

GROUPWARE TECHNOLOGIES, INC.

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

## Data to Care User Guide

**Provide® Enterprise**  
**Data to Care User Guide**

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# Introduction

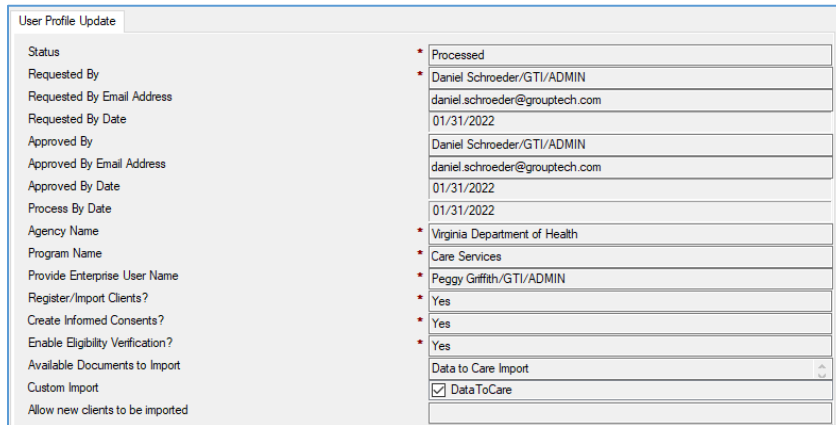
The Virginia Department of Health has chosen to use the Provide Enterprise (PE) system to manage their Ryan White Care and Prevention programs, which includes Data to Care management for individuals who may not have access to or have fallen out of care.

This user guide will walk through the management of these records.

# Security Requirements

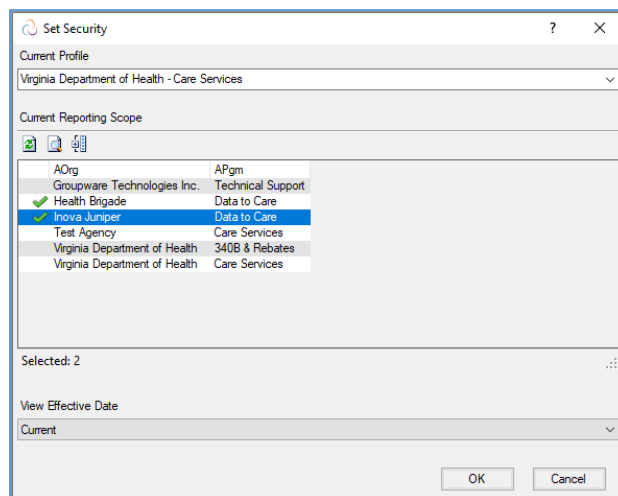
The role Provide.Users.DTC is required to perform the functions in this guide.

VDH users who will import the Out of Care file to receiving agencies will need to have Provide.Imports role as well as have the Custom Import, DataToCare checked in their user profile.



In addition, the user will also need to have those agency's Data to Care programs in their reporting scope.

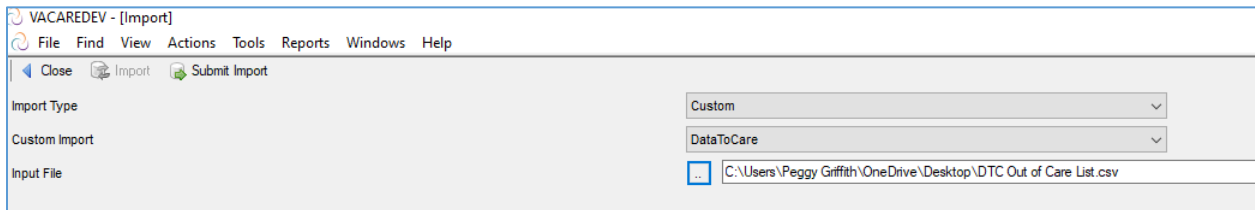
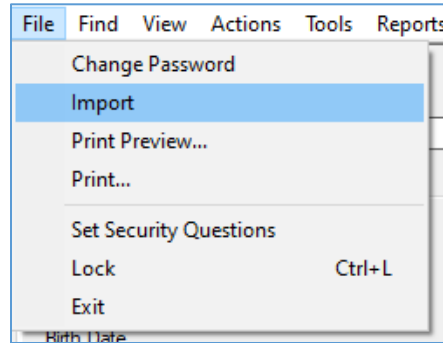
From Tools > User Security, place a check mark next to the Data To Care agency programs for which data will be imported.



