GROUPWARE TECHNOLOGIES, INC.

Provide® 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.

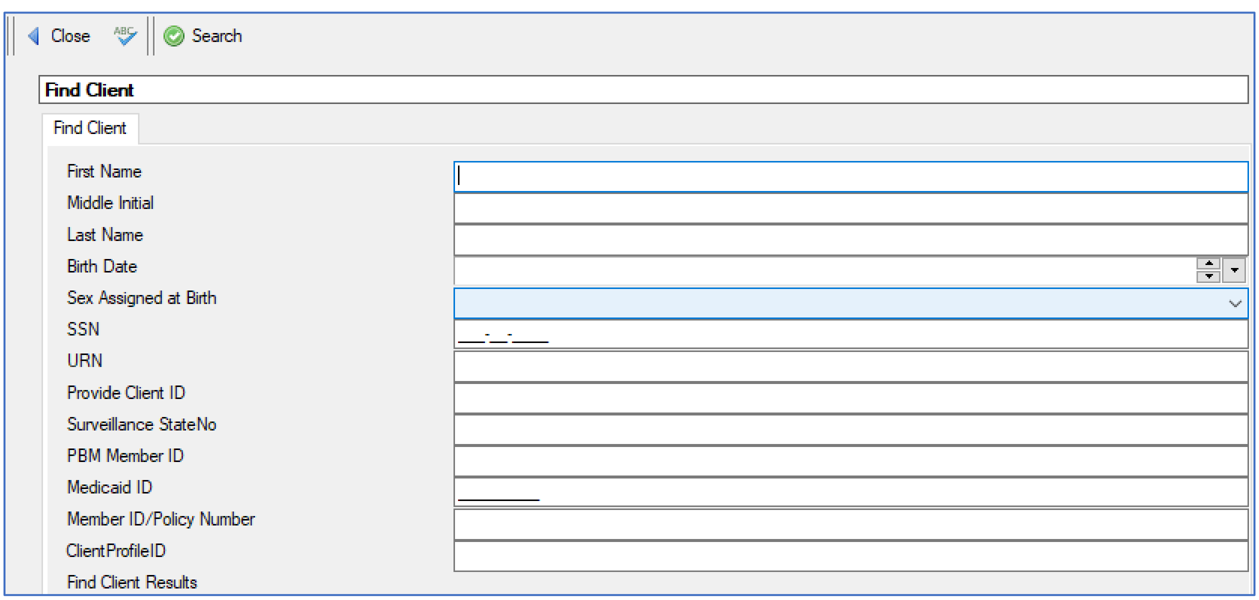
Registration Verification

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:

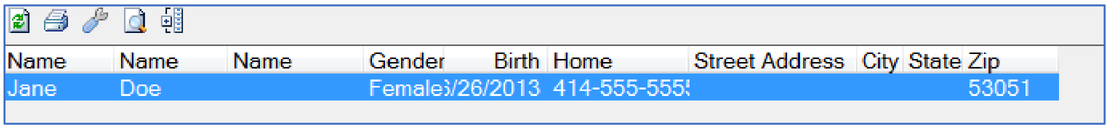
- Select the **Find – Client** screen in the menu bar.
- This will activate the Search criteria screen, seen in the figure below:



- 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:

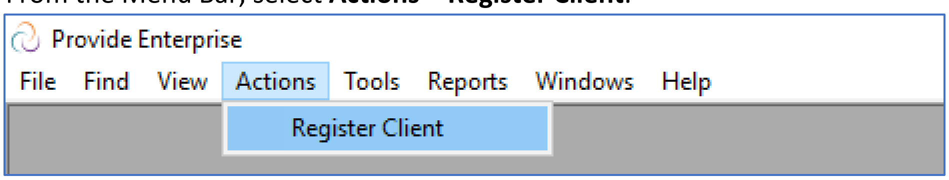


- Simply double click on the record that you wish to view in order to open the desired Client Profile.
- If, after reviewing the Client Profile, you determine that it is not the client that is present at your agency to receive services, you can move onto the next steps and actually register the client 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**.

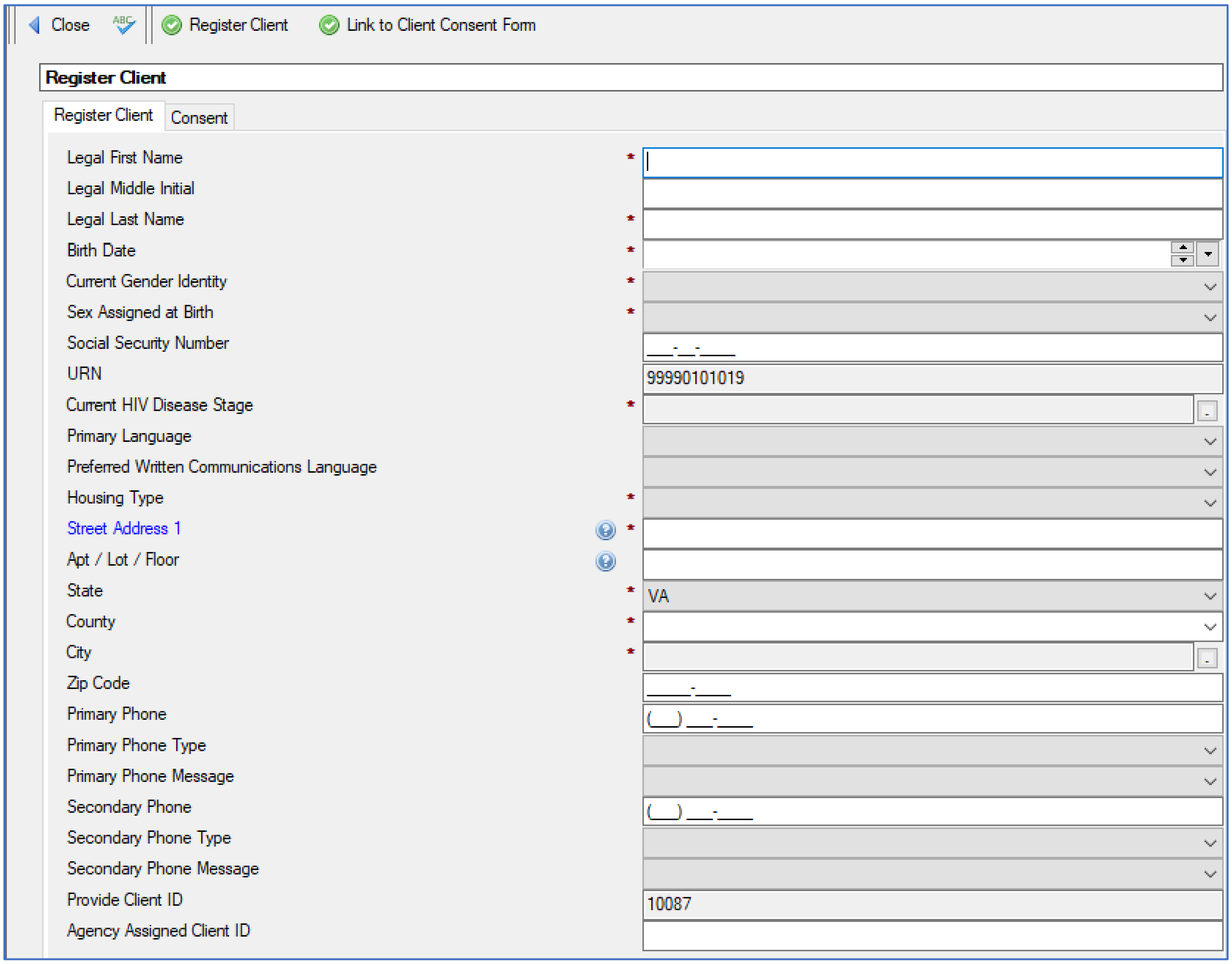


- The Register Client screen will appear. The Register screen appears as shown below.

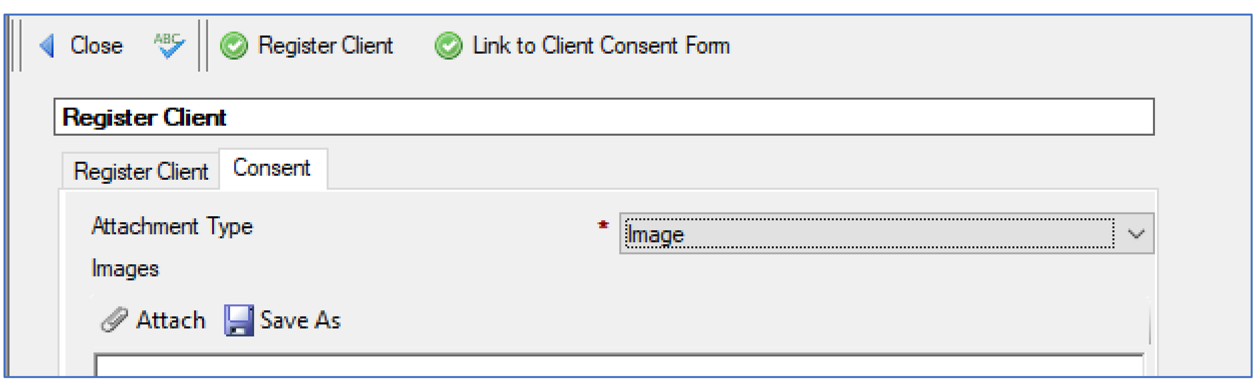
Fill in the appropriate fields. Some of the notable fields in the Register Client form have been detailed below.

- **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.



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



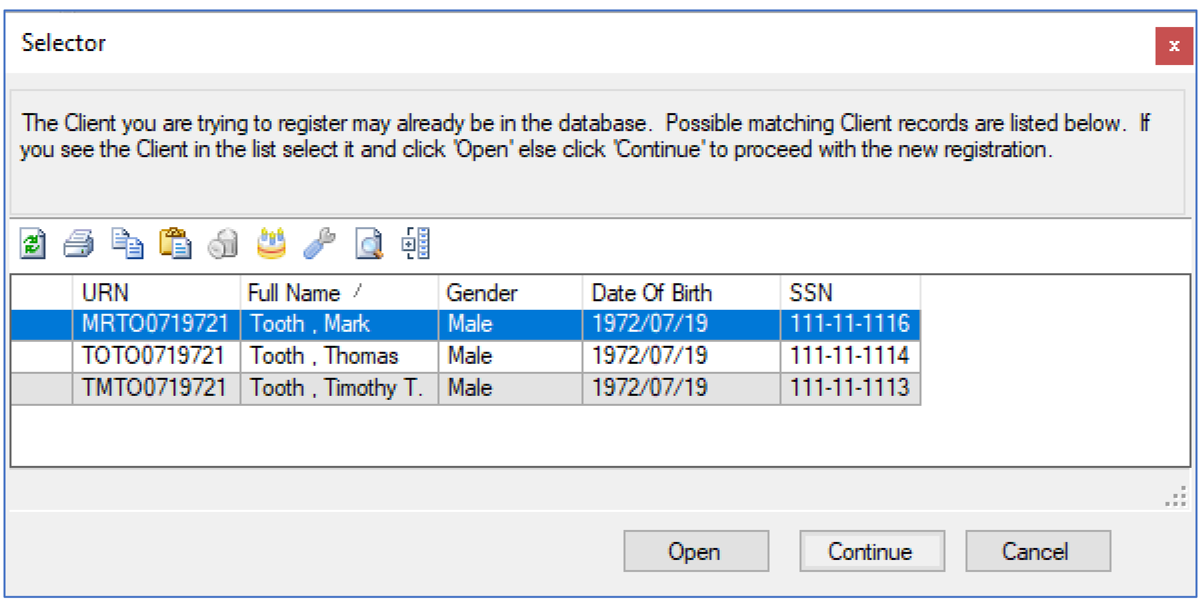
Once the form is completed, click the **Register Client** button on the button bar.

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:



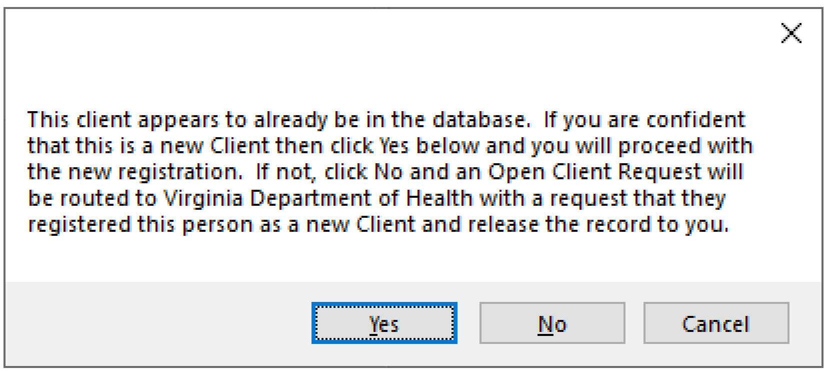
If you believe that one of the clients listed in the duplicate check window is the client you are trying to register, simply place a checkmark next to the client and click the **Open** button to go to that Client Profile.

