



Provide Enterprise

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Client Registration & Client Profile

Provide Enterprise User Guide
Virginia Department of Health

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Client Registration

Intake is the process of collecting information concerning the client and his or her support system, as well as determining program eligibility prior to any services being provided and funded. The following procedures should be followed at the time a new client is to be entered in the Provide® Enterprise system.

Registration Verification

Prior to entering the client in the Provide® Enterprise database, you should check to make sure that the client has not previously been entered in the database. To verify that the client has not already been registered, follow the steps below.

Find Client

The Find Client function will search the entire database to see if the client has previously been entered in the system and, therefore, has received Ryan White Part B services in the past. To do this, follow the steps below:

- Select the Find – Client screen in the menu bar.
- This will activate the Search criteria screen, seen in the figure below:

The screenshot shows the 'Find Client' search criteria screen. The title bar includes 'Close' and 'Search' buttons. The main window has a 'Find Client' tab. On the left, a list of search criteria is displayed: First Name, Middle Initial, Last Name, Birth Date, Sex Assigned at Birth, SSN, URN, Provide Client ID, Surveillance State No, PBM Member ID, Medicaid ID, Member ID/Policy Number, ClientProfileID, and Find Client Results. On the right, corresponding input fields are provided: text boxes for First Name, Middle Initial, Last Name, and Sex Assigned at Birth; a date picker for Birth Date; a masked text box for SSN; and text boxes for URN, Provide Client ID, Surveillance State No, PBM Member ID, Medicaid ID, Member ID/Policy Number, and ClientProfileID.

- Fill out the search criteria as appropriate and click on the Search button to complete the search.

NOTE: You may not want to enter full SSN or names in the appropriate fields, due to the possibility of prior data entry errors.

- You can enter an asterisk (*) as a wild card to do more general searches.
- After the search is completed, the client records that match the search criteria are listed and displayed below the search dialog in a view like the one below:

Name	Name	Name	Gender	Birth	Home	Street Address	City	State	Zip
Jane	Doe		Female	2/26/2013	414-555-5555				53051

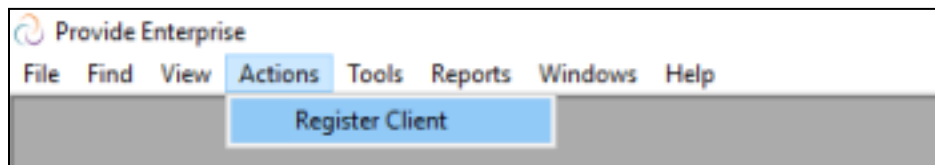
Simply double click on the record that you wish to view in order to open the desired Client Profile.

- If, after reviewing the Client Profile, you determine that it is not the client that is present at your agency to receive services, you can move onto the next steps and actually register the client in the system.

Client Registration

If, after searching the database, you determine that the client is **NOT** in the database, you will want to register the client in the system. To do that, follow the steps below:

- From the Menu Bar, select **Actions – Register Client**.



- The Register Client screen will appear. The Register screen appears as shown below. Fill in the appropriate fields. Some of the notable fields in the Register Client form have been detailed below.

- Legal First Name: Enter the client's legal First name. I.E. if the client's legal name is William but goes by Bill, please enter William and not Bill.
- Legal Last Name: Enter the client's legal Last name.
- Birth Date: Enter the client's birth date.
- Current Gender Identity: Select what the client's current gender identity is.
- Sex Assigned at Birth: Select what sex the client was assigned at birth.
- URN: This field will automatically populate based on the client's name, date of birth, and gender.
- Current HIV Disease Stage: Select the current HIV Disease Stage of the client.
- Housing Type: Select the client's housing situation.
- Street Address 1: Enter the client's current street address.
- State: Select what state the client's current street address is located.
- County: Select what county the client's current street address is located.
- City: Select what city the client's current street address is located.
- Agency Assigned Client ID: The "Agency Assigned Client ID" should reflect the ID number that is used at your agency to identify clients.

Close Register Client Link to Client Consent Form

Register Client

Register Client Consent

Legal First Name *

Legal Middle Initial *

Legal Last Name *

Birth Date *

Current Gender Identity *

Sex Assigned at Birth *

Social Security Number *

URN 99990101019

Current HIV Disease Stage *

Primary Language *

Preferred Written Communications Language *

Housing Type *

Street Address 1 *

Apt / Lot / Floor *

State VA *

County *

City *

Zip Code *

Primary Phone *

Primary Phone Type *

Primary Phone Message *

Secondary Phone *


Secondary Phone Type *

Secondary Phone Message *

Provide Client ID 10087

Agency Assigned Client ID *

On the “Consent” tab of the Register Client form, attach or scan in the client’s Virginia HIV/AIDS Service Network Consent. For a link to a blank Consent form, click

 [Link to Client Consent Form](#)

Close Register Client Link to Client Consent Form

Register Client

Register Client Consent

Attachment Type *

Image

Images

Attach Save As

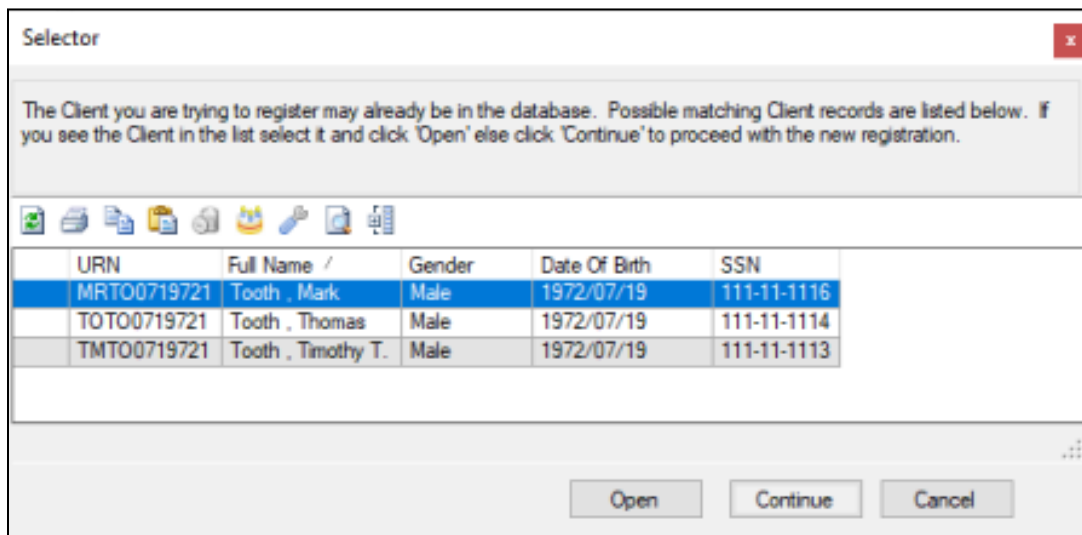
Once the form is completed, click the **Register Client** button on the button bar.

At this time, the system will start the duplicate check process to see if this client may already be in the database. The duplicate check logic looks to ensure there are no existing client records that are possible duplicates of the client you are trying to register.

If the client you are registering matches an existing client file with any of the below client information, you will not be allowed to register the duplicate client.

- Exact match on SSN
- Exact match on URN
- Exact match on First and Last Name (only shows for users from your agency unless Virginia DOH)
- Exact match on Last Name and Birthdate (only shows for users from your agency unless Virginia DOH)
- Exact Match on Client ID
- Exact match on Date of Birth, the register client's Last Name to existing client's First Name, and the register client's First Name to existing client's Last Name (to catch name reversal errors)


If any of the above matches are made to an existing client file, for which you have visibility, a screen similar to the following will appear:



The Selector window displays a warning message: "The Client you are trying to register may already be in the database. Possible matching Client records are listed below. If you see the Client in the list select it and click 'Open' else click 'Continue' to proceed with the new registration." Below the message is a table with the following data:

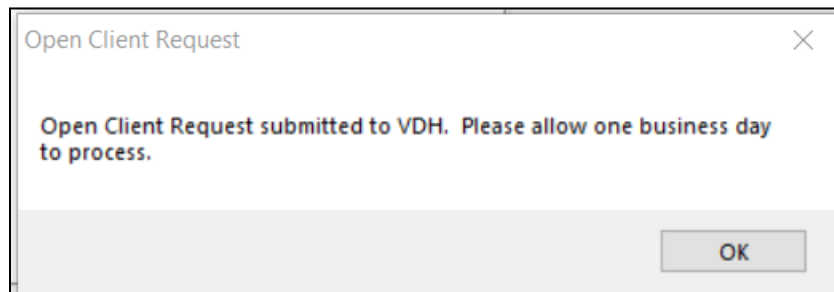
URN	Full Name /	Gender	Date Of Birth	SSN
MRT00719721	Tooth , Mark	Male	1972/07/19	111-11-1116
TOT00719721	Tooth , Thomas	Male	1972/07/19	111-11-1114
TMT00719721	Tooth , Timothy T.	Male	1972/07/19	111-11-1113

At the bottom of the window are three buttons: "Open", "Continue", and "Cancel".

If you believe that one of the clients listed in the duplicate check window is the client you are trying to register, simply place a checkmark  next to the client and click the Open

button to go to that Client Profile.

If no match is found that you can see, but the system detects a potential matching client for which you can see, then an Open Client Request will be submitted to the state.

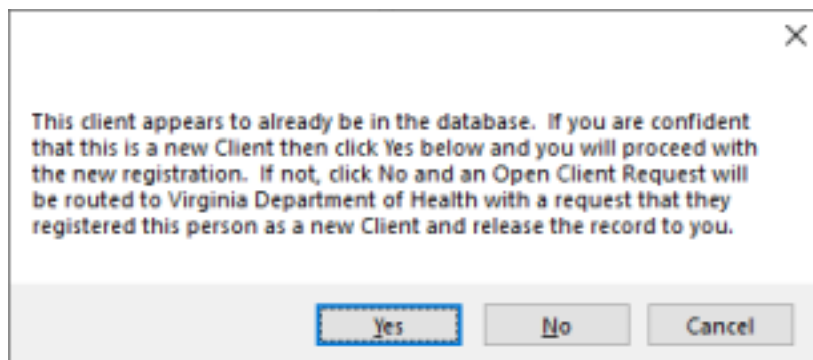


If you believe that none of the clients listed in the duplicate check window are the client you are trying to register, click the **Continue** button. This will do a duplicate check within the system for all of the Virginia Department of Health excluding the clients that were just shown in the previous screen. The system will look to see your role and determine if you can register as a new client. If not able to create a new client the system will send it to the Virginia Department of Health as an Open Client Request.

Otherwise, click on the **Cancel** button to cancel your new client registration.

If you click the **Continue** button it will do a duplicate check against the database for all Organizations within that Program type.

If your security settings allow you to override potential duplicate clients, and you are a sub-recipient agency for the Virginia Department of Health, the following prompt will appear.




If you click **Yes**, it will create a new registration for that client. If you click **No**, then an Open Client Request will be automatically sent to the Virginia Department of Health. If you click **Cancel**, the system will cancel out of the submission of the client you are

registering.

If your security settings do not allow you to override potential duplicate clients, the system will automatically send an Open Client Request to the Virginia Department of Health.

Completing the Client Profile

This section of the guide will review all of the tabs found within the Client Profile. To edit the Client Profile, click the  Edit button to place the record in “edit mode.” It is important to also note that information contained within the Client Profile is also collected during an Eligibility Assessment, and then copied to the Client Profile automatically. More details about Eligibility Assessments can be found in the Eligibility Assessment User Guide.

Profile Tab

The Profile tab of the client file shown in the below image is where you will find key client information, such as name, date of birth, and SSN:

Client Profile : Paper Clip ()	
Virginia Department of Health - Care Services : Test User [08/22/2024]	
Profile	Demo Address Profiles Care Team Finances Health Benefits ADAP Enrollments Medical Eligibility
Alert	
WARNING: Do not take screenshots or compile lists or reports that contain protected health information (PHI) or personally identifiable information (PII), such as client name, address, social security number, or the Provide ID number UNLESS this information is redacted or securely transmitted, such as with email encryption. Do not send any PHI or PII in an unsecured email. HIPAA compliance requires secure transmission of PHI and PII, so only use secure platforms or an email encryption program when sharing PHI or PII. HIPAA also requires that when using, sharing, or requesting PHI or PII that you limit the PHI and PII to the minimum necessary amount needed for accomplishing the intended purpose of the use, disclosure, or request. Failure to comply with safeguarding PHI and/or PII could result in an unauthorized use and disclosure of the data and cause a breach of client confidentiality, which is subject to the remedies outlined above, in addition to applicable contractual remedies.	
Status	Open
Date of Last Service	
Legal Last Name	* Clip
Legal First Name	* Paper
Legal Middle Initial	
Name Suffix	*
Preferred Name	
Pop-up Alert Message	
SSN	- -
URN	PPCI0817841
Provide Client ID	57906
Old ADAP Client ID	
Surveillance StateNo	
PBM Member ID	
RW Consent Date Redcap	
Client Intake Date Redcap	
Web Account	
Web Account History	
Date ▾	Status Form Email Okay Email Address Text Okay Cell Phone
E Messaging Setup	
Okay to send email?	No
Okay to send text messages?	No

The following fields may be edited.

- Preferred Name: If a client has a preferred name or alias, enter it here.
- Pop-up Alert Message: The field is used to enter a pop-up alert that will display any time the Client Profile is accessed by a user.
- Surveillance State No: If the client has a state surveillance ID, it can be used to help match client records with the state's surveillance system.
- PBM Member ID: This field can be used to identify the member ID assigned by the Prescription Benefits Manager (Ramsell).