## Out of Care – Import File

The Data to Care team at VDH will examine surveillance sources and complete the Out of Care list which will be imported into Provide Enterprise. The file must be saved as a .CSV.

To import the file, go to File > Import.



Complete the fields as shown in the image above.

- **Import Type** – Custom
- **Custom Import** – DataToCare
- **Input File** – browse and select the Out of Care import file in a .CSV format.

Click  **Submit Import**. A nightly agent will process the import into Provide Enterprise.

## View Import Log

The next day, you can check the Import Log view to check the status of the file. The Data To Care Imports are in the Custom category.

Agency /	Import Form /	Date ▾	User	Num Documents	Error Count	Import Count	Status	Delete
Virginia Department of Health								
ADAP Formulary								
Custom								
Virginia Department of Health	Custom	2022/02/01	Peggy Griffith/GTI/ADMIN	4	0	4	Completed	N
Virginia Department of Health	Custom	2021/07/25	Daniel Schroeder/GTI/ADMIN	4	0	4	Completed	N
Virginia Department of Health	Custom	2021/07/25	Daniel Schroeder/GTI/ADMIN	7	0	7	Completed	N
Virginia Department of Health	Custom	2021/07/25	Daniel Schroeder/GTI/ADMIN	4	4	0	Completed	N
Virginia Department of Health	Custom	2021/07/25	Daniel Schroeder/GTI/ADMIN	12	0	12	Completed	N
Virginia Department of Health	Custom	2021/07/20	Daniel Schroeder/GTI/ADMIN	4	4	0	Completed	N
Medicaid Category								

Double-click on the Import record to see details.

The screenshot shows the 'Mass Import' dialog box. On the left is a list of configuration options, and on the right is a corresponding list of values. Below the lists are buttons for 'Attach', 'Save As', and 'Launch'. At the bottom, there is a list of files to be imported.

Configuration Option	Value
Mass Form Type	Custom
Import Type	Data To Care
Status	Completed
Delim	Tab
MultiDelim	~
PrimaryKey	Insurance Enrollment Assistance Request:RequestID
PrimaryKeyMatch	Update
PrimaryKeyNoMatch	Bypass
SecondaryKey	None
SecondaryKeyMatch	Bypass
SecondaryKeyNoMatch	Create
RunCompute	Yes
RunEvents	Yes
RunLookup	Yes
RunRefRequired	Yes
Record Count	4
Error Count	0
Record Update Count	0
Record Import Count	4

Buttons: Attach, Save As, Launch

Files:

- DTC Out of Care List.csv
- DTC Out of Care List\_ERROR.txt
- DTC Out of Care List\_ERROR\_RECORDS.txt

The details will include the original CSV file that was submitted along with any errors that may have been encountered. This typically happens if a required column is missing or data is formatted incorrectly.

## View Imported Client Records

A set of views allows you to manage Data to Care clients that have been imported.

View > PLWH Clients > Data to Care Imports will display all imported records by status.

Status /	DTC Number /	State No /	Last Name /	First Name /	MI /	Agency Assigned /
<b>Error</b>						
Error	100002	20001	Day	John		Health Brigade
Error	100003	10347	Mcfly	Marty		Inova Juniper
Error	100004	20002	Catt	Romeo	T	Inova Juniper
<b>Processed</b>						
Processed	100001	10305	Castle	Billy		Health Brigade

Explanation of Status:

- **Referred** – The client record was successfully referred to an agency.
- **Open** – The client record was successfully imported, and the agency is actively working the case.
- **Imported** – The client record was successfully imported, but an error has occurred causing the referral to the agency to fail. This can happen for one of two reasons.
  - The agency has not provided services in the past for this client. Therefore, these records must be reviewed by Virginia Department of Health before making the decision to release the client to the agency.
  - The Agency name in the import file did not exactly match an agency name in Provide Enterprise.
- **Closed** – The client's case is Closed with outcomes recorded.

To view the details of a client case, double-click the import record. The record will display with all the data provided in the Out of Care import, along with an Error reason.