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.



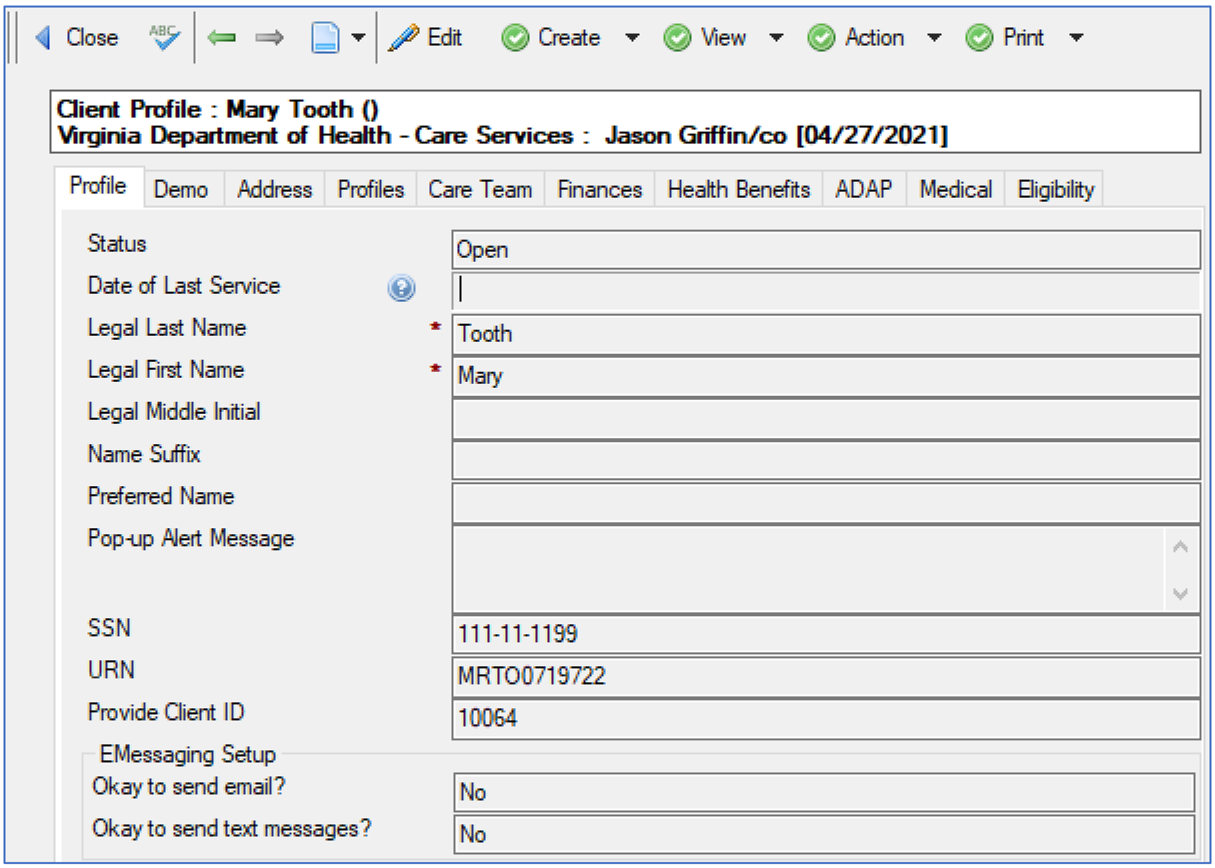
Chapter 2

Completing the Client Profile

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

Profile Tab

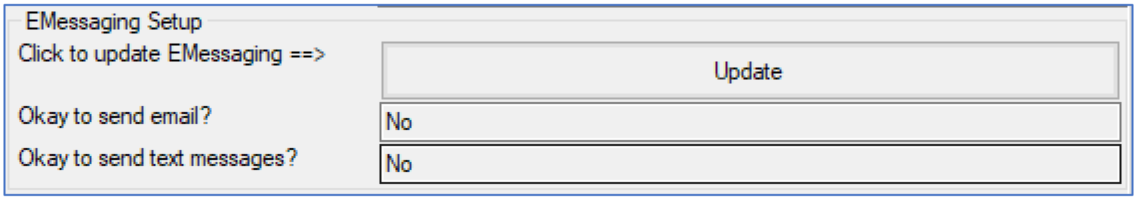
The Profile tab of the client file shown in the below image is where you will find key client information, such as name, date of birth, and SSN:



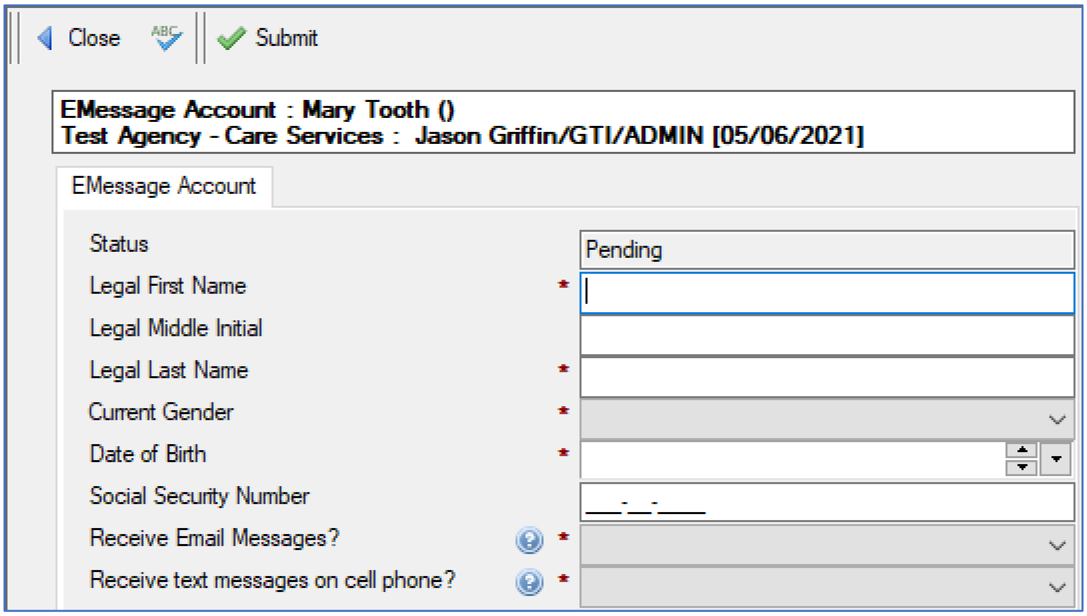
Fill in the appropriate fields. Some notable fields in the Client Profile form have been detailed below.

- **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 following screen will appear:



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.

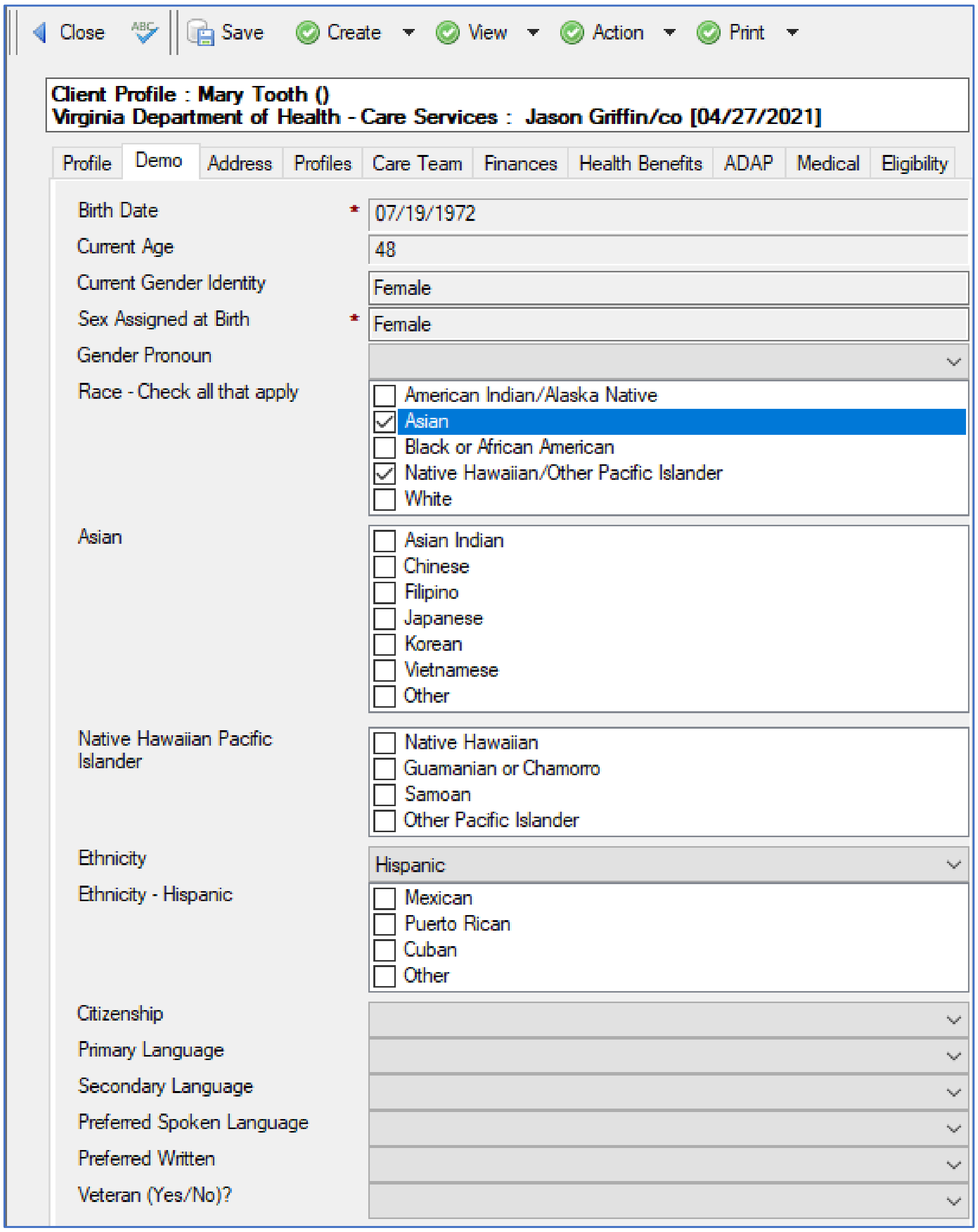
- **Receive Email Messages?:** Enter whether the client wants to receive email messages.
- **Email Address:** Enter the client's email address and any additional email address that the client would also like copies of the emails sent.
- **Receive text messages on cell phone?**: Enter whether the client 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

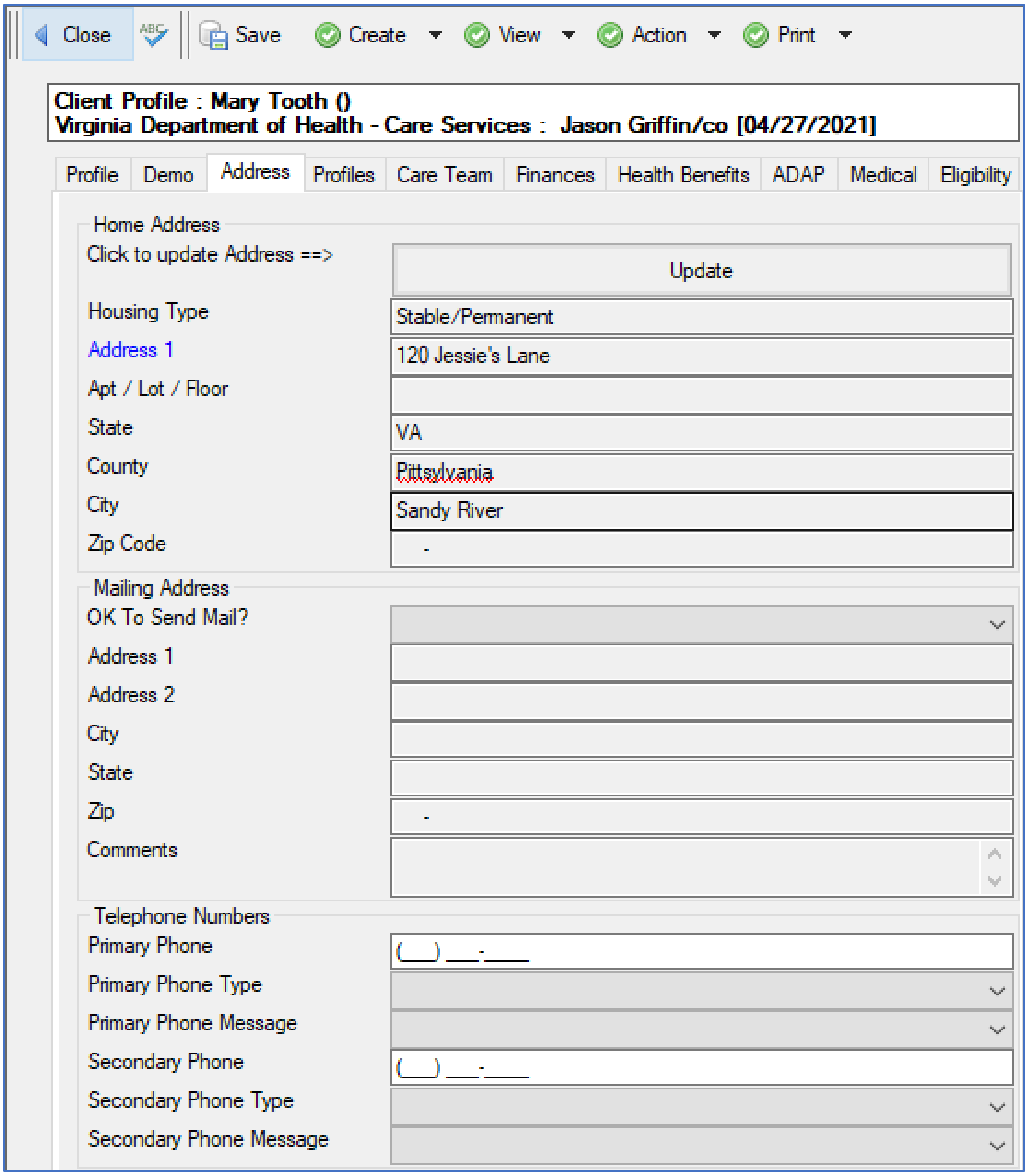
The Demographic section of the client file is where all vital demographic information on a client is located. Move through each field, filling all available information. The notable fields in the Demo Tab are detailed below.

