

GROUPWARE TECHNOLOGIES, INC.

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

Virginia Department of Health

User Guide

Provide® Enterprise

# Virginia Department of Health

## Client Registration and Completing a Client Profile

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## Client Registration

Intake is the process of collecting information concerning the client and his or her support system, as well as determining program eligibility prior to any services being provided and funded. The following procedures should be followed at the time a new client is to be entered in the Provide® Enterprise system.

### Registration Verification

Prior to entering the client in the Provide® Enterprise database, you should check to make sure that the client has not previously been entered in the database. To verify that the client has not already been registered, follow the steps below.

#### ***Find Client***

The Find Client function will search the entire database to see if the client has previously been entered in the system and, therefore, has received Ryan White Part B services in the past. To do this, follow the steps below:

- Select the **Find – Client** screen in the menu bar.
- This will activate the Search criteria screen, seen in the figure below:

Search Criteria	Input Field
First Name	<input type="text"/>
Middle Initial	<input type="text"/>
Last Name	<input type="text"/>
Birth Date	<input type="text"/>
Sex Assigned at Birth	<input type="text" value="M"/>
SSN	<input type="text"/>
URN	<input type="text"/>
Provide Client ID	<input type="text"/>
Surveillance StateNo	<input type="text"/>
PBM Member ID	<input type="text"/>
Medicaid ID	<input type="text"/>
Member ID/Policy Number	<input type="text"/>
ClientProfileID	<input type="text"/>
Find Client Results	

- Fill out the search criteria as appropriate and click on the **Search** button to complete the search.

**NOTE:** You may not want to enter full SSN or names in the appropriate fields, due to possibility of prior data entry errors.

- You can enter an asterisk (\*) as a wild card to do more general searches.
- After the search is completed, the client records that match the search criteria are listed and displayed below the search dialog in a view like the one below:

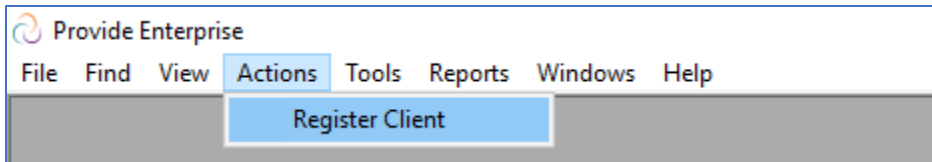
Name	Name	Name	Gender	Birth	Home	Street Address	City	State	Zip
Jane	Doe		Female	3/26/2013	414-555-555!				53051

- Simply double click on the record that you wish to view in order to open the desired Client Profile.
- If, after reviewing the Client Profile, you determine that it is not the client that is present at your agency to receive services, you can move onto the next steps and actually register the client in the system.
- If you come to the conclusion that the existing Client Profile is that of the client that is listed, follow the steps listed in the under “Opening an existing client to your Agency”.

## Client Registration

If, after searching the database, you determine that the client is **NOT** in the database, you will want to register the client in the system. To do that, follow the steps below:

- From the Menu Bar, select **Actions – Register Client**.



- The Register Client screen will appear. The Register screen appears as shown below.

Fill in the appropriate fields. Some of the notable fields in the Register Client form have been detailed below.

- **Legal First Name:** Enter the client’s legal First name. I.E. if the client’s legal name is William but goes by Bill, please enter William and not Bill.
- **Legal Last Name:** Enter the client’s legal Last name.
- **Birth Date:** Enter the client’s birth date.
- **Current Gender Identity:** Select what the client’s current gender identity is.
- **Sex Assigned at Birth:** Select what sex the client was assigned at birth.
- **URN:** This field will automatically populate based on the client’s name, date of birth, and gender.
- **Current HIV Disease Stage:** Select the current HIV Disease Stage of the client.
- **Housing Type:** Select the client’s housing situation.
- **Street Address 1:** Enter the client’s current street address.
- **State:** Select what state the client’s current street address is located.
- **County:** Select what county the client’s current street address is located.
- **City:** Select what city the client’s current street address is located.

- Agency Assigned Client ID:** The “Agency Assigned Client ID” should reflect the ID number that is used at your agency to identify clients. In addition, if your agency uses a formula to assign ID number to your clients, GTI can build the formula into this button (as long as the fields used to compute your ID number are in the Register Client screen). Contact the Provide® Enterprise Help Desk for more information.

Close ABC Register Client Link to Client Consent Form

**Register Client**

Register Client Consent

Legal First Name \*

Legal Middle Initial \*

Legal Last Name \*

Birth Date \* [dropdown]

Current Gender Identity \*

Sex Assigned at Birth \*

Social Security Number [mask]

URN 99990101019

Current HIV Disease Stage \*

Primary Language [dropdown]

Preferred Written Communications Language [dropdown]

Housing Type \*

Street Address 1 [dropdown]

Apt / Lot / Floor [dropdown]

State \* VA [dropdown]

County \*

City \*

Zip Code [mask]

Primary Phone [mask]

Primary Phone Type [dropdown]

Primary Phone Message [dropdown]

Secondary Phone [mask]

Secondary Phone Type [dropdown]

Secondary Phone Message [dropdown]

Provide Client ID 10087

Agency Assigned Client ID

On the “Consent” tab of the Register Client form, attach or scan in the client’s Virginia HIV/AIDS Service Network Consent.

Close ABC Register Client Link to Client Consent Form

**Register Client**

Register Client Consent

Attachment Type \* Image [dropdown]

Images

Attach Save As

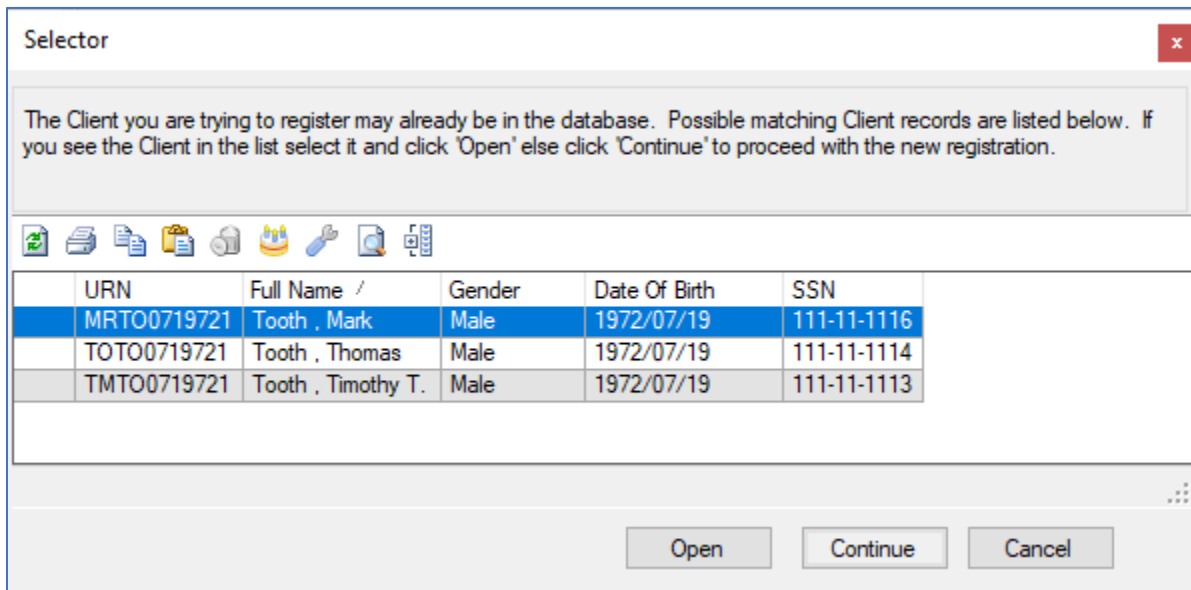
Once the form is completed, click the **Register Client** button on the button bar.

At this time, the system will start the duplicate check process to see if this client may already be in the database. The duplicate check logic looks to ensure there are no existing client records that are possible duplicates of the client you are trying to register.

If the client you are registering matches an existing client file one any of the below client information, you will not be allowed to register the duplicate client.

- Exact match on SSN
- Exact match on URN
- Exact match on First and Last Name (*only shows for users from your agency unless Virginia DOH*)
- Exact match on Last Name and Birthdate (*only shows for users from your agency unless Virginia DOH*)
- Exact Match on Client ID
- Exact match on Date of Birth, the register client's Last Name to existing client's First Name, and the register client's First Name to existing client's Last Name (*to catch name reversal errors*)

If any of the above matches are made to an existing client file, a screen similar to the following will appear:



The Client you are trying to register may already be in the database. Possible matching Client records are listed below. If you see the Client in the list select it and click 'Open' else click 'Continue' to proceed with the new registration.

URN	Full Name /	Gender	Date Of Birth	SSN
MRTO0719721	Tooth , Mark	Male	1972/07/19	111-11-1116
TOTO0719721	Tooth , Thomas	Male	1972/07/19	111-11-1114
TMT00719721	Tooth , Timothy T.	Male	1972/07/19	111-11-1113

Open Continue Cancel

If you believe that one of the clients listed in the duplicate check window is the client you are trying to register, simply place a checkmark  next to the client and click the **Open** button to go to that Client Profile.