Demo Tab

The Demographic section of the client file is where all vital demographic information on a client is located. Move through each field, filling all available information.

- Race – Check all that apply – If you select “Asian” or “Native Hawaiian/Other Pacific Islander” extra fields will appear asking you to specify the client’s race (shown in the image below).
- Ethnicity – If you select “Hispanic”, an extra “Ethnicity - Hispanic” will appear asking you to specify the client’s ethnicity.

Close
Save
Create
View
Action
Print

Client Profile : Mary Tooth ()
Virginia Department of Health - Care Services : Jason Griffin/co [04/27/2021]

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

Birth Date
07/19/1972

Current Age
48

Current Gender Identity
Female

Sex Assigned at Birth
Female

Gender Pronoun

Race - Check all that apply

☐ American Indian/Alaska Native
☒ Asian
☐ Black or African American
☒ Native Hawaiian/Other Pacific Islander
☐ White

Asian

☐ Asian Indian
☐ Chinese
☐ Filipino
☐ Japanese
☐ Korean
☐ Vietnamese
☐ Other

Native Hawaiian Pacific Islander

☐ Native Hawaiian
☐ Guamanian or Chamorro
☐ Samoan
☐ Other Pacific Islander

Ethnicity
Hispanic

Ethnicity - Hispanic

☐ Mexican
☐ Puerto Rican
☐ Cuban
☐ Other

Citizenship

Primary Language

Secondary Language

Preferred Spoken Language

Preferred Written

Veteran (Yes/No)?

Address Tab

The Address Tab in the Client Profile holds the client's current residential address, mailing address, and phone information.

Close
Save
Create
View
Action
Print

Client Profile : Mary Tooth ()
Virginia Department of Health - Care Services : Jason Griffin/co [04/27/2021]

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

Home Address

Click to update Address ==>

Update

Housing Type

Stable/Permanent

Address 1

120 Jessie's Lane

Apt / Lot / Floor

State

VA

County

Pittsylvania

City

Sandy River

Zip Code

-

Mailing Address

OK To Send Mail?

Address 1

Address 2

City

State

Zip

Comments

Telephone Numbers

Primary Phone

Primary Phone Type

Primary Phone Message

Secondary Phone

Secondary Phone Type

Secondary Phone Message

To update the address, you must click on the Update button. When you click on this button, you will see the following Address screen:

Address : Paper Clip ()
Virginia Department of Health - Care Services : Peggy Griffith/GTI/ADMIN [12/02/2024]

Residence **Mail** Documentation

Status * In Progress

Date Effective * 12/02/2024

Update Type Interim

Housing Type * Renting and living in an unsubsidized room or house or apartment

Housing Status Stable/Permanent

Street Address 1 ? * 8901 Office St

Apt / Lot / Floor ?


State * VA

County * Arlington

City * Arlington

Zip ? * 47328-____

Fill in the fields with the client's current residential address information.

On the Mail tab, the client can choose whether the client wants mail to be sent to an address. If you choose yes, fill in the address details. If there is address information in the previous screen and this is the same address the client wants as the mailing address, click on the user  button on the right on "Address 1".

If the client does not want mail sent to an address select No.

Address : Paper Clip ()
Virginia Department of Health - Care Services : Peggy Griffith/GTI/ADMIN [12/02/2024]

Residence **Mail** Documentation

Mail Address

OK To Send Mail? * Yes

Addressee (Care Of Line) ? Paper Clip

Address 1 * 8901 Office St

Address 2

State * VA

Mail City * Arlington

Zip ? * 47328-____

Comments

Comments

On the Documentation tab, you can review already existing proof of residency documentation or you can add new proof of residency documentation.

Address : Paper Clip ()
Virginia Department of Health - Care Services : Peggy Griffith/GTI/ADMIN [12/02/2024]

Residence Mail Documentation

Is existing documentation sufficient? Yes

Proof of Residency Document(s)

Icons: Document, Folder, Paper, Mail, Calendar, Key, Scan, Add Scan Document

Date	Type	Delete Flag
2024/10/15	Proof of Residency	N

Select whether the existing documentation is sufficient. If not, you will need to answer “Why Not?”. If existing documentation is sufficient, you should add new proof of residency documentation. To add new proof of residency documentation, see the “Create Proof of Residency Scan” section below.

When the address update is complete, hit the **Submit** button to submit your changes. Since address changes have the possibility of impacting a client’s eligibility, once you submit the address update, it will be in a Submitted status, and will need to be reviewed by someone who has access to review and “Complete” the update.

Once the update has been submitted and set to Completed, the final step will be to **Process** the updated address record, by a user with the appropriate entitlements.

**Note that if a client has VA MAP, the update request will be routed to VA MAP to be processed.

**Note that if a client has moved out of Virginia, the client will no longer be eligible for Ryan White or VA MAP services.

Create Proof of Residency Scan

Click the  **Add Scan Document** button from the embedded view.

Scan : Paper Clip ()
Virginia Department of Health - Care Services : Peggy Griffith/GTI/ADMIN [12/02/2024]

Scanned Document

Document Date * 12/02/2024

Document Type * Proof of Residency

Proof of Residency - Tier 1 ? Unexpired Virginia Driver License

Proof of Residency - Tier 2

☐ Current Virginia Voter Registration card (current address)

☐ Letter from lease holding roommate 1

☐ Copy of public assistance/ benefits document

☐ Court Corrections Proof of Identity

☐ Homeowners association

☐ Military/Veteran's Affairs

☐ Virginia vehicle title or registration card

☐ Other

Comments

Attachment Type ? * File

File Attachments *

Attach Save As Launch

Select the Proof of Residency Tier 1 and/or Tier 2 types and click  **Attach** to browse and attach the file.

When finished, click on the **Close** button and then select **Yes** to save your changes. You will then be brought back to the Address Update screen. Or, click on **Save and Create Another** to save this scan and open another blank Scan record.

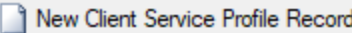
Profiles Tab

This section of the client profile is to view and/or create Client Service Profiles and Client Service Category Profiles.

Client Service Profiles

Client Service Profile records show whether a client is currently opened or closed to your agency.

To create a Client Service Profile, click the New Client Service Profile Record button above the view.

Profile	Demo	Address	Profiles	Care Team	Finances	Health Benefits	ADAP
Client Service Profiles							
							
Status ▾	Effective	Deleted	Agency Client ID	Agency /			

Fill out appropriate fields as needed.


Close
ABC
Link to Client Profile

Client Service Profile : Mary Tooth ()
Virginia Department of Health - Care Services : Jason Griffin/GTI/ADMIN [05/07/2021]

Main

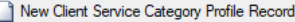
Agency Assigned Client ID
Status
Status Effective
Status Reason
First Service Date (auto set nightly)
Last Service Date (auto set nightly)
First Ambulatory Service Date (auto set nightly)
Last Ambulatory Service Date (auto set nightly)
Client Service Profile History Records

Open
05/07/2021
New Client



Date ▾ Deleted Field New Value Change Reason Change By

Client Service Category Profile Records



Status ▾ Effective / Deleted Agency / Service Category / Assigned Provider Last Service Date

Here, you can see the current status of the Client Service Profile and a history of every time this Client Service Profile record has been opened or closed.

Depending on the status of the Client Service Profile, you will see either a Close button or an Open button at the top of the record. You can use these buttons to open or close the client to your agency.

Care Team Tab

This section of the client profile is where the HIV Care Provider, HIV Case Management Provider, Pharmacy, Authorized Representatives and Provider Relationships are located.

Alternate Contacts are those relationships that were converted from the prior ADAP database for visibility purposes. Going forward, Authorized Representatives and Providers should be entered in the appropriate fields.

Client Profile : Marie Castle ()
Virginia Department of Health - Care Services : Peggy Griffith/GTI/ADMIN [06/30/2021]

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

HIV Care Provider

Primary HIV Care Clinic/Facility/Practice
None

Physician providing HIV Medical Care
None

HIV Case Management Provider

HIV Case Management Agency
None

HIV Case Manager
None

Pharmacy

Preferred Retail Pharmacy

Authorized Representatives

Number of authorized representatives
0

Alternate Contacts

Add Alternate Contact

Status /	Share Information	Contact Name /	Client Relationship	Primary Phone Number	Deleted
Active	Yes	Sandy Castle	Partner	(414) 555-4887	N

Provider Relationships

Add Provider Relationship Record

Status /	Relationship /	Provider /	Deleted
----------	----------------	------------	---------

Finances Tab

The Finances tab of the Client Profile is where the client's financial information is located. The Finances tab has four subtabs: Household, Income, Adjustments, Totals. On Household and Income Subtabs, you may view or update the financial data.

To update the client's financial data, you must click on the **Update** button. This **Update** button will be found on two of the Finances Subtabs (Household and Income).

Client Profile : Mary Tooth ()
Virginia Department of Health - Care Services : Jason Griffin/co [04/27/2021]

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

Household Income Adjustments Totals

Click to update Household and/or Income Data ==>

Total Household Size

Client Household Members

☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Status /	Last Name /	First Name /	Relationship	Emergency	Deleted

Summary tab

This tab in the Income History record holds the income history's status, date effective, and update type.

Income History : Mary Tooth ()
Virginia Department of Health - Care Services : Jason Griffin/GTI/ADMIN [05/07/2021]

Summary Household Income Adjustments Totals

Status * In Progress

Date Income Effective * 05/07/2021

Update Type * Interim

Changes Summary

Fill in the fields as appropriate.

- **Status:** Defaults to "In Progress" until the income record is submitted.
- **Date Income Effective:** Enter the date the income became effective.

- **Update Type:** Automatically defaults to the update type.
- **Changes Summary:** Detail about what was changed.

Household Tab

This tab shows the client's current household size.

Alternate Contacts are those relationships that were converted from the prior ADAP database for visibility purposes. Going forward, Authorized Representatives and Providers should be entered in the appropriate fields.

Client Profile : Marie Castle ()
Virginia Department of Health - Care Services : Peggy Griffith/GTI/ADMIN [06/30/2021]

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

Household Income Adjustments Totals










Click to update Household and/or Income Data ==>

Update

Total Household Size










1

Client Household Members

Status /	Last Name /	First Name /	Relationship	Emergency	Deleted

Alternate Contacts

Status /	Share Information	Contact Name /	Client Relationship	Primary Phone Number	Deleted

Click on the **Add Household Member** button to add an individual to the client's household.

Close Save And Create Another

Household Member : Mary Tooth ()
Virginia Department of Health - Care Services : Jason Griffin/GTI/ADMIN [05/07/2021]

Main

Status *

First Name *

Last Name *

Relationship to Client *

Date Of Birth *

Okay to Contact? *

Comments

Fill in all fields with the available household member information. When you are finished, click on the **Close** button and select **Yes** to save your changes.

After you add or update any household members records, you should recompute the household size. To recompute the household size, click on the **Recompute** button on the Household Tab in the Income History record. The household size will then be recomputed.

Income Tab

The Income tab is where you document the client's incomes. Input the total monthly income of the applicant and all legal household members in the respective fields. Any income type listed in all caps is not calculated for MAGI, but is a required field. Fill in each income field with the appropriate amount. The notable fields have been detailed below.

Close Create Scan Submit

Income History : Mary Tooth ()
Virginia Department of Health - Care Services : Jason Griffin/GTI/ADMIN [05/07/2021]

Summary Household **Income** Adjustments Totals

Current Monthly Household Income
 Note: Input the total monthly income of applicant and all legal household members in the respective fields. Any Income type listed in all caps is not calculated for MAGI, but is a required field of entry.

Click to Document that the Household Has Zero Income ==>

Wage Income Calculator

Click the **Household Has Zero Income** button to fill all fields with \$0.00. Then go through the fields to update the client's household income.

Wage Income Calculator button is a calculator to help with processing the wages.

Dialog Income Calculator for Mary Tooth

Dialog Income Calculator

Wage Income Calculator

Number of Jobs

Number of Current Jobs * 0

Other

Other Monthly Wage Income

Self Employed

Estimated Monthly Income

Totals

Income Calculation * \$0.00

Comments

OK

Cancel

- **Number of Current Jobs:** Select between 0 and 6 jobs.

Depending on the amount of jobs in the household will determine the next fields. For information purposes say you select anywhere from 1 to 6 jobs. The form will populate depending on your selection. Repeat next step for all the jobs selected.

- **Job – Pay Frequency:** Select whether the client gets paid monthly, weekly, bi-weekly, 2x month or year to date. This will determine what happens next.
 - **Monthly:** Will ask for two paystubs.
 - **Weekly:** Will ask for eight paystubs.
 - **Bi-Weekly:** This means that the client gets paid once every other week. Will ask for 4 paystubs.
 - **2x Month:** This means that the client gets paid twice per month. Will ask for 4 paystubs.
 - **Year To Date:** Will ask for Start Date and Thru Date. Enter Year To Date Amount.
- **Other Monthly Wage Income:** Enter any other monthly wage income.
- **Estimated Monthly Income:** Enter any monthly income from self-employment.
- **Income Calculation:** This field is computed depending on your entries. This field will be carried over to the “Wages, salaries, tips, etc.” field on the “Income History” Tab.
- **Comments:** Enter necessary comments.

Click the **OK** button to continue. You will be returned to the Income tab. Enter any additional income amounts as necessary in the other income categories.