- **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.

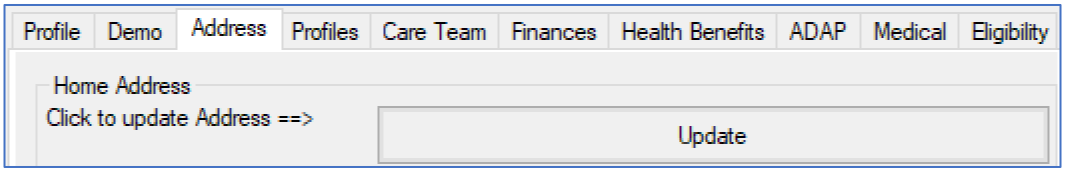


Address Tab

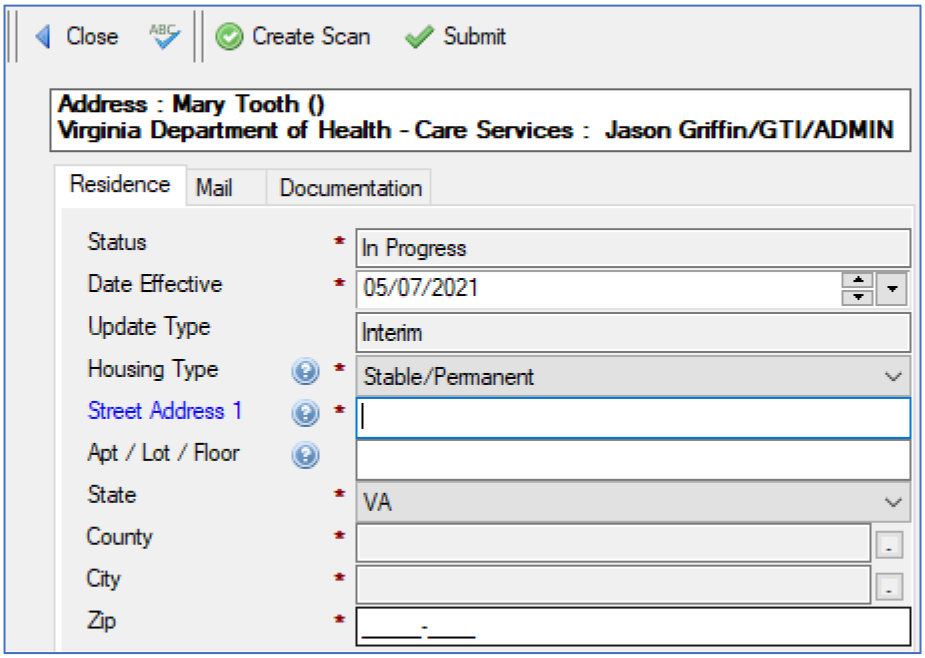
The Address Tab in the Client Profile holds the client's current residential address, mailing address, and phone information.



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

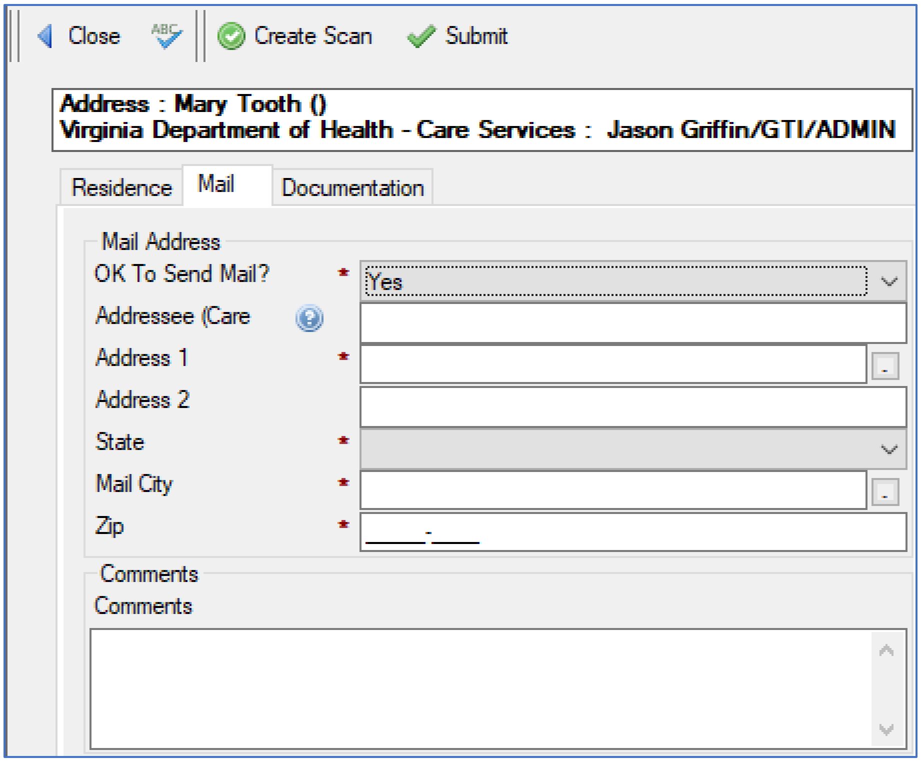


Fill in the fields with the client's current residential address information.

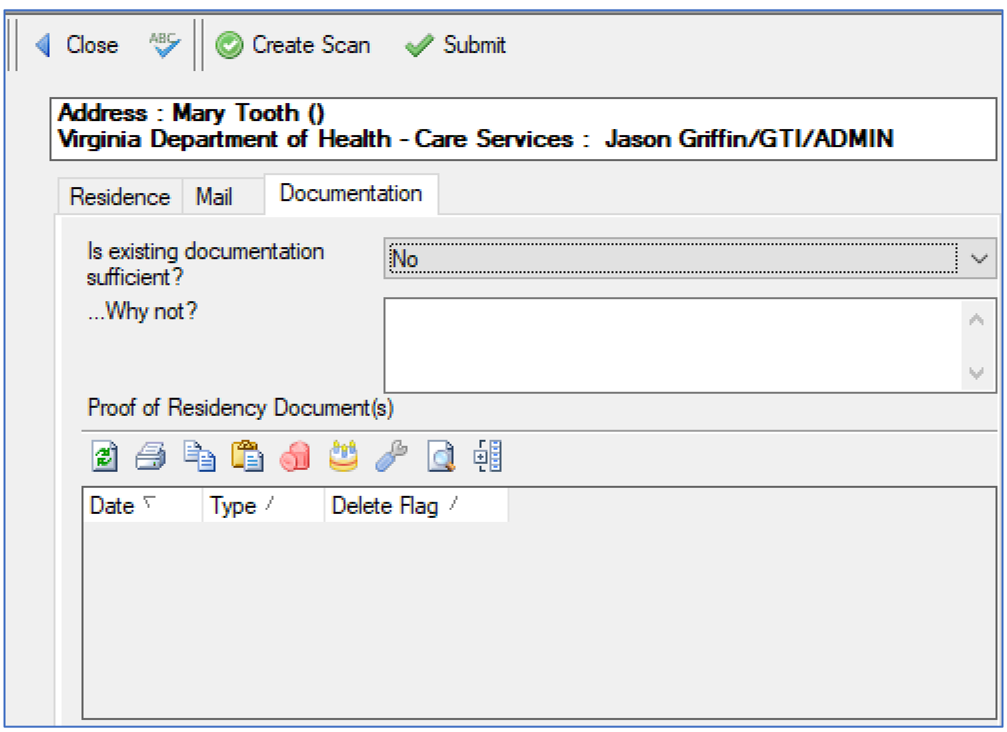


On the Mail tab, the client can choose whether the client wants mail to be sent to an address. If you choose yes, fill in the address details. If there is address information in previous screen and this is the same address the client wants as the mailing address, click on the user button on the right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

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



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

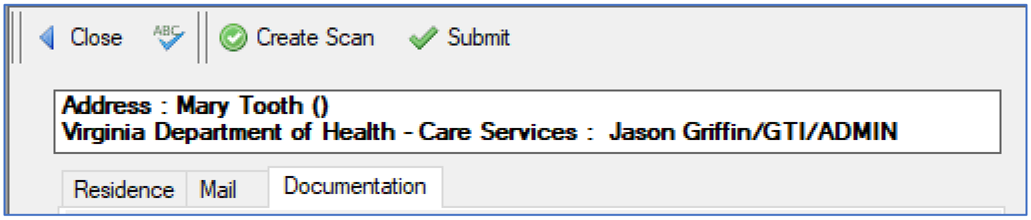


Select whether the existing documentation is sufficient. If no, you will need to answer “Why Not?”. If existing documentation is sufficient, you should add new proof of residency documentation. To add new proof of residency documentation, see the “Create Proof of Residency Scan” section below.

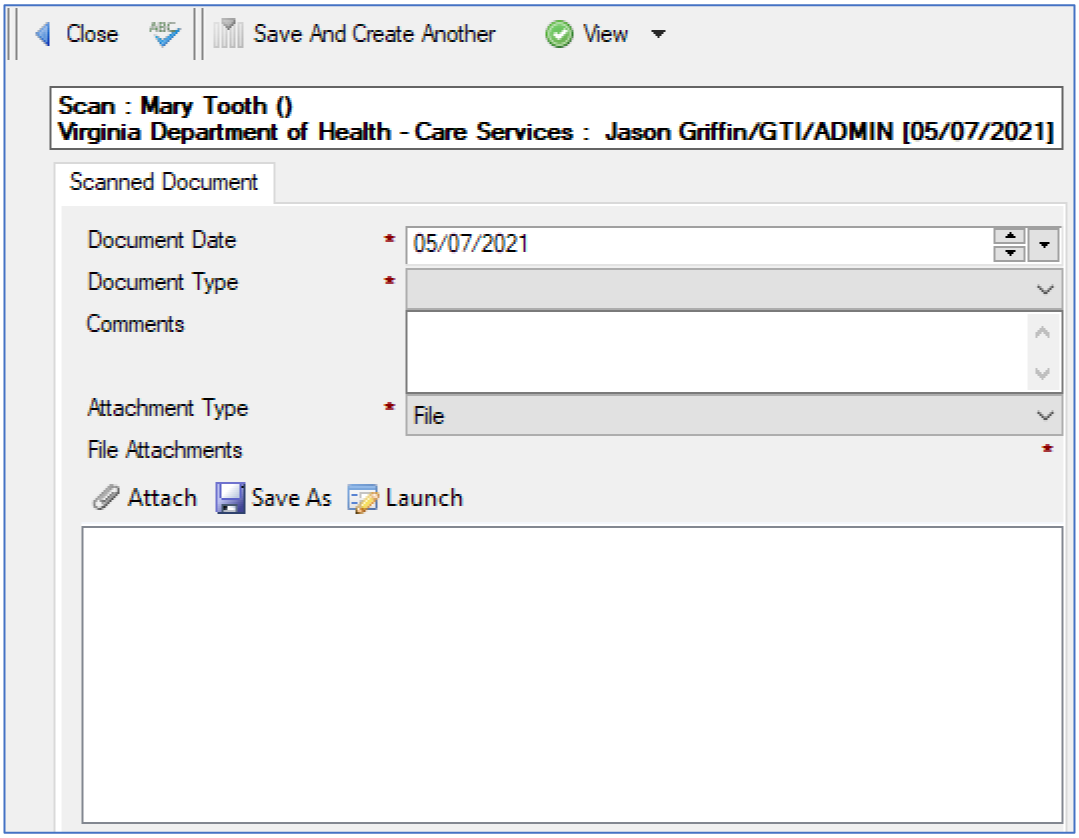
When the address update is complete, hit the **Submit** button to submit your changes.