Close ABC ← → 📄 ✖ Delete ✔ Process ✔ Reject 📁 Add Informed Consent 📄 Link to Client Profile


### Data to Care Import

Data to Care Import

Status	Error
Error Reason	Client is not currently released to the Agency
Agency	Health Brigade
Date Of Service	01/01/2022
Data to Care Number	100002
State No	20001
Max Marker	12/01/2021
Legal First Name	John
Legal Middle Initial	
Legal Last Name	Day
Birth Date	07/17/1968
Current Age	53
Sex	Male
SSN	554-00-1937
Race	White
HIV Risk Factor	Unknown
HIV Diagnosis Date	03/01/2020
Last HIV-1 Viral Load Result	4/1/2020
Recent Test Date	06/01/2020
Agency Assigned	Health Brigade
Days Since Last CM	200
Current Address	
Address 1	555 Daylight St
Apt / Lot / Floor	PO Box 100
City	Richmond
State	VA
Zip Code	55412
Primary Phone	(414) 577-8445
Current Address Date	05/01/2020
REDCap Address	
REDCap Street Address	555 Daylight St
REDCap City	Richmond
REDCap Zip	55412
REDCap Phone	(412) 457-7844
REDCap Email	test@test.com
ADAP Address	
ADAP Street Address	555 Daylight St
ADAP City	Richmond
ADAP State	VA
ADAP Zip	55412
LexisNexis Address	
LexisNexis Street Address	555 Davlight St

## Client Not Released to Agency

A common reason for error is that the Agency receiving the referred client does not have a current relationship with the client, and therefore the client record has not been released to that agency.

After reviewing the record, if you are certain of the agency assignment, you may click  **Add Informed Consent** to release the client to the appropriate agency.



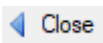
Informed Consent : John Day ()  
Virginia Department of Health - Care Services : Peggy Griffith/GTI/ADMIN [02/01/2022]

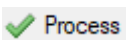
Informed Consent

Type of Release	* Provide Enabled
Destination Organization	* Health Brigade
Destination Program	* Data to Care
Client Signature on File	
Status	Active
Date Start	* 02/01/2022
Date End	
Reason for Release	Data to Care Investigation
Release Client Profile	Yes
Release Client Service Profile	Yes
Release Client Contacts	Yes
Release Activity Documents	All

Complete the Informed Consent record.

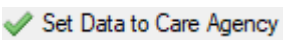
- **Destination Organization** – select the agency receiving the Data to Care client.
- **Destination Program** – defaults to Data to Care, based on the selection made above.
- **Client Signature on File** – select yes or no, but not required.
- **Status** – defaults to Active
- **Date Start** – defaults to today’s date
- **Date End** – if applicable, enter a date when the informed consent should be revoked.
- **Reason for Release** – type the reason for release
- **Release Client Profile** – select Yes to release the client profile to the agency.
- **Release Client Service Profile** – select Yes to allow the agency to record services performed for the client.
- **Release Client Contacts** – select Yes to allow the agency to view all alternative contacts for the client.
- **Release Activity Documents** – select All to allow the investigator to see all activity records performed for this client. You can also select “None” or “Select” to select specific activity types.

Click  and Yes to save your changes. This will submit create the informed consent, which is processed on an hourly basis.

Click  to re-process the import entry, and this will remove the record from the error list.

### Agency Not Found

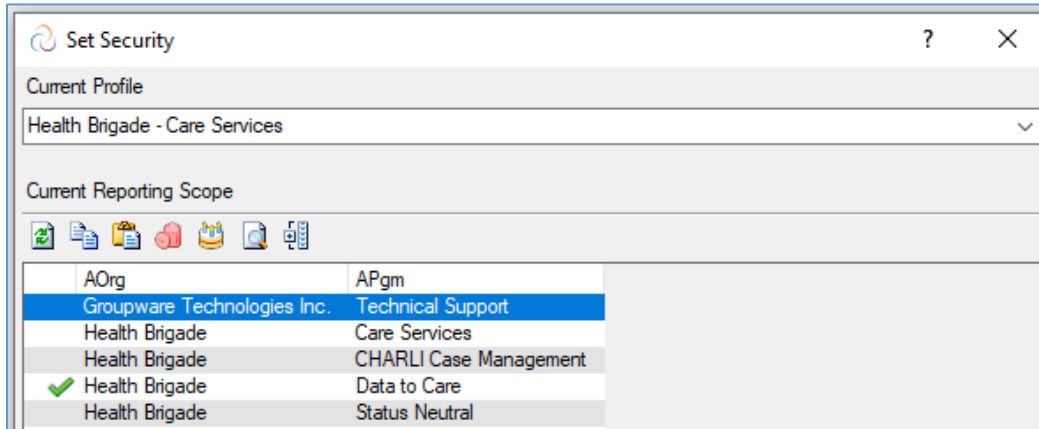
A common reason for error is that the Agency name in the import file was not an exact match to an agency in Provide Enterprise. This can happen due to misspellings, abbreviations, or different naming conventions.

