

GROUPWARE TECHNOLOGIES, INC.

---

Provide<sup>®</sup> Enterprise Care Management Software

## CHARLII User Guide

**Provide® Enterprise**  
**CHARLI User Guide**

---

© 2016 Groupware Technologies, Inc. All rights reserved. The GTI logo and Provide® Enterprise are registered trademarks of Groupware Technologies, Inc. All other product and company names referenced herein may be trademarks or registered trademarks of their respective companies.

Updated November 2021

## Table of Contents

<b>Introduction .....</b>	<b>4</b>
<b>Enrolling a Client in CHARLII .....</b>	<b>4</b>
<b>Enrollment Record .....</b>	<b>4</b>
<b>Additional Documentation .....</b>	<b>7</b>
Appointments .....	7
CHARLII Notes.....	8
<b>Summary Tab .....</b>	<b>Error! Bookmark not defined.</b>
<b>Referral Tab.....</b>	<b>9</b>
<b>Discharging a CHARLII Client.....</b>	<b>10</b>
<b>Viewing CHARLII Clients .....</b>	<b>11</b>
<b>Documenting Services Provided .....</b>	<b>12</b>
Marking the Service Provided as “Completed” .....	13
Marking the Service Provided as “Not Provided”.....	13

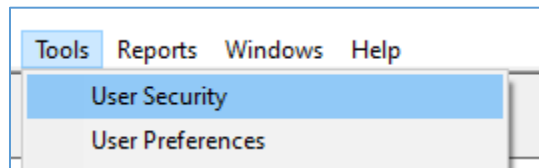
## Introduction

The Virginia Department of Health has chosen to use the Provide Enterprise (PE) system to manage their Ryan White Care and Prevention programs, which includes CHARLII.

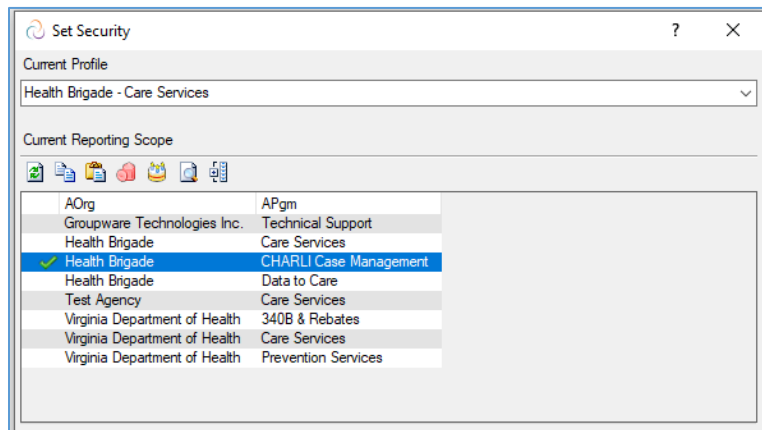
This user guide will walk through the management of these records.

## Enrolling a Client in CHARLII

Due to the sensitive nature of case management notes for CHARLII clients, Provide Enterprise requires the user to have the program CHARLI Case Management within their current reporting scope in order to view or add notes to the enrollment record. This can be found under Tools > User Security in the Menu bar.



The CHARLI Case Management program profile must “check marked” in your Current Reporting Scope to view and create notes.



The CHARLI Case Management program profile must be set as the user’s Current Profile in order to document services provided.

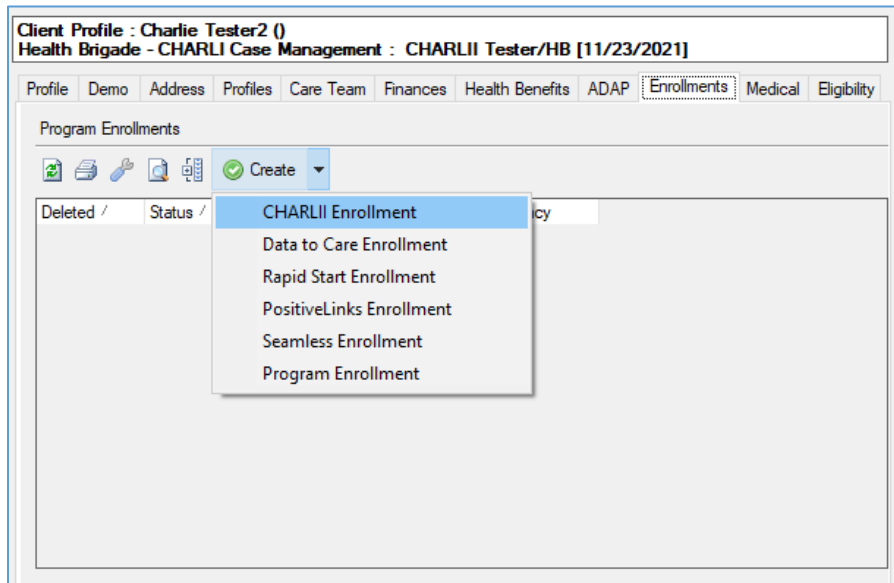
NOTE: Enrolling and discharging clients for the CHARLII program requires the user role Provide.Users.CHARLI.