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.

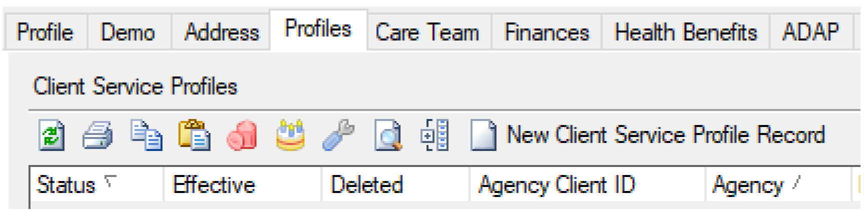
Profiles Tab

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

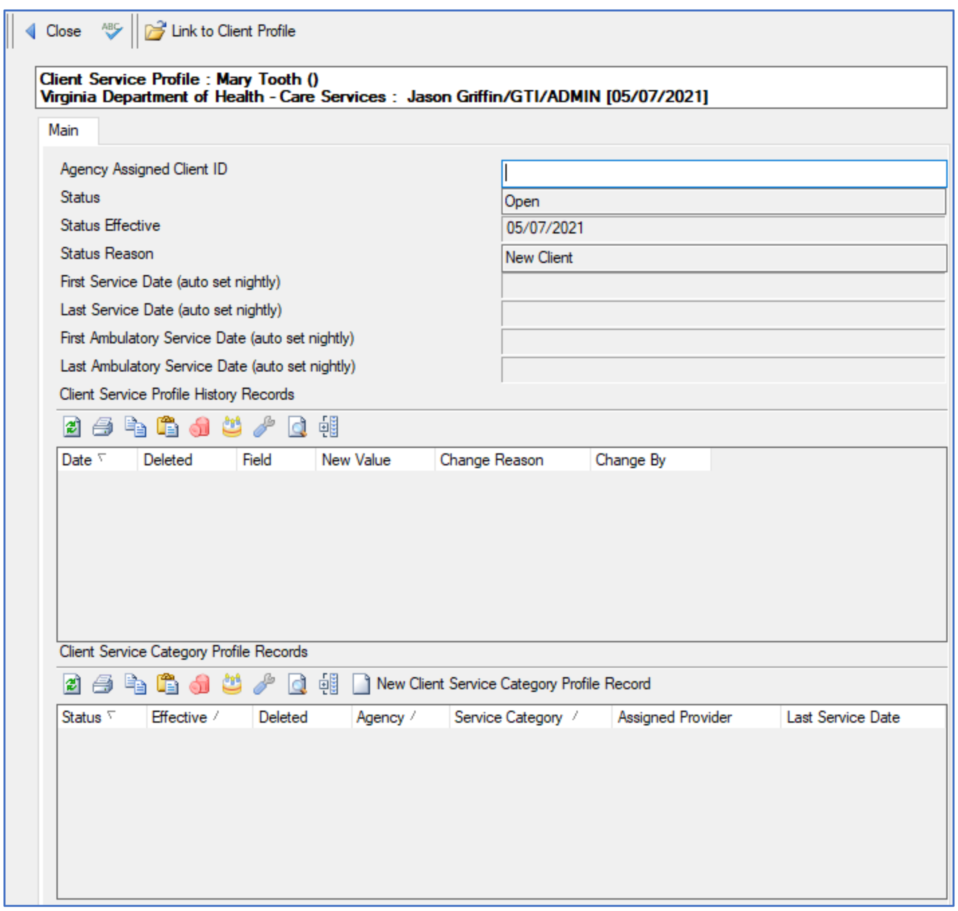
Client Service Profiles

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.



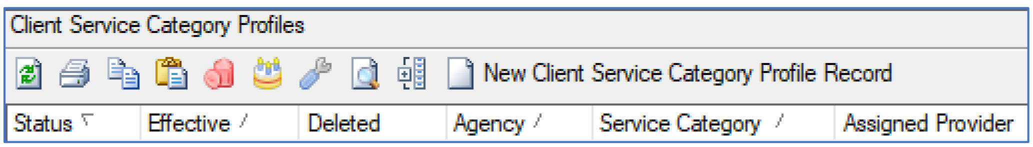
Here, you can see the current status of the Client Service Profile and a history of every time this Client Service Profile record has been opened or closed.

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.

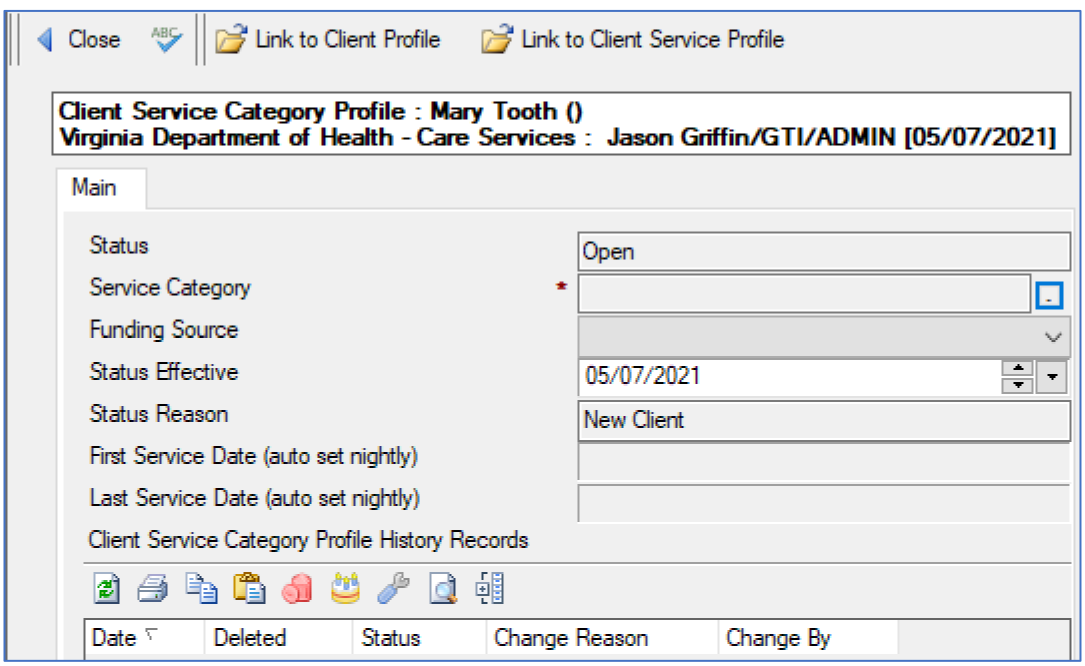
Client Service Category Profiles

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.

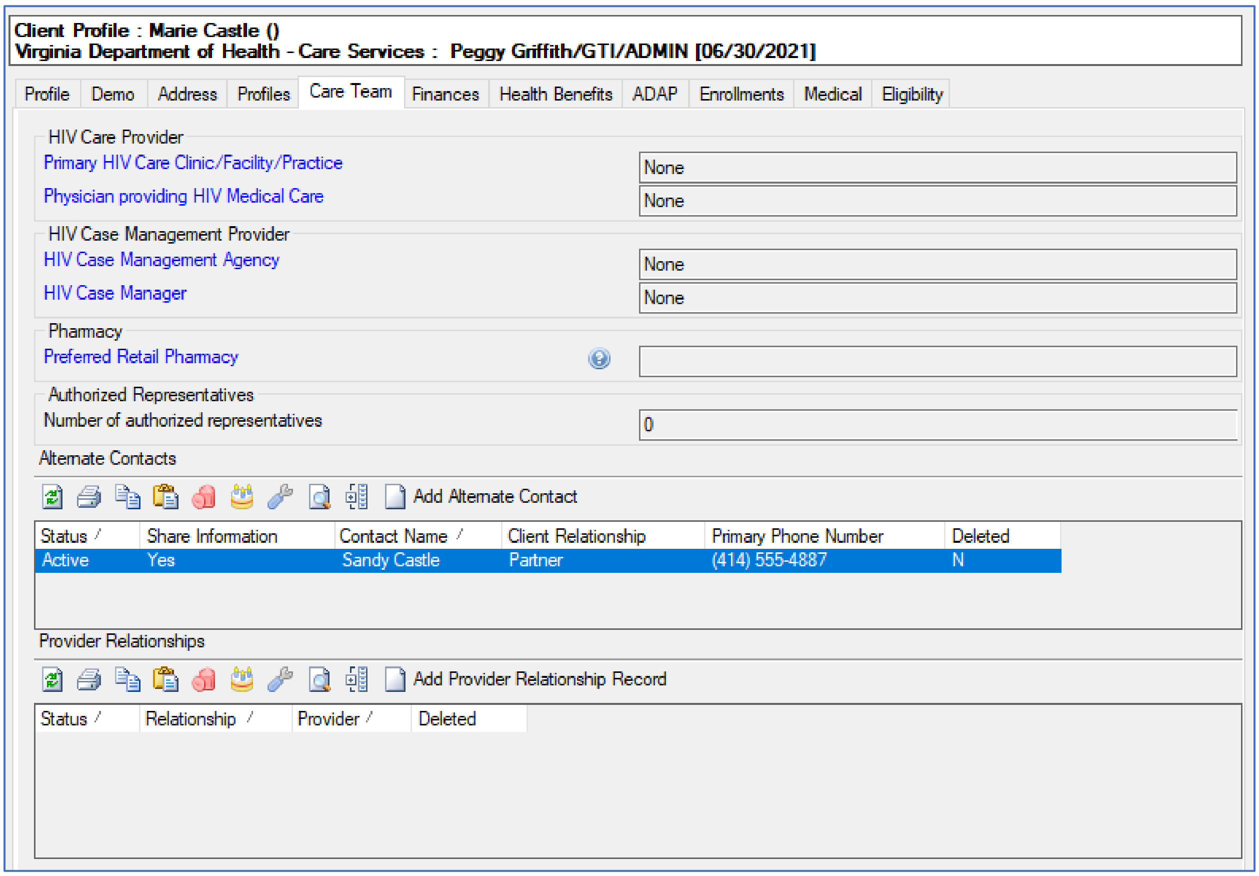


When finished, click on the **Close** button and then select **Yes** to save your changes.

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.

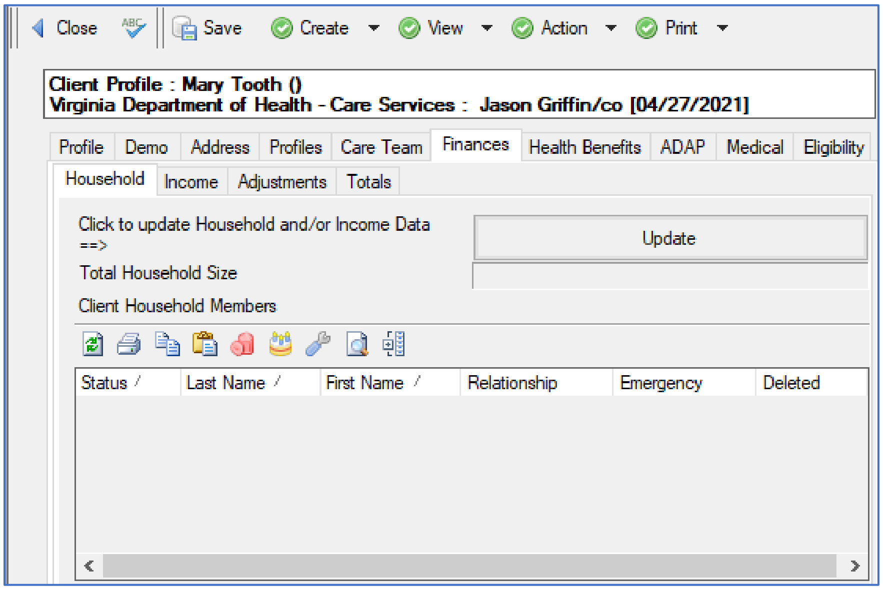
Alternate Contacts are those relationships that were converted from the prior ADAP database for visibility purposes. Going forward, Authorized Representatives and Providers should be entered in the appropriate fields.