The screenshot shows a web application interface for 'Income History'. At the top, there are buttons for 'Close', 'Create Scan', and 'Submit'. Below this is a header section with the text 'Income History : Mary Tooth ()' and 'Virginia Department of Health - Care Services : Jason Griffin/GTI/ADMIN [05/07/2021]'. A tabbed interface is present with 'Summary', 'Household', 'Income' (selected), 'Adjustments', and 'Totals'. The 'Income' tab contains a section titled 'Current Monthly Household Income' with a note: 'Note: Input the total monthly income of applicant and all legal household members in the respective fields. Any Income type listed in all caps is not calculated for MAGI, but is a required field of entry.' Below this note are two buttons: 'Household Has Zero Income' and 'Wage Income Calculator'. A list of income categories follows, each with a corresponding input field: 'Wages, salaries, tips, etc. (Form W-2)', 'Taxable interest (1099-INT form)', 'Tax-exempt Interest (Form 1099-INT box 8)', 'Ordinary Dividends (1099-DIV box 1a)', 'Exempt Interest Dividends (Form 1099-INT box 10)', 'Taxable refunds of state/local income taxes', 'Alimony or Other Spousal Support Received', and 'Business or Self Employed income/loss (Schedule C or C-EZ)'.

Adjustments Tab

The Adjustments tab is where you document the client's income adjustments. Input the total monthly adjustments of the applicant and all legal household members in the respective fields. Any income adjustment type listed in all caps is not calculated for MAGI, but is a required field. Fill in each adjustment field with the appropriate amount.

If the client has zero income, click on the **Household Has Zero Adjustments** button and each adjustment field will automatically fill in as \$0.00.

Close Create Scan Submit

Income History : Mary Tooth ()
Virginia Department of Health - Care Services : Jason Griffin/GTI/ADMIN [05/07/2021]

Summary Household Income Adjustments Totals

Current Monthly Household Income Adjustments
 Click to Document that the Household Has Zero Adjustments ==> [Household Has Zero Adjustments](#)

Educator expenses	\$0.00
Business expenses (Form 2106 or 2106-EZ)	\$0.00
Health Saving Account (Form 8889)	\$0.00
Moving Expenses (Form 3903)	\$0.00
Deductible part of Self-Employment Tax (Schedule SE)	\$0.00
Self-employed SEP, SIMPLE plans	\$0.00
Self-employed Health Insurance Deduction	\$0.00
Penalty on early withdrawal of savings	\$0.00
Alimony paid	\$0.00
IRA deduction	\$0.00
Student loan interest deduction	\$0.00
Tuition and fees (Form 8917)	\$0.00
DOMESTIC PRODUCTION ACTIVITIES (Form 8903)	\$0.00

Totals Tab

The totals tab will calculate the monthly gross income and the household poverty level percentage.

After the employment, household, income, and adjustments tabs have been updated as necessary, you should recompute the client's income totals. To do this, click on the **Recompute** button found on this Totals tab. The income totals will then be recomputed.

Close ABC Create Scan Submit

Income History : Mary Tooth ()
Virginia Department of Health - Care Services : Jason Griffin/GTI/ADMIN [05/07/2021]

Summary Household Income Adjustments **Totals**

Totals
Click to recompute all totals fields below ==> Recompute

Household Monthly Gross Income Adjustments *

Household Monthly Gross Income *

Household Poverty Level % *

Household Monthly MAGI *

Household MAGI Poverty Level % *

Proof of Income Documentation
Proof of Income Document(s)

Date / Type / Delete Flag /

When the income update is complete, hit the **Submit** button to submit your changes.

Since income changes have the possibility of impacting a client's eligibility, once you submit the address update, it will be in a Submitted status, and will need to be reviewed by someone who has access to review and "Complete" the update.

Once the update has been submitted and set to Completed, the final step will be to **Process** the updated address record, by a user with the appropriate entitlements.

**Note that if a client has VA MAP, the update request will be routed to VA MAP to be processed.

**Note that if a client's household income exceeds the FPL limits, the client will no longer be eligible for Ryan White or VA MAP services.

Create Proof of Income Scan

In the Income History record, click on the **Create Scan** button.

Close ABC Create Scan Submit

Income History : Mary Tooth ()
Virginia Department of Health - Care Services : Jason Griffin

Summary Household Income Adjustments Totals

Totals

In the Scan record, enter the Document Date, select “Proof of Income” as the Document Type, select the “Proof of Income”, and then scan in or attach the client’s proof of income documentation.

Close ABC Save And Create Another View

Scan : Mary Tooth ()
Virginia Department of Health - Care Services : Jason Griffin/GTI/ADMIN [05/07/2021]

Scanned Document

Document Date * 05/07/2021

Document Type *

Comments

Attachment Type * File

File Attachments *

Attach Save As Launch

When finished, click on the **Close** button and then select **Yes** to save your changes. You will then be brought back to the Income Update screen. Or, click on **Save and Create Another** to save this scan and open another blank Scan record.

When you have finished entering the client’s current income information on all tabs in the Income Update, click on the **Submit** button to submit your changes. After you submit the Income update, you will be brought back into the client’s Client Profile.

Health Benefits Tab

The Health Benefits tab in the Client Profile is where you can view and update the client’s private health insurance and public health benefits. The Health Benefits tab consists of two subtabs: Private Health Insurance and Public Health Benefits.

Client Profile : Mary Tooth ()
Virginia Department of Health - Care Services : Jason Griffin/co [04/27/2021]

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

Public Health Benefits Private Health Insurance

Click to update Health Benefits ==>

Medicare Status

Medicaid Date Last Verification Completed

Medicaid Coverage?

Medicaid ID

Comments

To update any of the health benefits, you must click on the **Update** button. You can click on **Update** on either of the two Health Benefits subtabs.

When you click on the **Update** button, you will see a view similar to this:

Close ABC Create Scan Submit Create Health Plan

Health Benefits : Mary Tooth ()
Virginia Department of Health - Care Services : Jason Griffin/GT1/ADMIN [05/07/2021]

Summary Benefits Insurance Services

Status

Update Type

Date Effective

Summary Tab

On the Summary tab in the Health Benefits update, fill in the appropriate fields:

- **Status** – defaults to “In Progress” until the health benefits record is submitted.
- **Update Type** – automatically defaults to the update type.
- **Date Effective** – select the date the health benefits information became effective.

Benefits Tab

Select the client’s Medicare status. If you select any status other than “No Benefits”, additional fields will show for you to fill in the client’s insurance information.

Close ABC Create Scan Submit Create Health Plan

Health Benefits : Mary Tooth ()
Virginia Department of Health - Care Services : Jason Griffin/GTI/ADMIN [05/07/2021]

Summary Benefits Insurance Services

Medicare

Status * Active

Effective Date *

Medicare Coverage *

Comments

Medicare Proof of Coverage Document(s)

Date	Type	Program	Delete Flag

Medicare Prescription Drug Plan (PDP)

Status * No Benefits

Medicaid

Medicaid Checked No

Medicaid Status?

Medicaid ID Number

Comments

If the client has Medicare coverage, you need to create a proof of coverage document by clicking on the **Create Scan** button.

In the Scan record, enter the Document Date. Select “Health Benefits Documentation” as the Document Type, “Proof of Coverage” as the Health Benefits Document Type (see image below).

Then, select either “Medicaid, Medicare, Medicare Part D or Private Medical” as the Health Benefits Program.

Close | Save And Create Another | View

Scan : Mary Tooth (0)
Virginia Department of Health - Care Services : Jason Griffin/GTI/ADMIN [05/07/2021]

Scanned Document

Document Date * 05/07/2021

Document Type * Health Benefits Documentation

Health Benefits Document * Proof of Coverage

Health Benefits Program *

Comments

Attachment Type * File

File Attachments *

Attach | Save As | Launch

Next, scan in or attach the client's proof of coverage documentation.

When finished, click on the **Close** button and then select **Yes** to save your changes. You will then be brought back to the Health Benefits Update screen.

When you are finished, click the **Close** button and then select **Yes** to save your changes.

Insurance Tab

If the client has private health insurance (either through ACA, Employer, or other Private Source), enter the required information for the policy based on coverage documentation provided by the client.

Summary | Benefits | Insurance | Services

Primary Private Insurance

Status * Active

Date Effective * 01/01/2021

Policy Source * Employer

Insurance Company Name * CareFirst BlueChoice

Insurance Plan Name * PPO Plus

Private Member ID * 813202101

Family Plan? * No

Medical Coverage? * Yes

Mental Health Coverage * No

Substance Abuse Coverage * No

Substance Abuse Residential Benefits? * No

Pharmacy Coverage Included? * No

Comments

Verified client meds are not covered.

Private Proof of Coverage Document(s)

Add Scan Document

Date	Type	Program	Delete Flag
2021/08/13	Proof of Coverage	Private Medical	N

Dental Care Policy

Status * No Benefits

Vision Care Policy

Status * No Benefits

Next, scan or attach the Proof of Coverage documentation provided by the client.

If the client also has access to private coverage for dental and/or vision care, enter the required information for those policies based on the coverage documentation provided by the client. Then scan or attach the proofs of coverage.

When you have finished entering the client's current health benefits information on all four tabs in the Health Benefits Update, click on the **Submit** button to submit your changes. After you submit the Health Benefits update, you will be brought back into the client's Client Profile.

ADAP Tab

The ADAP Tab shows links to all ADAP enrollment records as well as historical Client Notes. Permissions related to updating any VA MAP enrollments are limited to the VA MAP team.

The screenshot displays the ADAP Tab within a software interface. The top navigation bar includes tabs for Profile, Demo, Address, Profiles, Care Team, Finances, Health Benefits, ADAP, Enrollments, Medical, and Eligibility. The ADAP Tab is currently selected.

The main content area is divided into several sections:

- Medication Assistance Enrollment Records:** Contains a table with columns: Date Effective, Date End, Status, Benefit Level, Medication Pickup Site, and Deleted? / . The table shows two records: one enrolled on 2021/08/02 and one terminated on 2021/07/01.
- Premium Assistance Enrollment Records:** Contains a table with columns: Date Effective, Date End, Status, Policy Type, Carrier, Plan Name, and Deleted? / . The table shows one record enrolled on 2021/08/01.
- Enrollment Links:** Contains a table with columns: Status, Date Linked, Date Terminated, Primary, Secondary, and Deleted?.
- HCV Treatment Applications:** Contains a table with columns: Start Date and Status.
- ADAP Client Notes:** Contains a table with columns: Deleted, Date, Note Type, Program, and Entered By. The table shows one note entered on 2021/08/17.

Medication Assistance Enrollment Records

An embedded view shows all prior and current enrollments in direct ADAP. To view any record, double-click on the record to open the detail.

Date Sent	Status
2021/08/11	1

Changing the Enrollment Record

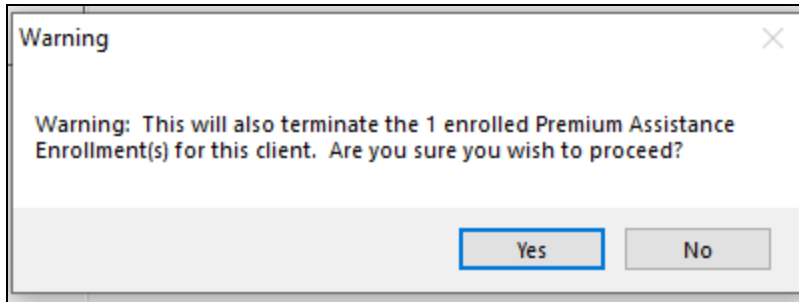
Click the Change button to change either the Benefit Effective Date, Benefit End Date, or Pickup Location for the enrollment record.

Terminating the Enrollment Record

Click the **Terminate** button to terminate the enrollment.

Enter the effective date of the termination, and the reason for termination. Then click OK.


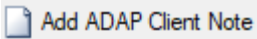
If the client also has a Premium Assistance enrollment, you will receive a warning message which will alert you that the Premium Assistance enrollment will also be terminated.



Premium Assistance Enrollment Records

An embedded view shows all prior and current enrollments in premium assistance (MPAP, ICAP, HIMAP).

Other embedded views on this tab include:

- **Enrollment Links** – embedded view allows you to link another client who is covered under the same family insurance policy.
- **HCV Treatment Applications** – embedded view shows all prior and current applications for HCV treatments. To create a new application record, click the  button to submit a new application.
- **ADAP Client Notes** – embedded view shows historical note entries. ADAP Client Notes are available only to ADAP users to view, add, and edit notes. To add a new note, click the  button.

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

ADAP Premium Assistance Enrollment		Premium Payments	Documentation	Enrollments	Historic Data
Status	Enrolled				
Enrollment Type	New Enrollee				
Date Enrolled	08/02/2021				
Policy Type	* Private Medical				
Policy Source	* ACA Exchange				
County of Residence	Accomack				
Health Plan Carrier	* Anthem HealthKeepers				
Plan Name	* Anthem HealthKeepers Bronze X 5500				
Billing ID	* 0802202103				
Is Client receiving tax credit?	No				
...Why is Client not receiving tax credit?	Does not file taxes				
...Tax Credit Notes					
Policy Coverage Effective Date	07/01/2021				
Premium Assistance Coverage Start Date	08/01/2021				
Client Premium Amount	\$250.00				
Premium Amount	\$250.00				
Payment Cycle	Monthly				
Maximum Out of Pocket Amount	\$1,000.00				
Support Notes					

Change Premium Information

To update premium or Maximum Out of Pocket Information, click on Change > Premium Information.

