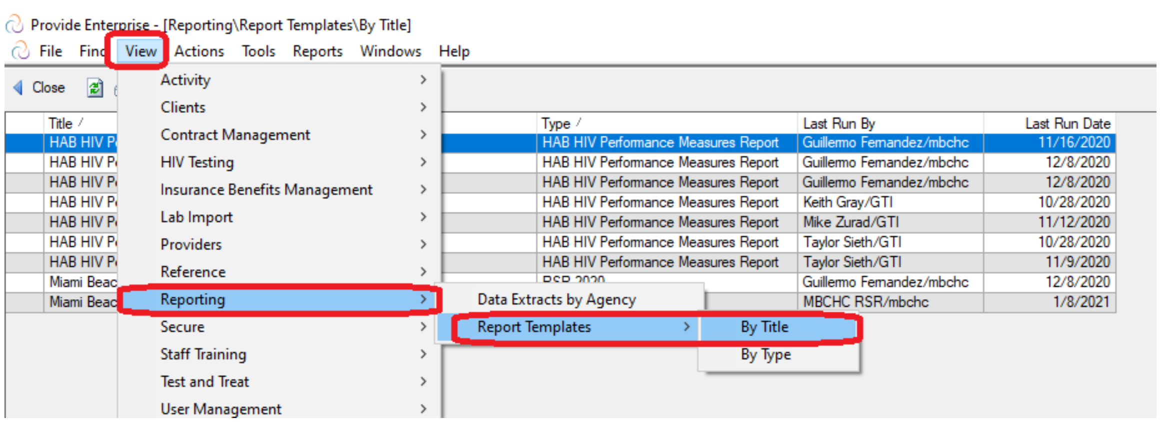
Introduction

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.

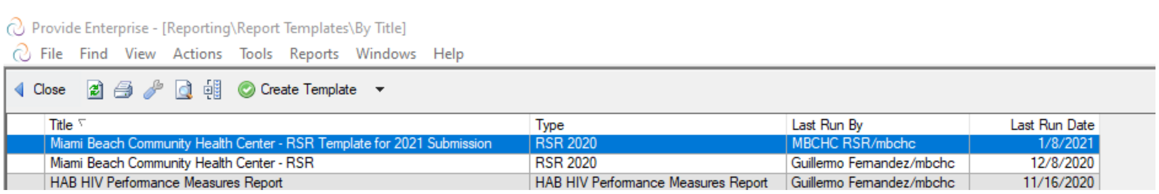
Step One: Compiling RSR Data

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:



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



- 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”.

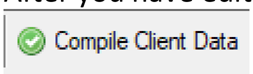
- Click on the 

button to edit the report template. Change any necessary fields, such as the Start and End Dates.

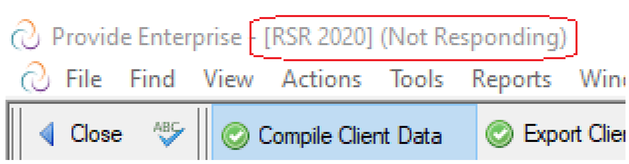
- Verify that the “**Funded Services**” section contains all Ryan White categories your agency is funded for.

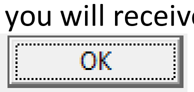
- Enter the location that you wish to save a client level export file in the **Client Level Export File** field. This will be a tab delimited text file that you can open in Excel to evaluate client and data elements included in your extract.

- 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 

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.

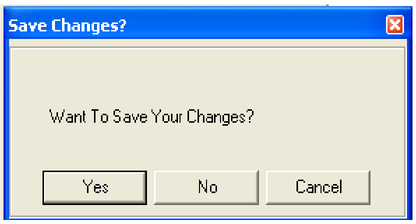


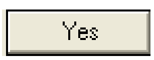
- After the data has been compiled, you will receive a message similar to that in the figure below. Simply click the 

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 

button. A message similar to the one below will open.

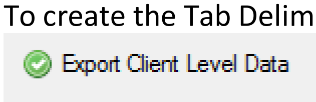


- Click on the 

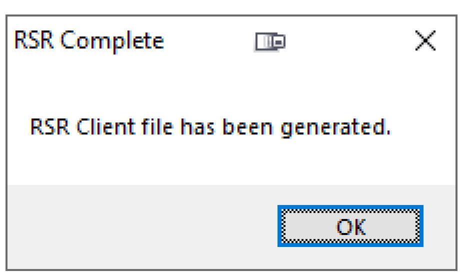
button if you wish to save the template. Saving the template will ensure that you can re-run the export at a later date, making only the necessary changes in the date range of the report, without having to setup a new template.