Finances Tab

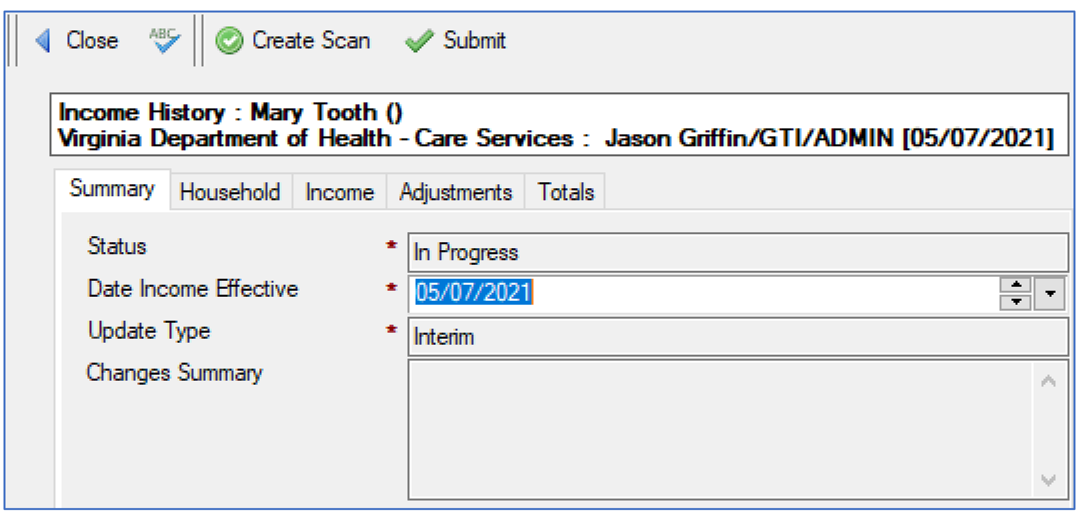
The Finances tab of the Client Profile is where the client's financial information is located. The Finances tab has four subtabs: Household, Income, Adjustments, Totals. On Household and Income Subtabs, you may view or update the financial data.

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).



Summary Tab

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



Fill in the fields as appropriate.

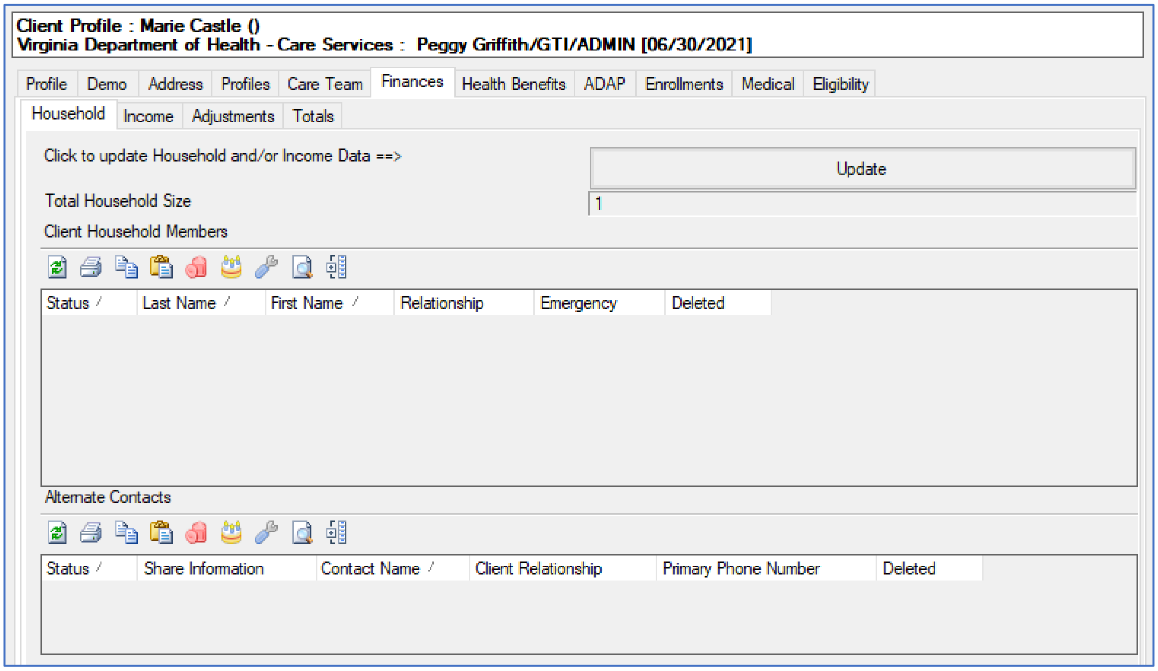
- **Status**: Defaults to "In Progress" until the income record is submitted.
- **Date Income Effective**: Enter the date the income became effective.

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

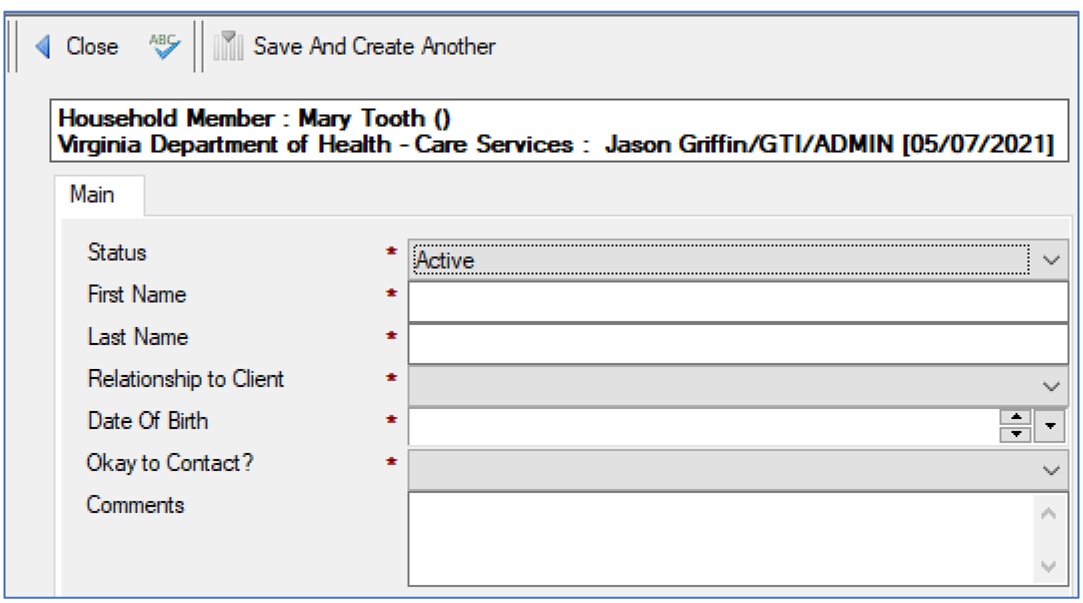
Household Tab

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.

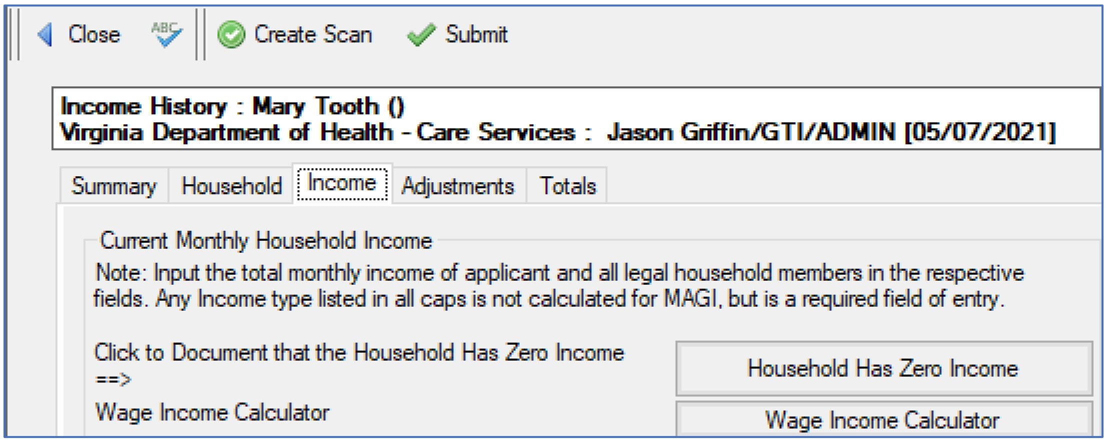


Fill in all fields with the available household member information. When you are finished, click on the **Close** button and select **Yes** to save your changes.

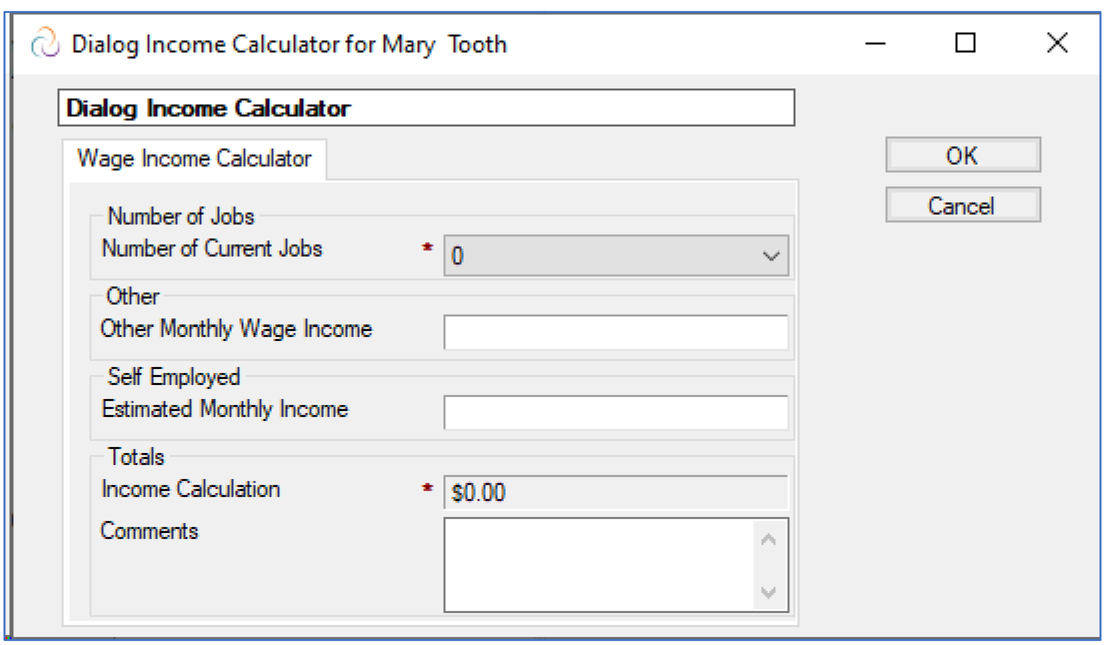
After you add or update any household members records, you should recompute the household size. To recompute the household size, click on the **Recompute** button on the Household Tab in the Income History record. The household size will then be recomputed.

Income Tab

The Income tab is where you document the client's incomes. Input the total <u>monthly</u> 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.



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.



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

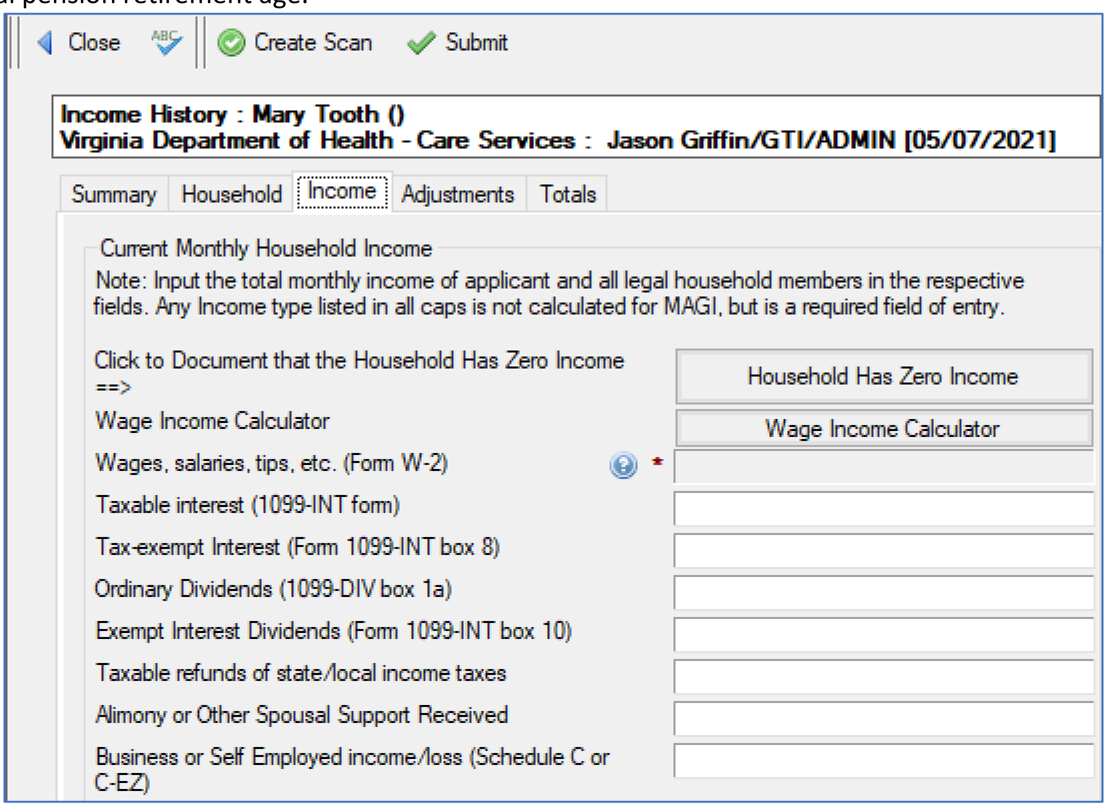
Depending on the amount of jobs in the household will determine the next fields. For information purposes say you select anywhere from 1 to 6 jobs. The form will populate depending on your selection. Repeat next step for all the jobs selected.