Dialog Change Premium Information

Set Premium Information

Policy Type: Private Medical

Policy Source: ACA Exchange

Is Client receiving tax credit?: No

... Why is Client not receiving tax credit?: Does not file taxes

... Tax Credit Notes:

Policy Coverage Effective Date: 07/01/2021

Client Premium Amount: \$250.00

Premium Amount: \$250.00

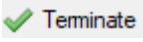
Payment Cycle: Monthly

Maximum Out of Pocket Amount: \$1,000.00

Support Notes:

OK Cancel

Terminating the Enrollment Record

Click the  **Terminate** button to terminate the enrollment.

Dialog ADAP Premium Assistance Termination

Date Terminated Effective: 12/02/2024

Reason Terminated: Other Payer Source

OK Cancel

Enter the effective date of the termination, and the reason for termination. Then click OK.

Create Button

Users with appropriate permissions may use the Create button to create additional records as needed.

✓ Create ▾

✓ View ▾

Health Plan

Payment Refund

Paid Premium Payment

Scan Document

Create Health Plan

This button allows a user to create a new Health Plan in the Health Plan directory (located in the View > Reference menu).

Create Payment Refund

This button allows a user to create a premium payment refund record. This may be needed in cases where the refund was received by check to the client outside of the Benalytics process.

Payment Refund : Starly Knight ()

Virginia Department of Health - Care Services : Peggy Griffith/GTI/ADMIN [12/02/2024]

Payment Refund

Status

Policy Type

Health Plan Carrier

Policy/Plan Name or Number

Member ID/Policy Number

Refund Reason

Received Voucher Date

Received Voucher ID

Refund Amount

Date Deposited

Comments

Posted

Private Medical

Healthkeepers

Anthem HealthKeepers Bronze X DED 5500

* ▾

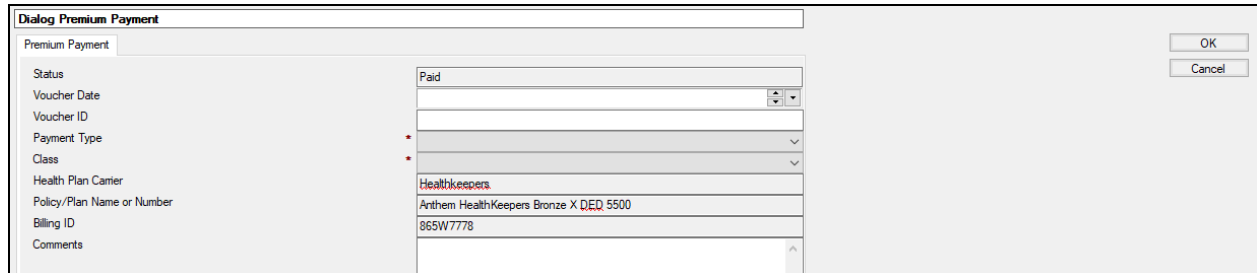
* ▴ ▾

* ▴ ▾

* ▴ ▾

Create Paid Premium Payment

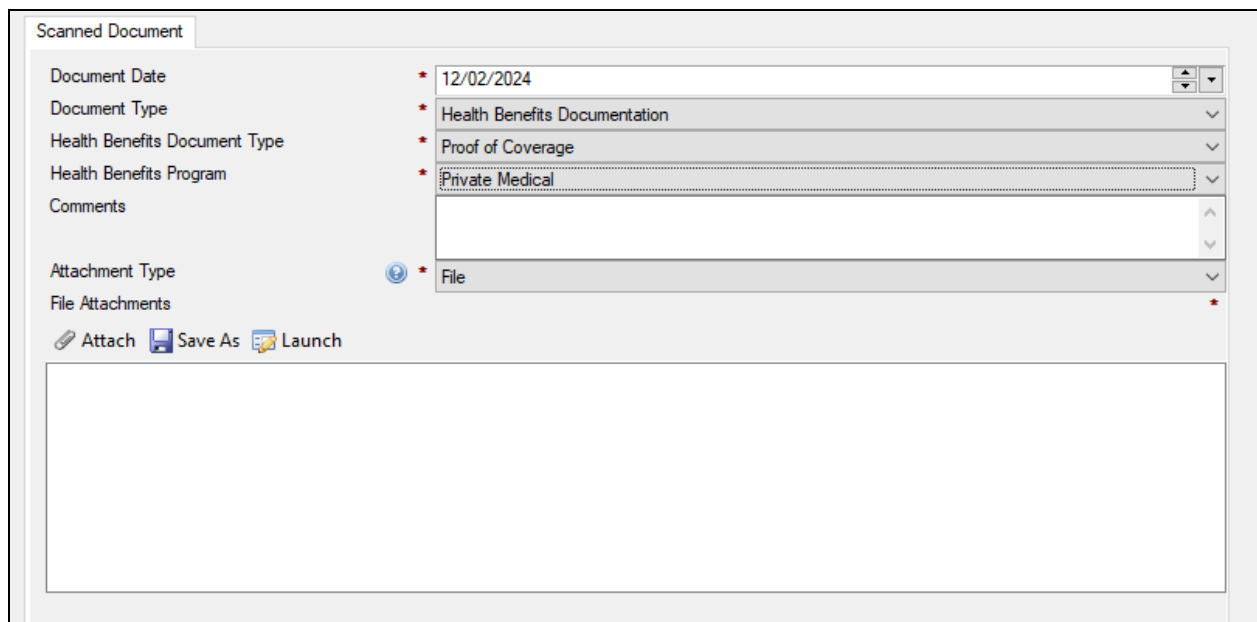
This button allows a user to create a premium payment record. This may be needed in cases where where a binder payment is made outside the Benalytics process.



The 'Dialog Premium Payment' form is a window with a title bar and two buttons: 'OK' and 'Cancel'. It contains a 'Premium Payment' tab. The form is divided into two main sections. The left section lists fields: Status, Voucher Date, Voucher ID, Payment Type, Class, Health Plan Carrier, Policy/Plan Name or Number, Billing ID, and Comments. The right section contains input fields for these fields. The 'Status' field is set to 'Paid'. The 'Payment Type' field has a red asterisk and a dropdown arrow. The 'Class' field has a red asterisk and a dropdown arrow. The 'Health Plan Carrier' field is set to 'Healthkeepers'. The 'Policy/Plan Name or Number' field is set to 'Anthem HealthKeepers Bronze X DEQ 5500'. The 'Billing ID' field is set to '865W7778'. The 'Comments' field is empty.

Create Scan Document

This button allows a user to create a Scan Document and attach it to the client profile.



The 'Scanned Document' form is a window with a title bar and a 'Scanned Document' tab. It contains a list of fields: Document Date, Document Type, Health Benefits Document Type, Health Benefits Program, Comments, Attachment Type, and File Attachments. The 'Document Date' field is set to '12/02/2024'. The 'Document Type' field is set to 'Health Benefits Documentation'. The 'Health Benefits Document Type' field is set to 'Proof of Coverage'. The 'Health Benefits Program' field is set to 'Private Medical'. The 'Comments' field is empty. The 'Attachment Type' field is set to 'File' and has a red asterisk. The 'File Attachments' field is empty and has a red asterisk. Below the fields are three buttons: 'Attach', 'Save As', and 'Launch'. The 'Attach' button has a paperclip icon. The 'Save As' button has a floppy disk icon. The 'Launch' button has a document icon.

Premium Payments

The Premium Payments tab displays any Premium Payments or Refunds that have been made by Benalytics for this enrollment.

Documentation

This tab displays any insurance-related information (premium statement or proof of insurance).

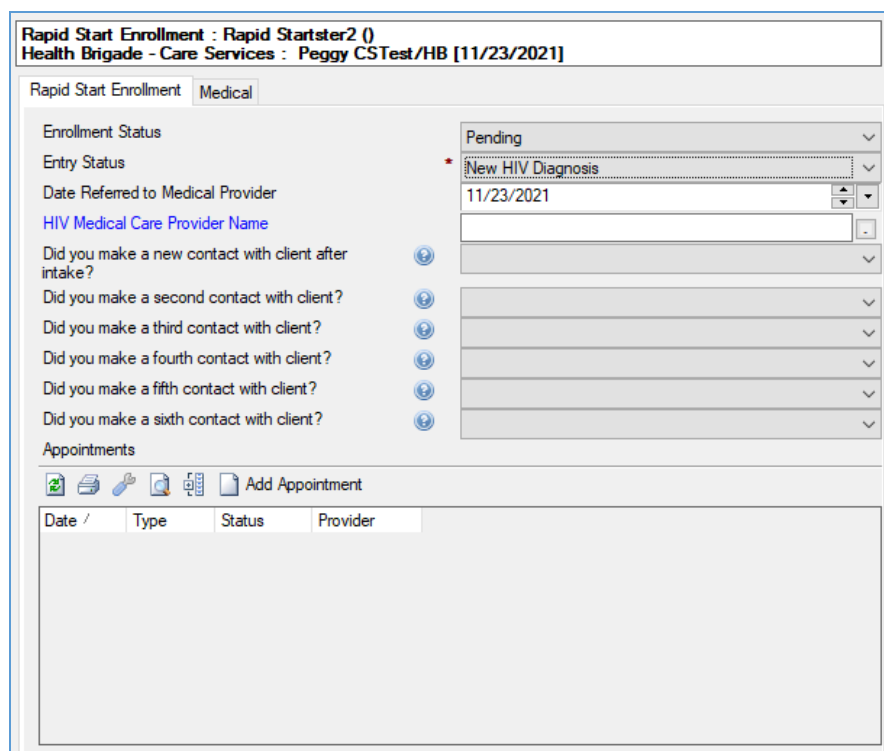
Enrollments Tab

This tab contains an embedded view that displays other enrollments where the client may be enrolled. Instructions for working with these enrollments are documented in the appropriate user guides supporting those programs.

- VDH Seamless User Guide
- VDH Rapid Start User Guide
- VDH Status Neutral User Guide
- VDH CHARLII User Guide

Create Rapid Start Enrollment

If Rapid Start is available at your agency, click  **Create Rapid Start Enrollment**.



The screenshot shows the 'Rapid Start Enrollment' form with the 'Medical' tab selected. The form title is 'Rapid Start Enrollment : Rapid Startster2 ()' and the subtitle is 'Health Brigade - Care Services : Peggy CStest/HB [11/23/2021]'. The form contains several fields and sections:

- Enrollment Status:** A dropdown menu set to 'Pending'.
- Entry Status:** A dropdown menu set to 'New HIV Diagnosis'.
- Date Referred to Medical Provider:** A date field set to '11/23/2021'.
- HIV Medical Care Provider Name:** A text input field.
- Did you make a new contact with client after intake?:** A dropdown menu.
- Did you make a second contact with client?:** A dropdown menu.
- Did you make a third contact with client?:** A dropdown menu.
- Did you make a fourth contact with client?:** A dropdown menu.
- Did you make a fifth contact with client?:** A dropdown menu.
- Did you make a sixth contact with client?:** A dropdown menu.
- Appointments:** A section with icons for adding appointments and a table with columns: Date /, Type, Status, and Provider.

Complete the required information on the enrollment form.

- **Status** – defaults to Pending. Change the status to Enrolled once the client is enrolled in the Rapid Start program.
- **Entry Status** – select whether the client is newly diagnosed or reengaging in care.
- **Referral Source** – select the source of the referral.
- **Date Referred to Medical Provider** – enter the date the client was referred.
- **HIV Care Clinic** – select the appropriate HIV Care Clinic.
- **HIV Medical Care Provider** – select the appropriate Medical Care Provider.
- **Did you make a new contact with client after intake?** – This is recommended 1 day after ARV initiation. Select Yes or No.
- **Date of First Contact** – If Yes is selected, enter the date of the first contact.

The remaining fields are intended to track recommended follow up contacts to the client after ARV initiation.

- Second Contact – recommended 5 days after ARV initiation.
- Third Contact – recommended 10 days after ARV initiation.
- Fourth Contact – recommended 30 days after ARV initiation.
- Fifth Contact – recommended 90 days after ARV initiation.
- Sixth Contact – recommended 180 days after ARV initiation.

An embedded view shows any prior appointment records that are made for the client. You may also click “Add Appointment” to create a new appointment.

Medical Tab:

Rapid Start Enrollment : Rapid Starter2 ()
Health Brigade - Care Services : Peggy CStest/HB [11/24/2021]

Rapid Start Enrollment **Medical**

HIV Status

Current Disease Stage *

Estimated Date HIV Diagnosed

Mode(s) of Transmission

- ☐ Blood Transfusion
- ☐ Hemophilia
- ☐ Heterosexual Contact
- ☐ Intravenous Drug Use
- ☐ Men Who Have Sex with Men
- ☐ Mother-at-Risk (Perinatal)
- ☐ Other
- ☐ Undetermined

Client received antiretroviral therapy?

Date prescribed antiretroviral therapy

First ARV Pickup Date

30-Day Supply?

Sample Pack Given?

ARV Medication Prescribed

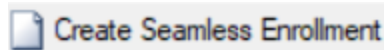
Use the Medical tab to record the following:

- **Current Disease Stage** – enter the client’s current HIV stage.
- **Estimated Date HIV Diagnosed** – enter the date diagnosed.
- **Mode of Transmission** – select mode of transmission (all that apply).

- **Client Received antiretroviral therapy?** – enter Yes or No.
- **Date prescribed antiretroviral therapy** – enter date of prescription.
- **First ARV Pickup Date** – enter the date of first ARV pickup.
- **30 day supply?** – enter Yes or No.
- **Sample Pack Given?** – enter Yes or No.
- **ARV Medication Prescribed** – select the appropriate medication.

