GROUPWARE TECHNOLOGIES, INC.

Provide® Enterprise Care Management Software

CHARLII User Guide

Provide® Enterprise

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Updated November 2021

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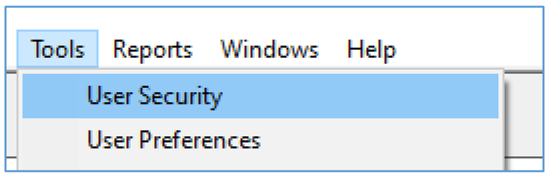
Introduction

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.

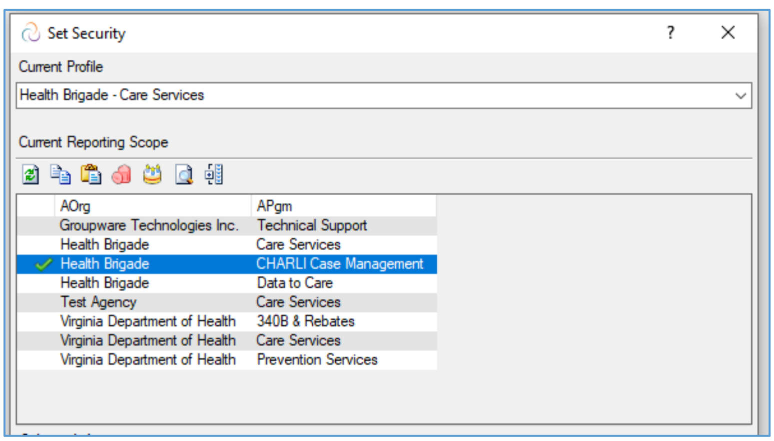
This user guide will walk through the management of these records.

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.



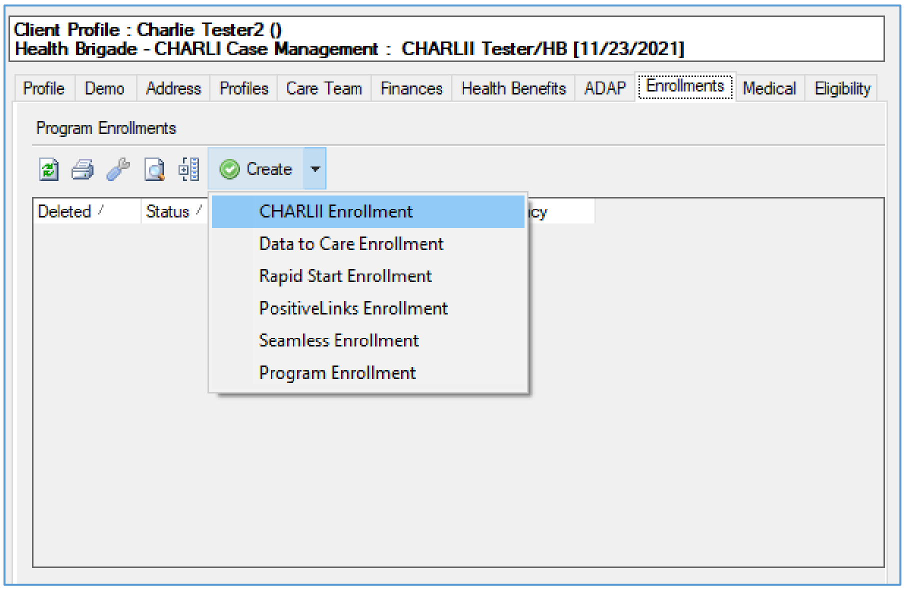
The CHARLI Case Management program profile must be set as the user's Current Profile in order to document services provided.