- **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.

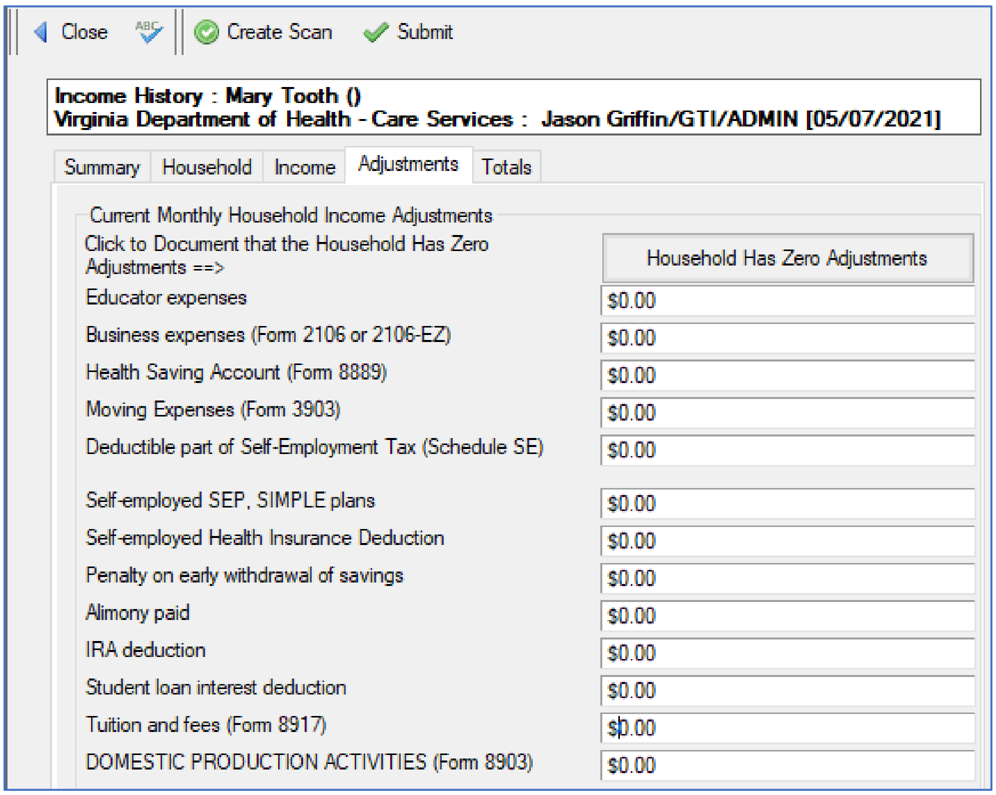
Pensions and Annuities: Include all income both employer-based and Veterans Administration based on pension. Note, do not include disability pension income here when disability pay is received prior to normal pension retirement age.



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.

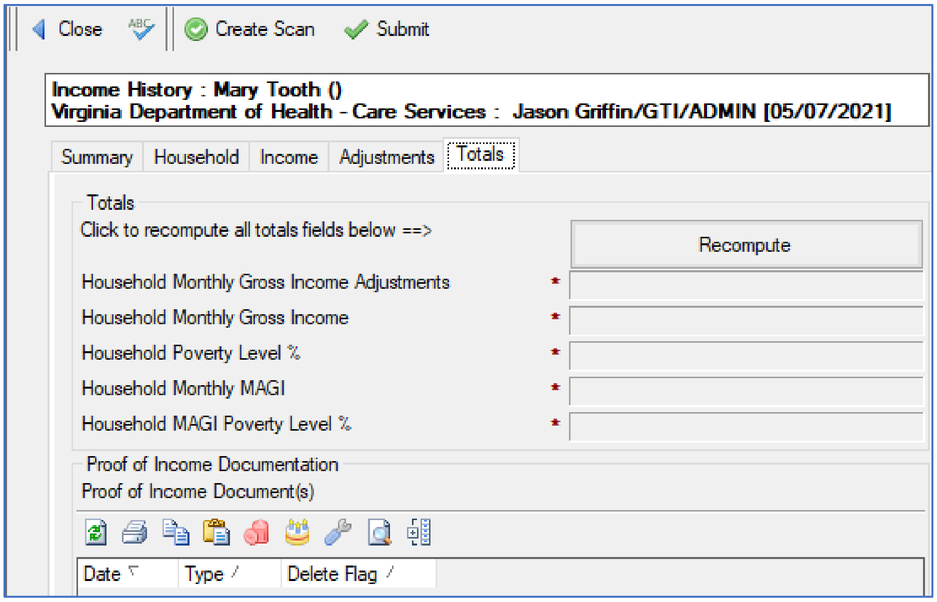
If the client has zero income, click on the **Household Has Zero Adjustments** button and each adjustment field will automatically fill in as $0.00.



Totals Tab

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

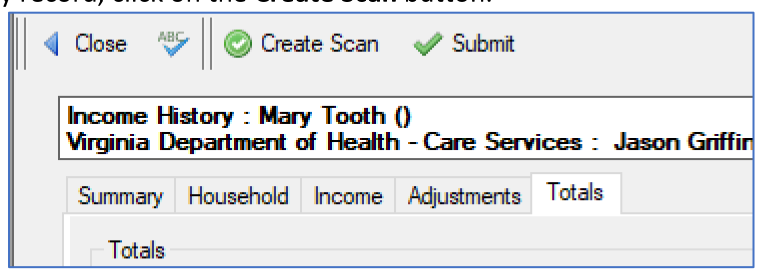
After the employment, household, income, and adjustments tabs have been updated as necessary, you should recompute the client's income totals. To do this, click on the **Recompute** button found on this Totals tab. The income totals will then be recomputed.



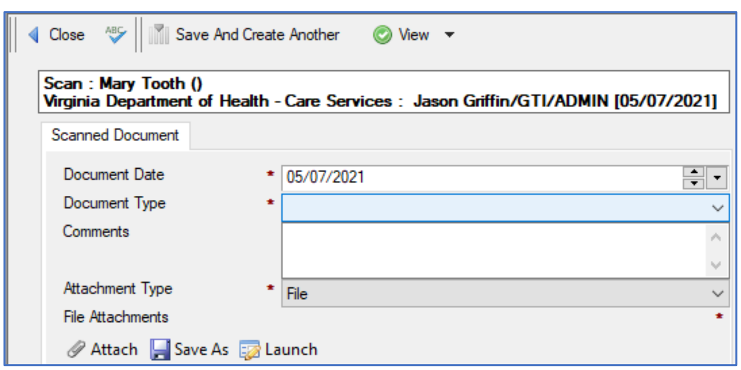
When the income update is complete, hit the **Submit** button to submit your changes.

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.

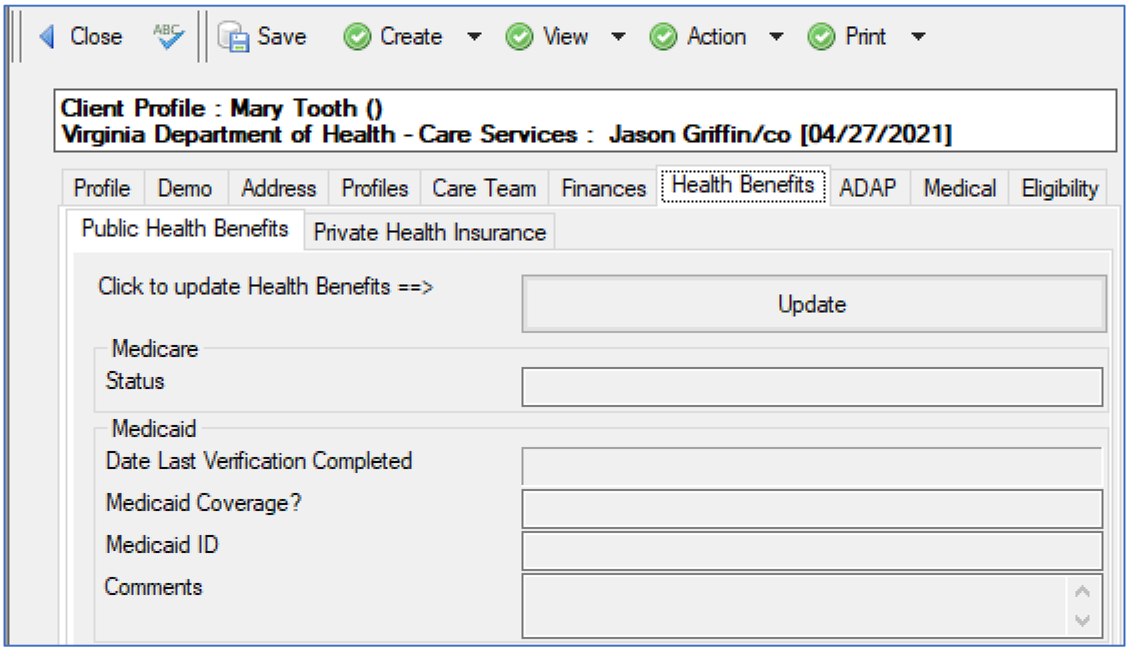


When finished, click on the **Close** button and then select **Yes** to save your changes. You will then be brought back to the Income Update screen. Or, click on **Save and Create Another** to save this scan and open another blank Scan record.

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.

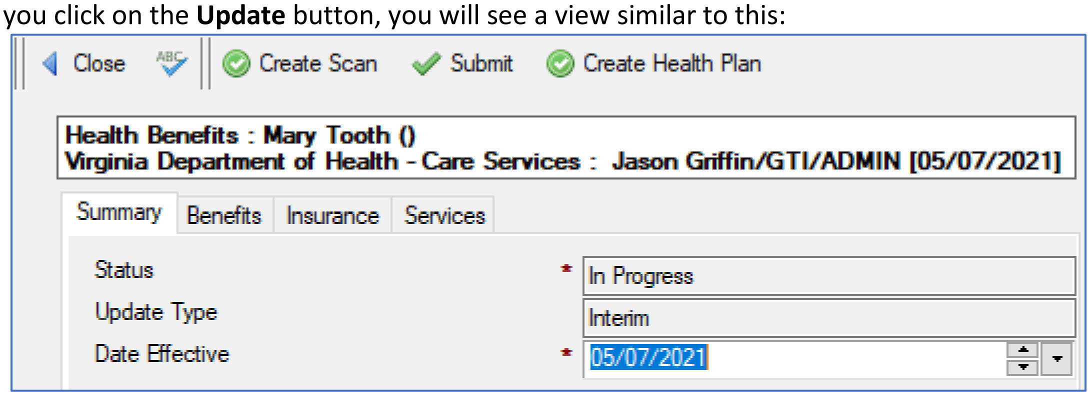
Health Benefits Tab

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.



