Introduction

The Virginia Department of Health will use Provide Enterprise (PE) to manage their PrEP. This user guide will walk through the input and management of services.

This guide assumes knowledge of Provide Enterprise Navigation, Client Registration, and Client Profile. Please refer to the following user guides for more information on these foundational topics.

1. Navigating Provide Enterprise
2. Client Registration – Completing the Client Profile

Finding Clients

There are two ways to find PrEP clients in Provide, detailed below:

**Find – Find Client**

The first way to find a client is by clicking on Find and then Find Client.

![Find Client](Image)

Here, you can search by client name, birth date, SSN, gender, etc.

The second way to view PrEP clients, is by using View > Clients > All PrEP. This view displays all the PrEP clients for your organization.

![PrEP Clients](Image)
**PrEP Application**

The PrEP Application in Provide is used to determine a client’s eligibility to receive services from the Virginia PrEP program and, if eligible, to enroll the Client in Medication Assistance. The PrEP Application is used for new Clients applying for services.

**Creating a PrEP Application**

To create a PrEP Application, you must first be in the Client Profile view. Next, click on “Create” and select “PrEP Application” from the Button Bar.

The PrEP Application will then display. To begin, notice there are eight (8) tabs beneath the Button Bar. Each tab is explained in further detail as this guide proceeds.

NOTE: The PrEP Application will automatically “inherit” all of the current information for that Client. This makes the process of completing the application quicker and easier.
Main Tab

The Main tab of the PrEP Application shown below is where you will collect key Client information, such as their name, gender, date of birth and social security number:

Fill in the appropriate fields:

- **Provide Client ID** – This will auto-populate with a unique client ID.
- **Application ID** – This will auto-populate with a new unique Assessment ID number.
- **Source** – This will auto-populate with the “Provider.”
- **Checked Out?** – This will default to “Yes” when you first create the Assessment as it will be automatically checked out to you.
- **Checked Out By** – This will default to your name.
- **Checked Out Date** – This will default to the date you started the assessment.
- **File Status** – This will default to “In Progress”.
- **Date Received** – This will default to today’s date.
- **Date Due** - 30 days from the day received.
- **Comments** - Add any comments that are needed.
• Legal Last Name – Enter the client’s legal last name.
• Legal Middle Initial – Enter the middle initial of the client.
• Legal First Name – Enter the client’s legal First name.
• Name Suffix – Enter any suffix the client wants after their name (Jr., Sr., I, II, etc.).
• Date of Birth – Enter the client’s date of birth.
• Current Age – Defaults based on the client’s date of birth.
• Social Security # – Enter the client’s social security number. Note, only enter full Social Security Numbers and leave blank if the Client does not have one.
• Current Gender – Enter the current gender of the client.
• Gender at Birth – Enter the gender of the client at birth.
• Gender Pronoun – Enter the appropriate gender pronoun for the client.
• Race – Check all that apply – Select all the races the client identifies with.
  o Note: If either Asian and/or Native Hawaiian/Pacific Islander are chosen, sub-categories are displayed to further identify. As seen below:
• Ethnicity – Select the appropriate ethnicity.
• Preferred Written Communications Language - Select the client’s primary communication language.
• Client Consent – A signed client consent form is required at the time of registration, and will appear in this imbedded view.

Address Tab

The Address tab of the PrEP Application is where the residence and mailing address and other contact information is collected.
Fill in the appropriate fields:

- **Housing Type** – Select the current housing type of the client.
- **Housing Status** – will pre-fill dynamically based on the Housing Type selection.
- **Residence Address** –
  - **Street Address** – Enter the house number and street name for the client.
  - **Apt/Lot/Floor** – Enter this field if appropriate.
  - **State** – Select the state of residence for the client.
  - **County** – Select the county of residence for the client.
  - **City** – Select the city in which the client lives.
  - **Zip** – Enter the zip code of residence for the client.
- **Does the client consent to receiving mail from the program?** - Select “Yes” or “No.”
  - If “Yes” then also enter the following fields:
    - **Mail Care Of** – If the Client wants their mail sent to a third-party address, then you must enter the name of the individual that the mail will be sent to.
    - **Mail Street Address 1** – Either manually enter the mailing address fields starting here or if the address is the same as their residence address entered
above, click the button, and the rest of the mailing address will be copied from the residence fields.

