GROUPWARE TECHNOLOGIES, INC.

Provide® Enterprise Care Management Software

Status Neutral User Guide

Provide® Enterprise

Status Neutral User Guide

Updated November 2023

Contents

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 Status Neutral Service Navigation for individuals who may be at risk or who do not know their HIV Status.

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

Security Requirements

In order to enroll and view clients in Status Neutral for your agency, you must have the program Status Neutral set as your current profile. This can be found under Tools > User Security in the Menu Bar.
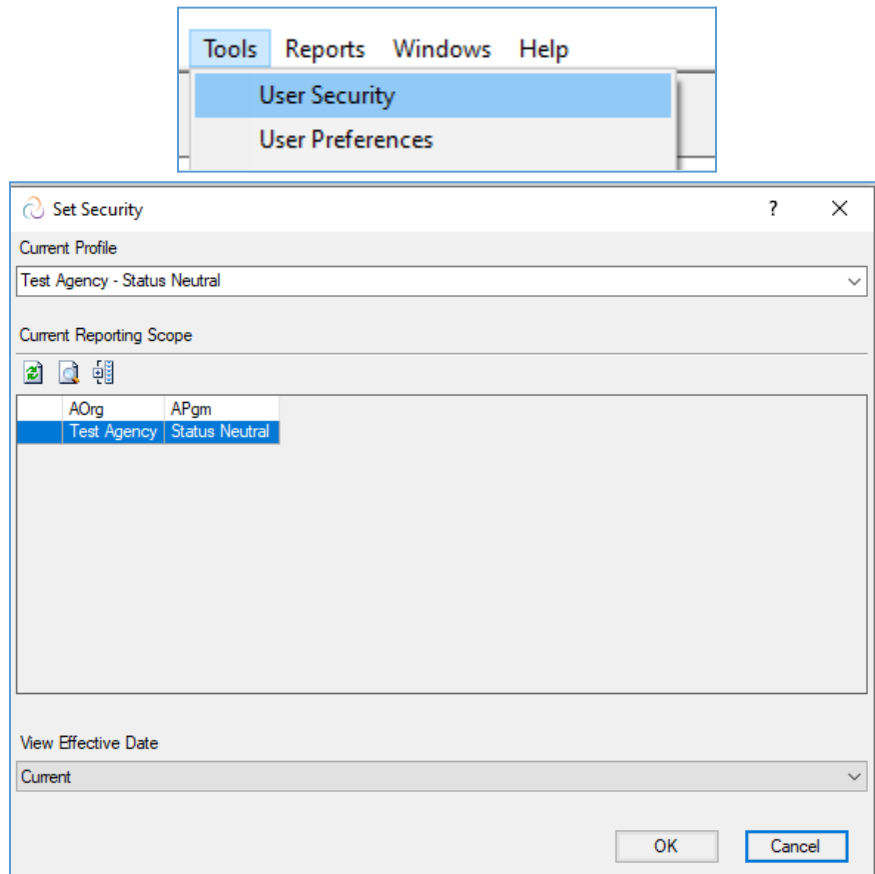