After reviewing the record, you may click  to select the appropriate agency.

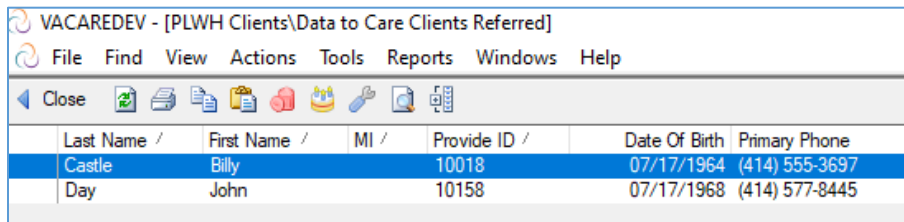
## Agency Tasks

\*Note that agency users must have the role Provide.Users.DTC and have the agency’s Data to Care program within their reporting scope.

From Tools > User Security:




At the receiving Agency, an entitled user may use the View > PLWH Clients > Data to Care Clients Referred, to see cases assigned to their agency.



Double-click to open a Data to Care record. To acknowledge receipt and start working on the investigation click Open . This will change the status of the case from “Referred” to “Open.”

Data to Care Import	
Data to Care Import	Notes
Status	Referred
Agency	Health Brigade
Program	Data to Care
Start Date	
Date Of Service	05/19/2022
Data to Care Number	* 0519202201
State No	
Max Marker	
Legal First Name	Rango
Legal Middle Initial	
Legal Last Name	Bucks
Birth Date	12/10/1990
Current Age	
Sex	Male
Sex Assigned at Birth	Male
SSN	987777777
Race	
Current HIV Disease Stage	
HIV Risk Factor	
HIV Diagnosis Date	
Last HIV-1 Viral Load Result	
Recent Test Date	
Agency Assigned	Health Brigade
Days Since Last CM	
Last District	
Last Region	
Current Address	
Housing Type	Renting and living in an unsubsidized room or house or apartment
Address 1	10305 Chewyan Drive
Apt / Lot / Floor	
State	VA
County	Richmond
City	Richmond
Zip Code	14141
Primary Phone	( ) -
Current Address Date	
Previous Address	

## Data to Care Notes

Activity is tracked in the Data to Care Notes. From the imported Data to Care case, navigate to the Notes tab, and click  **Add Data to Care Note** to add a note to the case.

Data to Care Note : Billy Castle ()  
Health Brigade - Data to Care : Peggy Griffith/GTI/ADMIN [02/01/2022]

Summary

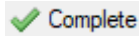
Note Status: In Progress  
 Provider: Peggy Griffith  
 Date of Contact: 02/01/2022  
 Note Date: 02/01/2022  
 Minutes:   
 Contact Category: Data to Care  
 Contact Type: Contact Attempt 2  
 Contact Method: Phone  
 Brief Description: Cell phone attempt

Full Description

Attempted cell phone. Phone number disconnected

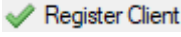
Complete the required fields.