- **Mail Street Address 2** – Enter the Unit / Lot/ Floor or PO Box
- **Mail State** – Enter the State where mail is to be delivered
- **Mail City** – Enter the City where the mail is to be sent
- **Mail Zip** – Enter the Zip code or where the email is to be sent.

- **Primary Phone Number** – Enter the client’s primary phone number.
- **Primary Phone Message** – Select the appropriate choice if phone messages are allowed at this phone number.
- **EMessaging** – Indicate whether it’s OK to send system-generated messages to:
  - **Okay to send Email** – Select Yes or No
    - If yes, enter Email Address.
  - **Okay to send text message** – Select Yes or No
    - If yes, select cell phone carrier and cell phone number.

- **Proof of Residency Document(s)** – The embedded lists Proof of Residency Scan documents in the Client chart. If new Proof of Residency documentation is provided by the Client, then click the “Add Scan Document” button within the embedded view.

### Contacts

The Contacts tab is where you document the client’s Authorized Representative(s), if appropriate.

![Contacts Tab](image)

Fill in the appropriate fields:

- **Number of Authorized Representatives** – Provide will allow you to enter up to three (3) Authorized Representatives for the client.
  - If the client has Authorized Representatives, name and phone number fields will appear based on the number of Representatives indicated.
**Income Tab**

Client household income is documented on the Income Tab. Here you will input the total monthly household income of the applicant.

![Income Tab Screen](image)

**Proof of Income** – If new Proof of Income document is provided by the client, then click the “Add Scan Document” button to upload proof of income documentation

**NOTES:**
The Client Household Monthly Wage Income can be manually entered in the field but sometimes it can be complicated to determine what the monthly amount is. To make it easier, the Provide system has a built in Wage Calculator. If you click on the “Wage Income Calculator” button the dialog screen below will open.

![Wage Calculator Screen](image)
Fill in the appropriate fields:

- **Number of Current Jobs** – Enter the number of current jobs. For each Job a series of additional fields will appear that vary based on how you will estimate the current monthly pay from each (Year-to-Date or a series of pay stubs).
- **Other Monthly Wage Income** – Enter any other monthly wages.
- **Self Employed** – Enter estimated monthly self-employed income.

The total household monthly wage income will be calculated. When completed, click on “Ok” to return to the income page. The computed total monthly household Wage Income will then be auto populated on the Income tab.

**NOTE**: The Provide system saves the Wage Calculator data points you entered in a record associated with the PrEP Application so at any time you can come back to the application and click the “Wage Calculator” button and the details of what you entered for the system to have calculated the Wage Income will be displayed for reference.

**Benefits Tab**

The Benefits tab is where you can document the client’s Medicare, Medicaid, Veterans Medical Services, and Indian Health Services program benefit status.

For Medicare, if Active, other variable data points are asked for as outlined and shown below:
• If Medicare Status is Active you need to enter:
  o Effective Date – Estimated date when coverage became effective.
  o Medicare Coverage – Type of Medicare coverage the Client has:
    ▪ Part A Only
    ▪ Part B Only
    ▪ Part A & B
    ▪ Part C (Also known as Medicare Advantage)
  o If Medicare Coverage is “Part C” then need to enter:
    ▪ Carrier Name – Use the UI button to try to find the Carrier and Plan in the Health Plan Directory in Provide. If it is not in the Directory select “*Other – Not Listed” and you will be prompted to enter the Carrier and Plan Name manually.
    ▪ Plan Name – Automatically set when Carrier Name selected.
    ▪ Includes Pharmacy Benefits? – If “Yes” this means that the Client Medicare Part D benefits are “rolled into” their Medicare Advantage Plan so not Part D information needs to be collected.
  o If Medicare Status is Active and Coverage is anything other than Part C that includes pharmacy benefits then you need to also collect Medicare Part D information.

  ![Carrier Name, Plan Name, Includes Pharmacy Benefit?]

  ▪ **Carrier Name** – Use the UI button to try to find the Carrier and Plan in the Health Plan Directory in Provide. If it is not in the Directory select “*Other – Not Listed” and you will be prompted to enter the Carrier and Plan Name manually.
  ▪ **Plan Name** – Automatically set when Carrier Name selected.