## Enrollment Record

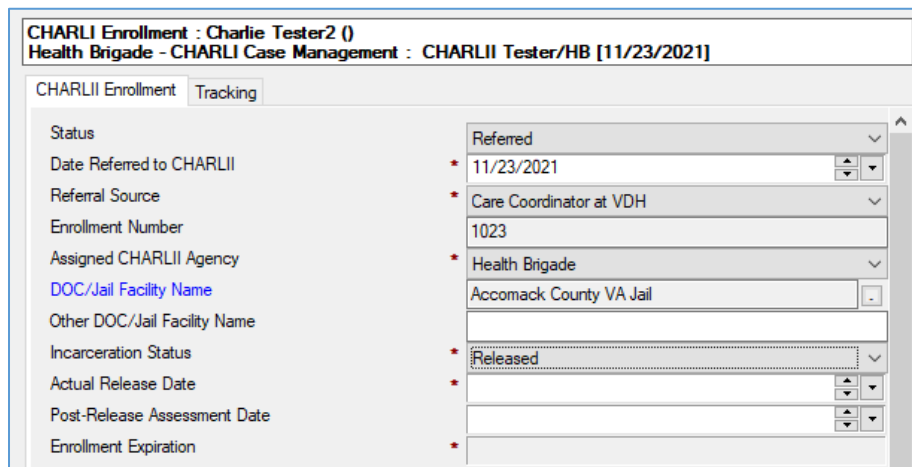
Virginia Department of Health works with local Departments of Corrections (DOCs) across the state. Representatives from the detention facility send a Discharge Summary or Referral form, which contains all the required information necessary, as well as a consent form. After a

member of the CHARLII team reviews and determines the documentation is in good order, the client may need to be registered (see *Client Registration – Completing the Client Profile User Manual*). If the client is new, and needs to be registered, the signed authorization provided with the Discharge Summary should be attached as the consent form.

From the Client Profile, navigate to the Enrollments tab. Within the Program Enrollments embedded view, click the Create button > CHARLII Enrollment.



CHARLII Enrollment tab:



Complete the required information on the enrollment form.

- **Status** – defaults to Referred. Change the status to Enrolled once the client is enrolled in CHARLII services.
- **Date Referred to CHARLII** – defaults to today's date.

- **Referral Source** – select the source of the referral.
- **Date Enrolled in CHARLII** – displays when the status = Enrolled.
- **Enrollment number** – automatically generated.
- **Assigned CHARLII Agency** – defaults to current agency.
- **DOC/Jail Facility Name** – select the facility from which the client is being discharged.
- **Other DOC/Jail Facility Name** – if the appropriate facility is not found in the above list, type the facility name.
- **Incarceration Status** – select if client is currently incarcerated or has been released.
- **Planned Release Date** – this field displays if Incarceration status = Currently incarcerated.
- **Actual Release Date** – this field displays if Incarceration Status = Released.
- **Post-Release Assessment Date** – enter the date of post-release assessment.
- **Enrollment Expiration** – auto-populated based on incarceration status and enrollment date. If the client is released, and the date of enrollment is later than the date of actual release, the date will default to 18 months after date of enrollment, otherwise the date will default to 18 months after the date of release. If the client is currently incarcerated, this field will not display and will remain blank until the client is released, and actual release date is entered.

Embedded Views will display any Seamless enrollment records, Appointments, and CHARLII Notes.