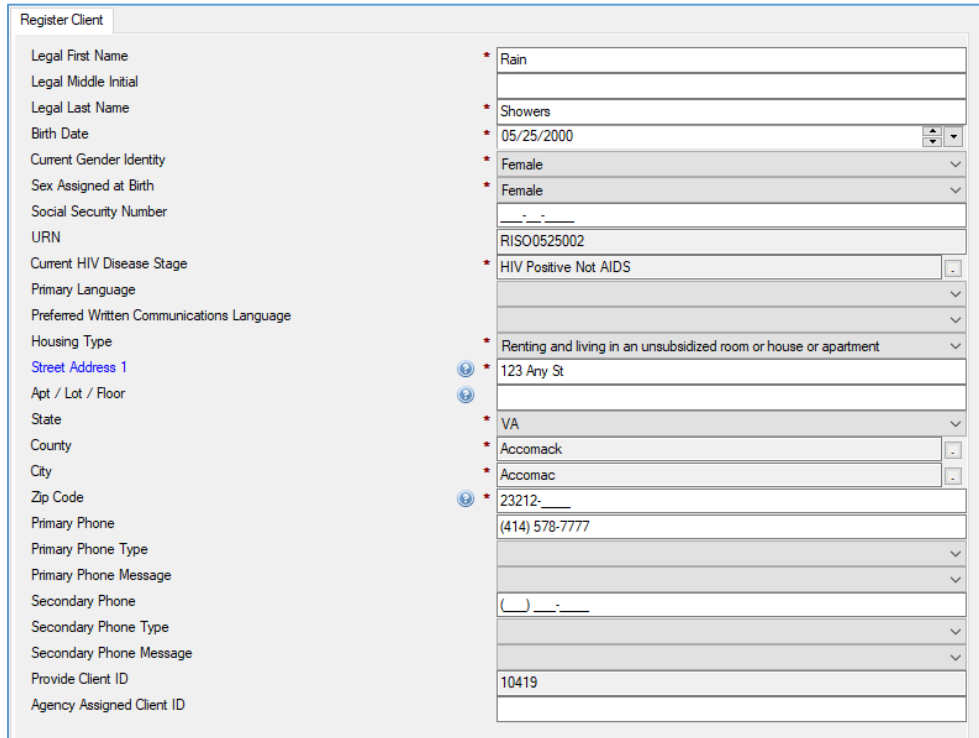
- **Note Status** – Defaults to In Progress.
- **Provider** – Defaults to your name.
- **Date of Contact** – defaults to today’s date. If the contact attempt happened previously, select the appropriate date.
- **Note Date** – defaults to today’s date.
- **Minutes** – optional – enter number of minutes spent on the contact attempt.
- **Contact Category** – Select Data to Care, and the appropriate Contact Type (Contact attempt 1, Contact attempt 2, etc)
- **Contact Method** – enter the contact method used
- **Brief Description** – enter a brief subject line for the note
- **Full Description** – enter details of the contact attempt.

When you are finished entering the details of the contact attempt, click . The contact information will be recorded in the Notes embedded view.

Status	Date	Provider	Contact Type	Deleted?
Complete	2/1/2022	Peggy Griffith	Cell phone attempt	N
Complete	2/1/2022	Peggy Griffith	Contact 1	N

## Register a client

If contact is made, and the client needs to be registered , to launch the Register Client form and create a new client record.



The screenshot shows the 'Register Client' form with the following fields and values:

Field Name	Value
Legal First Name	Rain
Legal Middle Initial	
Legal Last Name	Showers
Birth Date	05/25/2000
Current Gender Identity	Female
Sex Assigned at Birth	Female
Social Security Number	
URN	RISO0525002
Current HIV Disease Stage	HIV Positive Not AIDS
Primary Language	
Preferred Written Communications Language	
Housing Type	Renting and living in an unsubsidized room or house or apartment
Street Address 1	123 Any St
Apt / Lot / Floor	
State	VA
County	Accomack
City	Accomack
Zip Code	23212-
Primary Phone	(414) 578-7777
Primary Phone Type	
Primary Phone Message	
Secondary Phone	( ) -
Secondary Phone Type	
Secondary Phone Message	
Provide Client ID	10419
Agency Assigned Client ID	

After registering the client, the Client Profile record will appear as shown below. Please note, at this point, you will need to create an Eligibility Assessment and collect required scanned documents.

**Client Profile : Rain Showers ()**  
**Health Brigade - Care Services : Peggy Griffith/GT1/ADMIN [05/25/2022]**

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

Status: Open

Date of Last Service: [icon]

Legal Last Name: \* Showers|

Legal First Name: \* Rain

Legal Middle Initial: [icon]

Name Suffix: \* [icon]

Preferred Name: [icon]

Pop-up Alert Message: [icon]

SSN: [icon]

URN: RISO0525002

Provide Client ID: 10419

Old ADAP Client ID: [icon]

RW Consent Date Redcap: [icon]

Client Intake Date Redcap: [icon]

Web Account: [icon]

Web Account History: [icon]

[icon] [icon] [icon] [icon] [icon] [icon] [icon] [icon]