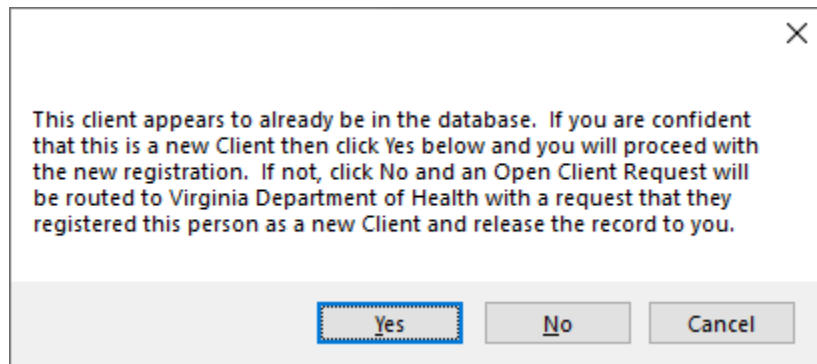
If you believe that one of the clients listed in the duplicate check window is not the client you are trying to register, click the **Continue** button. This will do a duplicate check within the system for all of Virginia Department of Health excluding the clients that were just shown in previous screen. The system will look to see your role and determine if you can register as a new client. If not able to create as new client the system will send to Virginia Department of Health as an Open Client Request.

Otherwise, click on the **Cancel** button to cancel your new client registration.

If you click the **Continue** button it will do a duplicate check against the database for all Organizations within that Program type.

If your security settings allow you to override potential duplicate clients, and you are a sub-recipient agency for Virginia Department of Health, the following prompt will appear. If you click **Yes**, it will create a new registration for that client. If you click **No**, then an Open Client Request will be automatically sent to Virginia Department of Health. If you click **Cancel**, the system will cancel out of the submission of the client you are registering.

If your security settings do not allow you to override potential duplicate clients, the system will automatically send an Open Client Request to the Virginia Department of Health.





## Completing the Client Profile

This section of the guide will review all of the tabs found within the Client Profile.

### Profile Tab

The Profile tab of the client file shown in the below image is where you will find key client information, such as name, date of birth, and SSN:

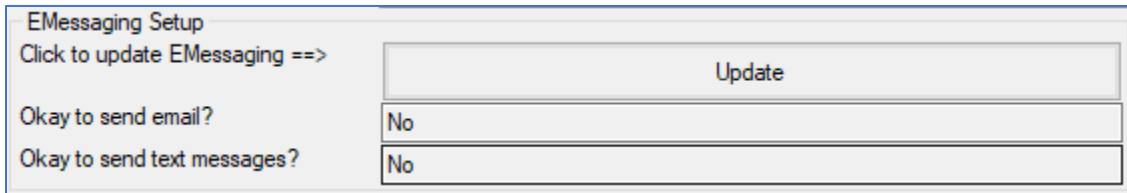
The screenshot shows a software interface for a client profile. At the top, there is a toolbar with icons for Close, Edit, Create, View, Action, and Print. Below the toolbar, the client's name and care services are displayed: "Client Profile : Mary Tooth ()" and "Virginia Department of Health - Care Services : Jason Griffin/co [04/27/2021]". A series of tabs are visible: Profile, Demo, Address, Profiles, Care Team, Finances, Health Benefits, ADAP, Medical, and Eligibility. The "Profile" tab is active, showing a list of fields and their values:

Status	Open
Date of Last Service	
Legal Last Name	* Tooth
Legal First Name	* Mary
Legal Middle Initial	
Name Suffix	
Preferred Name	
Pop-up Alert Message	
SSN	111-11-1199
URN	MRT00719722
Provide Client ID	10064
EMessaging Setup	
Okay to send email?	No
Okay to send text messages?	No

Fill in the appropriate fields. Some notable fields in the Client Profile form have been detailed below.

- **Legal First Name:** Enter the client's legal First name. I.E. if the client's legal name is William but goes by Bill, please enter William and not Bill.
- **Legal Last Name:** Enter the client's legal Last name.
- **Provide Client ID:** This will auto-populate with the agency client's ID.
- **URN:** This will auto-populate with the client's unique ID.
- **Status:** This will auto-populate indicating if the client is active or inactive.

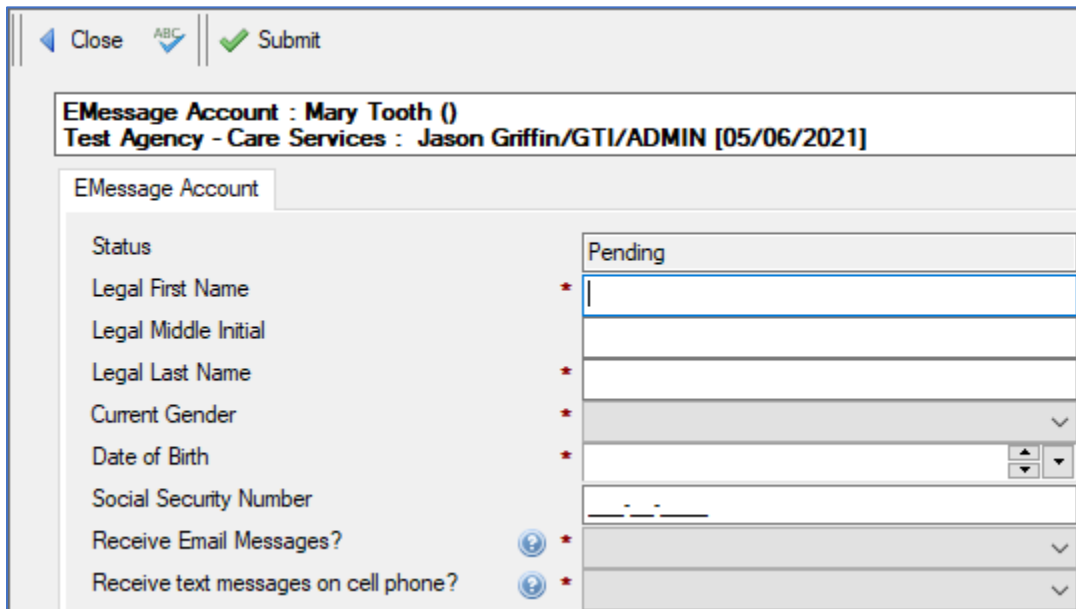
- **EMessaging Setup:** To update the client’s e-messaging information, click on the **Update** button.



The image shows a dialog box titled "EMessaging Setup". It contains the following elements:

- A button labeled "Click to update EMessaging ==>" on the left.
- A large button labeled "Update" on the right.
- A field labeled "Okay to send email?" with the value "No" entered.
- A field labeled "Okay to send text messages?" with the value "No" entered.

The following screen will appear:



The image shows the "EMessage Account" form. At the top, it displays "EMessage Account : Mary Tooth ()" and "Test Agency - Care Services : Jason Griffin/GTI/ADMIN [05/06/2021]". Below this, there are navigation buttons for "Close" and "Submit". The form fields are as follows:

- Status: Pending
- Legal First Name: \*
- Legal Middle Initial:
- Legal Last Name: \*
- Current Gender: \*
- Date of Birth: \*
- Social Security Number: - - -
- Receive Email Messages?: \*
- Receive text messages on cell phone?: \*

If the client’s email or phone number was previously entered, the previous values will be displayed.

Fill in the appropriate fields. Some notable fields in the EMessage Account form have been detailed below.

- **Receive Email Messages?:** Enter whether the client wants to receive email messages.
- **Email Address:** Enter the client’s email address and any additional email address that the client would also like copies of the emails sent.
- **Receive text messages on cell phone?:** Enter whether the client wants to receive text messages.
- **Select your Cell Phone Carrier:** Select the client’s cell phone carrier.
- **Enter your Cell Phone with Area Code:** Enter the client’s cell phone number.

After you have entered this information, click on the **Submit** to submit the e-messaging update. You cannot save e-messaging updates “In Progress.” You must Submit your changes or close without saving.

## Demo Tab

The Demographic section of the client file is where all vital demographic information on a client is located. Move through each field, filling all available information. The notable fields in the Demo Tab are detailed below.

- **Race – Check all that apply** – If you select “Asian” or “Native Hawaiian/Other Pacific Islander” extra fields will appear asking you to specify the client’s race (shown in the image below).
- **Ethnicity** – If you select “Hispanic”, an extra “Ethnicity - Hispanic” will appear asking you to specify the client’s ethnicity.

The screenshot displays a web-based form for a client profile. At the top, there are navigation buttons: Close, Save, Create, View, Action, and Print. Below this is a header for the client: "Client Profile : Mary Tooth ()" and "Virginia Department of Health - Care Services : Jason Griffin/co [04/27/2021]". The form has several tabs: Profile, Demo, Address, Profiles, Care Team, Finances, Health Benefits, ADAP, Medical, and Eligibility. The "Demo" tab is active. The form fields are as follows:

Birth Date	* 07/19/1972
Current Age	48
Current Gender Identity	Female
Sex Assigned at Birth	* Female
Gender Pronoun	▼
Race - Check all that apply	<input type="checkbox"/> American Indian/Alaska Native <input checked="" type="checkbox"/> Asian <input type="checkbox"/> Black or African American <input checked="" type="checkbox"/> Native Hawaiian/Other Pacific Islander <input type="checkbox"/> White
Asian	<input type="checkbox"/> Asian Indian <input type="checkbox"/> Chinese <input type="checkbox"/> Filipino <input type="checkbox"/> Japanese <input type="checkbox"/> Korean <input type="checkbox"/> Vietnamese <input type="checkbox"/> Other
Native Hawaiian Pacific Islander	<input type="checkbox"/> Native Hawaiian <input type="checkbox"/> Guamanian or Chamorro <input type="checkbox"/> Samoan <input type="checkbox"/> Other Pacific Islander
Ethnicity	Hispanic ▼
Ethnicity - Hispanic	<input type="checkbox"/> Mexican <input type="checkbox"/> Puerto Rican <input type="checkbox"/> Cuban <input type="checkbox"/> Other
Citizenship	▼
Primary Language	▼
Secondary Language	▼
Preferred Spoken Language	▼
Preferred Written	▼
Veteran (Yes/No)?	▼

## Address Tab

The Address Tab in the Client Profile holds the client's current residential address, mailing address, and phone information.