Status Neutral Intake

Status Neutral is often the first point of contact for a client seeking assistance. Therefore, the client will need to be registered into Provide Enterprise to begin the intake process. Please refer to the user guide for Client Registration – Completing the Client Profile for more information on the registration process.
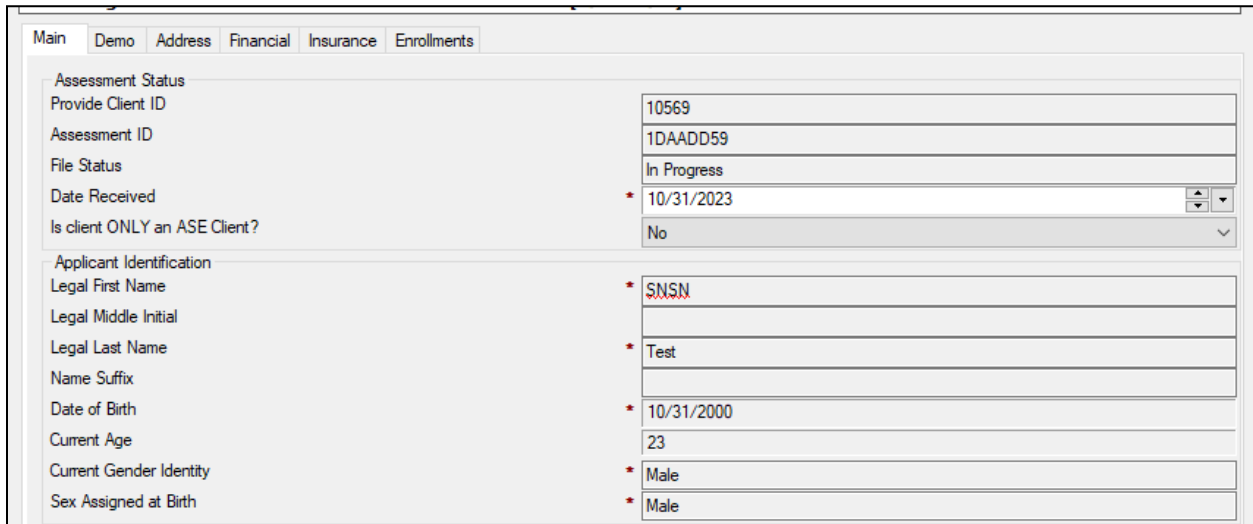
Once the client is registered, a base Client Profile is created.

From the Client Profile, click the Create button, and select Status Neutral Intake.
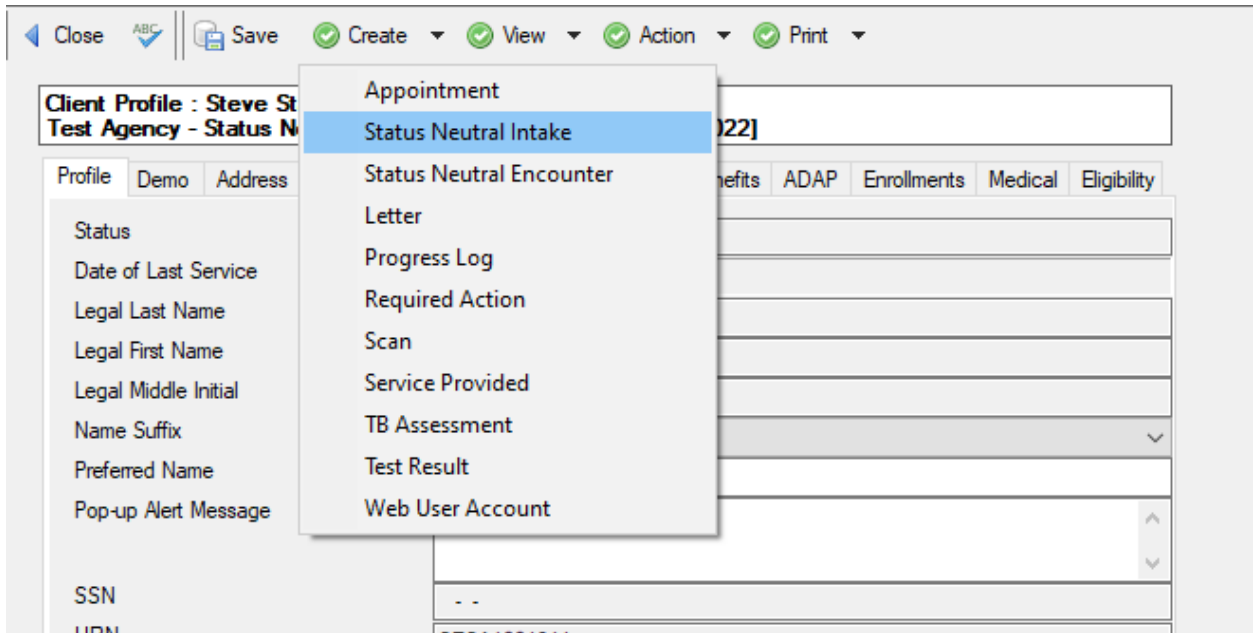
At any time in the intake process, you may click the [Save] button to save your updates.