Create Seamless Enrollment

If you have permissions to create a Seamless enrollment, click the



Seamless Enrollment : Jerry Mouse ()
Virginia Department of Health - Care Services : Peggy Griffith/GTI/ADMIN [07/13/2021]

Seamless Enrollment | Notes | ADAP | Appointments | Services Completion

Enrollment Number	1001
Status	Pending
DOC/Jail Facility Name	*
Facility Type	
Offender ID	
Planned Release Date	*
Actual Release Date	
Practice/Hospital/Clinic Name	*
Provider Name	*
Case Management Agency	*
Case Manager	*
Medication Pickup Site	*
Authorized Days Supply	
Care Coordination Medications Picked up?	

CHARLI Enrollments

Referred Date ▾ Status Facility Name

Required Attachments

Date ▾ Type /

2021/07/08 Client Consent

Complete the required information on the enrollment form.

- **Enrollment Number** – automatically generated
- **Status** – defaults to Pending
- **DOC/Jail Facility Name** – select the facility from which the client is being discharged
- **Facility Type** – automatically populates based on the facility chosen above
- **Offender ID** – if included in the discharge summary, enter the offender ID
- **Planned Release Date** – enter planned release date provided in the discharge summary
- **Actual Release Date** – enter actual release date if known
- **Practice/Hospital/Clinic Name** – select the clinic provided in the discharge summary
- **Provider Name** – select the medical provider name provided in the discharge summary
- **Case Management Agency** – select the case management agency provided in the discharge summary
- **Case Manager** – select the case manager name provided in the discharge summary (likely Charli Coordinator)
- **Medication Pickup Site** – select the location where client will pick up medications
- **Authorized Days Supply** – select 30, 60, or 90 day supply
- **Care Coordination Medications Picked Up?** – If known, enter Yes or No if medications were picked up
- **Date of Care Coordination Pick Up** – if known, enter date medications were picked up

The signed client consent should appear in the Required Attachments embedded view from the Client Registration process. If not, use the Create button > Scan to upload the attachment.

Notes Tab:

The screenshot shows a web application interface for 'Seamless Enrollment'. The title bar indicates the user is 'Jerry Mouse ()' and the session is for 'Virginia Department of Health - Care Services : Peggy Griffith/GTI/ADMIN [07/13/2021]'. Below the title bar, there are tabs for 'Seamless Enrollment', 'Notes', 'ADAP', 'Appointments', and 'Services Completion'. The 'Notes' tab is currently selected. The main area is titled 'Seamless Notes' and contains a toolbar with icons for creating, editing, deleting, and attaching files. Below the toolbar is a table with columns for 'Note Date', 'Status', 'Note Type', and 'Need Level'. The table is currently empty.

In the Notes tab, enter any additional notes regarding this enrollment. Notes may be created with type “Follow Up” to identify if follow up is needed for the enrollment.

ADAP tab:

The screenshot shows the 'ADAP' tab selected in the 'Seamless Enrollment' interface. The header bar includes the patient name 'Jerry Mouse ()' and the user 'Peggy Griffith/GT1/ADMIN' with a timestamp of '07/13/2021'. Below the header, there are tabs for 'Seamless Enrollment', 'Notes', 'ADAP', 'Appointments', and 'Services Completion'. The main content area is divided into two sections: 'ADAP Medication Assistance Enrollment Records' and 'ADAP Prescription Dispense History'. The first section has a table with columns: 'Date Effective', 'Date End', 'Status', 'Benefit Level', 'Medication Pickup Site', and 'Deleted? /'. The second section has a table with columns: 'Status', 'Prescription ID', 'Fill Date', 'Drug Name /', 'Drug Name - Generic', 'Drug Strength', 'Fill Number', and 'Days Supp'. Both tables are currently empty.

The ADAP tab will show any prior ADAP medication enrollments. The ADAP Prescription Dispense History section will be available in a later phase of the implementation.

Appointments tab:

The screenshot shows the 'Appointments' tab selected in the 'Seamless Enrollment' interface. The header bar is the same as the previous screenshot. Below the header, there are tabs for 'Seamless Enrollment', 'Notes', 'ADAP', 'Appointments', and 'Services Completion'. The main content area is titled 'Medical Appointment History'. It features a toolbar with icons for adding, editing, and deleting appointments, along with an 'Add Appointment' button. Below the toolbar is a table with columns: 'Date', 'Status', 'Provider Agency', and 'Provider'. The table is currently empty.

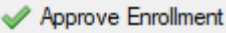
The Appointments tab will display any prior medical appointment history. You may also use the “Add Appointment” button to document any upcoming appointments provided in the discharge summary.

Appointment : Jerry Mouse ()
Virginia Department of Health - Care Services : Peggy Griffith/GTI/ADMIN [07/13/2021]

Appointment

Status	* Scheduled
Type	* Ambulatory Outpatient Medical Care
Provider Agency	MCV ID Clinic
Appointment With	Ayala-Sims, Veronica
Appointment Date	* 07/25/2021
Appointment Start Time	2:15 PM

Approve Enrollment

Click the  button to approve the client's enrollment into the Seamless program.

Complete Enrollment

When Seamless services are complete, navigate to the Services Completion tab.

Seamless Enrollment : Jerry Mouse ()
Virginia Department of Health - Care Services : Peggy Griffith/GTI/ADMIN [07/13/2021]

Seamless Enrollment Notes ADAP Appointments Services Completion

Date Services Completed

Services Completion Reason

Discharged To - Check all that apply

- ☐ Self Management
- ☐ Case Management
- ☐ Patient Navigation
- ☐ Unknown
- ☐ Other
- ☐ NA

The Services Completion tab documents the closure of the client's case and disposition.

Click the  when the client is discharged from the Seamless program.

Medical Tab

The Medical tab in the Client Profile holds the client's current HIV information such as current disease stage, risk factors, and whether they are on ARV.

Close ABC Save Create View Action Print

Client Profile : Mary Tooth ()
Virginia Department of Health - Care Services : Jason Griffin/co [04/27/2021]

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

HIV Status

Current Disease Stage * AIDS

Estimated Date HIV Diagnosed

Estimated Date AIDS Diagnosed

Mode(s) of Transmission

☐ Blood Transfusion
☐ Hemophilia
☐ Heterosexual Contact
☐ Intravenous Drug Use
☐ Men Who Have Sex with Men
☐ Mother-at-Risk (Perinatal)
☐ Other
☐ Undetermined

Currently taking Antiretroviral Therapy?

Nightly Updated Data

Date Of Last CD4 Count

Last CD4 Count Result

Date Of Last HIV-1 Viral Load

Last HIV-1 Viral Load Result

Date Of Last Medical Appointment Kept

Fill in the fields as appropriate. Depending on the client's "Current HIV Disease Stage", fill in their "Estimated Date HIV Diagnosed", "Estimated Date AIDS Diagnosed", "Mode(s) of Transmission" and if the client is "Currently taking Antiretroviral Therapy".

The fields on the bottom of the form are reference only. These will be populated as data is entered into the system. These will be updated nightly and auto-populate when you look at a client's profile.

Eligibility Tab

The Eligibility tab in the Client Profile has three tabs "Core", "Supportive" and "History".

These tabs have the eligibility data for the client after all information has been submitted.

Close
ABC
Edit
Create
View
Action
Print

Client Profile : Timothy T. Tooth ()
Virginia Department of Health - Care Services : Jason Griffin/GTI [04/13/2021]

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

Core
Supportive
History

Date Eligibility Effective	05/05/2021
Date Eligibility Expires	11/30/2021
Last Change Reason	Eligibility Assessment
ADAP Medication Assistance	No
ADAP Premium Assistance	No
AIDS Pharmaceutical Assistance (LPAP/CPAP)	No
Health Insurance Premium and Cost Sharing	No
Outpatient Ambulatory Health Services	No
Oral Health Services	No
Early Intervention Services	Yes
Home Health Services	No
Home and Community-Based Health Services	No
Hospice	No
Medical Case Management	No
Substance Abuse Outpatient Services	Yes

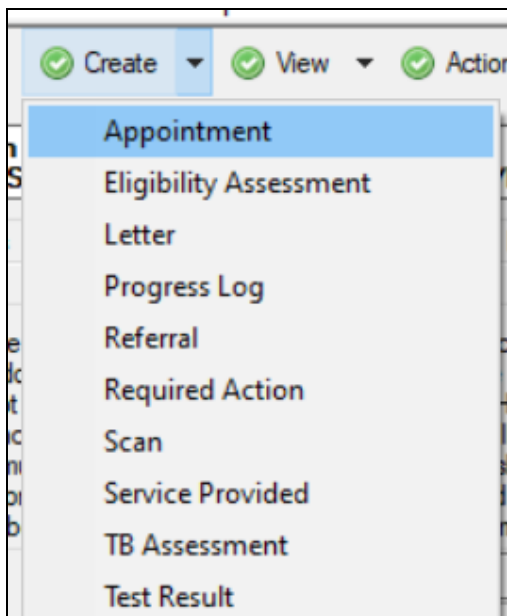


Working with the Client Profile

This section will walk through the menus and actions available for working with the Client Profile.

Create Menu

The Create menu from the Client Profile allows you to create various sub-records related to the client.



Appointments

This form is used to document scheduled, kept and missed appointments. It is useful to record appointments of all status (scheduled, kept, missed, etc.).

Appointment : Nancy New ()	
Health Brigade - Care Services : Peggy CStest/HB [11/18/2021]	
Appointment	
Status	* Scheduled
Type	* Ambulatory Outpatient Medical Care
Provider Agency	Test Agency
Appointment With	Price, Angela
Appointment Date	* 11/26/2021
Appointment Start Time	9:00 AM

Fill in the appropriate fields.

When finished, click on the Close button and then Yes to save your changes. You can come back into an appointment at any time and click on the Edit button to update the status of the appointment.

Eligibility Assessment

This topic will be covered in the VDH Eligibility Assessment User Guide.

Letter

This feature is not used.

Progress Log

This feature is not used at limited agencies. To enable progress logs at your agency, contact vaprovide@vdh.virginia.gov.

Progress Logs are used to document interactions and notes regarding a client's progress.

The screenshot shows a software interface with a 'Summary' tab selected. The interface includes several input fields and dropdown menus for appointment details:

- Status:** In Progress
- Provider:** Peggy CaseManagerTest
- Date:** 12/04/2024
- Minutes:** 15
- Contact Category:** Medical Case Management
- Contact Type:** Client Contact
- Funding Source:** Ryan White Part B
- Brief Description:** Initial meeting
- Full Description:** A text area with a rich text editor toolbar (bold, italic, underline, link, etc.) and a small icon.

When you are finished entering your progress note information, be sure to click the

 **Complete** button.

Referral

This feature is used to create and manage referrals to internal and external organizations for a client.

The screenshot shows a software interface for creating a referral. At the top, there are buttons for 'Close', 'Link to Client Profile', and 'Submit'. The main form is titled 'Referral : Nancy New ()' and 'Health Brigade - Care Services : Peggy CStest/HB [11/19/2021]'. The 'Referral' tab is selected, and the form contains the following fields:

- Referral Status:** Pending
- Referring Person:** Peggy CStest
- Referral Date:** 11/19/2021
- Eligibility Date Expire:** 06/30/2022
- Referred To:** Test Agency
- Referred for Service Type:** Medical Case Management
- Referred To Assignee:** Tester, Test
- Referred for Service Description:** Referred for MCM
- Created By:** Peggy CStest/HB
- Date Check Back:** 12/19/2021

- Fill in the appropriate fields:
 - **Referring Person** – This will default to you, but you can select a different person
 - **Referred To** – Select the agency you are referring the client to
 - **Referred for Service Type** – Select the service type

- **Referred to Assignee** – If there is a referred to assignee, select it here
- **Referred for Service Description** – Enter the description of the referral service
- **Date Check Back** – Enter the date to check back on the referral.
- **Consent Required** – defaults to Yes
- **Client Consent Obtained?** – Confirm that client has signed informed consent

When finished, click on the **Submit** button to save your changes and submit the referral. The referrals then can be “Acknowledged” by the receiving agency by clicking on the **Acknowledge** button. Acknowledging the referral will inform the referring provider that the referral has been received.

When a referral is completed, the agency receiving the referral will be able to view the referral in any of the *View\PLWH Activity\Referrals* views.

Once a referral is opened, it cannot be edited. However, you can come back to the referral at any time and click the **Close** button to close the referral.

Required Action

This feature is not used.

Scan

This feature is used to attach scanned and saved documents to the Client’s profile.

The screenshot shows a web-based form titled "Scanned Document". On the left is a sidebar with labels for form fields. The main area contains the following fields and controls:

- Document Date:** A date picker set to 12/03/2024.
- Document Type:** A dropdown menu currently showing "Client Consent".
- Release Notes:** A text area that is currently empty.
- Comments:** A text area that is currently empty.
- Attachment Type:** A dropdown menu currently showing "File".
- File Attachments:** A list showing one attached file, "Consent Form.docx", with a Word document icon.
- Buttons:** At the bottom of the form are three buttons: "Attach" (with a paperclip icon), "Save As" (with a floppy disk icon), and "Launch" (with a document icon).