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

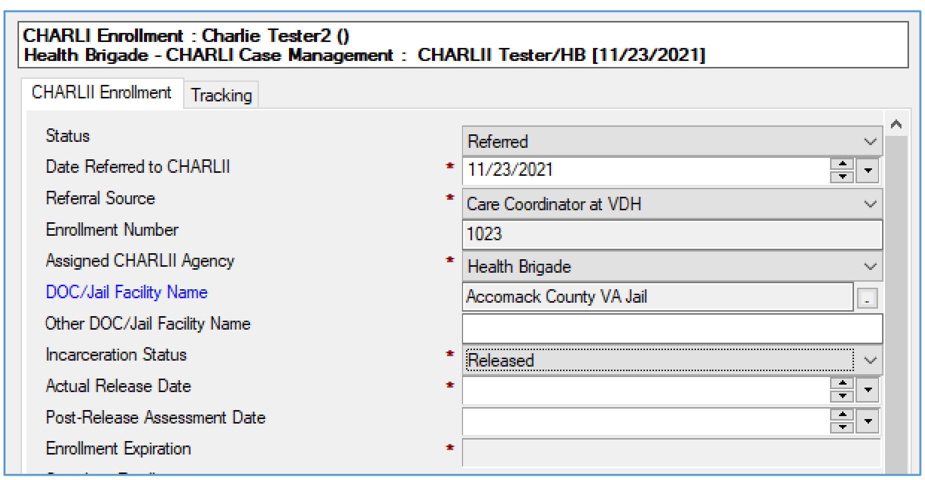
Enrollment Record

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:



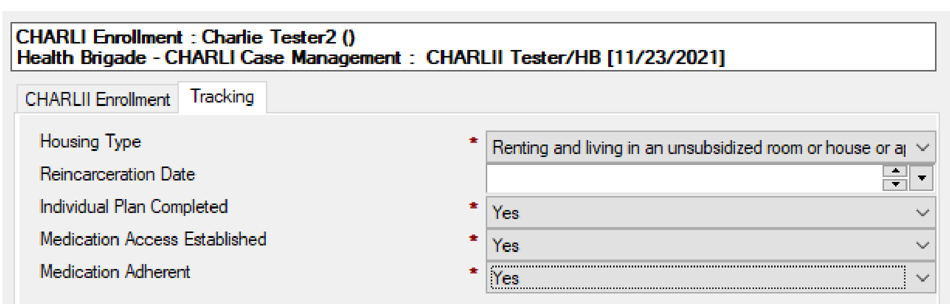
Complete the required information on the enrollment form.

- **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:



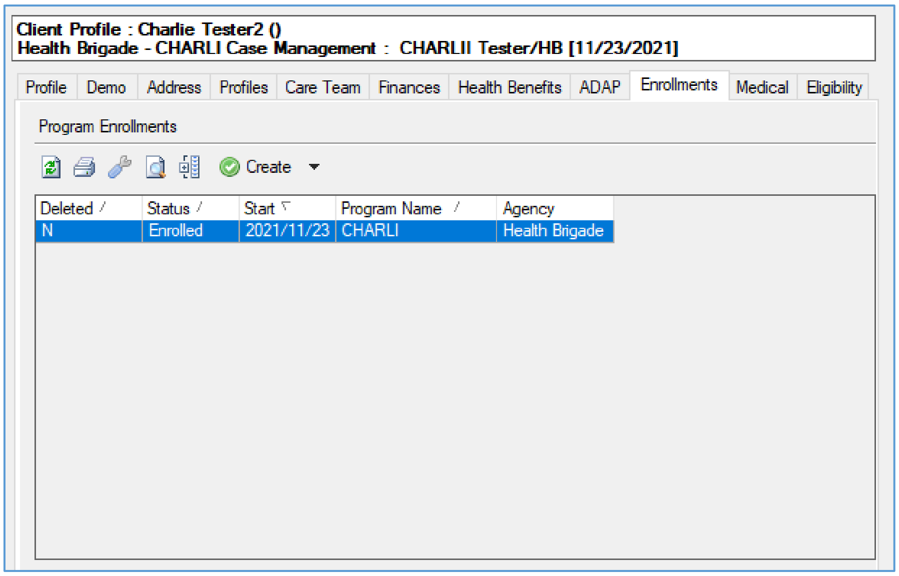
Use the Tracking tab to record the following:

- **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

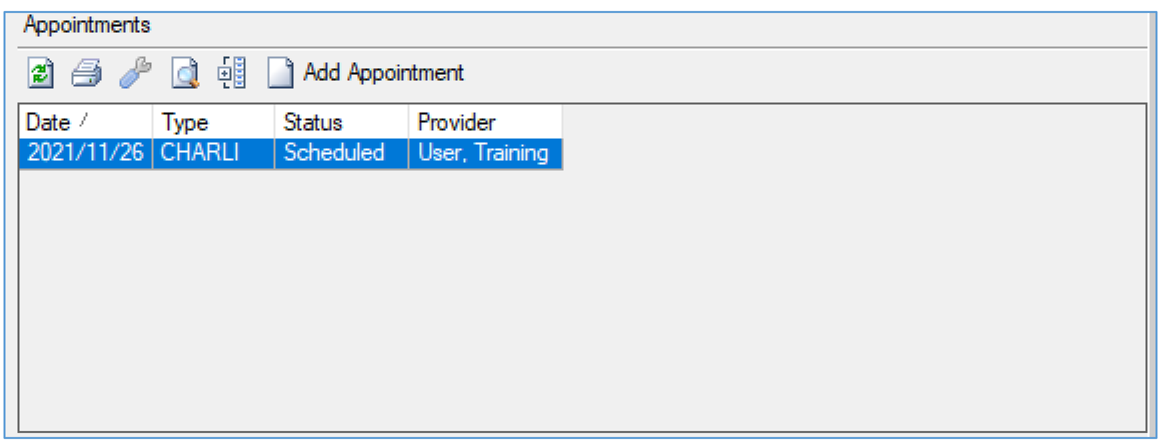
After you have completed all the required fields to process the enrollment, save the enrollment record by clicking Close, and answer Yes to save your changes.

Additional Documentation

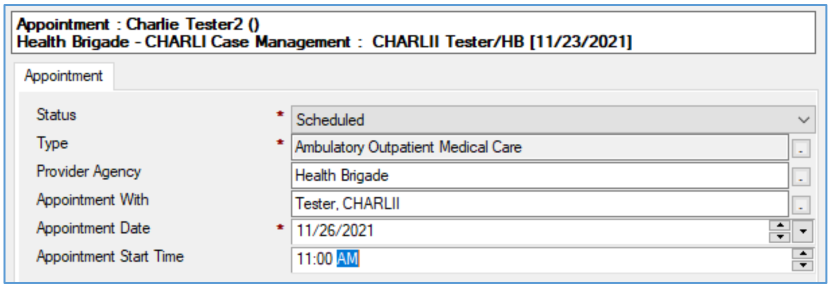
Other documentation necessary for CHARLII clients can be completed from within the Enrollment record. Navigate to the Enrollments tab on the Client Profile, double-click the CHARLII enrollment to open the record.



Appointments

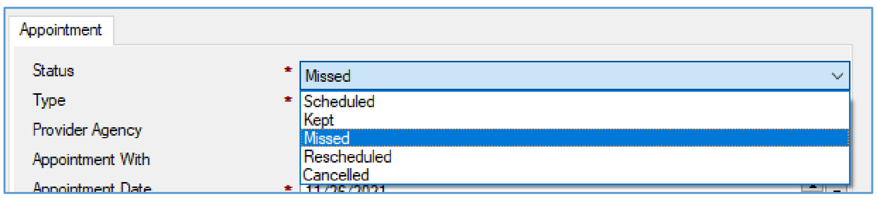


The Appointments embedded view will display any prior medical appointment history. You may also use the “Add Appointment” button to document any upcoming appointments



To Edit the appointment, click 

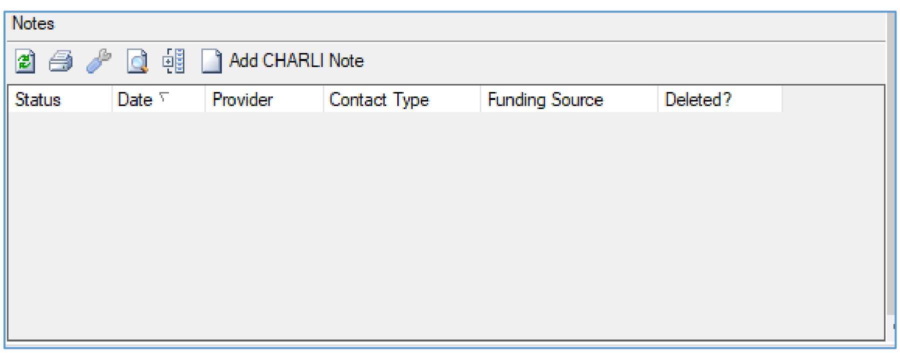
button to indicate if the appointment was kept, missed, rescheduled, or cancelled. If the appointment is missed, rescheduled, or cancelled, enter the reason in the field that displays.