Date	Status	Form	Email Okay	Email Address	Text Okay	Cell Phone

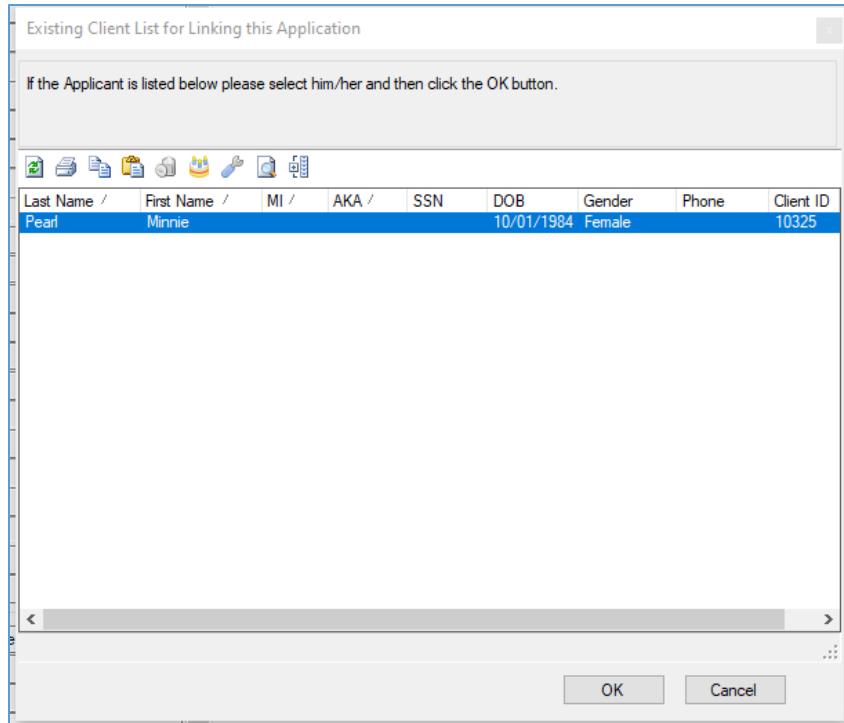
E Messaging Setup  
Click to update E Messaging ==> [icon] Update

Okay to send email? [icon]

Okay to send text messages? [icon]

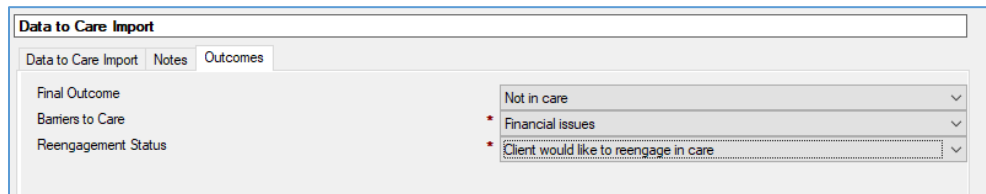
## Set Client

If your investigation finds that the client record already exists, click  **Set Client**.



## Documenting Outcomes

You will notice a new tab on the import record called Outcomes.





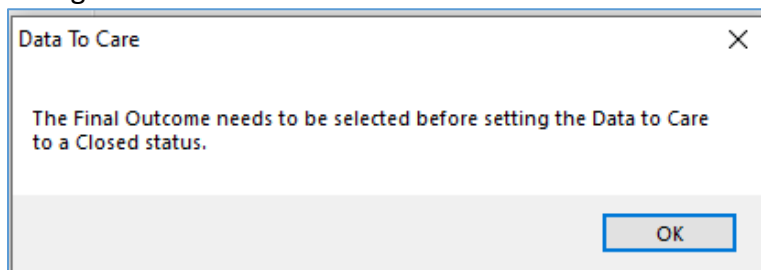
Complete the required fields.

- **Final Outcome** – upon selecting an outcome, the following fields become required.
  - In care within the last 12 months
    - **Provider name**
    - **Date of most recent/future care marker**
    - **Evidence of Care**
  - Not In care
    - **Barrier to Care**
    - **Reengagement Status**
      - If Reengagement Status = Client refused care, then you will be prompted to enter **Reason Refused Care**.

- Relocated out of service area
  - **State Relocated**
  - **Date Client Moved**
- Deceased
  - **Date of Death**
  - **Death Source of Information**
- Incarcerated
  - **DOC/Jail Facility Name**
  - **Expected Date of Release**
- Unable to locate
- Discharged from Agency
- Other
- Date Case Closed – enter the effective date of the case closure

### Closing a Data to Care Case

From the Data to Care enrollment record, click the  **Edit** button. Click the  **Close** button. If you have not already documented outcomes, you will be prompted to complete the final outcome prior to closing.



Upon completing and closing the import record, the Status will change to Closed.

Status /	DTC Number /	State No /	Last Name /	First Name /	MI /	Agency Assigned /
[-] Closed						
Closed	523202203		Pearl	Minnie		Health Brigade
[+] Imported						
[+] Open						