Main tab:

The Main tab, displays the applicant identifying information captured from the registration process.

The **Date Received** defaults to today's date, but can be edited.
- **Is client ONLY an ASE Client?** Select Yes or No.

Demo tab:

Status Neutral Intake : Steve Status ()
Test Agency – Status Neutral : Tester Statusneutral [01/08/2022]

| Main | Demo | Address | Financial | Insurance | Enrollments |

Demographic Data

Race - Check all that apply *
- [ ] American Indian/Alaska Native
- [x] Asian
- [ ] Black or African American
- [ ] Native Hawaiian/Other Pacific Islander
- [ ] White

Asian *
- [ ] Asian Indian
- [x] Chinese
- [ ] Filipino
- [ ] Japanese
- [ ] Korean
- [ ] Vietnamese
- [ ] Other

Ethnicity * Non-Hispanic

Complete the required fields containing demographic data for the client.

Address:
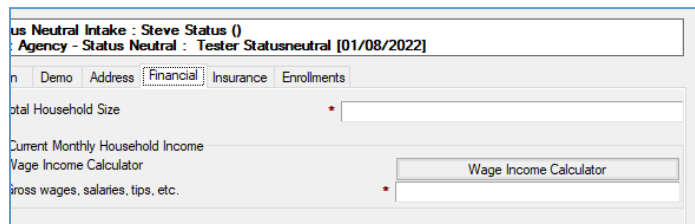
Status Neutral Intake : Steve Status ()
Test Agency – Status Neutral : Tester Statusneutral [01/08/2022]

| Main | Demo | Address | Financial | Insurance | Enrollments |

Residence

Housing Type *	Renting and living in an unsubsidized room or house or apartment
Housing Status	Stable/Permanent
Street Address *	123 Sunshine Way
Apt / Lot / Floor	
State *	VA
County *	Accomack
City *	Accomac
Zip Code *	53202-____

Telephones

Primary Phone	(__) ___-____
Secondary Phone	(__) ___-____

The address tab displays address and phone information captured from the registration process. Check to make sure all required fields are entered correctly.
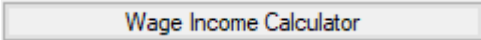
Financial tab:

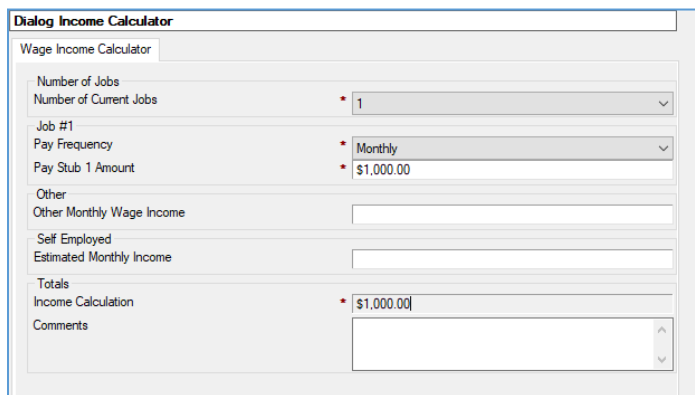The Financial tab will only display if you chose "No" to **Is client ONLY an ASE Client?**.

Enter the required financial information.
- **Total Household Size** – enter the number of members in the client's household.
- **Current Monthly Household Income** – enter the total monthly gross income for the household. You may use the button to help calculate the total.

Insurance Tab:

Complete the required fields for the client's current insurance or benefits coverage.