The screenshot shows a software interface for a client profile. At the top, there is a navigation bar with buttons for 'Close', 'Save', 'Create', 'View', 'Action', and 'Print'. Below this, the client's name 'Mary Tooth ()' and the organization 'Virginia Department of Health - Care Services : Jason Griffin/co [04/27/2021]' are displayed. A series of tabs includes 'Profile', 'Demo', 'Address', 'Profiles', 'Care Team', 'Finances', 'Health Benefits', 'ADAP', 'Medical', and 'Eligibility'. The 'Address' tab is active, showing three sections: 'Home Address', 'Mailing Address', and 'Telephone Numbers'. The 'Home Address' section includes a 'Click to update Address ==>' button and an 'Update' button. The 'Mailing Address' section includes a dropdown for 'OK To Send Mail?' and several text input fields. The 'Telephone Numbers' section includes input fields for primary and secondary phone numbers and dropdowns for phone type and message.

Field	Value
Home Address	
Click to update Address ==>	Update
Housing Type	Stable/Permanent
Address 1	120 Jessie's Lane
Apt / Lot / Floor	
State	VA
County	Pittsylvania
City	Sandy River
Zip Code	-
Mailing Address	
OK To Send Mail?	
Address 1	
Address 2	
City	
State	
Zip	-
Comments	
Telephone Numbers	
Primary Phone	( ) - -
Primary Phone Type	
Primary Phone Message	
Secondary Phone	( ) - -
Secondary Phone Type	
Secondary Phone Message	

To update the address, you must click on the **Update** button. When you click on this button, you will see the following Address screen:

Profile	Demo	Address	Profiles	Care Team	Finances	Health Benefits	ADAP	Medical	Eligibility
Home Address									
Click to update Address ==>									
Update									

Fill in the fields with the client's current residential address information.

<a href="#">Close</a> <span style="margin-left: 20px;">ABC</span> <span style="margin-left: 20px;">✔ Create Scan</span> <span style="margin-left: 20px;">✔ Submit</span>	
<b>Address : Mary Tooth ()</b> <b>Virginia Department of Health - Care Services : Jason Griffin/GTI/ADMIN</b>	
Residence	Mail   Documentation
Status	* In Progress
Date Effective	* 05/07/2021
Update Type	Interim
Housing Type	* Stable/Permanent
Street Address 1	* <input type="text"/>
Apt / Lot / Floor	* <input type="text"/>
State	* VA
County	* <input type="text"/>
City	* <input type="text"/>
Zip	* <input type="text"/>

On the Mail tab, the client can choose whether the client wants mail to be sent to an address. If you choose yes, fill in the address details. If there is address information in previous screen and this is the same address the client wants as the mailing address, click on the user button on the right on "Address 1".

If the client does not want mail sent to an address select **No**.

Close ABC Create Scan Submit

**Address : Mary Tooth ()**  
**Virginia Department of Health - Care Services : Jason Griffin/GTI/ADMIN**

Residence | **Mail** | Documentation

Mail Address  
 OK To Send Mail? \* Yes

Addressee (Care)

Address 1 \*

Address 2

State \*

Mail City \*

Zip \*

Comments  
 Comments

On the Documentation tab, you can review already existing proof of residency documentation or you can add new proof of residency documentation.

Close ABC Create Scan Submit

**Address : Mary Tooth ()**  
**Virginia Department of Health - Care Services : Jason Griffin/GTI/ADMIN**

Residence | Mail | **Documentation**

Is existing documentation sufficient? No

...Why not?

Proof of Residency Document(s)

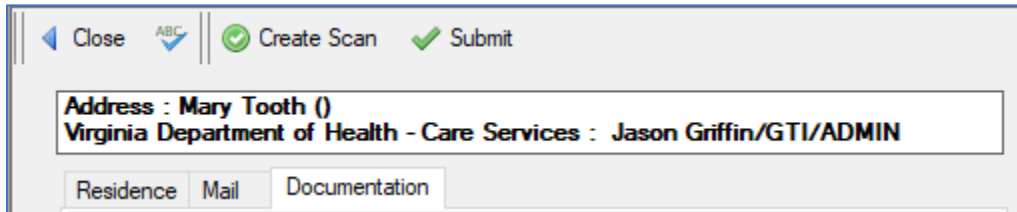
Date	Type	Delete Flag

Select whether the existing documentation is sufficient. If no, you will need to answer “Why Not?”. If existing documentation is sufficient, you should add new proof of residency documentation. To add new proof of residency documentation, see the “Create Proof of Residency Scan” section below.

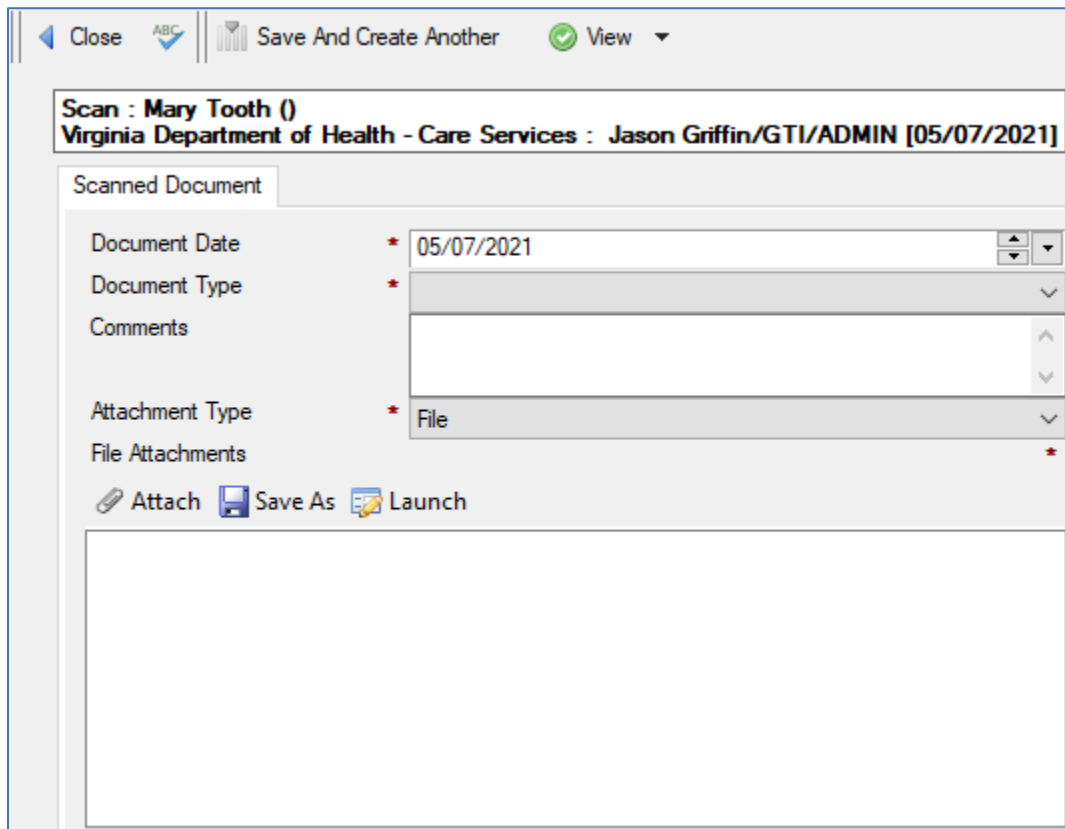
When the address update is complete, hit the **Submit** button to submit your changes.

### **Create Proof of Residency Scan**

In the Address update record, click on the **Create Scan** button.



In the Scan record, enter the Document Date, select “Proof of Residency” as the Document Type, select the “Proof of Residency”, and then scan in or attach the client’s proof of residency documentation.



When finished, click on the **Close** button and then select **Yes** to save your changes. You will then be brought back to the Address Update screen. Or, click on **Save and Create Another** to save this scan and open another blank Scan record.

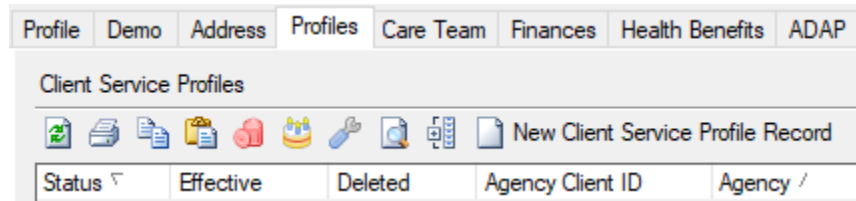
## Profiles Tab

This section of the client profile is view and/or create Client Service Profiles and Client Service Category Profiles.

### Client Service Profiles

Client Service Profile records show whether a client is currently opened or closed to your agency.

To create a Client Service Profile, click the **New Client Service Profile Record** button above the view.



Fill out appropriate fields as needed.