  ![Medicare Prescription Drug Plan (PDP)]

  ▪ **Effective Date** – Estimated date when Part D coverage first became effective.
  ▪ **Carrier Name** – Use the UI button to try to find the Carrier and Plan in the Health Plan Directory in Provide. If it is not in the Directory select “*Other – Not Listed” and you will be prompted to enter the Carrier and Plan Name manually.
  ▪ **Plan Name** – Automatically set when Carrier Name selected.
For Medicare and Medicare D when Status is Active you will also be asked to collect in a Scan document Proof of Coverage documentation. Click the “Create” and “Scan” to scan or upload documents.

Every Client should be checked to see if they are actively enrolled in Medicaid. This can be done with the click of a button from the PrEP Application. Select the option shown below:

The following fields will appear on the screen filled in depending on if the Client is found to be enrolled in Virginia Medicaid or not and what their “Medicaid Category” is.

For the VA Medical Services, and Indian Health Services we only collect the Status of each (Active, Applied, or No Benefits).

After you complete a “Check Medicaid Enrollment”, if you have information and supporting documentation that the Medicaid Enrollment Check is not correct or current, you should set the client’s 10-digit Medicaid ID (if you have the ID).

Type the 10-digit Medicaid ID, and click on “OK”.
Then, execute the Action “Recheck Medicaid Enrollment”.

**Insurance Tab**

On the Insurance tab, collect and document the Client’s primary private medical insurance plan.

If the Primary Private Insurance Status is set to “Active” the following fields appear:

- **Effective Date** – Estimated date when coverage became effective.
- **Policy Source** – How policy was obtained by the Client:
  - ACA Exchange – Through the Federally Facilitated Marketplace
  - Employer – Through and Employer
  - Individual – Purchased by Client through private market
• If an Employer policy currently on COBRA, set the Status to “COBRA” and fill in the COBRA Start and End Dates that appear.

• Insurance Company Name – Click the UI button to get a list of Plans by Carrier that are in the Health Plan Directory in Provide to pick from. The list varies by the Policy Source selected above.

• Insurance Plan Name – Enter the plan name.

• Private Member ID – Enter the member ID found on the insurance card.

• Pharmacy Coverage Included? – Indicate if this policy includes pharmacy coverage. Click “Yes” or “No.”

• Comments

Click the “Add Scan Document” button to scan or upload proof of medical coverage documentation.

**Medical Tab**
The Medical tab is where you document key medical related information about the client.
Fill in the appropriate fields:

- **Stage of Disease** – Click the button to select the client’s current stage of HIV. NOTE: Once set to AIDS it can only be reset to HIV+ by Central Office staff.
- **Allergies** – click “Add Allergy Record” to document any allergies.
- **STI Diagnosis** – check all that apply.
- **Used Substances** – check all that apply.
- ** Injected Substances** – check all that apply.
- **Risk Categories** – check all that apply.

**Services Tab**

The Services tab is where you can view the Client’s history of Medication Assistance Enrollment as shown below:

- **Core PrEP Eligible?** – defaults to Yes or No based on criteria.
- **Medication Pickup Site** – select the access site where client will be picking up medications.

When complete, click on .

**Saving PrEP Applications in Progress**

To save an PrEP Application “In Progress”, click on . The PrEP Application will still be “Checked-Out” by you.
If you want to save the PrEP Application “In Progress” and allow another team member to “work” the application, click on **Check In/Save and Close**.

To open an PrEP Application that has been saved “In Progress”, in the Client Profile click on the “View - PrEP Applications” from the Client Profile Button Bar.

Then, double click on the PrEP Application that is “In Progress.”

If the PrEP Application has “No” for “Checked Out?” you know you can open and then “Check Out” the PrEP Application so you can work it by clicking on the **Check Out** button.

**Reviewing and Completing a PrEP Application**

After a PrEP Application has been submitted, a supervisor will review the assessment for quality assurance and to approve the request for services. Supervisors will use the View – Administration – PrEP Applications from the menu bar to see a list of submitted PrEP Applications ready for review.
Double-click on the submitted PrEP Application that you are ready to review and complete. Click the Edit button from the button bar. Navigate through the tabs and check for accuracy and completion. On tabs that require scanned documentation, a new question appears asking if the existing documentation is sufficient. Select “Yes” or “No.”

![Example of Client Consent Document](image)

Documentation must be marked as sufficient in order to complete a PrEP Application. The following tabs must be reviewed and completed.

- Main
- Address
- Income

On the Services Tab, complete the required fields to authorize a client’s enrollment in PrEP Medication Assistance.