Note that if you answered "Yes" to **Is client ONLY an ASE Client? then Policy Source and Parent's Insurance fields will be hidden.

Also if you answer "No Benefits" to all types of insurance, then you will be required to answer **Was Client Educated about Insurance?**

Enrollment tab:

If you haven't done so already, click the button to save the intake record. The button will be displayed. Click to enroll the client in Status Neutral.

Complete the required fields:

- **Enrollment Status** – defaults to Pending, change status to Enrolled, Complete, or Denied as appropriate.
- **Referral Source** – make the appropriate selection for how the client was referred to Status Neutral.
- **Was psychosocial screening done?** – Indicate Yes or No. If Yes is selected:
  - o **Date** – enter date of psychosocial screening
  - o **Were needs identified** – enter Yes or No
- **Was PrEP/nPEP Behavioral screening done?** – Indicate Yes or No. If Yes is selected:
  - o **Date** – enter date of PrEP/nPEP Behavioral screening.
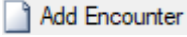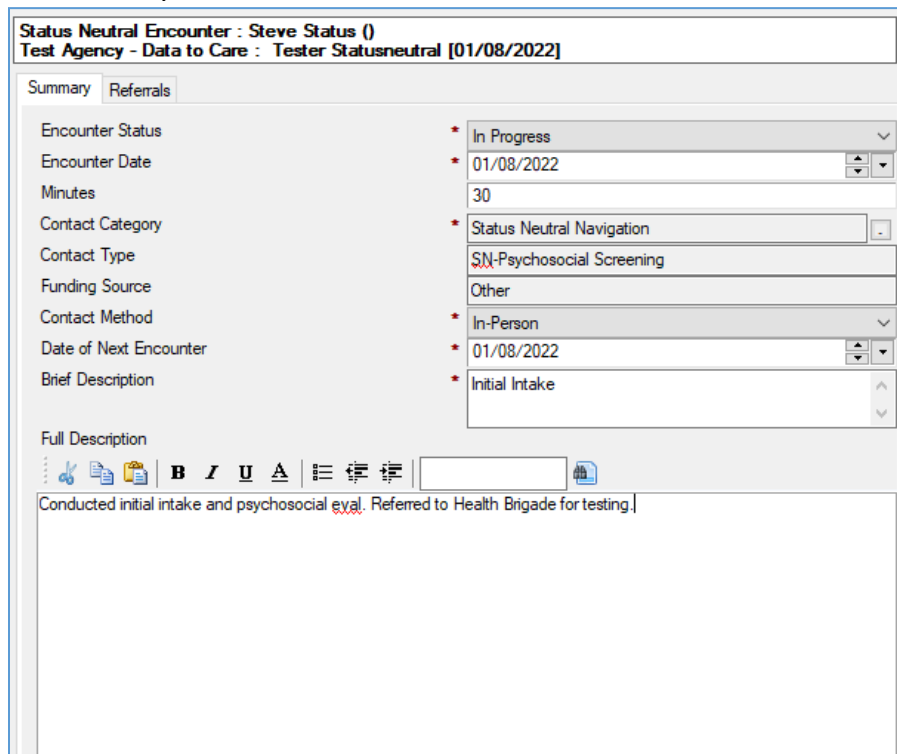 - o **Were needs identified?** – enter Yes or No

If you haven't done so already, click the ⬚ Save button to save the enrollment record.

Document the Encounter

From the Enrollment record, click the ⬚ Add Encounter button to document the encounter. You may document other encounters later from the Client Profile by using the Create > Status Neutral Encounter activity.

Complete the required fields for the encounter.

- **Status** – defaults to In Progress. When you have completed all the documentation for this encounter, change the status to "Complete."

- **Encounter Date** – enter the date of the encounter.
- **Minutes**- enter the number of minutes for the encounter.
- **Contact Category** – Select the appropriate Contact Type from the list.
- **Contact Method** – Select the appropriate method to indicate how the encounter was conducted.
- **Date of Next Encounter** – Enter the date for your next encounter.
- **Brief Description** – Enter a brief subject of the encounter.
- **Full Description –** Enter any detailed notes about the encounter and next steps.