Close
Link to Client Profile

---

**Client Service Profile : Mary Tooth ()**  
**Virginia Department of Health - Care Services : Jason Griffin/GTI/ADMIN [05/07/2021]**

Main

Agency Assigned Client ID	<input type="text"/>
Status	Open
Status Effective	05/07/2021
Status Reason	New Client
First Service Date (auto set nightly)	<input type="text"/>
Last Service Date (auto set nightly)	<input type="text"/>
First Ambulatory Service Date (auto set nightly)	<input type="text"/>
Last Ambulatory Service Date (auto set nightly)	<input type="text"/>

Client Service Profile History Records

Date	Deleted	Field	New Value	Change Reason	Change By

Client Service Category Profile Records

Status	Effective	Deleted	Agency	Service Category	Assigned Provider	Last Service Date



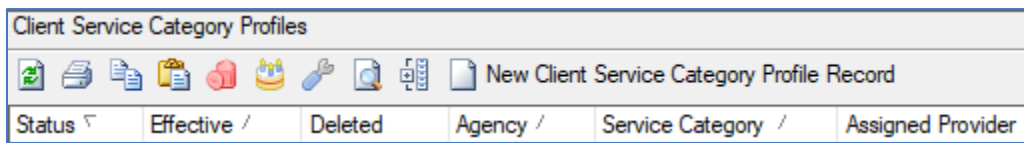
Here, you can see the current status of the Client Service Profile and a history of every time this Client Service Profile record has been opened or closed.

Depending on the status of the Client Service Profile, you will see either a **Close** button or an **Open** button at the top of the record. You can use these buttons to open or close the client to your agency.

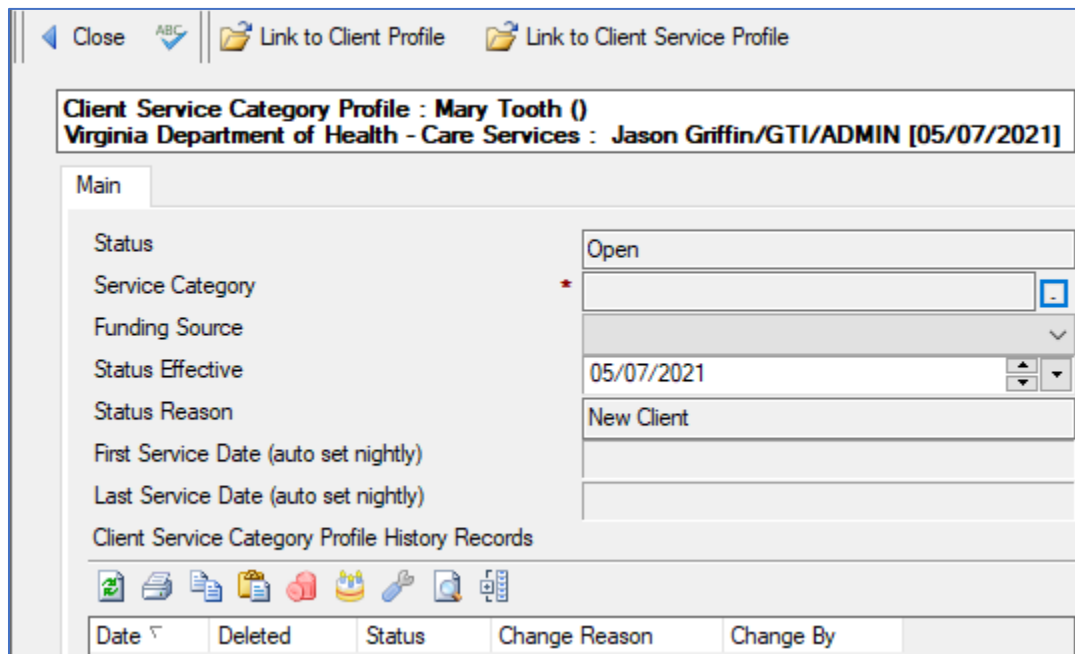
### **Client Service Category Profiles**

Client Service Category Profile records show by which service category(s) a client is being served.

To create a new Client Service Category Profile record, click on the **New Client Service Category Profile Record** button.



Select which service category the client is receiving services from, the funding source for this service category, and the date they started receiving services from this service category. Depending on which Service Category you pick, an “Assigned Provider” field will appear for you to select the client’s assigned provider for this specific service category.



When finished, click on the **Close** button and then select **Yes** to save your changes.

## Care Team Tab

This section of the client profile is where the HIV Care Provider, HIV Case Management Provider, Pharmacy, Authorized Representatives and Provider Relationships are located.

Alternate Contacts are those relationships that were converted from the prior ADAP database for visibility purposes. Going forward, Authorized Representatives and Providers should be entered in the appropriate fields.

**Client Profile : Marie Castle ()**  
**Virginia Department of Health - Care Services : Peggy Griffith/GTI/ADMIN [06/30/2021]**

Profile Demo Address Profiles **Care Team** Finances Health Benefits ADAP Enrollments Medical Eligibility

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**HIV Care Provider**  
 Primary HIV Care Clinic/Facility/Practice   
 Physician providing HIV Medical Care

**HIV Case Management Provider**  
 HIV Case Management Agency   
 HIV Case Manager

**Pharmacy**  
 Preferred Retail Pharmacy








**Authorized Representatives**  
 Number of authorized representatives

**Alternate Contacts**

       Add Alternate Contact

Status /	Share Information	Contact Name /	Client Relationship	Primary Phone Number	Deleted
Active	Yes	Sandy Castle	Partner	(414) 555-4887	N

**Provider Relationships**

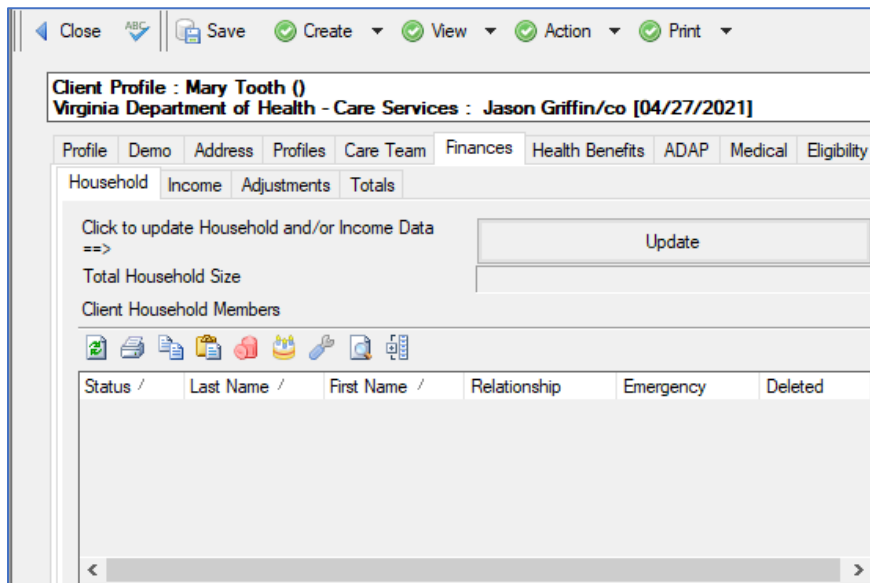
       Add Provider Relationship Record

Status /	Relationship /	Provider /	Deleted
----------	----------------	------------	---------

## Finances Tab

The Finances tab of the Client Profile is where the client's financial information is located. The Finances tab has four subtabs: Household, Income, Adjustments, Totals. On Household and Income Subtabs, you may view or update the financial data.

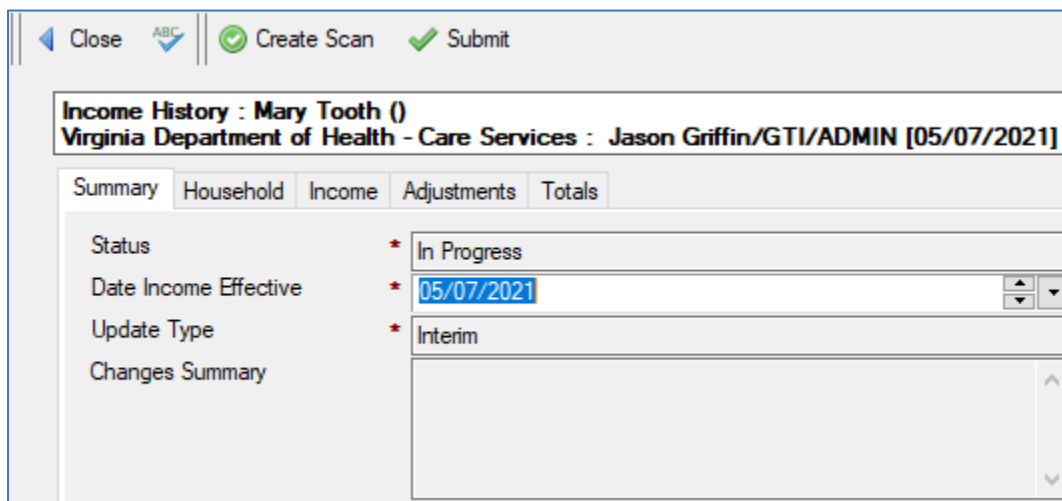
To update the client's financial data, you must click on the **Update** button. This **Update** button will be found on two of the Finances Subtabs (Household and Income).



The screenshot shows the 'Client Profile' for Mary Tooth, with the 'Finances' tab selected. The 'Household' subtab is active. The interface includes a toolbar with 'Close', 'Save', 'Create', 'View', 'Action', and 'Print'. Below the client information, there are tabs for 'Profile', 'Demo', 'Address', 'Profiles', 'Care Team', 'Finances', 'Health Benefits', 'ADAP', 'Medical', and 'Eligibility'. Under the 'Finances' tab, there are subtabs for 'Household', 'Income', 'Adjustments', and 'Totals'. A text box contains the instruction 'Click to update Household and/or Income Data ==>' and an 'Update' button. Below this, there are fields for 'Total Household Size' and 'Client Household Members'. A table with columns 'Status /', 'Last Name /', 'First Name /', 'Relationship', 'Emergency', and 'Deleted' is visible at the bottom.