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 

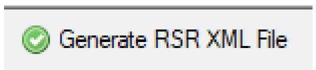
button.
- After the file is generated, you will get a message similar to that in the figure below:



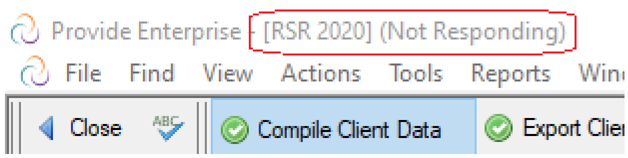
- The file will be created and saved to the location that you specified in your report template for the "Client Level Output File".

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 

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:

RSR Data Completion

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 Clients Reported	Required Clients for Date Element	# Clients with Known Value Reported	% Clients with Known Value Reported	# Clients with Unknown Value Reported	% Clients with Unknown Value Reported	# Clients with No Value Reported	% Clients with No Value 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:

RSR Data Completion

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

Report Run by on 12/28/2020 for:

Client Services

Fields in *Italics* have been removed from the RSR starting in 2014

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

Number of Clients by HIV Status

	Total
HIV-positive	3,857
Unknown/unreported (affected)	2
Total Number of Unduplicated Clients	3,859

Number of Clients by HIV/AIDS Status

	HIV-affected	HIV-positive/indeterminate
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

Number of New Clients by HIV Status

	Total
HIV-positive	553
Unknown/unreported (affected)	2
Total	555

Number of Clients by Gender and HIV Status

	HIV-affected	HIV-positive/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:

RSR CLINICAL SUMMARY REPORT
Data Between 1/1/2020 and 12/31/2020

Agency Name - Client Services
Agency Name - Medical Case Management

Number of Clients by HIV Status

	Total
HIV-positive	1,107
Total Number of Unduplicated Clients	1,107

Number of Clients by HIV/AIDS Status

	HIV-positive/indeterminate
CDC-defined AIDS	366
HIV-positive, AIDS status unknown	645
HIV-positive, not AIDS	96
Total Number of Clients	1,107

Number of New Clients by HIV Status

	Total
HIV-positive	195
Total	195

Number of Clients by Gender and HIV Status

	HIV-positive/indeterminate
Female	218
Male	879
Transgender	9
Unknown	1
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 Name - Client Services
Agency Name - Case Management

Zip Code	Clients Served
11186	1
33010	45
33012	71
33013	37
33014	33
33015	48
33016	34
33018	28
33024	1
33030	14
33031	2
33032	34
33033	28
33034	8

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 Management

Errors

Clients with Duplicate URNs

URN	CLIENT ID
ABCD1234562	CIS1234555
ABCD1234562	CIS987654

Warnings

Clients with Warnings

Client ID / Warning

CIS000

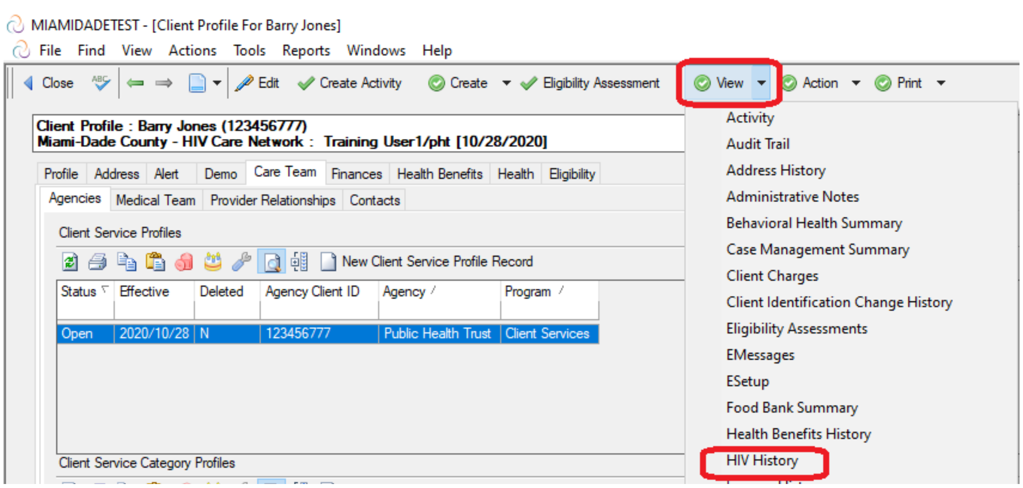
Client missing Medical Insurance
Missing Core Medical or Support Services

