Introduction

This brief guide will review how to run the RSR 2020 Template (for your RSR 2021 Submission) and how to run associated reports that will help you in validating your data prior to your submission to HAB. Groupware Technologies has created an RSR template record for your agency in Provide Enterprise that you should use for compiling, validating, and reviewing your RSR data to help you address any deficiencies and ensuring that the data generated seems reasonable and accurate prior to submission to HRSA. The RSR Template in Provide[®] Enterprise will help you compile both the Client Level XML file (unreadable to most people) that you will upload to HRSA, but also a Client Level Data File that you can open in Excel to view all of the clients and most data elements that are contained that are part of your RSR submission in your XML file in a format that is easier to read. Additionally, validation and completion reports mimicking those of HRSA's RSR upload tool are built into Provide Enterprise that can be run from the Template record.

Step One: Compiling RSR Data

To view and/or modify your RSR 2020 Template and begin working with your RSR data, follow the steps below:

 From within Provide[®] Enterprise open one of the Reporting Views, using the navigation from the Windows Toolbar (*View – Reporting – Report Template...*), similar to that seen in the figure below:

쉱 Provide Enterprise	[Reporting\Report Templates\By]	Title]				
쉱 File 🛛 Find Vie	w Actions Tools Reports Wir	ndows	Help			
↓ Close ②	Activity	>	1			
	Clients	>				
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HAB HIV P	Contract Management		HAB HIV Performance Mean	sures Report	Guillermo Fernandez/mbchc	11/16/2020
HAB HIV P	HIV Testing	>	HAB HIV Performance Mea	sures Report	Guillemo Femandez/mbchc	12/8/2020
HAB HIV P	Insurance Benefits Management		HAB HIV Performance Mea	sures Report	Guillermo Fernandez/mbchc	12/8/2020
HAB HIV P			HAB HIV Performance Mea	sures Report	Keith Gray/GTI	10/28/2020
HAB HIV P	Lab Import	>	HAB HIV Performance Mea	sures Report	Mike Zurad/GTI	11/12/2020
HAB HIV P	Providers	>	HAB HIV Performance Mea	sures Report	Taylor Sieth/GTI	10/28/2020
HAB HIV P	Deferrer		HAB HIV Performance Mea	sures Report	Taylor Sieth/GTI	11/9/2020
Miami Beac	Reference		000 000		Guillermo Fernandez/mbchc	12/8/2020
Miami Beac	Reporting	>	Data Extracts by Agency		MBCHC RSR/mbchc	1/8/2021
	Secure	>	Report Templates >	By Title		
	Staff Training	>		Ву Туре		
	Test and Treat	>				
	User Management	>				

• A view, similar to that seen below, will open on your screen:

Provide Enterprise - [Reporting\Report Templates\By Title]									
🔿 File Find View Actions Tools Reports Windows Help									
Close 👔 🍰 🥜 🗋 🏮 Create Template 🔻									
Title ∇	Туре	Last Run By	Last Run Date						
Miami Beach Community Health Center - RSR Template for 2021 Submission	Miami Beach Community Health Center - RSR Template for 2021 Submission RSR 2020 MBCHC RSR/mbchc 1/8/2021								
Miami Beach Community Health Center - RSR RSR 2020 Guillermo Fernandez/mbchc 12/8/2020									
HAB HIV Performance Measures Report HAB HIV Performance Measures Report Guillermo Fernandez/mbchc 11/16/2020									

• Double click on your RSR template. The template created by GTI to assist you, will be named with your agency name followed by "RSR Template for 2021 Submission".

1		
		Edit
	~	

- Click on the button to edit the report template. Change any necessary fields, such as the Start and End Dates.
- Verify that the "Funded Services" section contains all Ryan White categories your agency is funded for.
- Enter the location that you wish to save a client level export file in the **Client Level Export File** field. This will be a tab delimited text file that you can open in Excel to evaluate client and data elements included in your extract.
- Set the **RSR Output File** field to a file path where the RSR XML report should be saved. This is the file that you will actually upload to HRSA.
- After you have edited all of the appropriate information, click the

📀 Compile Client Data

button to start compiling the client data that will be used throughout the rest of the reporting process. Depending on a number of factors (database usage, network traffic, internet connectivity), this will take some time to do. You will not see anything happen on your screen while the data is compiling. NOTE: If you click on your Provide screen while the "complie" is running, you may see a "Not Responding" message at the top of your screen (similar to that in the figure below. This is normal and indicates the system is still compiling data. Please do not exit out of Provide while the data is being compiled. For agencies with fairly large client bases (over 1,000 served clients in the year) and multiple service categories, we recommend you consider clicking on the "Compile Client data" button late in the day and then lock your PC to let the compile run after hours to limit your impact on overall server performance.