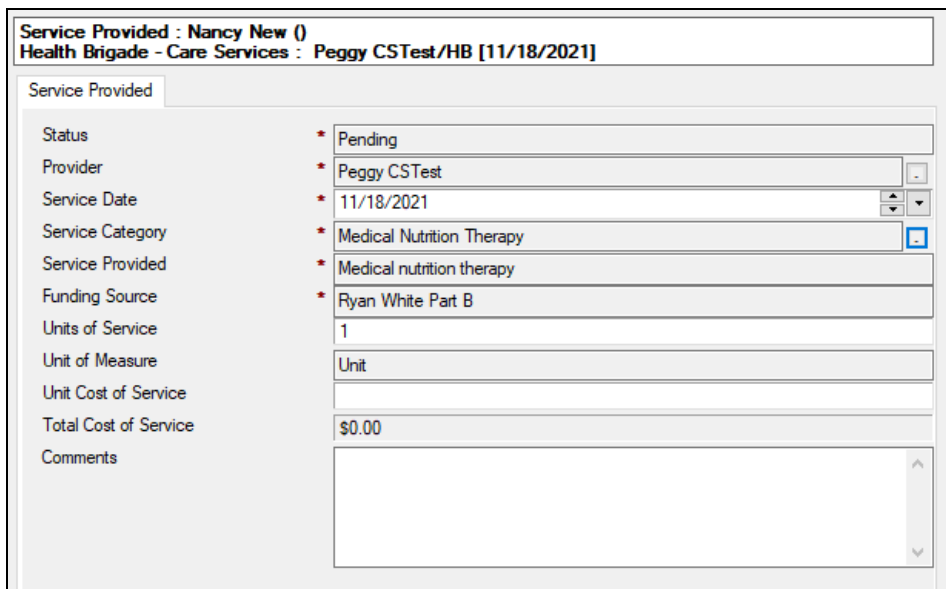
- Fill in the appropriate fields.
- Click on the **Attach** button to attach a document that you saved on your computer.

If you would like to save and create another scan, click .

When finished, click on the **Close** button and then **Yes** to save your changes.

Service Provided

Services Provided are used to document a tangible service that you provided to the client. To create a Service Provided, follow the steps below:



The screenshot shows a web form titled "Service Provided : Nancy New ()" and "Health Brigade - Care Services : Peggy CStest/HB [11/18/2021]". The form has a tab labeled "Service Provided". On the left is a list of fields: Status, Provider, Service Date, Service Category, Service Provided, Funding Source, Units of Service, Unit of Measure, Unit Cost of Service, Total Cost of Service, and Comments. On the right, the corresponding values are entered: Status is "Pending", Provider is "Peggy CStest", Service Date is "11/18/2021", Service Category is "Medical Nutrition Therapy", Service Provided is "Medical nutrition therapy", Funding Source is "Ryan White Part B", Units of Service is "1", Unit of Measure is "Unit", Unit Cost of Service is empty, Total Cost of Service is "\$0.00", and Comments is an empty text area.

- Fill in the appropriate fields. Depending on the Service Provided, the data entry fields will vary.

When finished, you can either mark the service as “Completed” or “Not Provided”.

If you do not have time to enter in all the required information in one sitting, you can save the Service Provided as “Pending” so you can come back to it later. To save it as “Pending”, click on the **Close** button and then **Yes** to save your changes. When you want to come back and complete the Service Provided, double click into the “Pending” Service Provided and click on the **Edit** button.

PLEASE NOTE: It is important to complete each Service Provided. Services Provided that are not in a “Completed” status will not be included in your reports. You can see a list of all your “Pending” Services Provided at *View\PLWH Activity\Services Provided Records Pending*.

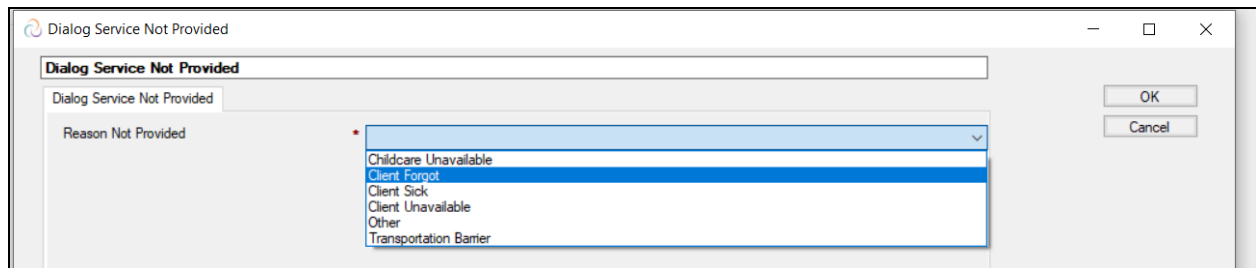
Marking the Service Provided as “Completed”

Click on the **Complete** button to save your changes. Once a Service Provided is marked as Complete, you cannot edit the Service Provided.

Marking the Service Provided as “Not Provided”

Marking the Service Provided as “Not Provided” allows you to document that you had planned to deliver a service but did not actually deliver the service.

Click on the **Not Provided** button to mark the Service Provided as “Not Provided”.



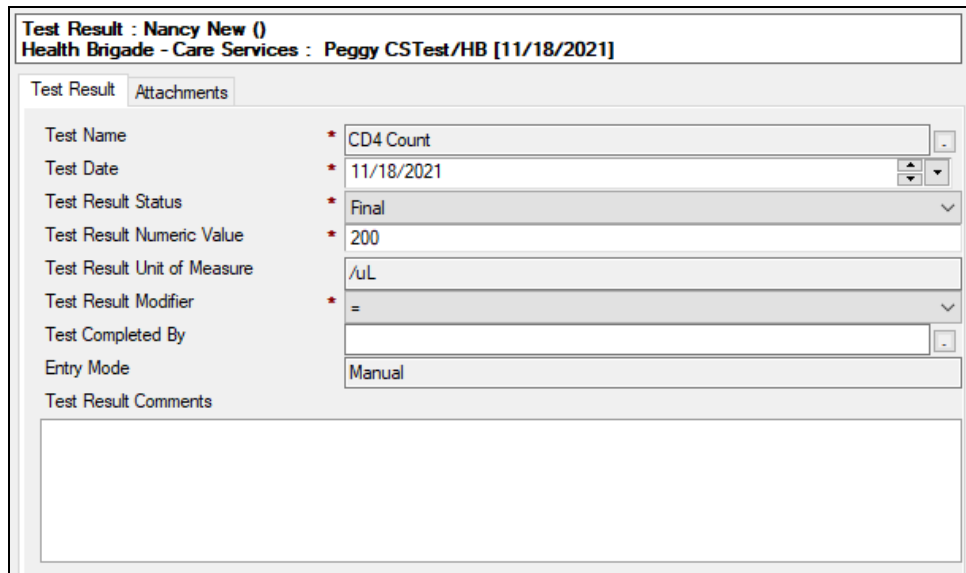
Select the reason you are marking the service as “Not Provided” and click **OK**.

TB Assessment

This feature is not used.

Test Result

This tab documents information related to specific medical tests a client has been given.

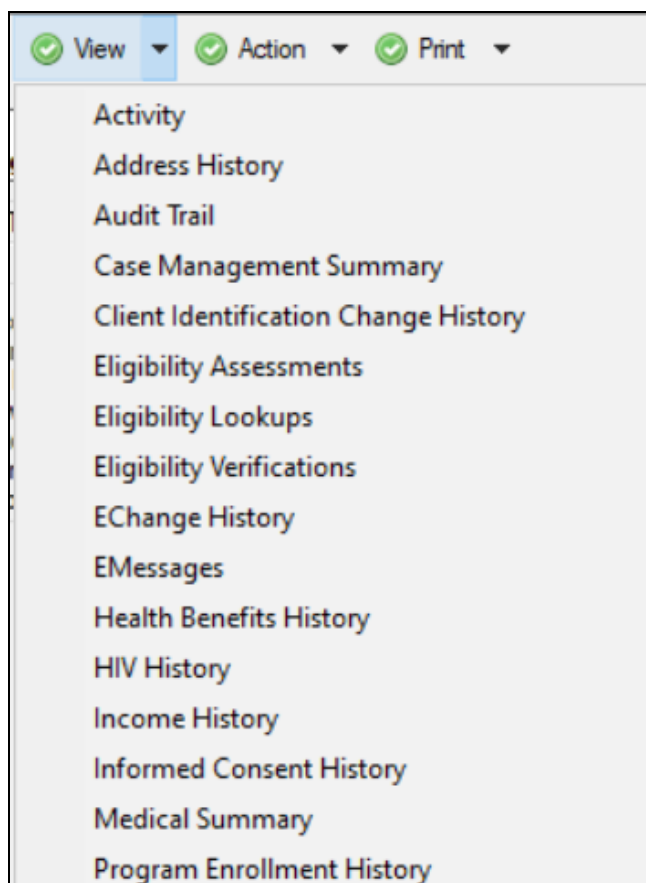


- Fill in the appropriate fields.
- Use the Attachments tab to attach any proof documents.

When finished, click on the **Close** button and then **Yes** to save your changes.

View Menu

The View Menu on the Client Profile is a powerful source of information that allows you to view history and activity that has taken place for the client.



Activity

View Activity is very useful for viewing all the activity that has taken place for a client in one place. This includes (but not limited to) all Scan Documents, Test Results, Eligibility Assessments, and Services Provided.


Form	Deleted	Summary
Letter		
Letter		2024/12/03: Psychosocial Assessment
Required Action		
Required Action		2024/12/03 - Reminder to do the thing
Scan		
Scan		2024/12/03: Client Consent
Service Provided		
Service Provided		2024/12/03: Completed - Early Intervention Services - EIS - Referral to HIV Medical Care (Health Brigade)
Test Result		
Test Result		2024/12/03: CD4 Count result = 200 /uL - Final

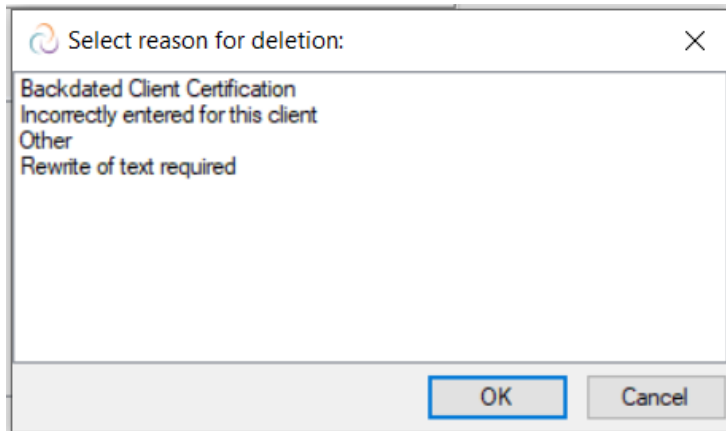
You can double-click on any sub-record to view details and take action.

Deleting a Scan Document

In the event an attachment has been made incorrectly to this client, it can be deleted by either the user who attached it, or a supervisor.

Scan : Bowman Bowtie ()	
Health Brigade - Care Services : Peggy CaseManagerTest/HB [12/03/2024]	
Scanned Document	
Document Date	* 12/03/2024
Document Type	* Client Consent
Release Notes	
Comments	
Attachment Type	* File
File Attachments	
Attach Save As Launch	
Consent Form.docx	

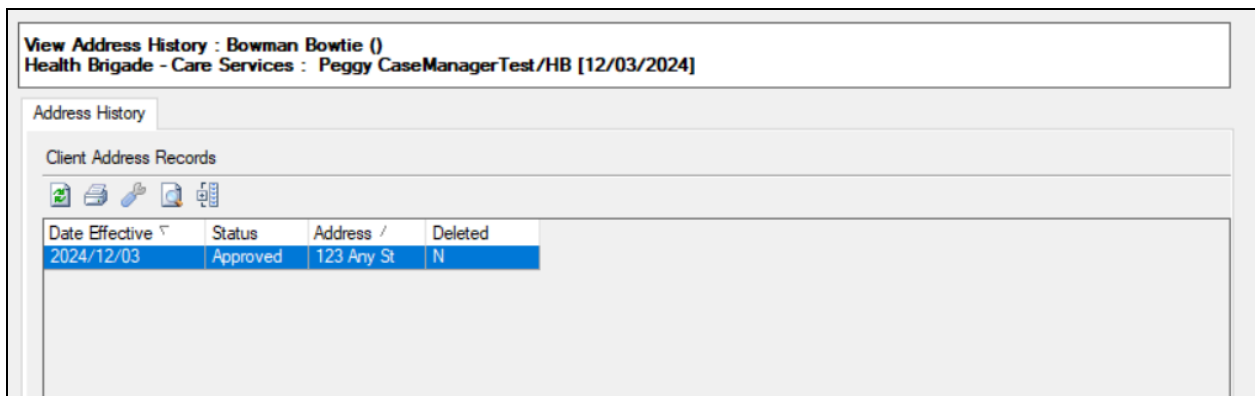
From an opened Scan document, you may click the  Delete button.



Select the reason for deleting the document, and click OK.






Address History

The Address History displays an embedded view of all address history records that exist for a client by the effective date. Simply double-click on the record for which you would like to view the details.



Audit Trail

The Audit Trail displays an embedded view of all users that accessed the Client Profile.

View Access Audit Trail			
Client Access Audit Trail			
    			
Audit Date ▾	User Name /	IP Address	Host Name
2024-12-03 13:34:45	Peggy CaseManagerTest/HB	172.16.253.162	PeggyG

Case Management Summary







The Case Management Summary compiles a variety of records to view and create in one easy location. Since these records are covered in the “Create Menu” section of this user guide, please refer to that section for information on each type of record. This Summary compiles the following types of information:

- Eligibility Assessments
- Services Provided
- Appointments
- Test Results
- Referrals

Client Identification Change History













Client Identification Change History displays a record any time the client’s identification information changes. This includes:

- Legal Last Name
- Legal First Name
- Legal Middle Initial
- SSN
- Birth Date
- Current Gender
- Sex Assigned at Birth

Client Identification Change History						
Client Identification Change Records						
						
Date Change ▾	Change By	Last Name	First Name	MI	SSN	Birth Date
2024/12/04	Peggy CaseManagerTest/HB	Bowtie	Bowman		987-00-5412	2000/12/03

Eligibility Assessments

View Eligibility Assessments displays records of all eligibility assessments that have been created for a client. **Note that Virginia Department of Health no longer supports Eligibility Assessments from the Client Web Portal, but prior records if applicable will also be displayed.