Tracking Tab:

The screenshot shows a software interface for CHARLII Enrollment. At the top, it displays 'CHARLII Enrollment : Charlie Tester2 ()' and 'Health Brigade - CHARLII Case Management : CHARLII Tester/HB [11/23/2021]'. Below this, there are two tabs: 'CHARLII Enrollment' and 'Tracking'. The 'Tracking' tab is active, showing a list of fields on the left and their corresponding values on the right. The fields and values are:
 

- Housing Type: Renting and living in an unsubsidized room or house or a
- Reincarceration Date: (empty field)
- Individual Plan Completed: Yes
- Medication Access Established: Yes
- Medication Adherent: Yes

 Each field on the right has a red asterisk to its left and a dropdown arrow on the right side.

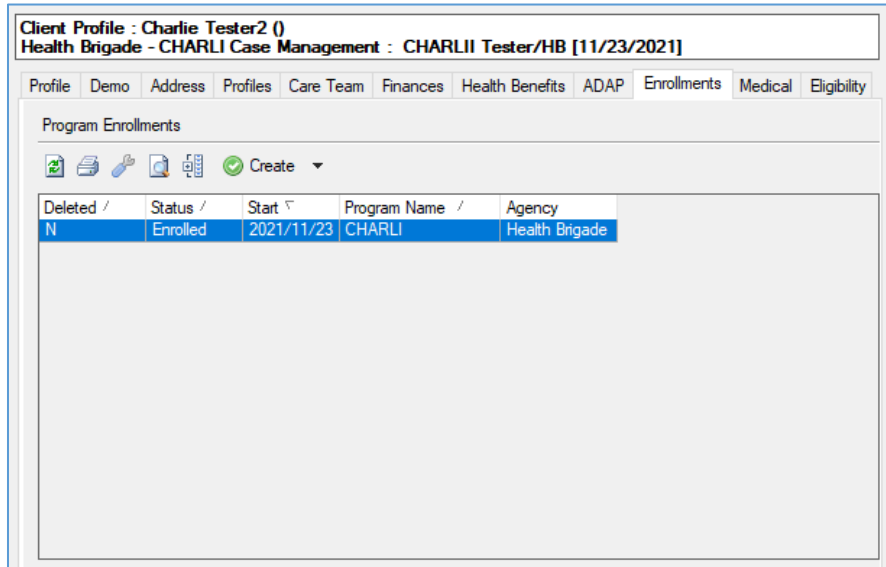
Use the Tracking tab to record the following:

- **Housing Type** – client’s current housing type
- **Reincarceration date** – enter reincarceration date (if applicable)
- **Individual Plan Completed** – enter Yes or No
- **Medication Access Established** – enter Yes or No
- **Medication Adherent** – enter Yes or No

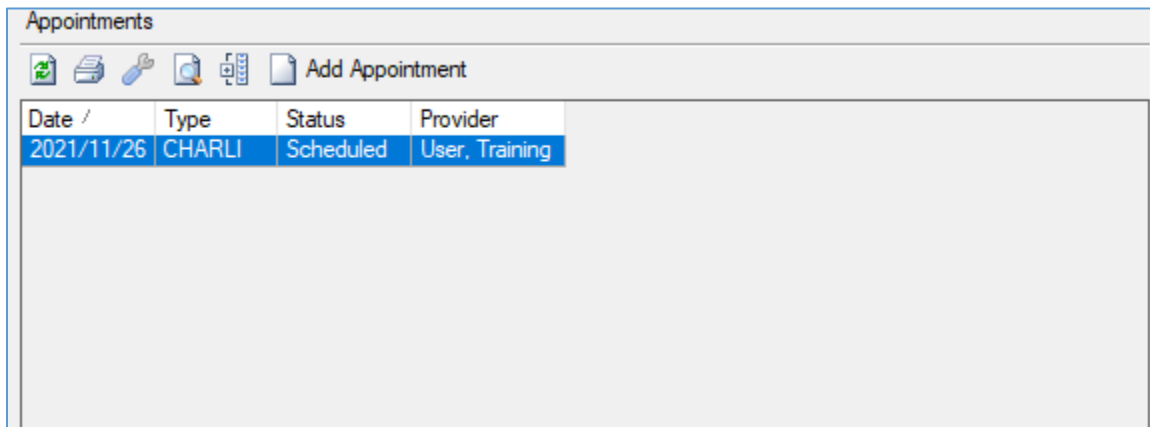
After you have completed all the required fields to process the enrollment, save the enrollment record by clicking Close, and answer Yes to save your changes.

## Additional Documentation

Other documentation necessary for CHARLII clients can be completed from within the Enrollment record. Navigate to the Enrollments tab on the Client Profile, double-click the CHARLII enrollment to open the record.



