	+			
CHARLI Services					<input checked="" type="checkbox"/>	+			
CHARLI Appointments					<input type="checkbox"/>				
CHARLI Discharge					<input type="checkbox"/>				
Data to Care							<input type="checkbox"/>		
Prevention								<input checked="" type="checkbox"/>	+

- 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

The screenshot shows a web form for recording CHARLI services. The form is divided into several sections: 'CHARLI Service Date', 'Charli Services Provided', 'Service Units', 'Form Status', and 'Complete?'. The 'CHARLI Service Date' field contains '06-12-2019' and is highlighted with a green box. The 'Charli Services Provided' dropdown menu is set to 'ADAP eligibility initiated' and is also highlighted with a green box. The 'Service Units' field contains the number '2' and is highlighted with a green box. The 'Form Status' dropdown menu is set to 'Complete' and is highlighted with a green box. The 'Complete?' section is highlighted in green. At the bottom, there are three buttons: 'Save & Exit Form' (highlighted with a green box), 'Save & Go To Next Form', and '-- Cancel --'. Green arrows point from the instructions on the right to these specific elements.

- 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

Basic Intake	<input checked="" type="checkbox"/>	+							
Ryan White ID	<input checked="" type="checkbox"/>								
HIV Status	<input checked="" type="checkbox"/>	+							
Housing, Income, and Insurance	<input checked="" type="checkbox"/>	+							
Ryan White Service Encounters			<input checked="" type="checkbox"/>	+					
CD4 Results			<input type="checkbox"/>						
Viral Load Results			<input type="checkbox"/>						
Syphilis Screening			<input type="checkbox"/>						
Antiretroviral Medication			<input type="checkbox"/>						
Pregnancy			<input type="checkbox"/>						
Patient Navigation Enrollment	<input checked="" type="checkbox"/>	+							
Patient Navigation Client Assessment	<input checked="" type="checkbox"/>	+							
Patient Navigation Services	<input checked="" type="checkbox"/>	+							
Patient Navigation Discharge	<input checked="" type="checkbox"/>	+							
CHARLI Enrollment	<input checked="" type="checkbox"/>	+							
CHARLI Tracking	<input checked="" type="checkbox"/>	+							
CHARLI Services	<input checked="" type="checkbox"/>	+							
CHARLI Appointments	<input checked="" type="checkbox"/>	+							
CHARLI Discharge	<input checked="" type="checkbox"/>	+							
Data to Care			<input type="checkbox"/>						
Prevention	<input checked="" type="checkbox"/>	+							

- 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

The screenshot shows a web form for CHARLI Appointments. The form is divided into several sections. The first section, 'Provider Referred to Care', has a dropdown menu with 'VDH' selected. The second section, 'Date of Referral', has a date field with '06-12-2019' and a calendar icon. The third section, 'Date of Appointment', also has a date field with '06-12-2019' and a calendar icon. The fourth section, 'Client Attended Appointment', has a dropdown menu with 'Yes' selected. The fifth section, 'Form Status', has a dropdown menu with 'Complete' selected. At the bottom, there are three buttons: 'Save & Exit Form', 'Save & Go To Next Form', and '-- Cancel --'. Green boxes highlight the dropdown menus for 'Provider Referred to Care', 'Date of Referral', 'Date of Appointment', 'Client Attended Appointment', and 'Form Status'. Green arrows point from the instructions on the right to these highlighted elements.

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

Basic Intake	<input checked="" type="checkbox"/>	+							
Ryan White ID	<input checked="" type="checkbox"/>								
HIV Status	<input checked="" type="checkbox"/>	+							
Housing, Income, and Insurance	<input checked="" type="checkbox"/>	+							
Ryan White Service Encounters			<input checked="" type="checkbox"/>	+					
CD4 Results			<input type="checkbox"/>						
Viral Load Results			<input type="checkbox"/>						
Syphilis Screening			<input type="checkbox"/>						
Antiretroviral Medication			<input type="checkbox"/>						
Pregnancy			<input type="checkbox"/>						
Patient Navigation Enrollment	<input checked="" type="checkbox"/>	+							
Patient Navigation Client Assessment	<input checked="" type="checkbox"/>	+							
Patient Navigation Services	<input checked="" type="checkbox"/>	+							
Patient Navigation Discharge	<input checked="" type="checkbox"/>	+							
CHARLI Enrollment	<input checked="" type="checkbox"/>	+							
CHARLI Tracking	<input checked="" type="checkbox"/>	+							
CHARLI Services	<input checked="" type="checkbox"/>	+							
CHARLI Appointments	<input checked="" type="checkbox"/>	+							
CHARLI Discharge	<input type="checkbox"/>								
Data to Care			<input type="checkbox"/>						
Prevention	<input checked="" type="checkbox"/>	+							