## Summary Tab

This tab in the Income History record holds the income history's status, date effective, and update type.



The screenshot shows the 'Income History' record for Mary Tooth, with the 'Summary' tab selected. The interface includes a toolbar with 'Close', 'Create Scan', and 'Submit'. Below the client information, there are tabs for 'Summary', 'Household', 'Income', 'Adjustments', and 'Totals'. The 'Summary' tab is active, showing fields for 'Status' (In Progress), 'Date Income Effective' (05/07/2021), and 'Update Type' (Interim). There is also a 'Changes Summary' field with a scrollable area.

Fill in the fields as appropriate.

- **Status:** Defaults to "In Progress" until the income record is submitted.
- **Date Income Effective:** Enter the date the income became effective.

- **Update Type:** Automatically defaults to the update type.
- **Changes Summary:** Detail about what was changed.

### Household Tab

This tab shows the client’s current household size.

Alternate Contacts are those relationships that were converted from the prior ADAP database for visibility purposes. Going forward, Authorized Representatives and Providers should be entered in the appropriate fields.

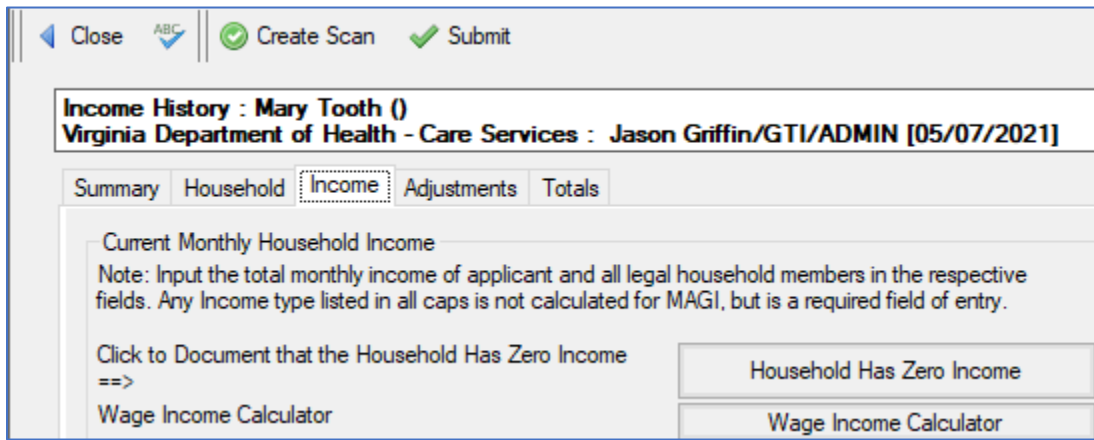
Click on **Add Household Member** button to add an individual to the client’s household.

Fill in all fields with the available household member information. When you are finished, click on the **Close** button and select **Yes** to save your changes.

After you add or update any household members records, you should recompute the household size. To recompute the household size, click on the **Recompute** button on the Household Tab in the Income History record. The household size will then be recomputed.

### **Income Tab**

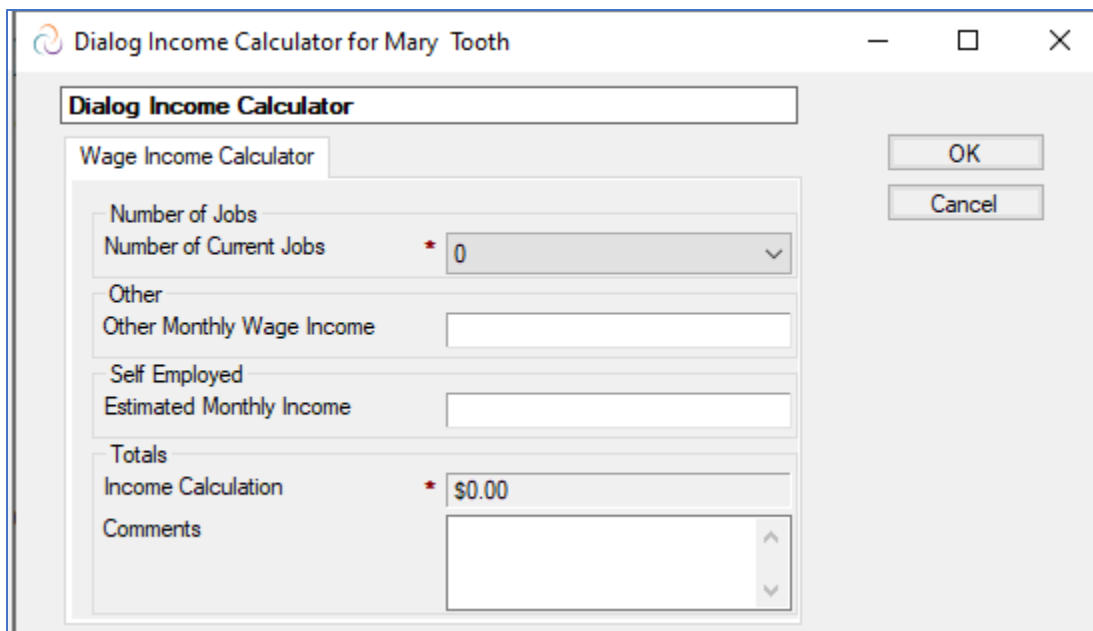
The Income tab is where you document the client's incomes. Input the total monthly income of the applicant and all legal household members in the respective fields. Any income type listed in all caps is not calculated for MAGI, but is a required field. Fill in each income field with the appropriate amount. The notable fields have been detailed below.



The screenshot shows a software interface for 'Income History : Mary Tooth ()' under the 'Virginia Department of Health - Care Services' user 'Jason Griffin/GTI/ADMIN' on '05/07/2021'. At the top, there are buttons for 'Close', 'Create Scan', and 'Submit'. Below the title bar, there are tabs for 'Summary', 'Household', 'Income' (which is selected), 'Adjustments', and 'Totals'. The main content area contains a section for 'Current Monthly Household Income' with a note: 'Note: Input the total monthly income of applicant and all legal household members in the respective fields. Any Income type listed in all caps is not calculated for MAGI, but is a required field of entry.' Below this note are two buttons: 'Household Has Zero Income' and 'Wage Income Calculator'. There is also a link that says 'Click to Document that the Household Has Zero Income ==>'.

Click the **Household Has Zero Income** button to fill all fields with \$0.00. Then go through the fields to update the client's household income.

**Wage Income Calculator** button is a calculator to help with processing the wages.



The screenshot shows a dialog box titled 'Dialog Income Calculator for Mary Tooth'. The dialog has a title bar with standard window controls (minimize, maximize, close). The main area is titled 'Dialog Income Calculator' and contains a 'Wage Income Calculator' section. This section has several input fields: 'Number of Jobs' (a dropdown menu currently showing '0'), 'Other Monthly Wage Income' (a text input field), 'Self Employed' (a section header), 'Estimated Monthly Income' (a text input field), and 'Income Calculation' (a text input field showing '\$0.00'). There is also a 'Comments' field with a text area and scroll arrows. On the right side of the dialog, there are 'OK' and 'Cancel' buttons.

- **Number of Current Jobs:** Select between 0 and 6 jobs.

Depending on the amount of jobs in the household will determine the next fields. For information purposes say you select anywhere from 1 to 6 jobs. The form will populate depending on your selection. Repeat next step for all the jobs selected.

- **Job #1 – Pay Frequency:** Select whether the client gets paid monthly, weekly, bi-weekly, 2x month or year to date. This will determine what happens next.
  - **Monthly:** Will ask for two paystubs.
  - **Weekly:** Will ask for eight paystubs.
  - **Bi-Weekly:** Will ask for 4 paystubs.
  - **2x Month:** Will ask for 4 paystubs.
  - **Year To Date:** Will ask for Start Date and Thru Date. Enter Year To Date Amount.
- **Other Monthly Wage Income:**
- **Estimated Monthly Income:**
- **Income Calculation:** This field is computed depending on your entries. This field will be carried over to the “Wages, salaries, tips, etc.” field on the “Income History” Tab.
- **Comments:** Enter necessary comments.

Click **OK** button to continue.

**Wages, salaries, tips, etc:** Include the total monthly income that the applicant and any legal household members receive from Wages or Salary’s (W-2), tip income, and any disability pension benefits received prior to meeting minimum age requirement.

**Pensions and Annuities:** Include all income both employer-based and Veterans Administration based on pension. Note, do not include disability pension income here when disability pay is received prior to normal pension retirement age.

The screenshot shows a web application interface for 'Income History'. At the top, there are navigation buttons: 'Close', 'ABC', 'Create Scan', and 'Submit'. Below this is a header section with the text: 'Income History : Mary Tooth ()' and 'Virginia Department of Health - Care Services : Jason Griffin/GTI/ADMIN [05/07/2021]'. There are four tabs: 'Summary', 'Household', 'Income', 'Adjustments', and 'Totals'. The 'Income' tab is selected. The main content area is titled 'Current Monthly Household Income' and includes a note: 'Note: Input the total monthly income of applicant and all legal household members in the respective fields. Any Income type listed in all caps is not calculated for MAGI, but is a required field of entry.' Below the note are several input fields with corresponding labels: 'Click to Document that the Household Has Zero Income ==>' (with a 'Household Has Zero Income' button), 'Wage Income Calculator' (with a 'Wage Income Calculator' button), 'Wages, salaries, tips, etc. (Form W-2)', 'Taxable interest (1099-INT fom)', 'Tax-exempt Interest (Fom 1099-INT box 8)', 'Ordinary Dividends (1099-DIV box 1a)', 'Exempt Interest Dividends (Fom 1099-INT box 10)', 'Taxable refunds of state/local income taxes', 'Alimony or Other Spousal Support Received', and 'Business or Self Employed income/loss (Schedule C or C-EZ)'. Each label has an empty input field to its right.