## Appointments




The Appointments embedded view will display any prior medical appointment history. You may also use the “Add Appointment” button to document any upcoming appointments

Appointment : Charlie Tester2 ()  
 Health Brigade - CHARLI Case Management : CHARLII Tester/HB [11/23/2021]

Appointment

Status	* Scheduled
Type	* Ambulatory Outpatient Medical Care
Provider Agency	Health Brigade
Appointment With	Tester, CHARLII
Appointment Date	* 11/26/2021
Appointment Start Time	11:00 AM

To Edit the appointment, click  button to indicate if the appointment was kept, missed, rescheduled, or cancelled. If the appointment is missed, rescheduled, or cancelled, enter the reason in the field that displays.

Appointment

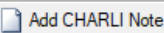
Status	* Missed
Type	* Scheduled
Provider Agency	Kept
Appointment With	Missed
Appointment Date	* Rescheduled
	Cancelled
	11/26/2021

When finished, click Close, and Yes to save the changes to the Appointment record.

## ***CHARLII Notes***

The Notes embedded view will display a history of case management note records. Click “Add CHARLI Note” to create a new note.

Notes



Status	Date	Provider	Contact Type	Funding Source	Deleted?



CHARLI Note : Charlie Tester2 ()  
Health Brigade - CHARLI Case Management : CHARLII Tester/HB [11/23/2021]

Summary Referrals

Note Status \* In Progress

Provider \* CHARLII Tester

Note Date \* 11/23/2021

Minutes

Contact Category \*

Contact Type

Funding Source

Brief Description \*

Full Description

Enter the required information on the appropriate Tab.

- **Note Status** – defaults to In Progress. If a note is started, and the Case Manager doesn't have time to complete the note, it can be saved in the status of In Progress.
- **Provider** – defaults to user name.
- **Note date** – defaults to today's date.
- **Minutes** – enter number of minutes were spent during this encounter.
- **Contact Category** – defaults to CHARLI Case Management
- **Contact Type** – Client Contact
- **Funding Source** – auto-populates based on Contact Type.
- **Brief Description** – enter the subject line of the note.
- **Full Description** – enter the complete detailed notes.

#### Referral Tab

The Referral tab may be used if a referral is made as a result of the client contact. An embedded view will display a history of referral records for the client. Click "Add Referral" to create a new referral.

CHARLI Note : Charlie Tester2 ()  
Health Brigade - CHARLI Case Management : CHARLII Tester/HB [11/23/2021]

Summary Referrals

Referrals

Add Referral

Status /	Service Type /	Referred To

**Referral : Charlie Tester2 ()**  
**Health Brigade - CHARLI Case Management : CHARLII Tester/HB [11/23/2021]**

Referral

Referral Status	* Pending
Referring Person	* CHARLII Tester
Referral Date	* 11/23/2021
Eligibility Date Expire	12/22/2021
Referred To	*
Referred for Service Type	*
Referred To Assignee	*
Referred for Service Description	
Date Check Back	* 12/23/2021
Require Consent	* Yes
Created By	CHARLII Tester/HB
Was Client Consent Obtained	*


- Fill in the appropriate fields:
  - **Referring Person** – This will default to you, but you can select a different person
  - **Referred To** – Select the agency you are referring the client to
  - **Referred for Service Type** – Select the service type
  - **Referred to Assignee** – If there is a referred to assignee, select it here
  - **Referred for Service Description** – Enter the description of the referral service
  - **Date Check Back** – Enter the date to check back on the referral.
  - **Consent Required** – defaults to Yes
  - **Client Consent Obtained?** – Confirm that client has signed informed consent

When finished, click on the **Submit** button to save your changes and submit the referral. The referrals then can be “Acknowledged” by the receiving agency by clicking on the **Acknowledge** button. Acknowledging the referral will inform the referring provider that the referral has been received.

When a referral is completed, the agency receiving the referral will be able to view the referral in any of the *View\PLWH Activity\Referrals* views.

Once a referral is opened, it cannot be edited. However, you can come back to the referral at any time and click the **Close** button to close the referral.

## Discharging a CHARLII Client

From the Enrollment Record, click the  **Edit** to update the status of the CHARLII enrollment.

CHARLII Enrollment Tracking Discharge

Status	Discharged
Date Referred to CHARLII	* Referred
Referral Source	* Enrolled
Date Enrolled in CHARLII	* Declined
	* Discharged

When the status is changed to Discharged, the Discharge tab appears within the enrollment record.