• After the data has been compiled, you will receive a message similar to that in

the figure below. Simply click the button to continue working with the template.

- NOTE: Once you have compiled the data, you can use the other buttons in the template, without having to re-compile the data each time. If you close out of the report template or make updates to Client Profile data or enter additional Client services or lab results data from the RSR Reporting period (1/1/2020 12/31/2020), you will need to compile the client data again. NOTE: If you make changes to service data, you will need to wait until the following day to see these reflected in your RSR as the nightly job needs to process the service changes.
- Once you have compiled the data, you can run a series of reports based on your RSR client level data. These are discussed in the section below entitled "Running Ryan White Reports from the RSR Template".
- After you are done working with this report template, simply click on the
 Close button. A message similar to the one below will open.

Save Changes?		×
Want To Save Y	Your Changes?	
Yes	No	Cancel

• Click on the ^{Yes} button if you wish to save the template. Saving the template will ensure that you can re-run the export at a later date, making only the necessary changes in the date range of the report, without having to setup a new template.

Generating a Tab Delimited Client Level Data File

Once you have created and/or edited a saved RSR Report Template **and** Compiled the RSR Data, you can generate a Client Level Data file (in a tab delimited text format that can be used in Microsoft Excel).

• To create the Tab Delimited Client Level Data File, click on the

📀 Export Client Level Data

button.

• After the file is generated, you will get a message similar to that in the figure below:



• The file will be created and saved to the location that you specified in your report template for the "Client Level Output File".

Generating the RSR XML File for Upload to HRSA

Once you edited a saved RSR Report Template **and** Compiled the RSR Data, you can generate the Client XML file that you will upload directly to the HRSA web site. We recommend that you do this as a last step, after reviewing your data using the available reports and making any necessary corrections to the date. NOTE: If your data requires corrections, make sure that you follow the directions above to Compile RSR data so that any updates are pulled into your associated reports.

• To create the actual RSR Client file that you will upload to HRSA, click the

📀 Generate RSR XML File

button. The XML file will be created and saved to the location that you specified in your repot template for the "RSR Output File".

- NOTE: The "Compile Client Data" must be run prior to attempting to generate the client level data file or the XML file.
- NOTE: If you click on your Provide screen while the report is running, you may see a "Not Responding" message at the top of your screen (similar to that in the figure below. This is normal and indicates the report is still compiling data. Please do not exit out of Provide while it the data is being compiled.



• When the report has finished, the Ryan White Client Level Report (RSR) XML file will be created and saved to the location that you specified in the report template in the **RSR Output File** field.

Running Data Validation Reports

- Currently there are several different reports that can be run directly on your RSR data to assist in validating the data. To run any of the following reports, you must first complete Step One from earlier in this guide to compile your RSR Data.
- Once the data has been compiled, you can print the following Completion/and Validation reports. Some of these reports mimic the actual reports that HRSA uses for data validation.

These reports can all be found under the Print button and are outlined below:

Completion Report

This will generate a report very similar to the completion report summary that HRSA's web site provides after your Client XML file has been uploaded. It evaluates the most common demographic and reportable data elements and provides totals for each category along with the number of clients with unknown or missing data for the particular value. A small screenshot of the report can be seen below:

			RSF	R Data Compl	etion					
Fields in Italics have been removed from the RSR starting in 2014										
	Data Between 01/01/2020 and 12/31/2020									
	Report Run by on 12/28/2020 For:									
	My agency completion report									
Data Element	Total	Required	# Clients with	% Clients with	# Clients with	% Clients with	# Clients with	% Clients with		
	Clients Clients for Known Value Known Value Unknown Value Unknown Value No Value									
	Reported	Date Element	Reported	Reported	Reported	Reported	Reported	Reported		
FirstServiceDate	3,859	3,859	3,859	100.00%	0	0.00%	0	0.00%		
EnrollmentStatus	3,859	3,859	3,823	99.07%	0	0.00%	36	0.93%		
DeathDate	3,859	4	0	0.00%	0	0.00%	4	100.00%		
BirthYear	3,859	3,859	3,859	100.00%	0	0.00%	0	0.00%		
Ethnicity	3,859	3,859	3,856	99.92%	3	0.08%	0	0.00%		
Hispanic Subgroup	3,859	2,686	2,681	99.81%	0	0.00%	5	0.19%		

Completion Detail Report

This report provides the detailed client level information related to the Completion Report. (For example, if your completion report lists clients missing Enrollment Status, the Completion Detail Report will list out these clients). A sample of this report can be seen in the screenshot below:



Client ID: CIS04143444 Missing or Unknown HivRiskFactor Missing or Unknown MedicalInsurance

Client Summary Report

This report provides a summary of all clients and services contained in your RSR. It is a useful tool to give you an overall idea of the client demographics of those served by your agency. A screenshot sample of this report can be seen below:

RSR CLIENT SUMMARY REPORT Data Between 1/1/2020 and 12/31/2020 Report Run By Report Testor For: Agency Name - Client Services Agency Name Medical Case Management

N	umber of Clients by	HIV Statu	s	
	Total]		
HIV-positive	3,857			
Unknown/unreported (affected)	2]		
Total Number of Unduplicated Clients	3,859]		
Num	ber of Clients by HI	V/AIDS Sta	itus	
	HIV-affect	ed	HIV-positive/indete	minate
CDC-defined AIDS	0		1,111	
HIV-positive, AIDS status unknown	0		2,479	
HIV-positive, not AIDS	0		267	
Unknown	2		0	
Total Number of Clients	2		3,857	
и	the state of sector		4	
Num	iber of New Clients	by HIV Sta	tus	
	Total			
HIV-positive	553			
Unknown/unreported (affected)	2			
Total	555			
Number	of Clients by Gend	er and HIV	Status	
	HIV-affected	HIV-pos	sitive/indeterminate]

Clinical Summary Report

This report provides a summary of all clients and services contained in your RSR. It is a useful tool to give you an overall idea of the client demographics of those served by your agency. The Clinical Summary report contains all data points included in the Client Summary Report with additional data points that are only applicable to providers that are funded for Outpatient Ambulatory Health Services. A screenshot sample of this report can be seen below:

Number of Clients by HIV Status Total Total HIV-positive 1,107 Total Number of Unduplicated Clients 1,107 Total Number of Clients by HIV/AIDS Status MiV-positiveIndeferminate CDC-defined AIDS 366 HIV-positive, not AIDS 96 Total Number of Clients 1,107 Number of New Clients by HIV Status Total HIV-positive, not AIDS 96 1,107 Total Total HIV-positive 195 Total HIV-positiveIndeferminate Female 218 Male 879 Transgender 9 Unknown 1 Total Name 1,107	RSR CLINICAL SUMMARY REPORT Data Between 1/1/2020 and 12/31/2020 Agency Name - Client Services Agency Name - Medical Case Management						
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Unknown 1 Table Weinberg of Olicette 1 197	Transgender		9				
Tatal Number of Oliopta 1 107	Unknown		1				
Total Number of Clients 1,107	Total Number of Clients		1,107				

Total Clients Served by Zip Code

This report gives you the details of the number of clients served broken down by zip code. It can be used to enter the required information in the Provider Report on the HRSA website. You can see a sample of this report below:

Total Clients Served by Zip Code

Data Between 01/01/2020 and 12/31/2020

Report Run	: on 12/28/2020 for:
Agency Agency	y Name - Client Services y Name - Case Management
Zip Co	ode Clients Served
1118	36 1
3301	10 45
33012	12 71
3301	13 37
33014	14 33
3301	15 48
3301	16 34
3301	18 28
33024	24 1
3303	30 14
3303	31 2
3303	32 34
3303	33 28
2303	2 <i>4</i> Q

Validation Report

This report performs the validation checks for errors, warnings, and alerts recommended by HRSA to ensure accuracy in your RSR submission. HRSA provides three types of Validation outcomes: Errors, Warnings and Alerts.

Errors must be fixed before submitting your RSR. The RSR will be able to be submitted with **Warnings**, but you will be required to enter a comment that explains the data irregularity. The RSR can be submitted with **Alerts** and no additional documentation, but you should try to fix these as well. A screen shot of the Validation Report can be seen in the figure below:

RSR Validation Checks for Client-Level Data Data Between 1/1/2020 and 12/31/2020										
Report Run by	on 12/28/2020 for:									
Agency Name - Client Services Agency Name - Medical Case Manager	nent _									
Errors										
Clients with Duplicate URNs URN ABCD1234562 ABCD1234562	CLIENT ID CIS1234555 CIS987654									
Warnings										
Clients with Warnings Client ID / Warning CIS000 Client missing Medical Insurance Missing Core Medical or Support Services										

Fixing the Most Common RSR Errors

Missing HIV Status, HIV/AIDS Diagnosis Year or HIV Risk Factor

The RSR looks at the most recent HIV History with a "Date Information Effective" prior to or during the reporting period. If the HIV information for the clients was changed after the end of the reporting period, that HIV history record will not be included in the RSR.

• To fix this, simply navigate to the most recent HIV History record for these clients (View\HIV History).