## Adjustments Tab

The Adjustments tab is where you document the client's income adjustments. Input the total monthly adjustments of the applicant and all legal household members in the respective fields. Any income adjustment type listed in all caps is not calculated for MAGI, but is a required field. Fill in each adjustments field with the appropriate amount.

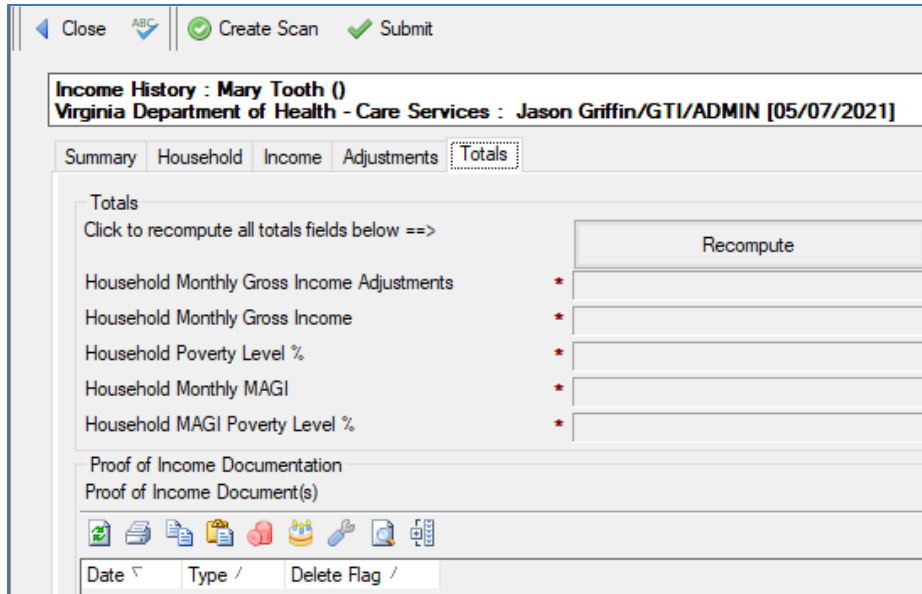
If the client has zero income, click on the **Household Has Zero Adjustments** button and each adjustment field will automatically fill in as \$0.00.

Adjustment Category	Amount
Current Monthly Household Income Adjustments Click to Document that the Household Has Zero Adjustments ==>	<input type="button" value="Household Has Zero Adjustments"/>
Educator expenses	\$0.00
Business expenses (Form 2106 or 2106-EZ)	\$0.00
Health Saving Account (Form 8889)	\$0.00
Moving Expenses (Form 3903)	\$0.00
Deductible part of Self-Employment Tax (Schedule SE)	\$0.00
Self-employed SEP, SIMPLE plans	\$0.00
Self-employed Health Insurance Deduction	\$0.00
Penalty on early withdrawal of savings	\$0.00
Alimony paid	\$0.00
IRA deduction	\$0.00
Student loan interest deduction	\$0.00
Tuition and fees (Form 8917)	\$0.00
DOMESTIC PRODUCTION ACTIVITIES (Form 8903)	\$0.00

## Totals Tab

The totals tab will calculate the monthly gross income and the household poverty level percentage.

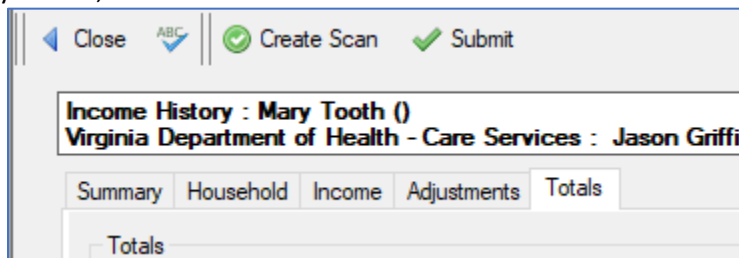
After the employment, household, income, and adjustments tabs have been updated as necessary, you should recompute the client's income totals. To do this, click on the **Recompute** button found on this Totals tab. The income totals will then be recomputed.



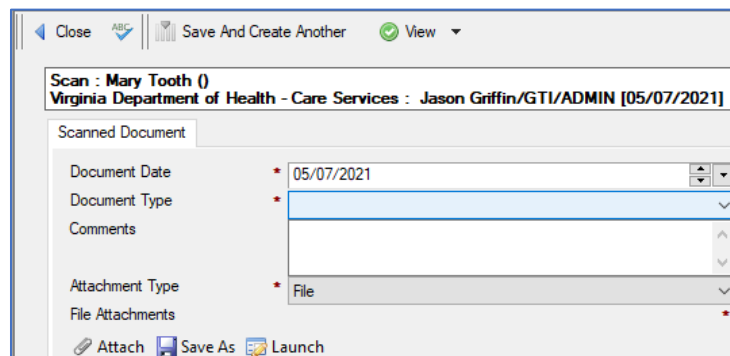
When the income update is complete, hit the **Submit** button to submit your changes.

### Create Proof of Income Scan

In the Income History record, click on the **Create Scan** button.



In the Scan record, enter the Document Date, select “Proof of Income” as the Document Type, select the “Proof of Income”, and then scan in or attach the client’s proof of income documentation.



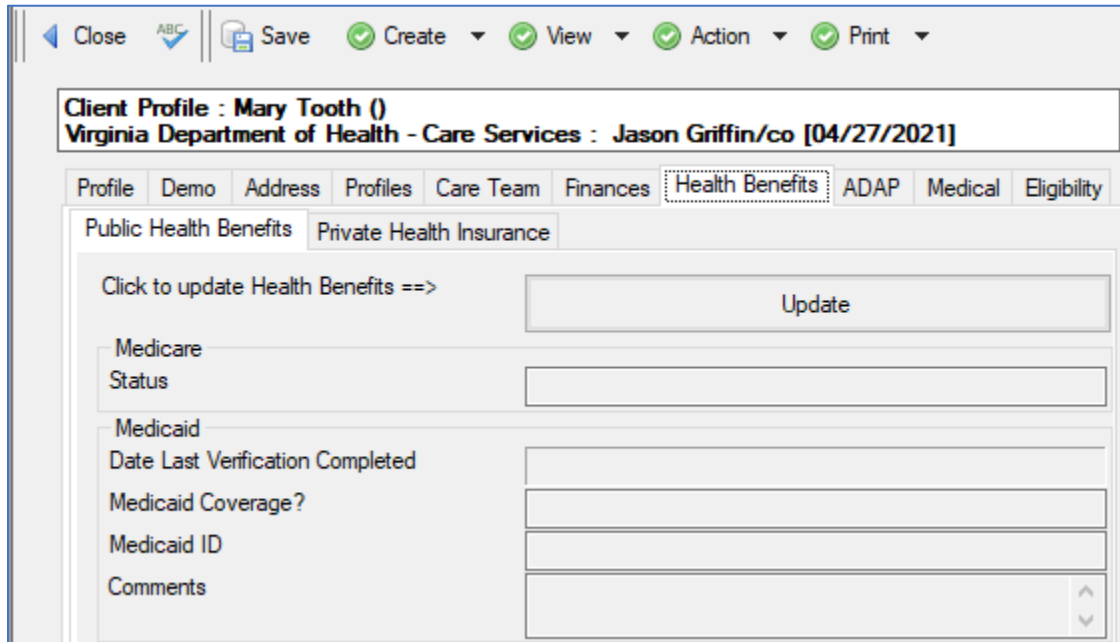
When finished, click on the **Close** button and then select **Yes** to save your changes. You will then be brought back to the Income Update screen. Or, click on **Save and Create Another** to save this scan and open another blank Scan record.



When you have finished entering the client’s current income information on all tabs in the Income Update, click on the **Submit** button to submit your changes. After you submit the Income update, you will be brought back into the client’s Client Profile.

## Health Benefits Tab

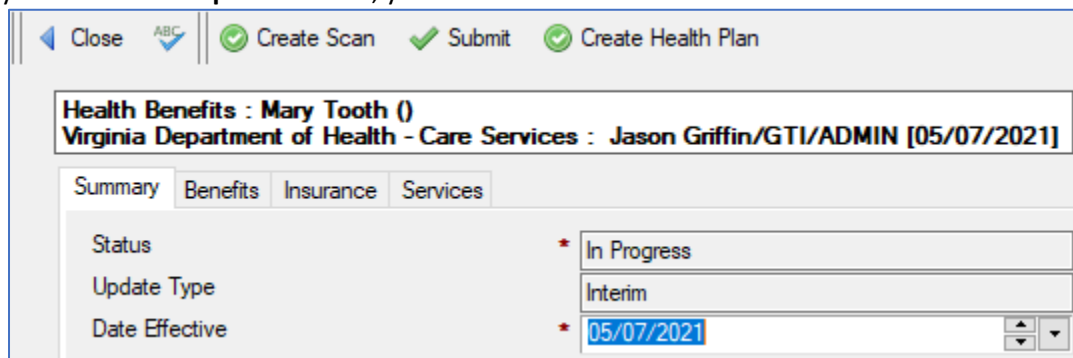
The Health Benefits tab in the Client Profile is where you can view and update the client’s private health insurance and public health benefits. The Health Benefits tab consists of two subtabs: Private Health Insurance and Public Health Benefits.