Fixing the Most Common RSR Errors

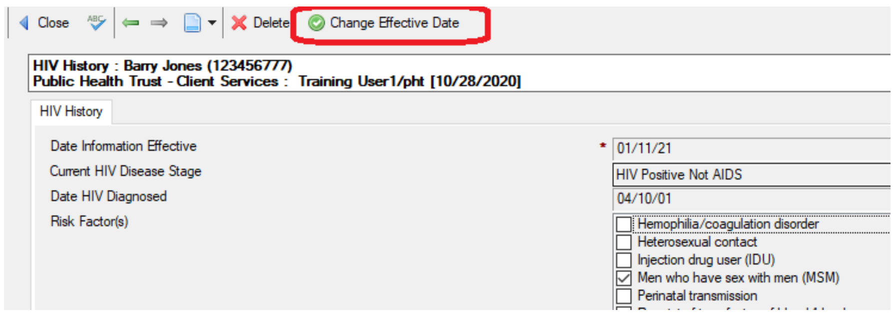
Missing HIV Status, HIV/AIDS Diagnosis Year or HIV Risk Factor

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).



- 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.

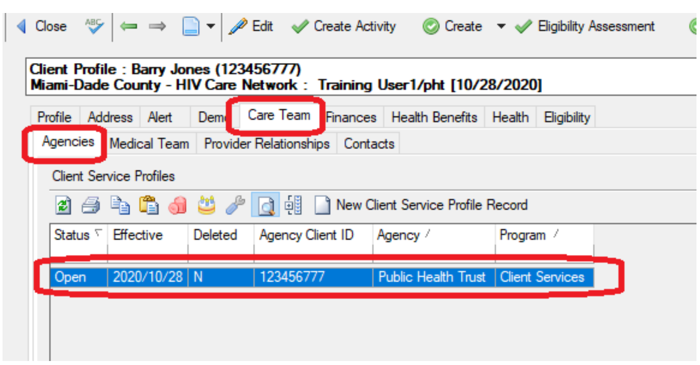


- NOTE: Only specific users will be able to perform this task. Contact the Help desk with questions about who can do this.

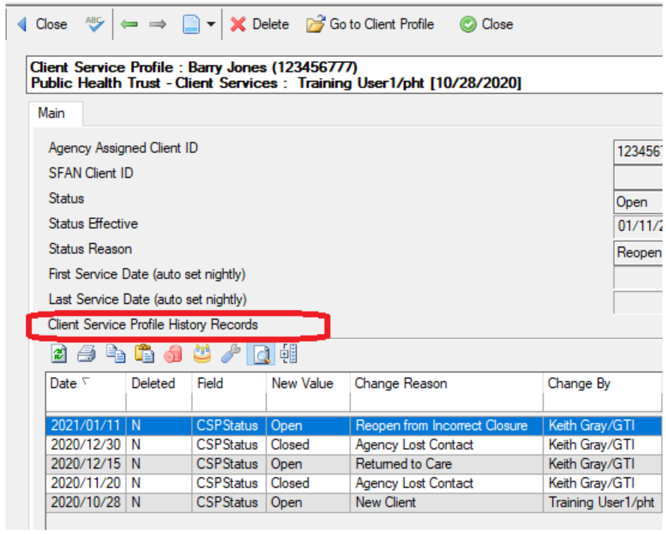
Missing Enrollment Status

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.

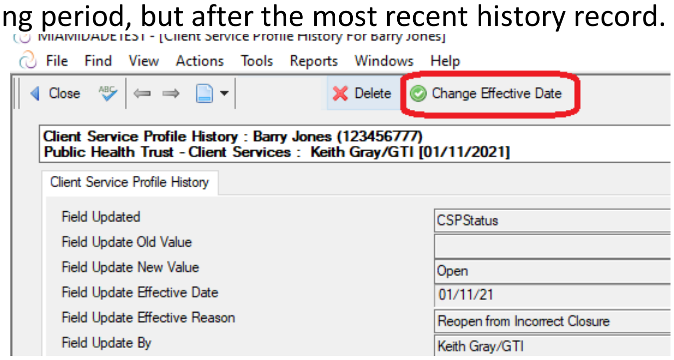
- To fix this issue, you will want to navigate to the Client Service Profile. These are found on the Care Team Tab of the Client Profile on the Agencies Sub Tab.



- 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**.



- 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.



- 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.