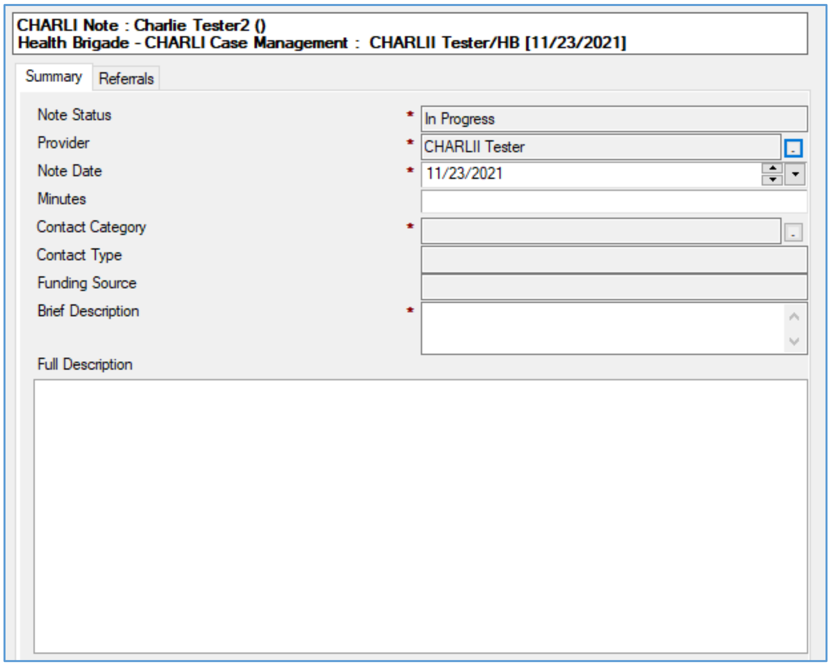


When finished, click Close, and Yes to save the changes to the Appointment record.

CHARLII Notes

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



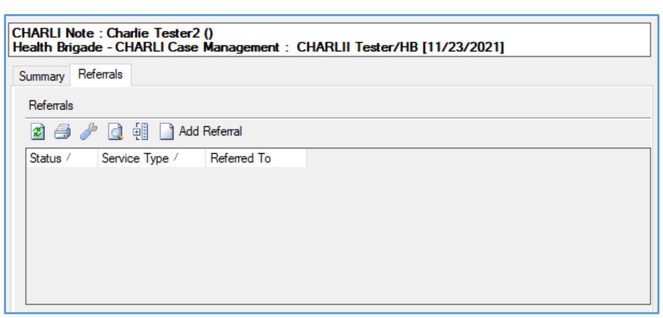


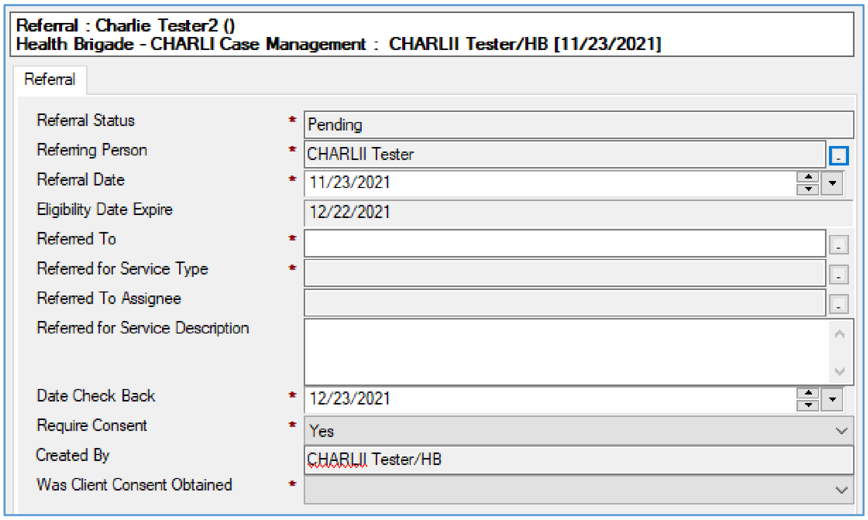
Enter the required information on the appropriate Tab.

- **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.