Referral Tracking

From the Encounter, you may track any resulting referrals on the Referrals tab. Click the Add Referral to create a referral.

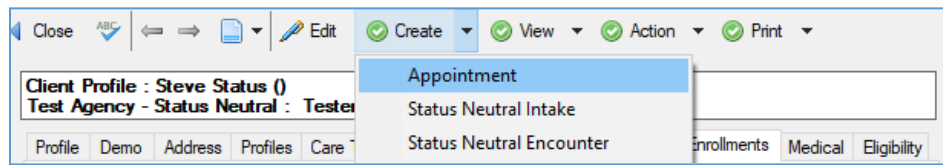Complete the required fields and attach the appropriate consent.
- **Referral Status** – defaults to Pending
- **Referring Person** – defaults to your user name
- **Referral Date** – defaults to today's date
- **Referred To** – Select the agency receiving the referral
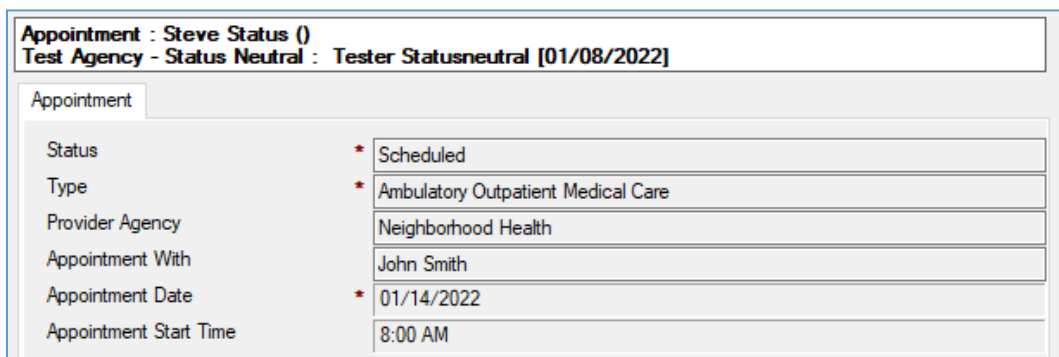
- **Referred for Service Type** – Select the appropriate service for the referral
- **Referred to Assignee** – if applicable, select an individual to receive the referral. Otherwise, leave blank.
- **Referred for Service Description** – brief description of the service to be provided by the receiving organization.
- **Date Check Back** – defaults to one month from date of referral
- **Require Consent** – Defaults to Yes
- **Was Client Consent Obtained** – Yes or No, If Yes attach the signed consent form.

When all the information has been entered, click ✓ Submit button.

Appointments

Track appointments made for the client from the Client Profile by clicking Create > Appointment.
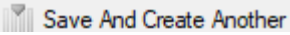
Complete the required fields to track the appointment.
- **Status** – defaults to scheduled.
- **Type** – select the appropriate appointment type
- **Provider Agency** – type or select the service organization where the appointment will take place.
- **Appointment With** – type or select the individual provider
- **Appointment Date** – enter date of appointment
- **Appointment Start Time** – enter time of appointment

When finished you can either select [Save And Create Another] or [Close] to save the appointment.