- 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

The screenshot shows a web form for CHARLI Discharge. The fields are as follows:

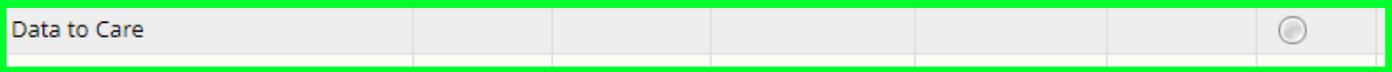
- Date of Discharge From CHARLI:** A date picker showing 06-12-2019, with a calendar icon and a 'Today' button. The format is M-D-Y.
- Discharge Reason:** A dropdown menu with 'Moved out of service area' selected.
- Discharge Service Level:** A list of checkboxes:
 - Medical Case Management
 - Non-Medical Case Management
 - Patient Navigator/Community Health Worker
 - Self-Management
 - Unknown
 - Not Applicable
- Discharge Housing Status:** A dropdown menu with 'Stable/Permanent' selected.
- Form Status:** A section header.
- Complete?:** A dropdown menu with 'Complete' selected.
- Buttons:** 'Save & Exit Form' (highlighted with a green box and a mouse cursor), 'Save & Stay', and '-- Cancel --'.

- 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 Responses. 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	<input checked="" type="radio"/> +						
Ryan White ID	<input checked="" type="radio"/>						
HIV Status	<input type="radio"/>						
Housing, Income, and Insurance	<input type="radio"/>						
Ryan White Service Encounters		<input type="radio"/>					
CD4 Results			<input type="radio"/>				
Viral Load Results			<input type="radio"/>				
Syphilis Screening			<input type="radio"/>				
Antiretroviral Medication			<input type="radio"/>				
Pregnancy			<input type="radio"/>				
Patient Navigation Enrollment				<input type="radio"/>			
Patient Navigation Client Assessment				<input type="radio"/>			
Patient Navigation Services				<input type="radio"/>			
Patient Navigation Discharge				<input type="radio"/>			
CHARLI Enrollment					<input type="radio"/>		
CHARLI Tracking					<input type="radio"/>		
CHARLI Services					<input type="radio"/>		
CHARLI Appointments					<input type="radio"/>		
CHARLI Discharge					<input type="radio"/>		
Data to Care						<input type="radio"/>	
Prevention							<input type="radio"/>

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



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Adding Data to Care Tracking Information

Tracking **Contact Attempts** **Final Outcome**

Selection:
* must provide value

Data to Care Number
* must provide value

Start Date: M-D-Y
* must provide value

Staff Name Conducting Follow-up:
* must provide value
First Name

* must provide value
Last Name

Form Status

Complete?

Save & Stay
Save & Exit Record
Save & Go To Next Record

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”.

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Adding Data to Care Final Outcome

Selection: Tracking Contact Attempts Final Outcome

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

Final Client Outcome

- In care within the last 12 months
- Not in care
- Relocated out of service area
- Deceased
- Incarcerated
- Unable to locate
- Discharged from agency
- Other

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

Final Client Outcome End Date

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

Complete?

- Incomplete
- Unverified
- Complete

4. Change “Complete?” to “Complete”.

5. Select “Save & Exit Record”.

Save & Exit Form Save & Add New Instance

-- Cancel -- Save & Stay

Delete data for THIS Save & Exit Record Save & Go To Next Record

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Final Client Outcome: In Care

Final Client Outcome <small>* must provide value</small>	<input type="text" value="In care within the last 12 months"/>
Provider Name	<input type="text"/>
Agency Name <small>* must provide value</small>	<input type="text"/>
Date of Last Appointment <small>* must provide value</small>	<input type="text"/> <input type="text" value="31"/> <input type="button" value="Today"/> M-D-Y
Date of Upcoming Appointment	<input type="text"/> <input type="text" value="31"/> <input type="button" value="Today"/> M-D-Y
Final Client Outcome End Date <small>* must provide value</small>	<input type="text"/> <input type="text" value="31"/> <input type="button" 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

Final Client Outcome
* must provide value

Not in care

Barriers to Care
* must provide value

- Client Reports Feeling Well
- Discrimination/Stigma
- Fear of Disease
- Financial Issues
- Housing Issues
- Lack of Insurance
- Lack of Knowledge (disease, treatments, services)
- Lack of Transportation
- Not Satisfied with Medical Provider
- Privacy Concerns
- Religious Reasons
- Other

Reengagement Status
* must provide value

Client Would Like to Reengage in Care
Client is Currently Reengaging in Care
Client Refused Care