- 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

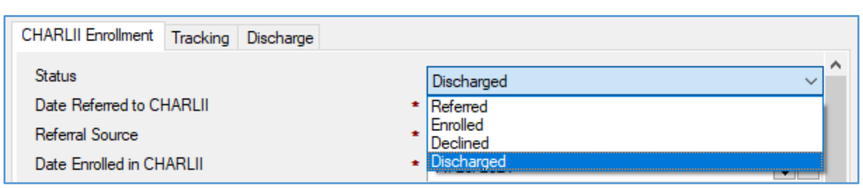
When finished, click on the **Submit** button to save your changes and submit the referral. The referrals then can be "Acknowledged" by the receiving agency by clicking on the **Acknowledge** button. Acknowledging the referral will inform the referring provider that the referral has been received.

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.

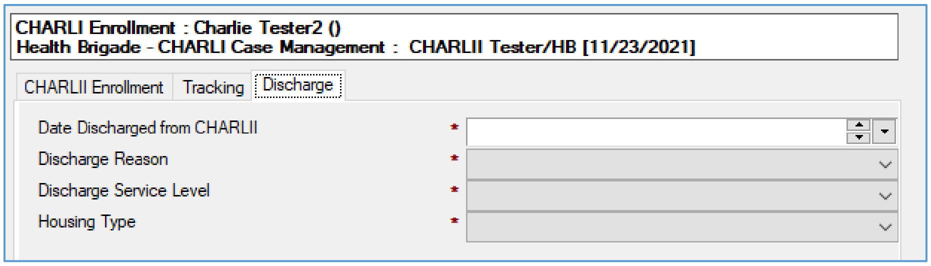
Once a referral is opened, it cannot be edited. However, you can come back to the referral at any time and click the **Close** button to close the referral.

Discharging a CHARLII Client

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



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



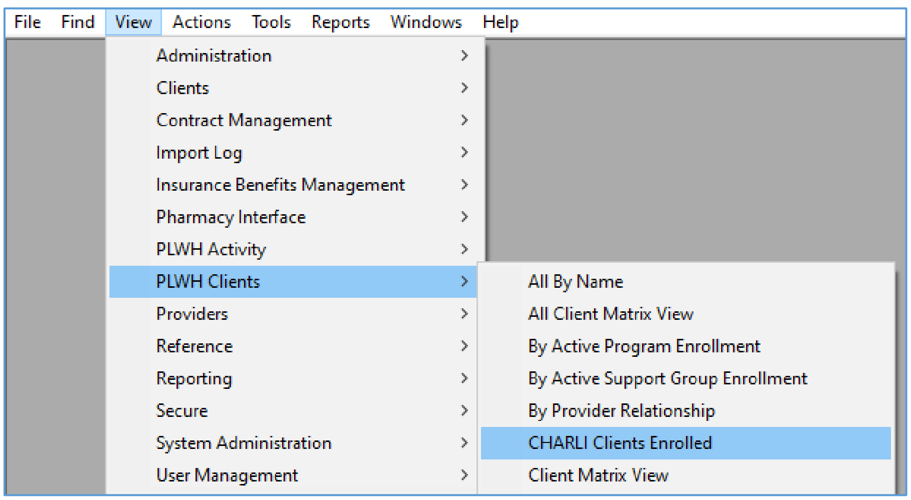
Complete the required fields:

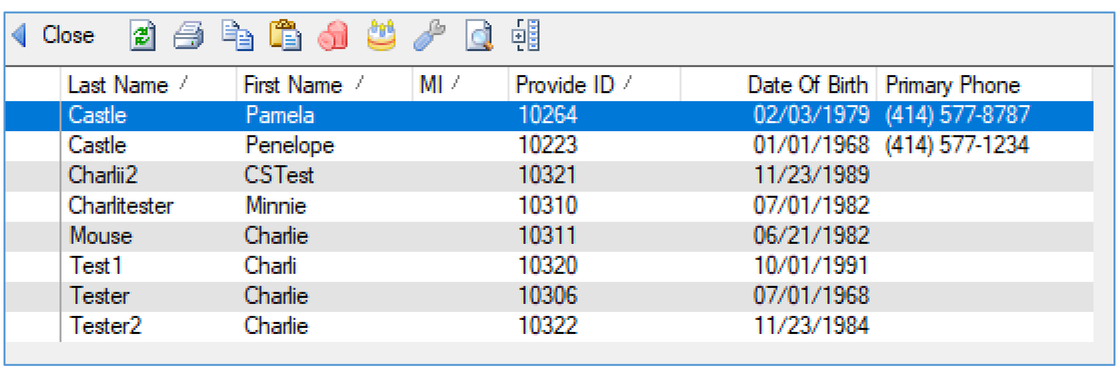
- Date Discharged from CHARLII – enter the date of discharge from the CHARLII program
- Discharge Reason – select the reason for discharge
- Discharge Service Level – select the appropriate service level
- Housing Type – enter the client's housing situation as of the date of discharge

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.