CHARLI Enrollment : Charlie Tester2 ()  
 Health Brigade - CHARLI Case Management : CHARLII Tester/HB [11/23/2021]

CHARLII Enrollment Tracking Discharge

Date Discharged from CHARLII \*

Discharge Reason \*

Discharge Service Level \*

Housing Type \*

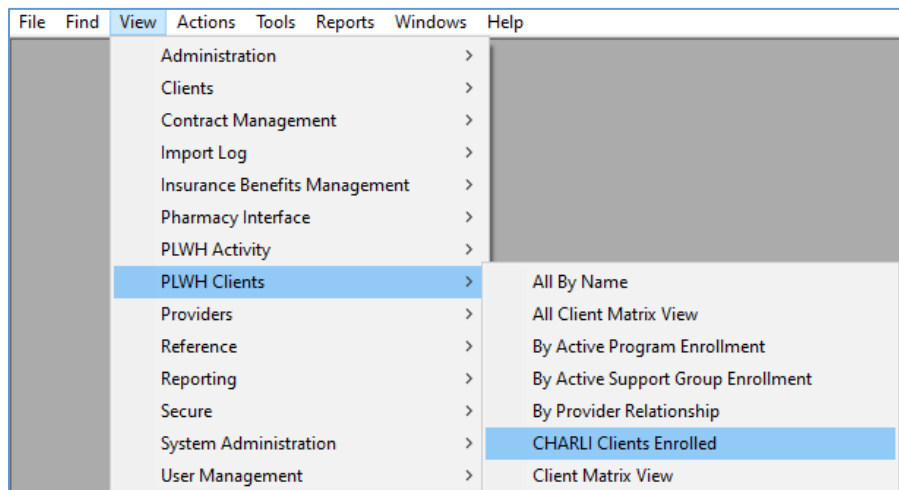
Complete the required fields:

- Date Discharged from CHARLII – enter the date of discharge from the CHARLII program
- Discharge Reason – select the reason for discharge
- Discharge Service Level – select the appropriate service level
- Housing Type – enter the client’s housing situation as of the date of discharge

When complete, click the Close button, and select Yes to save the enrollment record.

## Viewing CHARLII Clients

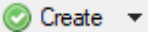
To help you quickly view CHARLII clients, click View > PLWH Clients > CHARLI Clients Enrolled.

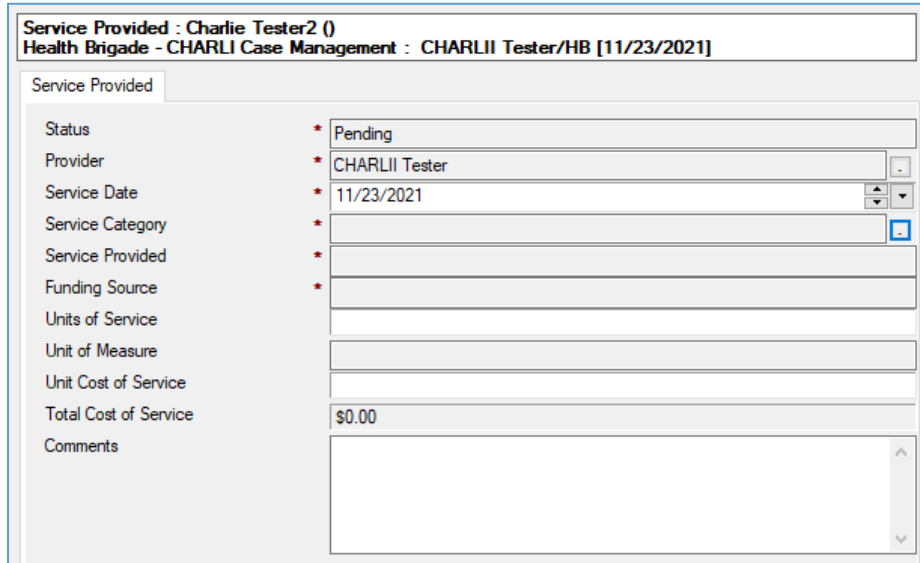


Last Name /	First Name /	MI /	Provide ID /	Date Of Birth	Primary Phone
Castle	Pamela		10264	02/03/1979	(414) 577-8787
Castle	Penelope		10223	01/01/1968	(414) 577-1234
Charlii2	CSTest		10321	11/23/1989	
Charlittester	Minnie		10310	07/01/1982	
Mouse	Charlie		10311	06/21/1982	
Test1	Charli		10320	10/01/1991	
Tester	Charlie		10306	07/01/1968	
Tester2	Charlie		10322	11/23/1984	