The screenshot shows the 'Health Benefits' tab selected in the client profile for Mary Tooth. The interface includes a top navigation bar with 'Close', 'Save', 'Create', 'View', 'Action', and 'Print' buttons. Below the client name, there are tabs for 'Profile', 'Demo', 'Address', 'Profiles', 'Care Team', 'Finances', 'Health Benefits', 'ADAP', 'Medical', and 'Eligibility'. Under the 'Health Benefits' tab, there are sub-tabs for 'Public Health Benefits' and 'Private Health Insurance'. A prominent 'Update' button is visible, along with a text prompt 'Click to update Health Benefits ==>'. Below this, there are input fields for 'Medicare Status', 'Medicaid Date Last Verification Completed', 'Medicaid Coverage?', 'Medicaid ID', and 'Comments'.

To update any of the health benefits, you must click on the **Update** button. You can click on **Update** on either of the two Health Benefits subtabs.

When you click on the **Update** button, you will see a view similar to this:



The screenshot shows the 'Health Benefits' update form for Mary Tooth. The top navigation bar includes 'Close', 'Create Scan', 'Submit', and 'Create Health Plan' buttons. The client name and care services are displayed. Below, there are tabs for 'Summary', 'Benefits', 'Insurance', and 'Services'. The 'Summary' tab is active, showing fields for 'Status' (set to 'In Progress'), 'Update Type' (set to 'Interim'), and 'Date Effective' (set to '05/07/2021').

### Summary Tab

On the Summary tab in the Health Benefits update, fill in the appropriate fields:

- **Status** – defaults to “In Progress” until the health benefits record is submitted.
- **Update Type** – automatically defaults to the update type.

- **Date Effective** – select the date the health benefits information became effective.

### **Benefits Tab**

Select the client’s Medicare status. If you select any status other than “No Benefits”, additional fields will show for you to fill in the client’s insurance information.

The screenshot displays a software interface for managing health benefits. At the top, there are navigation buttons: 'Close', 'Create Scan', 'Submit', and 'Create Health Plan'. The main header identifies the client as 'Mary Tooth ()' and the user as 'Jason Griffin/GTI/ADMIN' on '05/07/2021'. Below the header are four tabs: 'Summary', 'Benefits', 'Insurance', and 'Services'. The 'Benefits' tab is selected, showing the following sections:

- Medicare:**
  - Status: Active (dropdown menu)
  - Effective Date: (calendar icon)
  - Medicare Coverage: (dropdown menu)
  - Comments: (text area)
  - Medicare Proof of Coverage Document(s): (table with icons for adding documents)
- Medicare Prescription Drug Plan (PDP):**
  - Status: No Benefits (dropdown menu)
- Medicaid:**
  - Medicaid Checked: No (text field)
  - Medicaid Status?: (text field)
  - Medicaid ID Number: (text field)
  - Comments: (text area)

If the client has Medicare coverage, you need to create a proof of coverage document by clicking on the **Create Scan** button.

In the Scan record, enter the Document Date. Select “Health Benefits Documentation” as the Document Type, “Proof of Coverage” as the Health Benefits Document Type (see image below).

Then, select either “Medicaid, Medicare, Medicare Part D or Private Medical” as the Health Benefits Program.

Next, scan in or attach the client’s proof of coverage documentation.

When finished, click on the **Close** button and then select **Yes** to save your changes. You will then be brought back to the Health Benefits Update screen.

When you are finished, click the **Close** button and then select **Yes** to save your changes.

### ***Insurance Tab***

If the client has private health insurance (either through ACA, Employer, or other Private Source), enter the required information for the policy based on coverage documentation provided by the client.

Next, scan or attach the Proof of Coverage documentation provided by the client.

If the client also has access to private coverage for dental and/or vision care, enter the required information for those policies based on the coverage documentation provided by the client. Then scan or attach the proofs of coverage.

When you have finished entering the client’s current health benefits information on all four tabs in the Health Benefits Update, click on the **Submit** button to submit your changes. After you submit the Health Benefits update, you will be brought back into the client’s Client Profile.

## ADAP Tab

The ADAP Tab shows links to all ADAP enrollment records as well as historical Client Notes.

The screenshot shows the ADAP tab interface with the following sections:

- Medication Assistance Enrollment Records:**

Date Effective	Date End	Status	Benefit Level	Medication Pickup Site	Deleted? /
2021/08/02		Enrolled	10072 - VA ACAIC	Accomack	N
2021/07/01	2021/08/01	Terminated	10000 - VA Uninsured	Accomack	N
- Premium Assistance Enrollment Records:**

Date Effective	Date End	Status	Policy Type	Carrier	Plan Name	Deleted? /
2021/08/01		Enrolled	Private Medical	Anthem HealthKeepers	Anthem HealthKeepers Bronze X 5500	N
- Enrollment Links:**

Status	Date Linked	Date Terminated	Primary	Secondary	Deleted?
- HCV Treatment Applications:**

Start Date	Status
- ADAP Client Notes:**

Deleted	Date	Note Type	Program	Entered By
N	2021/08/17	Premium		Peggy Griffith

- **Medication Assistance Enrollment Records** – embedded view shows all prior and current enrollments in direct ADAP. To view any record, double-click on the record to open the detail.

The screenshot shows the detail view for an ADAP Medication Assistance Enrollment with the following fields:

- Status: Enrolled
- Date Enrolled: 08/02/2021
- Benefit Level: 10072 - VA ACAIC
- Benefit Effective Date: 08/02/2021
- Medicare Effective Date: (empty)
- Medicare Camer Name: (empty)
- Medicare Plan Name: (empty)
- Medicaid Date Effective: (empty)
- Private Effective Date: 07/01/2021
- Insurance Company Name: Anthem HealthKeepers
- Insurance Plan Name: Anthem HealthKeepers Bronze X 5500
- Enrollment Records Sent to Ramsell: (empty)

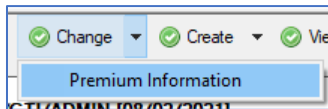
Below the fields is a table with the following data:

Date Sent	Status
2021/08/11	1

- **Premium Assistance Enrollment Records** – embedded view shows all prior and current enrollments in premium assistance (MPAP, ICAP, HIMAP). To view any record, double-click on the record to open the detail.

ADAP Premium Assistance Enrollment	Premium Payments	Documentation	Enrollments	Historic Data
Status			Enrolled	
Enrollment Type			New Enrollee	
Date Enrolled			08/02/2021	
Policy Type			Private Medical	
Policy Source			ACA Exchange	
County of Residence			Accomack	
Health Plan Carrier			Anthem HealthKeepers	
Plan Name			Anthem HealthKeepers Bronze X 5500	
Billing ID			0802202103	
Is Client receiving tax credit?			No	
...Why is Client not receiving tax credit?			Does not file taxes	
...Tax Credit Notes				
Policy Coverage Effective Date			07/01/2021	
Premium Assistance Coverage Start Date			08/01/2021	
Client Premium Amount			\$250.00	
Premium Amount			\$250.00	
Payment Cycle			Monthly	
Maximum Out of Pocket Amount			\$1,000.00	
Support Notes				

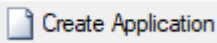
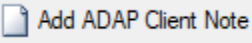
- To update premium or Maximum Out of Pocket Information, click on Change > Premium Information.



**Dialog Change Premium Information**

Set Premium Information	
Policy Type	Private Medical
Policy Source	ACA Exchange
Is Client receiving tax credit?	No
...Why is Client not receiving tax credit?	Does not file taxes
...Tax Credit Notes	
Policy Coverage Effective Date	07/01/2021
Client Premium Amount	\$250.00
Premium Amount	\$250.00
Payment Cycle	Monthly
Maximum Out of Pocket Amount	\$1,000.00
Support Notes	

OK Cancel

- Enrollment Links** – embedded view allows you to link another client who is covered under the same family insurance policy.
- HCV Treatment Applications** – embedded view shows all prior and current applications for HCV treatments. To create a new application record, click the  button to submit a new application.
- ADAP Client Notes** – embedded view shows historical note entries. ADAP Client Notes are available only to ADAP users to view, add, and edit notes. To add a new note, click the  button.

## Medical Tab

The Medical tab in the Client Profile holds the client’s current HIV information such as current disease stage, risk factors, and whether they are on ARV.

Close Save Create View Action Print

**Client Profile : Mary Tooth ()**  
**Virginia Department of Health - Care Services : Jason Griffin/co [04/27/2021]**

Profile Demo Address Profiles Care Team Finances Health Benefits ADAP Medical Eligibility

HIV Status

Current Disease Stage \* AIDS

Estimated Date HIV Diagnosed

Estimated Date AIDS Diagnosed

Mode(s) of Transmission

Blood Transfusion  
 Hemophilia  
 Heterosexual Contact  
 Intravenous Drug Use  
 Men Who Have Sex with Men  
 Mother-at-Risk (Perinatal)  
 Other  
 Undetermined

Currently taking Antiretroviral Therapy?