Final Client Outcome End Date
* must provide value

Form Status

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

Reengagement Status
* must provide value

Client Would Like to Reengage in Care

Client was Referred to
* must provide value

Appointment Date
* must provide value

Agency Name

Was a CCSA Form Completed
* must provide value

Final Client Outcome End Date
* must provide value

> Client is Currently Reengaging in Care

Reengagement Status
* must provide value

Client is Currently Reengaging in Care

Appointment Date
* must provide value

Agency Name

Final Client Outcome End Date
* must provide value

> Client Refused Care

Reengagement Status
* must provide value

Client Refused Care

Reason Client Refused Care
* must provide value

Final Client Outcome End Date
* must provide value

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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

Final Client Outcome H ⓘ Relocated out of service area ▼
** must provide value*

State Name H ⓘ
** must provide value*

Date Client Moved H ⓘ 31 Today M-D-Y

Final Client Outcome End Date H ⓘ 31 Today M-D-Y
** must provide value*

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

> Deceased

Final Client Outcome H ⓘ Deceased ▼
** must provide value*

Date of Death: H ⓘ
Month

H ⓘ
Day

** must provide value* H ⓘ
Year

Source of Death Information H ⓘ

Final Client Outcome End Date H ⓘ 31 Today M-D-Y
** must provide value*

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.

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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

The screenshot shows a form with four sections. The first section, 'Final Client Outcome', has a dropdown menu with 'Incarcerated' selected and is highlighted with a green box. The second section, 'Correctional Facility Name', has an empty dropdown menu. The third section, 'Expected Date of Release', has an empty date field and a 'Today' button. The fourth section, 'Final Client Outcome End Date', has an empty date field and a 'Today' button. Red asterisks indicate required fields.

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

The screenshot shows a form with two sections. The first section, 'Final Client Outcome', has a dropdown menu with 'Unable to locate' selected and is highlighted with a green box. The second section, 'Final Client Outcome End Date', has an empty date field and a 'Today' button. Red asterisks indicate required fields.

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

The screenshot shows a form with four sections. The first section, 'Final Client Outcome', has a dropdown menu with 'Discharged from agency' selected and is highlighted with a green box. The second section, 'Discharge Date', has an empty date field and a 'Today' button. The third section, 'Agency Discharged to', has an empty text field. The fourth section, 'Final Client Outcome End Date', has an empty date field and a 'Today' button. Red asterisks indicate required fields.

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	<input checked="" type="radio"/> +						
Ryan White ID	<input checked="" type="radio"/>						
HIV Status	<input checked="" type="radio"/> +						
Housing, Income, and Insurance	<input checked="" type="radio"/> +						
Ryan White Service Encounters		<input checked="" type="radio"/> +					
CD4 Results			<input type="radio"/>				
Viral Load Results			<input type="radio"/>				
Syphilis Screening			<input type="radio"/>				
Antiretroviral Medication			<input type="radio"/>				
Pregnancy			<input type="radio"/>				
Patient Navigation Enrollment				<input type="radio"/>			
Patient Navigation Client Assessment				<input type="radio"/>			
Patient Navigation Services				<input type="radio"/>			
Patient Navigation Discharge				<input type="radio"/>			
CHARLI Enrollment					<input type="radio"/>		
CHARLI Tracking					<input type="radio"/>		
CHARLI Services					<input type="radio"/>		
CHARLI Appointments					<input type="radio"/>		
CHARLI Discharge					<input type="radio"/>		
Data to Care						<input type="radio"/>	
Prevention							<input checked="" type="radio"/> +

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

Adding HIV Testing Record

The screenshot shows a web form for adding an HIV testing record. The form is divided into several sections, each with a title and a red asterisk indicating a required field. The sections are: Testing Site (dropdown menu with 'AIDS Resource Center'), Date of Test (calendar icon, '06-03-2019', 'Today' button, 'M-D-Y'), Test Result (dropdown menu with 'Preliminary Positive'), Barcode (text input with '12311'), and Confirm Barcode (text input with '12311' and a note 'Please re-enter the barcode.'). Below these is a 'Form Status' section with a 'Complete?' dropdown menu (set to 'Complete') and two buttons: 'Save & Exit Form' and 'Save & Add New Instance'. Green boxes and arrows highlight the 'Complete?' dropdown and the 'Save & Add New Instance' button.

Testing Site <small>* must provide value</small>	<input type="text" value="AIDS Resource Center"/>
Date of Test <small>* must provide value</small>	<input type="text" value="06-03-2019"/> Today M-D-Y
Test Result <small>* must provide value</small>	<input type="text" value="Preliminary Positive"/>
Barcode <small>* must provide value</small>	<input type="text" value="12311"/>
Confirm Barcode <small>* must provide value</small>	<input type="text" value="12311"/> <small>Please re-enter the barcode.</small>
Form Status	
Complete?	<input type="text" value="Complete"/>
<input type="button" value="Save & Exit Form"/> <input type="button" value="Save & Add New Instance"/>	

1. Once in the Prevention form, you will be able to enter; Testing site, Date of Test, Test result, Barcode, and confirm barcode client 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.”