Viewing Activity

To view activity records for a client, click the View > Activity from the Client Profile.
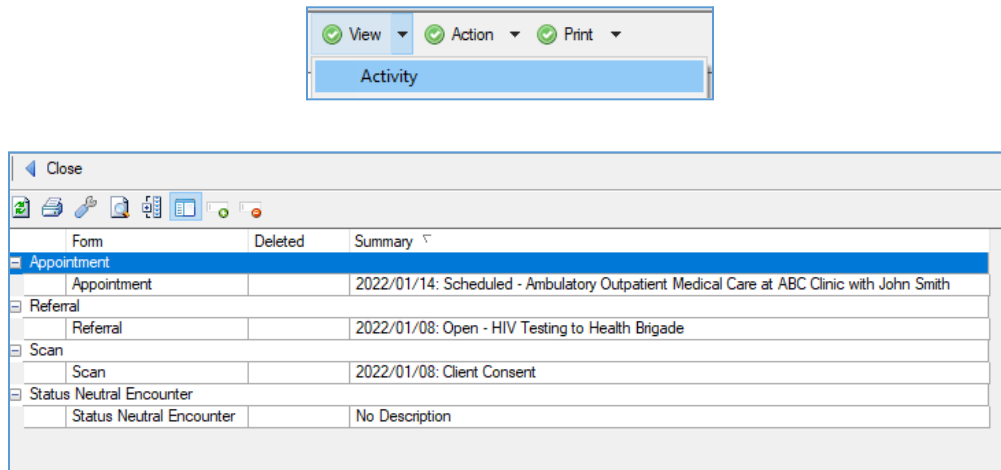
Editing Appointments

Double-click on the appointment record to open it. Then click the [Edit] button. You can change the appointment status to Kept, Missed, Rescheduled, or Cancelled. If the appointment was missed, rescheduled or cancelled, enter the appropriate reason.

Viewing Status Neutral Enrollments

Status Neutral Views

Provide Enterprise allows you to quickly view your Status Neutral clients. To access these views, navigate to View > Clients.
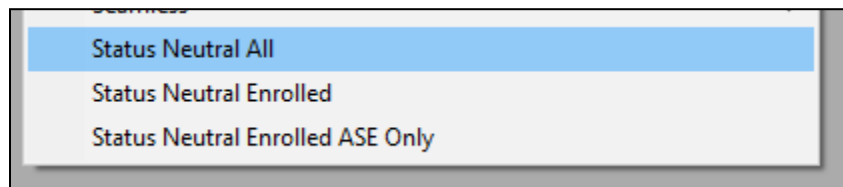
The "Status Neutral All" view shows all clients with a record in your Status Neutral Program. You can use the [icon] button to categorize the list by any of the columns.

Client ID	Last Name	First Name	Status	Primary Phone	Address 1	City	State	Zip	Historic Client	Program Code
10573	Test	SNClient	Open		123 Any st	Accomac	VA	23212-	Current	ASE
10569	Test	SNSN	Open		123 Any St	Arlington	VA	23221-	Current	SN
10477	Pebbles	Fruity	Open		15444 Lake Dr	Accomac	VA	23212-	Current	
10476	Chocula	Count	Open		15454 Main St	Accomac	VA	23212-	Current	
10473	Jacks	Apple	Open		1524 Main St	Accomac	VA	23212-	Current	SN
10397	Queen	Oliver	Open		ereqwr	Clementown Mills	VA	43232-4444	Current	
10396	Queen	Oliver	Open	(898) 989-8989	1313 Mockingbird Lane	Acorn	VA	11111-1111	Current	ASE
10392	Client2	Neutral	Open		456 Mason Street	Agricola	VA	23212-	Current	ASE
10391	Client1	Neutral	Open		123 Super Street	Accomac	VA	23212-	Current	SN

The "Status Neutral Enrolled" view shows all the clients currently enrolled in Status Neutral with any program code except "ASE."

Last Name	First Name	MI	Provide ID	Date Of Birth	Primary Phone	Program Code
Client1	Neutral		10391	05/12/2000		SN
Jacks	Apple		10473	04/15/1988		SN

The "Status Neutral Enrolled ASE Only" view shows all the clients currently enrolled in Status Neutral with a program code of "ASE."

Last Name	First Name	MI	Provide ID	Date Of Birth	Primary Phone	Program Code
Queen	Oliver		10396	04/19/1987	(898) 989-8989	ASE
Test	SNClient		10573	11/10/2000		ASE