Nightly Updated Data

Date Of Last CD4 Count

Last CD4 Count Result

Date Of Last HIV-1 Viral Load

Last HIV-1 Viral Load Result

Date Of Last Medical Appointment Kept

Fill in the fields as appropriate. Depending on the client’s “Current HIV Disease Stage”, fill in their “Estimated Date HIV Diagnosed”, “Estimated Date AIDS Diagnosed”, “Mode(s) of Transmission” and if the client is “Currently taking Antiretroviral Therapy”.

The fields on the bottom of the form are reference only. These will be populated as data is entered into the system. These will be updated nightly and auto-populate when you look at a client’s profile.

## Eligibility Tab

The Eligibility tab in the Client Profile has three tabs “Core”, “Supportive” and “History”.

These tabs have the eligibility data for the client after all information has been submitted.

Client Profile : Timothy T. Tooth ()	
Virginia Department of Health - Care Services : Jason Griffin/GTI [04/13/2021]	
Date Eligibility Effective	05/05/2021
Date Eligibility Expires	11/30/2021
Last Change Reason	Eligibility Assessment
ADAP Medication Assistance	No
ADAP Premium Assistance	No
AIDS Pharmaceutical Assistance (LPAP/CPAP)	No
Health Insurance Premium and Cost Sharing	No
Outpatient Ambulatory Health Services	No
Oral Health Services	No
Early Intervention Services	Yes
Home Health Services	No
Home and Community-Based Health Services	No
Hospice	No
Medical Case Management	No
Substance Abuse Outpatient Services	Yes

## Update Client

Anytime you update a client, the client's information will be updated overnight in Provide®. If you want or need to update the client's information immediately, click on the **Action – Update Client** in the Client Profile.

Client Profile : Mary Tooth ()	
Virginia Department of Health - Care Services : Ja	
Date Eligibility Effective	04
Date Eligibility Expires	05/26/2021

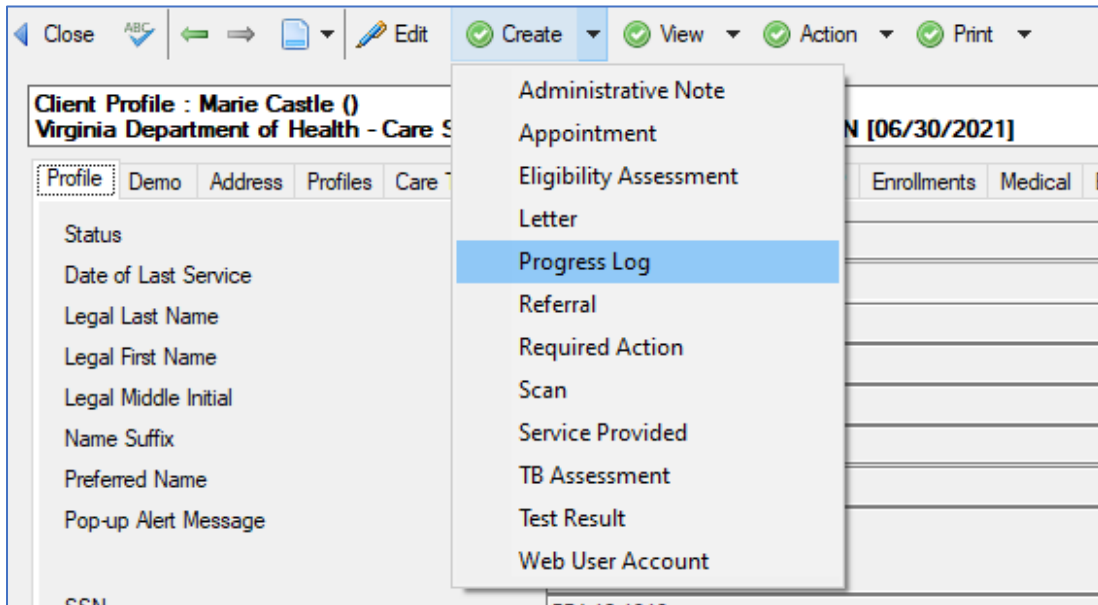
- Change Client Identification
- Document Death
- Eligibility Termination
- Set URN Suffix
- Update Client**

This **Update Client** button will pull changes from the following records:

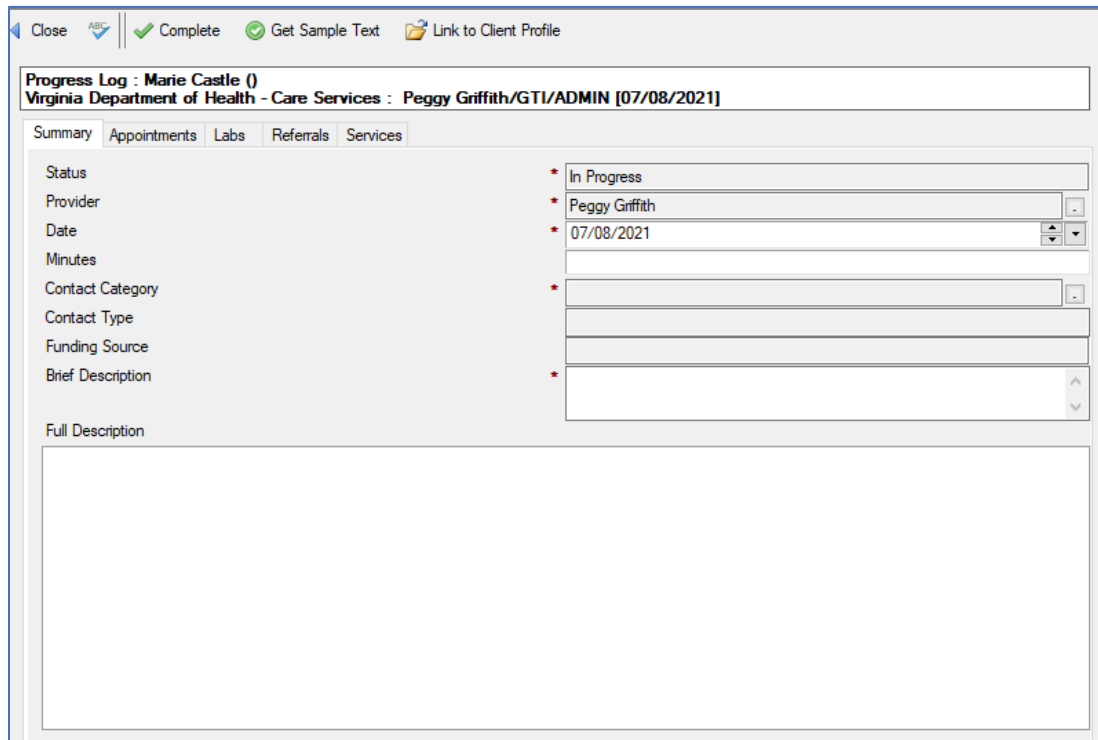
- Address Update Records
- Income Update Records
- Health Benefits Update Records

## Create Progress Logs

From the Client Profile, you may enter notes into Progress Logs to document correspondence or communication with the client. Click the Create > Progress Log to open the Progress Log form.



Enter the required fields into the Progress Log Form.




On the Summary tab in the Health Benefits update, fill in the appropriate fields:

- **Status** – defaults to “In Progress” until the Progress Log is completed

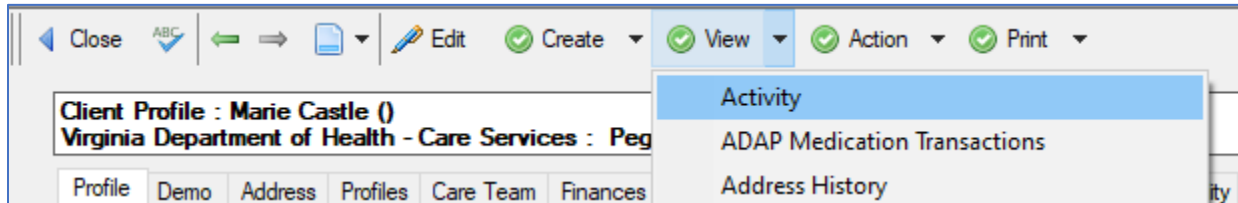


- **Provider** – defaults to User Name
- **Date** – defaults to the current date
- **Minutes** – enter the number of minutes spent with the client
- **Contact Category** – select from the list, the appropriate category and contact type
- **Contact Type** – defaults based on Contact Category selected
- **Funding Source** – defaults based on Contact Category selected
- **Brief Description** – enter a short description of the subject matter (consider this the subject line)
- **Full Description** – enter the detailed notes regarding the encounter with the client

When you are finished with the Progress Log, click  **Complete** .

## Viewing Activity

To view activity that has taken place on the client's record, click View > Activity from the Client Profile.



The following list appears, categorized by the type of activity entered in Provide. Double-click on any activity to see details.

	Form	Deleted	Summary
[-] Appointment			
	Appointment		2021/07/08: Scheduled - Ambulatory Outpatient Medical Care at (Forest)Bon Secours ID Specialists with Acuna, Dr
[-] Eligibility Assessment			
	Eligibility Assessment		2021/07/02 - Submitted
	Eligibility Assessment		2021/06/30 - Processed
[-] Eligibility Assessment Web			
	Eligibility Assessment Web		2021/07/02 - Accepted
	Eligibility Assessment Web		2021/06/30 - Accepted
[-] Progress Log			
	Progress Log		2021/07/08: Complete - ADAP Medication Assistance - Telephone Call (Virginia Department of Health) - Support call 7/8/2021
	Progress Log		2021/07/08: Complete - ADAP Medication Assistance - Telephone Call (Virginia Department of Health) - Support Call 7/8/2021
[-] Scan			
[-] Scan Web			
[-] Test Result			