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:



Summary Tab

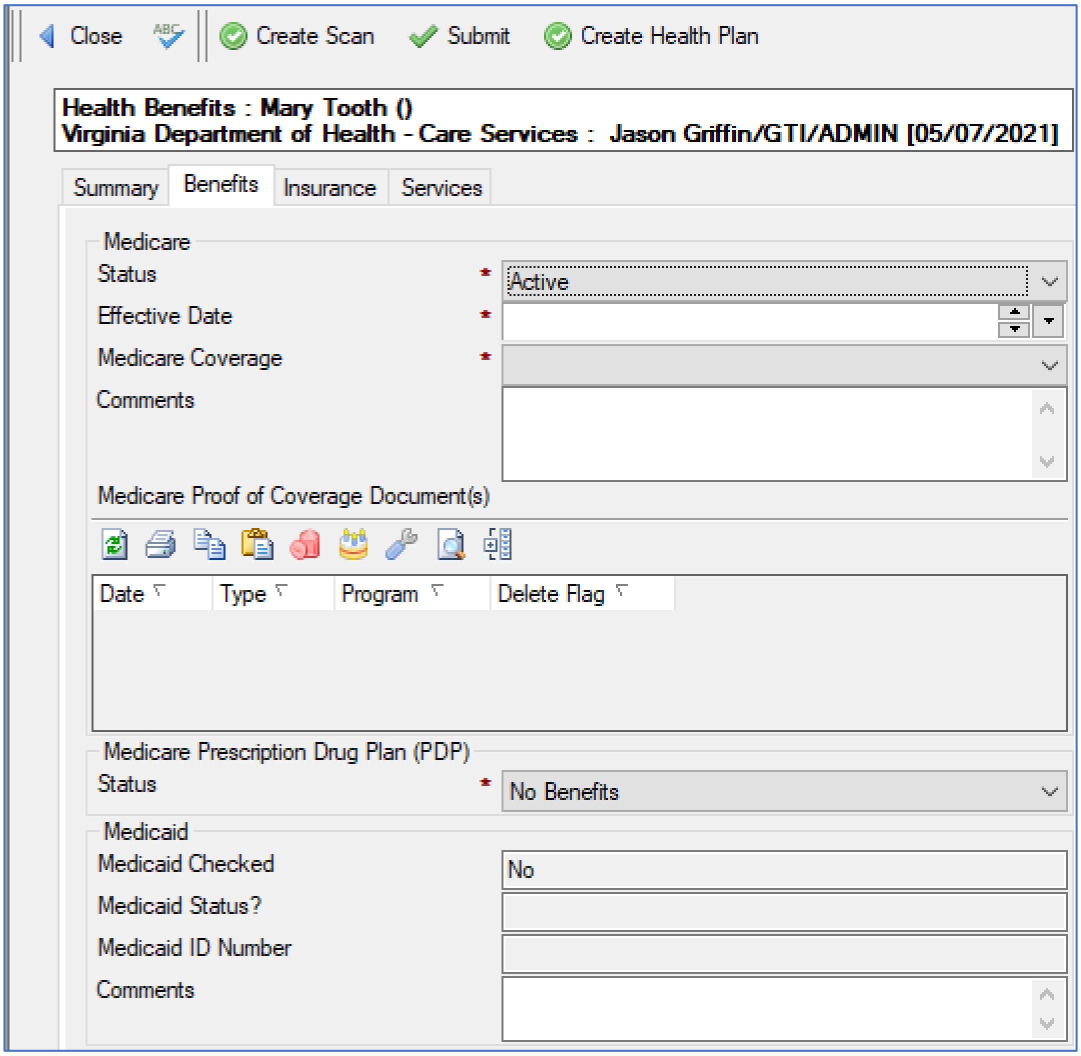
On the Summary tab in the Health Benefits update, fill in the appropriate fields:

- **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

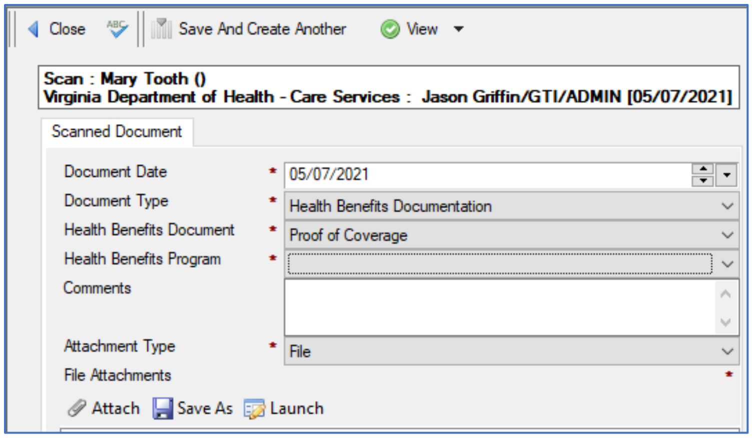
Select the client's Medicare status. If you select any status other than "No Benefits", additional fields will show for you to fill in the client's insurance information.



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.



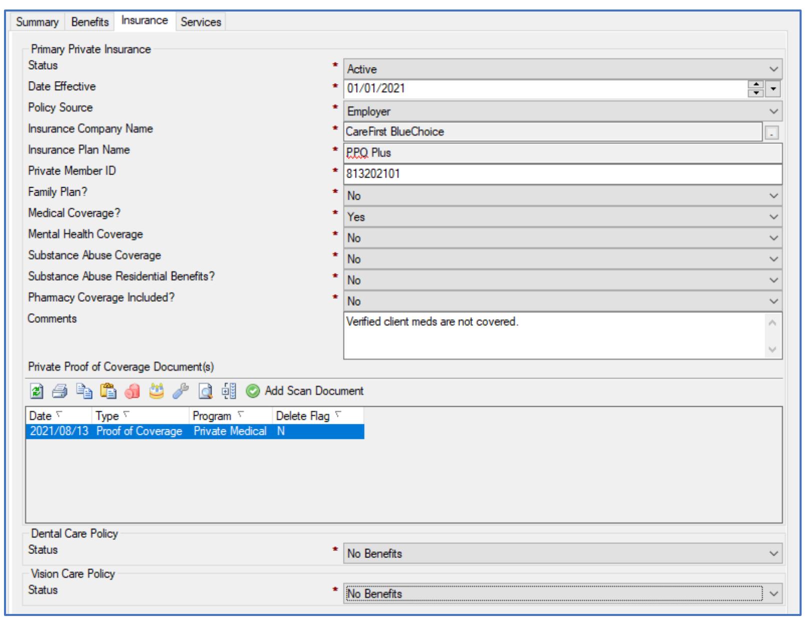
Next, scan in or attach the client's proof of coverage documentation.

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.



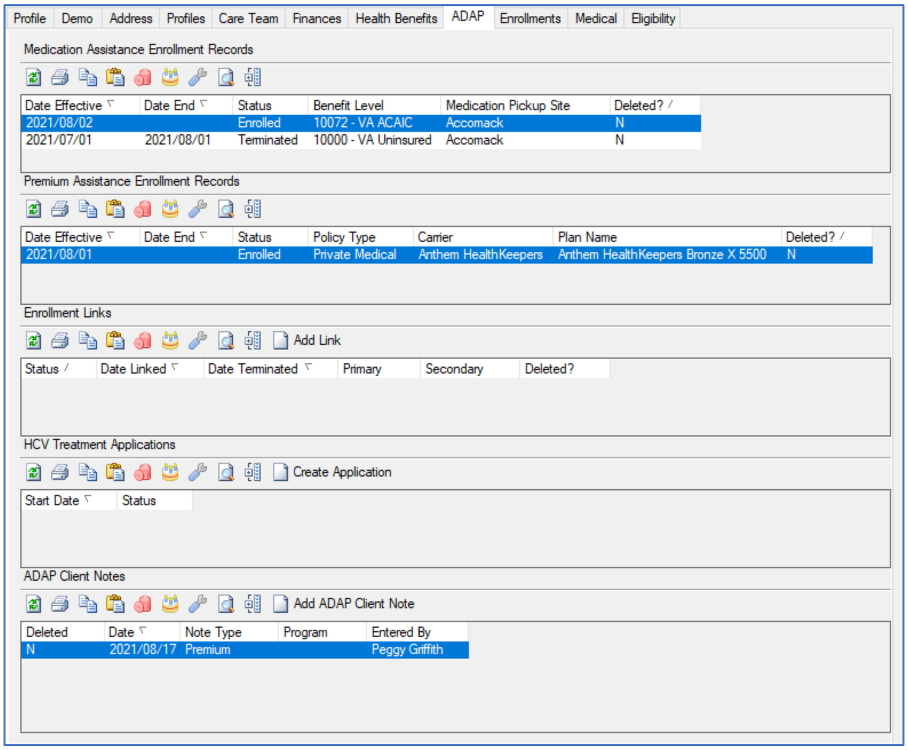
Next, scan or attach the Proof of Coverage documentation provided by the client.

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.

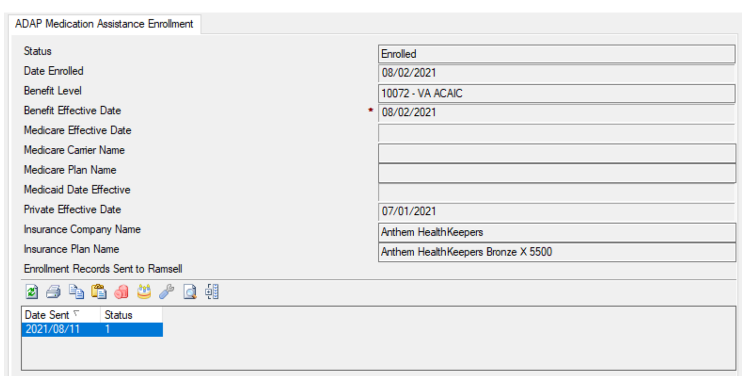
When you have finished entering the client's current health benefits information on all four tabs in the Health Benefits Update, click on the **Submit** button to submit your changes. After you submit the Health Benefits update, you will be brought back into the client's Client Profile.

ADAP Tab

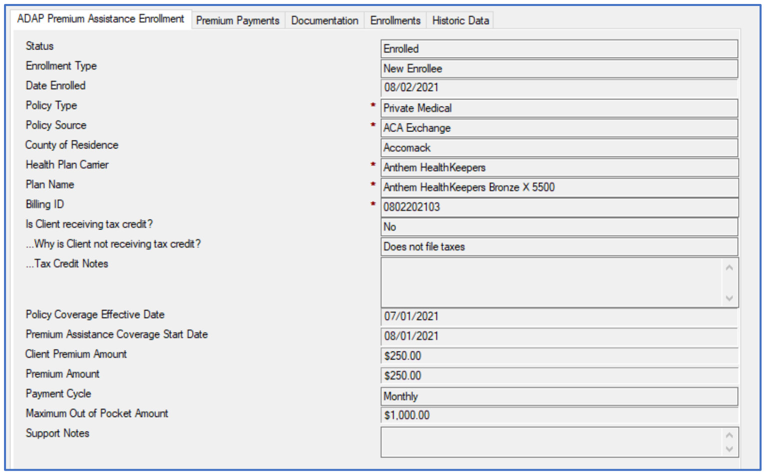
The ADAP Tab shows links to all ADAP enrollment records as well as historical Client Notes.



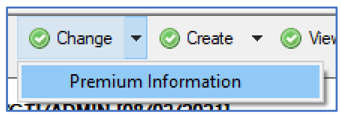
- **Medication Assistance Enrollment Records** – embedded view shows all prior and current enrollments in direct ADAP. To view any record, double-click on the record to open the detail.

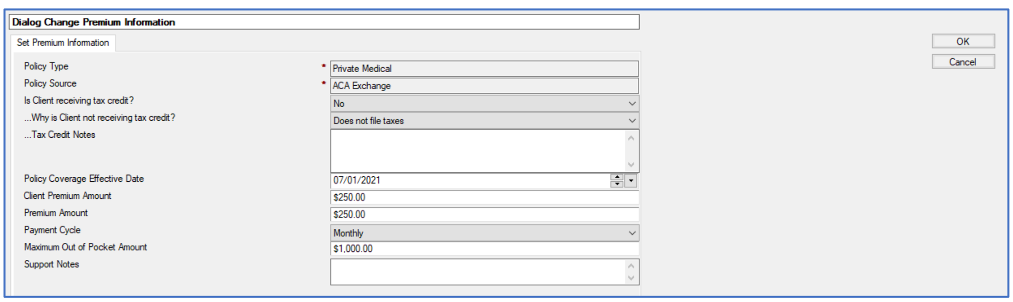


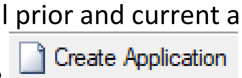
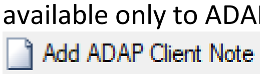
- **Premium Assistance Enrollment Records** – embedded view shows all prior and current enrollments in premium assistance (MPAP, ICAP, HIMAP). To view any record, double-click on the record to open the detail.