	DETEST -	[Client	Profile F	or Barry Jone	s]						
File Fin	nd View	Acti	ons To	ols Reports	Windo	ows Help					
Close	NB⊊ ←	⇒ [•	PEdit 🛷 C	reate Activ	vity 📀 Create	- 🗸	Eligibility /	Assessment	⊘ View	🔹 🛇 Action 👻 🛇 Print 👻
Client Pr Miami-Da	ofile : Ba ade Cour	arry Joi nty - H	nes (123 IV Care I	1456777) Network : 1	raining	User1/pht [10/2	28/2020]		Activ Audi	vîty it Trail
Profile	Address	Alert	Demo	Care Team	Finances	Health Benefits	Health	Eligibility		Addr	ress History
Agencie	s Medic	al Team	Provide	er Relationship	s Conta	cts				Adm	inistrative Notes
Client	Service P	mfilee								Beha	avioral Health Summary
		a	And In		9 No	ant Canada a Darfila	Decent			Case	Management Summary
		<u> </u>	<u> </u>	<u> </u>		ent Service Frome	Necora			Clien	nt Charges
Status	Effect	tive	Deleted	Agency Clie	ent ID /	Agency /	Progra	n /		Clien	nt Identification Change History
Open	2020	/10/28	N	123456777	/	Public Health Trus	t Client	Services		Eligit	bility Assessments
										EMe	ssages
										ESetu	up
										Food	l Bank Summary
										Healt	th Benefits History
Client	Service C	ategory	Profiles							HIVE	History

- Identify the HIV history record that contains the correct information. If none do, make sure to navigate back into the profile, update the appropriate field(s) on the Health Tab, close and save the profile and then return to the View\HIV History.
- Once you have identified the record that needs to be corrected (the one that should be included in your RSR), use the "Change Effective Date" button and back date the effective date to be during the reporting period (but after the last HIV History record that has invalid data.



• NOTE: Only specific users will be able to perform this task. Contact the Help desk with questions about who can do this.

Missing Enrollment Status

As with HIV information, the RSR looks at the most recent enrollment status that is prior to or during the reporting period to determine what to report on the client level RSR report. In Provide, this comes from the Client Service Profile History records.

• To fix this issue, you will want to navigate to the Client Service Profile. These are found on the Care Team Tab of the Client Profile on the Agencies Sub Tab.



• Double click on the "Client Service Profile" for your agency and look at the embedded view in the middle of the Client Service Profile entitled **Client Service Profile History Records**.

۹ (Close 🎸		🗋 🕶 🔀 De	elete 🛛 🔂 Go	to Client Profile	📀 Close		
C	lient Service ublic Health	Profile : Trust - Cl	Barry Jones ient Service	(12345677) es : Training	7) g User1/pht [10	/28/2020]		
	Main							
	Agency Assig	ned Client I	D					123456
	SFAN Client I	D						
	Status							Open
	Status Effecti	ive						01/11/
	Status Reaso	n						Reoper
	First Service	Date (auto s	et nightly)					
	Last Service	Date (auto s	et nightly)					
C	Client Service	e Profile Hist	ory Records					
	2 / h	n 🛱 👌	😃 🥓 🖸) (8				
	Date ∇	Deleted	Field	New Value	Change Reason		Change By	'
	2021/01/11	Ν	CSPStatus	Open	Reopen from Inc	orrect Closure	Keith Gray	/GTI
	2020/12/30	N	CSPStatus	Closed	Agency Lost Cor	ntact	Keith Gray	/GTI
	2020/12/15	N	CSPStatus	Open	Returned to Care	•	Keith Gray	/GTI
	2020/11/20	N	CSPStatus	Closed	Agency Lost Cor	tact	Keith Gray	/GII
	2020/10/28	N	CSPStatus	Open	New Client		Training Us	ser I/pht

• Double click on the most recent Client Service Profile History record for the "CSPStatus" (especially if it has a date after the end of the reporting period.) Click the "Backdate History" button and select a date that falls prior to or during the reporting period, but after the most recent history record.

0	VIIAIVII	DADEI	E21 - [/	Client Serv	ICE PTOT	ie Histor	уг	or barry	JOU	esj	
0	File	Find	View	Actions	Tools	Reports	s	Window	s	Help	
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	Client Public	Servi Healt	ce Prot th Trus	file Histor st - Client	y : Barr Service	y Jones s : Keit	(12 th (2345677 Gray/G1	77) [1 [()1/11/2021]	
	Client	Service	e Profile	History							
	Field	d Updat	ted							CSPStatus	
	Field	d Updat	te Old V	/alue							
	Field	d Updat	te New	Value						Open	
	Field	d Updat	te Effec	tive Date						01/11/21	
	Field	d Updat	te Effec	tive Reaso	n					Reopen from Incorrect (Closure
	Field	d Updat	te By							Keith Gray/GTI	

- If the client does not have a history record that reflects the current status, you would need to first change the status. Once that is done, you should be able to then double click on the most recent Client Service Profile History record for the "CSPStatus". Click the "Backdate History" button and select a date that falls prior to or during the reporting period, but after the most recent history record.
- NOTE: Only specific users will be able to perform this task. Contact the Help desk with questions about who can do this.