![Example of Services Tab](image)

When all information is complete, click the Complete button from the button bar. Click OK to complete the enrollment.
When a PrEP Application is processed, the updated information will be pushed to the client profile overnight. However, if you want the information to be pushed to the client profile immediately, in the client profile, click on “Action – Update Client”.

**Marking a PrEP Application Incomplete**

If the application is incomplete, you will need to click on \[Incomplete\].

**Rejecting a PrEP Application**

If application has been incomplete for an extended period of time, you would reject the assessment. You will need to click on \[Reject\] to reject the assessment.

**Update Client**

When you Process a PrEP Application the new information collected about the Client in the PrEP Application does not immediately flow back to and update the Client Profile record. Instead, you can either apply the changes immediately as outlined below or let the system automatically apply the changes at night.

To apply the changes immediately, open the Client Profile. Click the “Edit” button to place the record in edit mode and then click on the “Action\Update Client” Button shown.

This will apply all of the changes to the Client Profile that were made in the PrEP Application.
View PrEP Enrollment

Once enrolled in PrEP Medication Assistance, a client will remain enrolled until they either test positive or withdraw from the program (either themselves or by a clinician).

PrEP Enrollment records may be viewed on the Client Profile on the PrEP tab.

To view the enrollment, double-click on the record to open the detail.

Withdrawal

To withdraw a client from their enrollment, click the Withdraw button.
Complete the fields:

- **Status** – defaults to In Progress.
- **Date Enrolled** – defaults to date the client was enrolled in PrEP.
- **Date of Withdrawal** – enter the date of withdrawal from PrEP.
- **HIV Status** – select “Reactive” or “Non-reactive.”
- **HIV Test Date** – enter the date of the last HIV test.
- **Withdrawal Type** – Select “Withdrawal by Clinician” or “Self-Withdrawal.”
- **Reason for Withdrawal** – Select the appropriate reason for withdrawal. Note the list of reasons is different depending on the Withdrawal Type selected.
- **Attachments** – Attach any supporting documentation as necessary.

**View PrEP Medication History**

From the Client Profile, navigate to View > PrEP Medication History. This view will show all of the medication fills that have occurred for this client.
Recording Lab Test Results
From the Client Profile, navigate to Create > Test Result. This will open a form to record test results and attach proof documentation.
Create Linkage to Care

From the Client Profile, navigate to Create > Linkage to Care. This will open a form to record test results and attach proof documentation.
Complete the appropriate fields.

- **Status** – defaults to In Progress
- **Referring PrEP Agency** – defaults to your agency
- **Agency Referred To** – select the care agency to which you are linking the client. Note that this could be your agency.
- **Client Contact Instructions** – free-form notes for any instructions
- **Date Positive Confirmed** – enter the date of the positive test result

The Client Information section defaults from the PrEP Client Profile.

Attach the Client’s signed consent on the Consent tab. When all information has been completed, click **Submit**. This process will create a new Client Record for the assigned agency’s Care Services program.

**Receiving Agency – Linkage to Care**

The receiving agency may view clients linked to their Care Services program, by clicking View > Clients > Linkage to Care.

A view will be presented showing a list of clients submitted to care. Double click the record to open it.

From within the Linkage to Care record, click **Acknowledge** to acknowledge receipt of the referral.
To register the client into the Care Services program, click **Register Client**, which will open up the Register Client form to be completed as you normally would, however the information from the referral will prefill to reduce re-keying information.

When your work with the request is completed, click **Close Request**, and enter the reason for closing the record. Click OK.

![Select Close Reason:](image)

### Closing

1. Copies of this user guide and all other Provide User Guides are available in the View\Reference\Documentation\By Type view in Provide database.

2. Policy questions should be directed to your VAProvide@vdh.virginia.gov.

3. Problems accessing Provide should be directed to your internal IT support team.

4. Questions about how to use Provide should be directed to the Provide Help Desk at provide.help@grouptech.com or 414-454-0161 x191. The best way to receive a quick response and resolution to your question or problem is to send an email and be sure to include:
   a. Your Name and Contact Information (Email and Phone).
   b. As much detail about the nature of your problem. For example, the name of the report you are running or the screen or view you are working in.
   c. Be sure to not include any client identifying information in your email to the Provide Help Desk. You can use the Provide Client ID field from the Profile tab of the Client Profile to identify an individual client if needed.