View Eligibility Assessment : Bowman Bowtie () Health Brigade - Care Services : Peggy CaseManagerTest/HB [12/04/2024]						
Eligibility Assessment						
Client Eligibility Assessment Records						
						
Date Submitted ▾	Status	Delete Flag	Source	Submitted By	Checked Out?	Checked Out By
	In Progress	N	Provider		Yes	Peggy CaseManagerTest
Client Eligibility Assessments from Web						
						
Date Submitted ▾	Status	Delete Flag				

Web Eligibility Lookups

This feature is not used.

Eligibility Verifications

This embedded view displays records when a verification check is performed for Medicaid eligibility and enrollment.

View Eligibility Verifications				
Client Eligibility Verification Records				
				
Deleted	Date ▾	Status	Payor	Medicaid Status

Exchange History






This embedded view displays records when a client’s email address and preferences are changed.

EMessages

This feature is not used.






Health Benefits History

This embedded view displays records when a client’s health benefits information is changed. This includes health benefit updates and eligibility assessments.

Health Benefit							
Client Health Benefit Records							
							
Effective Date ▾	Status	Update Type	Medicare	Medicare D	Medicaid	Private	Deleted
2024/06/27	Approved	Eligibility Assessment	No Benefits	No Benefits	No Benefits	No Benefits	N






HIV History

This embedded view displays records when a client’s HIV History (HIV diagnosis status, dates, mode(s) of transmission, etc) has changed.

View HIV History		
Client HIV History Records		
		
		
Effective	Stage of Disease	Deleted
2024/06/27	HIV Positive Not AIDS	N
2024/06/27	HIV Positive Not AIDS	N
2024/06/27	HIV Positive Not AIDS	N








Income History

This embedded view displays records when a client’s income information is changed. This includes interim income updates and eligibility assessments.

View Income History							
Client Income History Records							
							
Date	Status	Update Type	Gross HH Income	MAGI	FPL %	MAGI FPL %	Deleted
2024/06/27	Approved	Eligibility Assessment	\$1,000.00	\$1,000.00	80	80	N


Informed Consent History

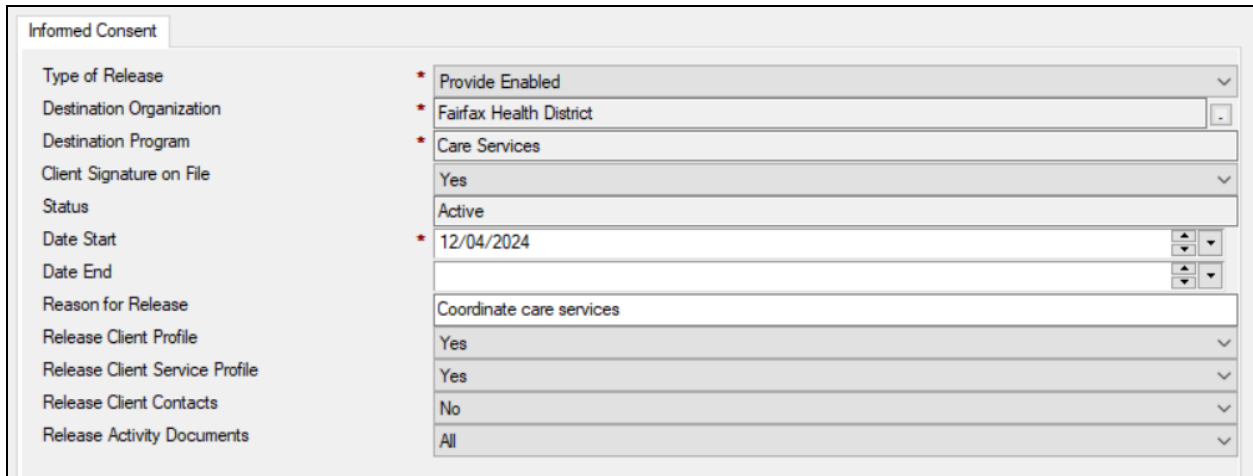
This embedded view displays records when an informed consent has been created for a client. An informed consent is an explicit action to share a client’s profile and sub-records with another agency or program.

Client Informed Consents			
View Informed Consents			
			
			Add Informed Consent Record
Status	From	Deleted	To
Active			
<input type="checkbox"/>	Virginia Department of Health - Care Services		
Active	Virginia Department of Health - Care Services	N	Health Brigade - Care Services

Adding Informed Consents

A user with appropriate permissions may add informed consents as needed to coordinate care for a client.

Click  **Add Informed Consent Record** .




Informed Consent	
Type of Release	* Provide Enabled
Destination Organization	* Fairfax Health District
Destination Program	* Care Services
Client Signature on File	Yes
Status	Active
Date Start	* 12/04/2024
Date End	
Reason for Release	Coordinate care services
Release Client Profile	Yes
Release Client Service Profile	Yes
Release Client Contacts	No
Release Activity Documents	All

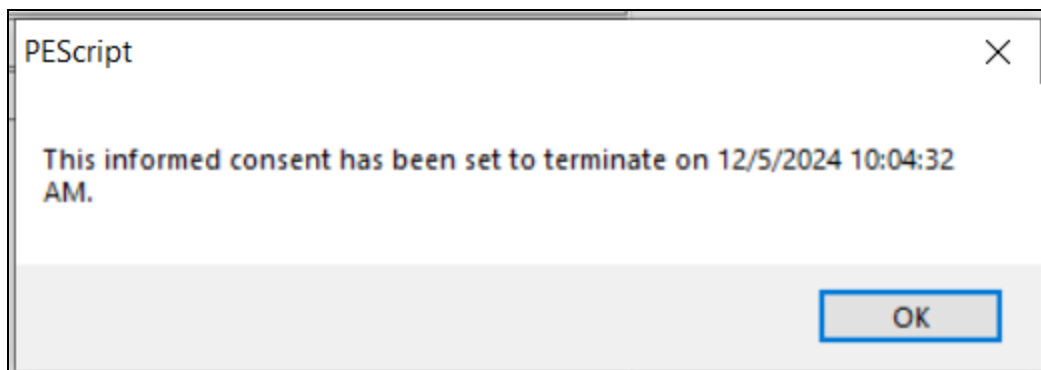
- Destination Organization: Select the Agency/Program combination to release the client information.
- Client Signature on File: Ensure that the client has signed the appropriate consent form and select Yes.
- Date Start: Defaults to today's date
- Date End: You may enter an end date if this access is temporary. Otherwise, the field may remain blank if no end date is known or specified.
- Reason for Release: enter the reason for the release of information.
- Release Client Profile: Select Yes.
- Release Client Service Profile: This allows the destination org/program to see Client Service Profile information which shows which agencies may be serving a client.
- Release Client Contacts: This allows the destination org/program to see any contacts and/or household members related to the client.
- Release Activity Documents: This allows the destination org/program to see any sub-records and activity records that have taken place for the client. Choices are:
 - All - this releases all activity records to the destination organization/program, and is the most commonly made selection.

- Selective - this allows you to specify only certain types of sub-records to the destination organization/program.
- None - this would release the client profile only to the destination organization/program. No sub-records would be released.
- ***Note - an hourly script agent facilitates the release of all records to the destination organization/program. It may take up to one hour for all records to be released.*

Terminating an Informed Consent

To terminate an Informed Consent, open the record, and click the  **Terminate** button. A message will appear alerting you that the informed consent is set to be terminated. Click OK.

Once the consent is terminated, the destination org/program will still have a historic view of the client, but will be unable to serve the client or see any new updates, sub-records, or eligibility statuses regarding the client.





















Medical Summary

The Medical Summary compiles a variety of medical records to view and create in one easy location.

- **Condition:** Information on to the client's diagnosis, medical problems, and treatment records.
- **Services:** Information regarding services provided to the client. Includes Care Actions, Services Provided, and Procedure records. Care Actions and Services Provided can be created in this tab.

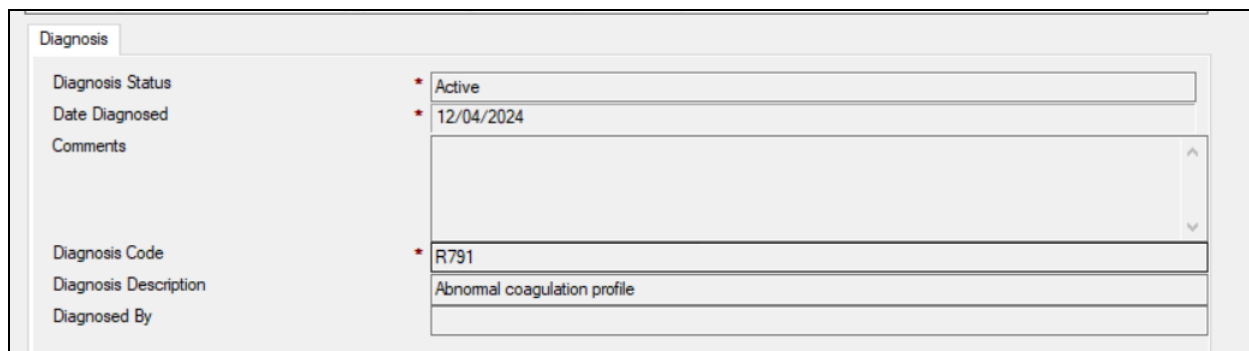
- **Medical Appointments:** Lists all medical appointments the client has in Provide. Appointments can be added in this tab.
- **Allergies:** Information on client's allergies to medications and other irritants.
- **Medications:** Information on the client's current drug protocol, prescriptions, and allergy records. Drugs, Prescriptions, and Allergy records can be created in this tab.
- **Test Results:** Displays all labs the client has had completed, including CD4s and Viral Loads. Test Results and Lab Panels can be created in this tab.
- **Vaccinations:** Information regarding the client's vaccinations for Hep A, Hep B, HPV, Influenza, and Pneumonia.
- **Referrals:** Displays any Referrals made for the client. Referral records can be created in this tab.

Condition	Services	Medical Appts	Medications	Allergies	Test Results	Pregnancies	Vaccinations	Referrals
Diagnosis								
      Add Diagnosis								
Deleted /	StartDate ▾	End Date ▾	Code ▾	DiagnosisName ▾				
N	2024/12/04		R791	Abnormal coagulation profile				
Medical Problems								
      Add Medical Problem Record								
Deleted /	Status /	Problem /	Date Started ▾	Date Ended				
N	Active	HPV	2024/12/04					
N	Active	Hypertension	2024/12/04					
Treatments								
      Add Treatment Record								
Status /	Type /	Started	Ended	Reason Ended				
Active	HPV	2024/12/04						

Diagnosis

Diagnosis records are used to track medical diagnoses a client may have received. To create a Diagnosis record, follow the steps below:

- On the Condition Tab in the Medical Summary view, click on the **Add Diagnosis** button.



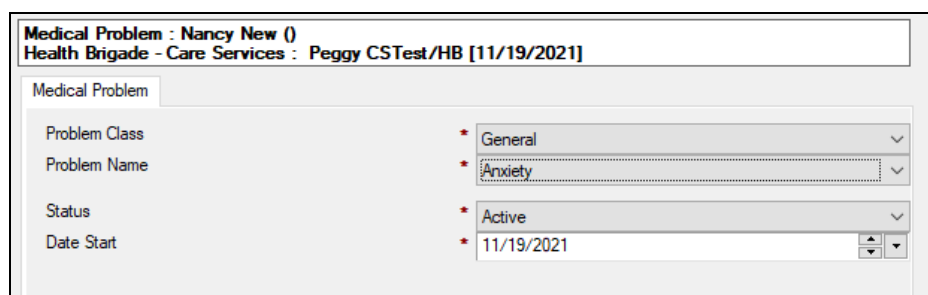
The screenshot shows a 'Diagnosis' form with the following fields and values:

Field	Value
Diagnosis Status	Active
Date Diagnosed	12/04/2024
Comments	
Diagnosis Code	R791
Diagnosis Description	Abnormal coagulation profile
Diagnosed By	

Medical Problem

Medical problem records are used to track the client's medical problems using either generalized problem names or SNOMED problem list codes. To create a Medical Problem record, follow the steps below:

- On the Condition Tab in the Medical Summary, click on the **Add Medical Problem Record** button.



The screenshot shows a 'Medical Problem' form with the following fields and values:

Field	Value
Problem Class	General
Problem Name	Anxiety
Status	Active
Date Start	11/19/2021

- Fill in the appropriate fields.

When finished, click on the **Close** button and then **Yes** to save your changes.

Treatment Record

The Treatment Record is used to track when a client undergoes treatment for (or documents when it is determined that treatment is not clinically indicated) for key conditions that are monitored and reported on for HIV Care.

Conditions include Chlamydia, CMV, Gonorrhea, Hepatitis A, Hepatitis B, Hepatitis C, Herpes, HPV, PCP Prophylaxis, and Syphilis. Documentation of treatment for these

conditions is done within the Treatment record. To create a Treatment record, follow the steps below:

- On the Condition Tab in the Medical Summary view, click on the **Add Treatment Record** button.