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

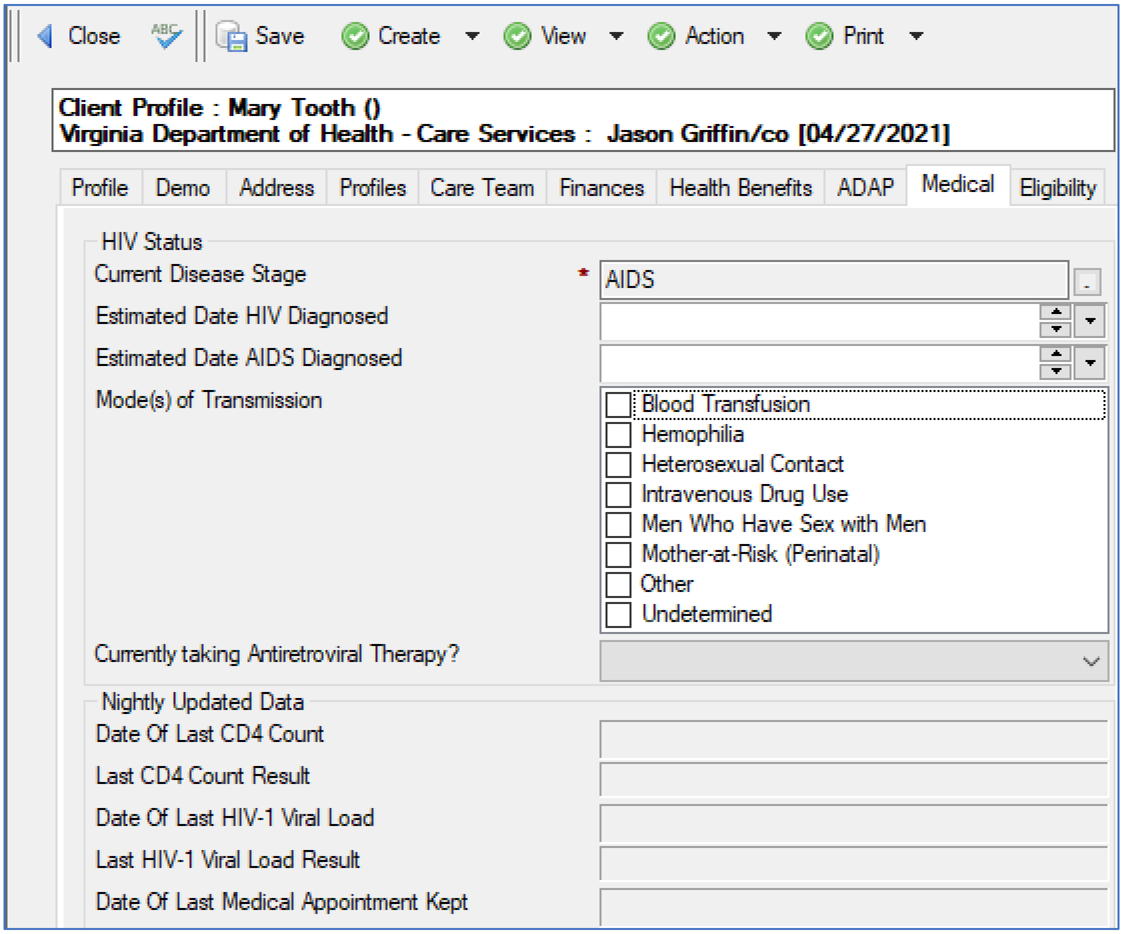




- **Enrollment Links** – embedded view allows you to link another client who is covered under the same family insurance policy.
- **HCV Treatment Applications** – embedded view shows all prior and current applications for HCV treatments. To create a new application record, click the  button to submit 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.



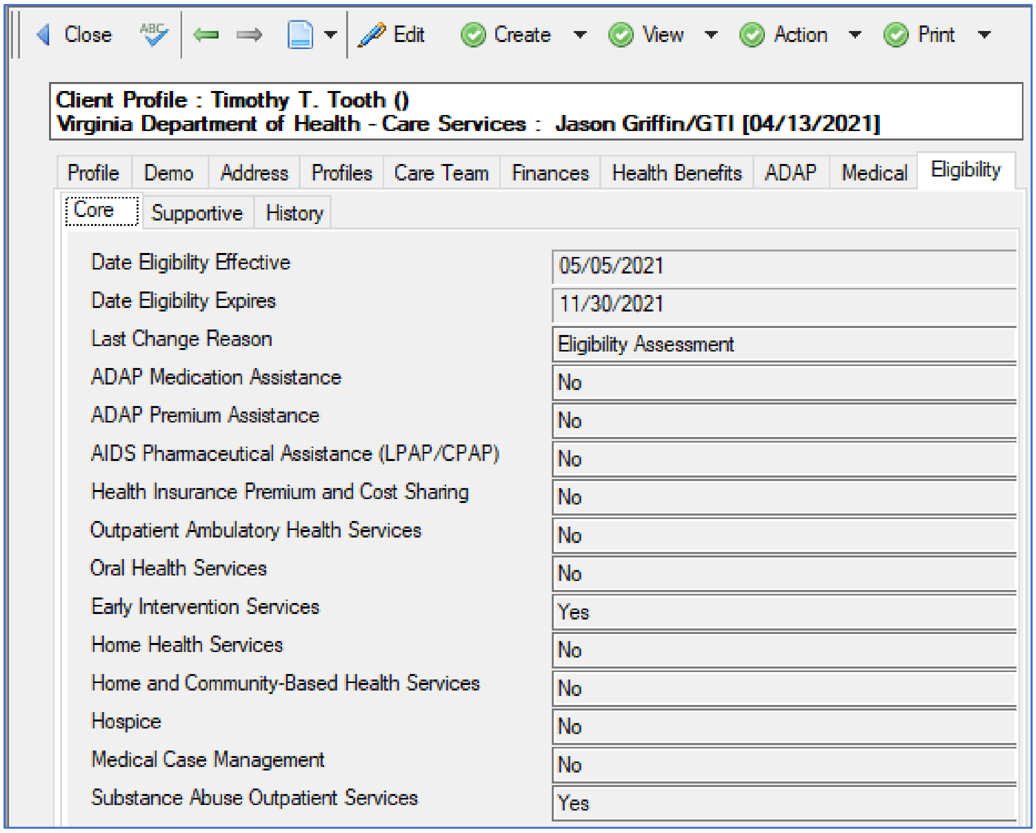
Fill in the fields as appropriate. Depending on the client's "Current HIV Disease Stage", fill in their "Estimated Date HIV Diagnosed", "Estimated Date AIDS Diagnosed", "Mode(s) of Transmission" and if the client is "Currently taking Antiretroviral Therapy".

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

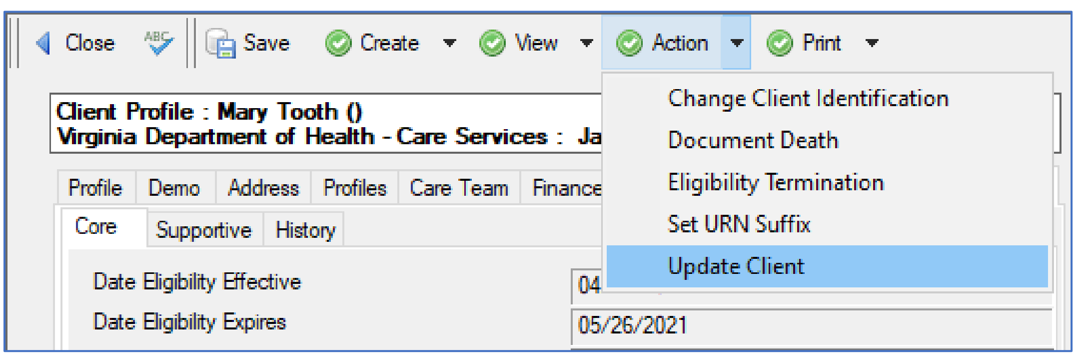
The Eligibility tab in the Client Profile has three tabs "Core", "Supportive" and "History".

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



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.

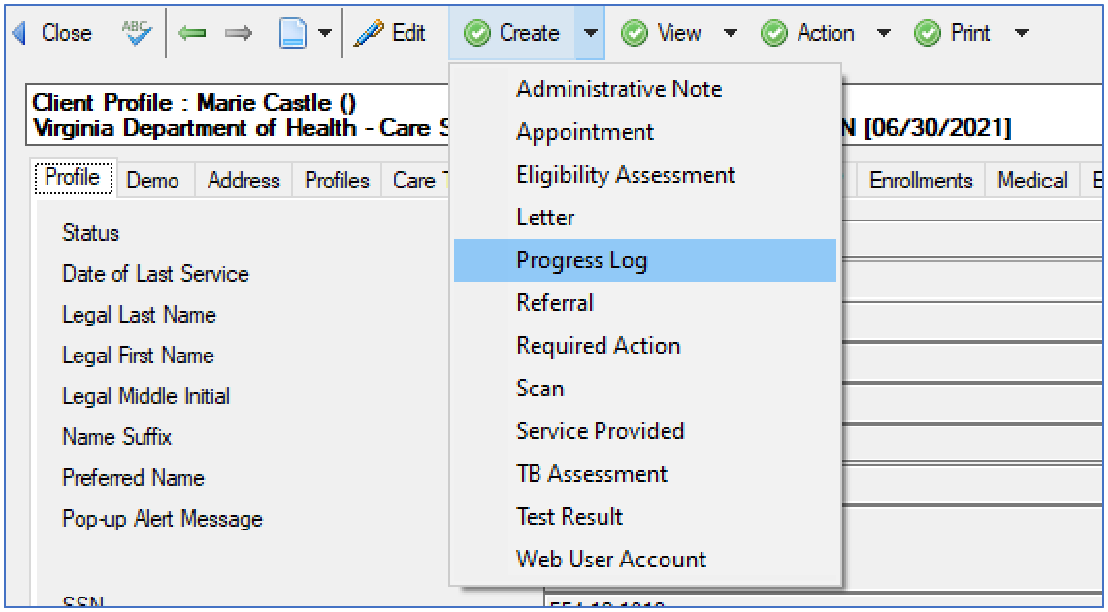


This **Update Client** button will pull changes from the following records:

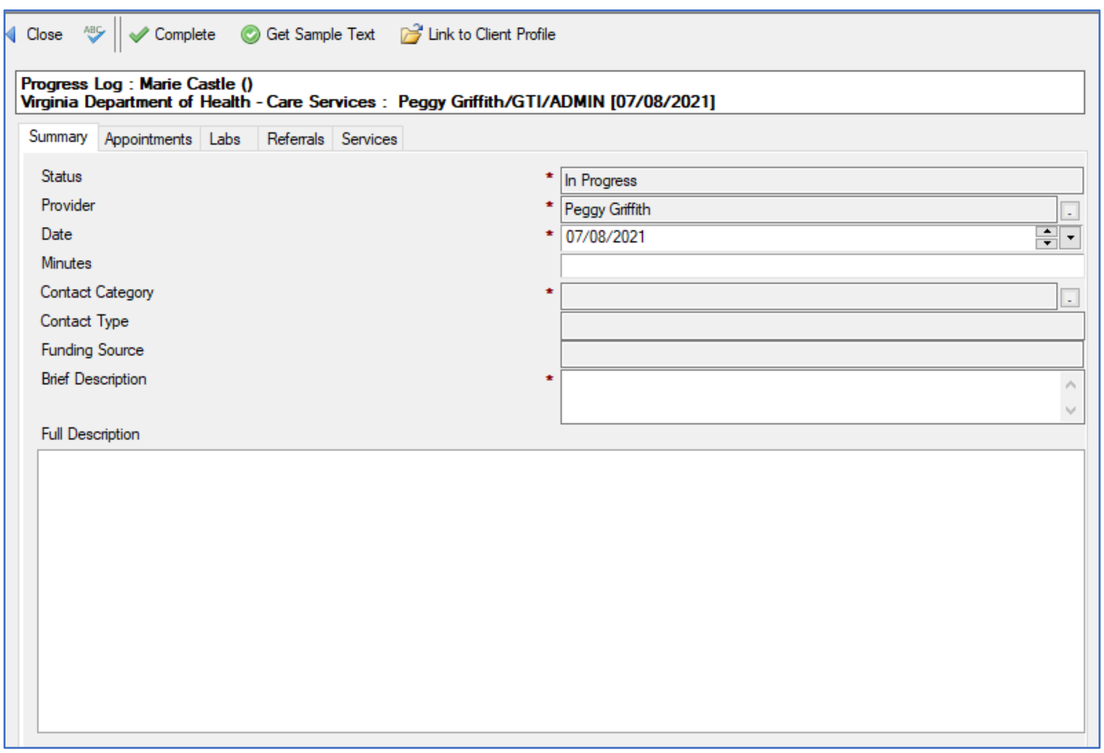
- Address Update Records
- Income Update Records
- Health Benefits Update Records

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

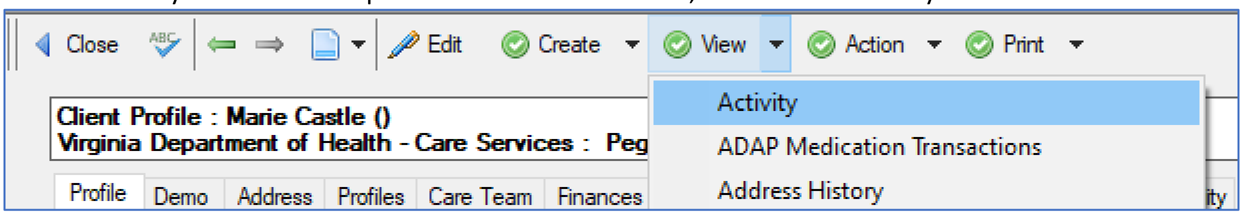
- **Provider –** defaults to User Name
- **Date** – defaults to the current date
- **Minutes** – enter the number of minutes spent with the client
- **Contact Category** – select from the list, the appropriate category and contact type
- **Contact Type** – defaults based on Contact Category selected
- **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 

.

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.