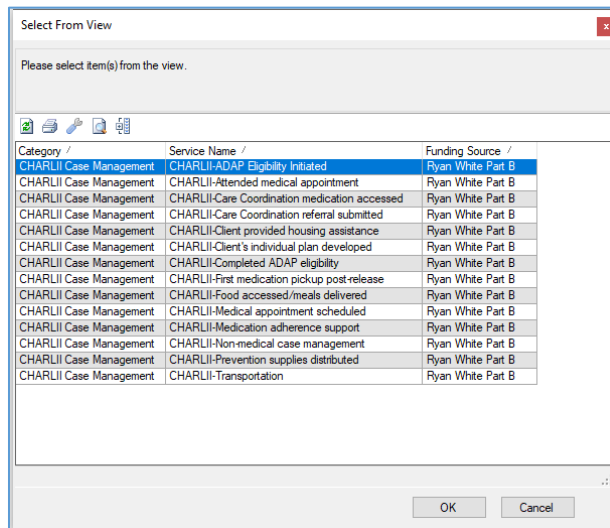
# Documenting Services Provided

Services Provided are used to document a tangible service that you provided to the client. To create a Service Provided, follow the steps below:

From the Client Profile, click  from the button bar, and select Service Provided.



- Fill in the appropriate fields. Depending on the Service Provided, the data entry fields will vary. Please note that services documented for CHARLII clients, should be within the CHARLII Case Management Category.



Category /	Service Name /	Funding Source /
CHARLII Case Management	CHARLII-ADAP Eligibility Initiated	Ryan White Part B
CHARLII Case Management	CHARLII-Attended medical appointment	Ryan White Part B
CHARLII Case Management	CHARLII-Care Coordination medication accessed	Ryan White Part B
CHARLII Case Management	CHARLII-Care Coordination referral submitted	Ryan White Part B
CHARLII Case Management	CHARLII-Client provided housing assistance	Ryan White Part B
CHARLII Case Management	CHARLII-Client's individual plan developed	Ryan White Part B
CHARLII Case Management	CHARLII-Completed ADAP eligibility	Ryan White Part B
CHARLII Case Management	CHARLII-First medication pickup post-release	Ryan White Part B
CHARLII Case Management	CHARLII-Food accessed/meals delivered	Ryan White Part B
CHARLII Case Management	CHARLII-Medical appointment scheduled	Ryan White Part B
CHARLII Case Management	CHARLII-Medication adherence support	Ryan White Part B
CHARLII Case Management	CHARLII-Non-medical case management	Ryan White Part B
CHARLII Case Management	CHARLII-Prevention supplies distributed	Ryan White Part B
CHARLII Case Management	CHARLII-Transportation	Ryan White Part B

When finished, you can either mark the service as “Completed” or “Not Provided”.

If you do not have time to enter in all the required information in one sitting, you can save the Service Provided as “Pending” so you can come back to it later. To save it as “Pending”, click on the **Close** button and then **Yes** to save your changes. When you want to come back and complete the Service Provided, double click into the “Pending” Service Provided and click on the **Edit** button.

**PLEASE NOTE:** It is important to complete each Service Provided. Services Provided that are not in a “Completed” status will not be included in your reports. You can see a list of all your “Pending” Services Provided at *View\PAHR Activity\Services Provided Records Pending*.

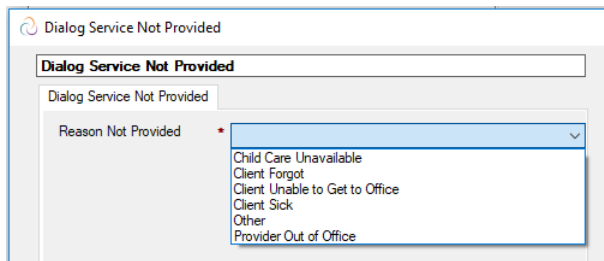
### ***Marking the Service Provided as “Completed”***

Click on the **Complete** button to save your changes. Once a Service Provided is marked as Complete, you cannot edit the Service Provided.

### ***Marking the Service Provided as “Not Provided”***

Marking the Service Provided as “Not Provided” allows you to document that you had planned to deliver a service but did not actually deliver the service.

Click on the **Not Provided** button to mark the Service Provided as “Not Provided”.



Select the reason you are marking the service as “Not Provided” and click **OK**.