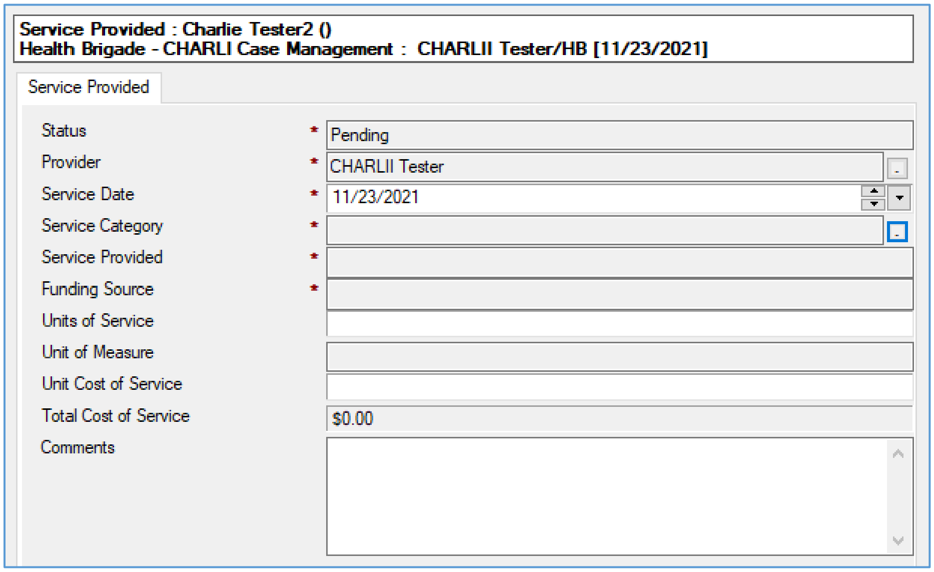


Last Name	First Name	MI	Provide ID	Date Of Birth	Primary Phone
Castle	Pamela		10264	02/03/1979	(414) 577-8787
Castle	Penelope		10223	01/01/1968	(414) 577-1234
Charlii2	CSTest		10321	11/23/1989	
Charlitester	Minnie		10310	07/01/1982	
Mouse	Charlie		10311	06/21/1982	
Test1	Charli		10320	10/01/1991	
Tester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

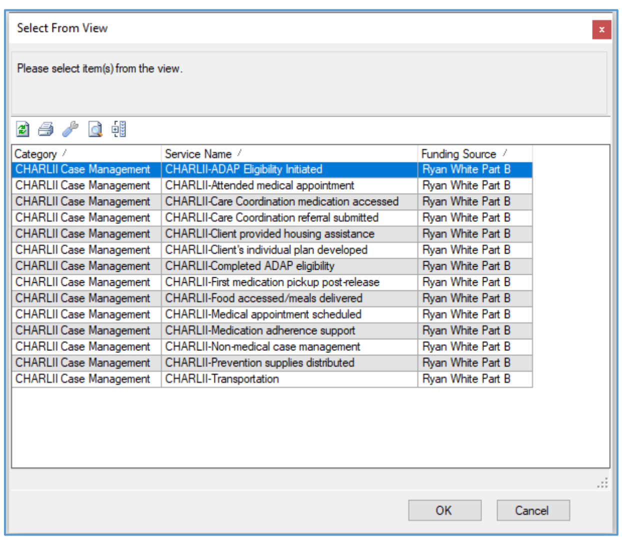
Documenting Services Provided

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 Create 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.



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*.

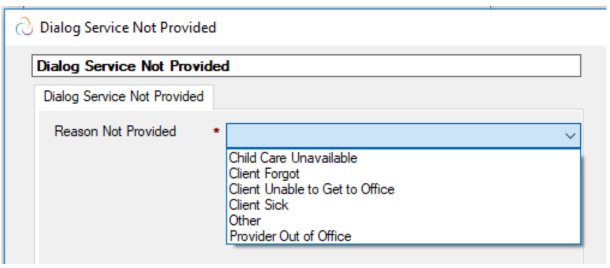
Marking the Service Provided as "Completed"

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**.