Treatment : Nancy New ()
Health Brigade - Care Services : Peggy CStest/HB [11/19/2021]

Treatment

Treatment Status * Active
Treatment Type *
Date Treatment Started * 11/19/2021
Drug Name
Drug Name Generic
ARV Count
Strength
Route
Dosage Form

- Fill in the fields as appropriate.

When finished, click on the **Close** button and then **Yes** to save your changes.

Care Action

This form is used to capture some specific clinical activities that are not typically captured as data points like in CPT4 encoded procedures. These interventions may or may not have been provided by your agency but should be documented when they occur. They include:

- Adherence Counseling
- HIV Alcohol Counseling
- HIV Risk Counseling
- Mental Health History
- Mental Health Evaluation
- Oral Health Exam
- Substance Abuse Evaluation
- Tobacco Cessation Counseling

To create a Care Action, follow the steps below:

- On the Services Tab in the Medical Summary view, click on the **Add Care Action** button.

Care Action : Nancy New ()
Health Brigade - Care Services : Peggy CStest/HB [11/19/2021]

Care Action

Date	* 11/19/2021
Provider	* Peggy CStest
Service Category	*
Care Action	*
Care Action Result	* Completed

- Fill in the appropriate fields.

When finished, click on the **Close** button and then **Yes** to save your changes.

Appointment

This form is used to document scheduled, kept and missed appointments. It is useful to record appointments of all status (scheduled, kept, missed, etc.).

To create an Appointment, follow the steps below:

- On the Medical Appointments Tab in the Medical Summary, click on the **Add Appointment** button.

Appointment : Nancy New ()
Health Brigade - Care Services : Peggy CStest/HB [11/19/2021]

Appointment

Status	* Scheduled
Type	* Ambulatory Outpatient Medical Care
Provider Agency	
Appointment With	
Appointment Date	* 11/19/2021
Appointment Start Time	

- Fill in the appropriate fields.

When finished, click on the **Close** button and then **Yes** to save your changes. You can come back into an appointment at any time and click on the **Edit** button to update the status of the appointment.

Drug

Drug records are used to track a client's medication. It is not required to keep track of a client's medications, but it can be a helpful tool as a medical provider.

To create a Drug record, follow the steps below:

- On the Medications Tab in the Medical Summary view, click on the **Add Drug** button.

Drug : Nancy New ()
Health Brigade - Care Services : Peggy CStest/HB [11/19/2021]

Drug

Drug Status	* Active
Date Started	* 11/19/2021
Drug Type - Reason Prescribed	*
Drug Name	*
Drug Name Generic	
ARV Count	
Strength	
Route	
Dosage Form	
Frequency	
Instructions	
Drug Comments	

- Fill in the appropriate fields.

When finished, click on the **Close** button and then **Yes** to save your changes.

Allergy

Allergy records are used to track a client's allergies. It is not required to keep track of a client's allergies, but it can be a helpful tool as a medical provider.

To create an Allergy record, follow the steps below:

- On the Medications Tab in the Medical Summary view, click on the **Add Allergy Record** button.

Allergy : Nancy New ()
Health Brigade - Care Services : Peggy CStest/HB [11/19/2021]

Allergy

Status	* Active
Date Started	* 11/19/2021
Allergy Type	* Medication
Drug Name	*
Drug Name Generic	
Diagnosed By	
Treatment Status	
Allergic Reactions	
Comments	

- Fill in the appropriate fields.

When finished, click on the **Close** button and then **Yes** to save your changes.

Test Result

This tab documents information related to specific medical tests a client has been given.

To create a Test Result, follow the steps below:

- On the Test Results Tab in the Medical Summary view, click on the **Add Test Result** button.

Test Result : Nancy New ()
Health Brigade - Care Services : Peggy CStest/HB [11/19/2021]

Test Result Attachments

Test Name *

Test Date * 11/19/2021

Test Result Status * Final

Test Result Modifier * =

Test Completed By

Entry Mode Manual

Test Result Comments

- Fill in the appropriate fields.

When finished, click on the **Close** button and then **Yes** to save your changes.

Vaccination

To create a Vaccination, follow the steps below:

- On the Vaccinations Tab in the Medical Summary view, click on the **Add Vaccination** button.

Vaccine : Nancy New ()
Health Brigade - Care Services : Peggy CStest/HB [11/19/2021]

Vaccination

Vaccine Status * Administered

Vaccine Name *

Date Administered, Refused or Determined NA * 11/19/2021

Administered By

Vaccine Type

Vaccine Reactions

Vaccine Manufacturer

Vaccine Lot Number

Vaccine Expiration Date

- Fill in the appropriate fields.

When finished, click on the **Close** button and then **Yes** to save your changes.

Create Referral

To create a Referral, follow the steps below:

- On the Referrals Tab in the Medical Summary view, click on the **Add Referral** button.

Referral : Nancy New ()
Health Brigade - Care Services : Peggy CStest/HB [11/19/2021]

Referral	
Referral Status	* Pending
Referring Person	* Peggy CStest
Referral Date	* 11/19/2021
Eligibility Date Expire	06/30/2022
Referred To	*
Referred for Service Type	*
Referred To Assignee	*
Referred for Service Description	
Date Check Back	* 12/19/2021
Require Consent	* Yes
Created By	Peggy CStest/HB
Was Client Consent Obtained	*

- Fill in the appropriate fields:
 - **Referring Person** – This will default to you, but you can select a different person
 - **Referred To** – Select the agency you are referring the client to
 - **Referred for Service Type** – Select the service type
 - **Referred to Assignee** – If there is a referred to assignee, select it here
 - **Referred for Service Description** – Enter the description of the referral service
 - **Date Check Back** – Enter the date to check back on the referral.

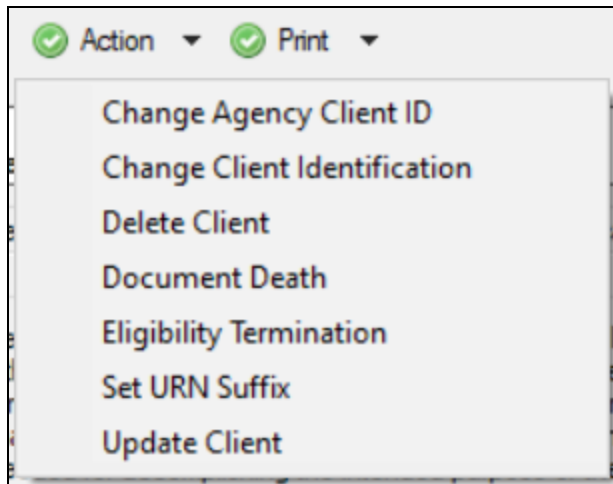
When finished, click on the **Submit** button to save your changes and submit the referral. The referrals then can be “Acknowledged” by the receiving agency by clicking on the **Acknowledge** button. Acknowledging the referral will inform the referring provider that the referral has been received.

When a referral is completed, the agency receiving the referral will receive an email regarding the referral. Referrals can be viewed in any of the *View\PLWH Activity\Referrals* views.

Once a referral is opened, it cannot be edited. However, you can come back to the referral at any time and click the **Close** button to close the referral.

Action Menu

The Action menu is used to make updates to the Client Profile. These options will appear based on your specific user permissions.



Change Agency Client ID

This feature is used to set an agency identified Client ID for a client profile, which is separate from the Provide Enterprise Client ID used by the state. This could be a unique identifier used by your agency such as MRN or Case Number.

 A screenshot of a dialog box titled 'Enter New Client ID'. It has a close button (X) in the top right corner. Inside the dialog, there is a label 'Enter New Client ID' and a text input field containing the text 'BOBO123'. To the right of the input field are two buttons: 'OK' and 'Cancel'.

After you have entered the unique identifier, click OK. This action will update the Client Service Profile with your agency assigned ID.

Change Client Identification

To change client identifying information, which has potential impacts to URN and other identifiers, click Action > Change Client Identification.

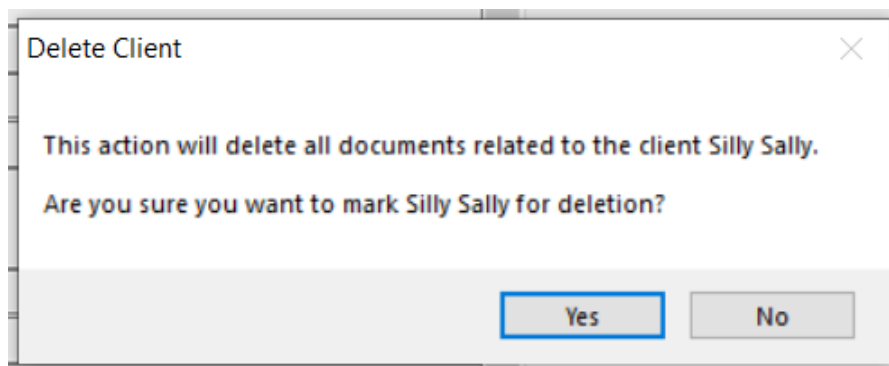
 A screenshot of a form titled 'Dialog Change Client Identification'. The form has a tabbed interface with the first tab selected. It contains several input fields and dropdown menus: 'Legal Last Name' (with a 'Cp' icon), 'Legal First Name', 'Legal Middle Initial', 'SSN', 'Birth Date' (with a date picker showing '08/17/1984'), 'Current Gender' (a dropdown menu showing 'Male'), and 'Sex Assigned at Birth' (a dropdown menu showing 'Male'). There are 'OK' and 'Cancel' buttons in the top right corner.

A dialog box will appear that allows you to enter and update identifying information for the client.

Click OK when finished. The Client Profile will be updated.

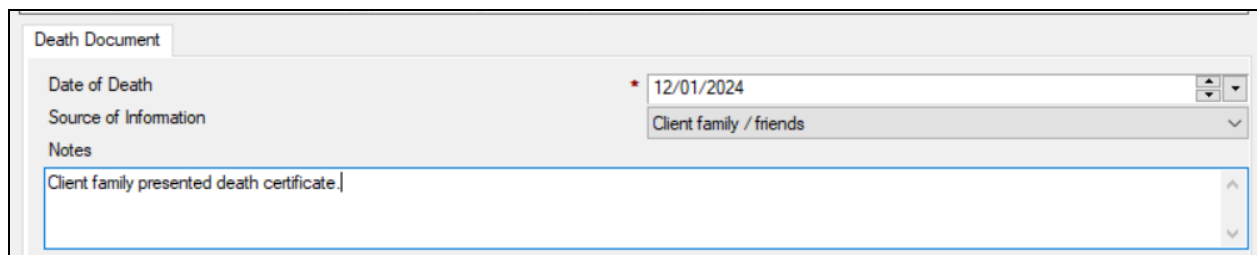
Delete Client (limited permissions)

If a client record has been created in error, action can be taken to delete the client record. You will receive a warning message asking if you are sure you want to delete the client profile.

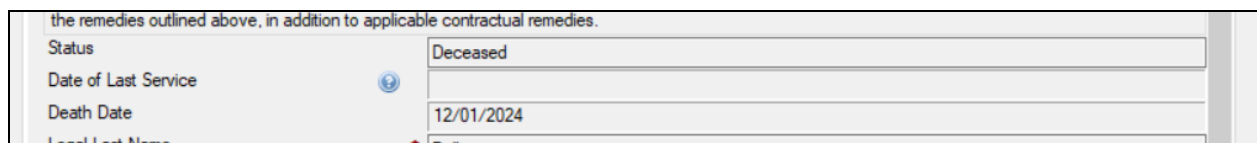


Document Death

If you are made aware of a client's death, you may document it.

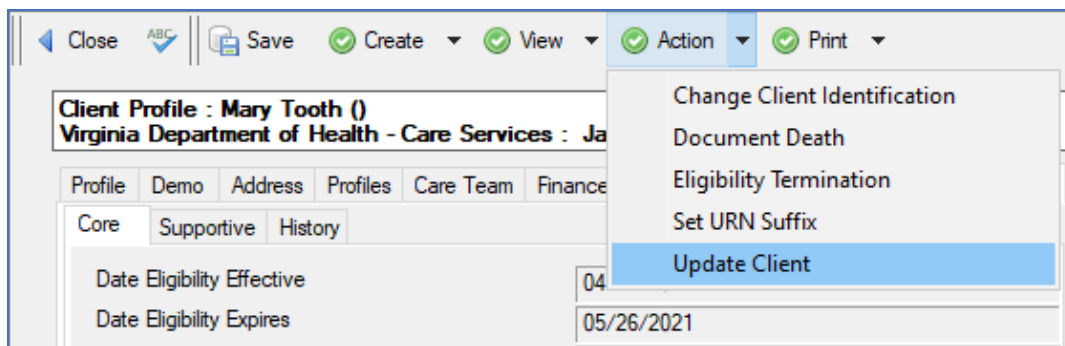
A screenshot of a 'Death Document' form. The form has a title bar 'Death Document' and a close button. It contains several fields: 'Date of Death' with a date picker set to '12/01/2024'; 'Source of Information' with a dropdown menu set to 'Client family / friends'; and a 'Notes' section with a text area containing the text 'Client family presented death certificate.'.

The client's status will be changed to Deceased when the update agent is run.

A screenshot of a client profile form. The form has a title bar with text 'the remedies outlined above, in addition to applicable contractual remedies.' Below the title bar, there are several fields: 'Status' with a dropdown menu set to 'Deceased'; 'Date of Last Service' with a date picker; 'Death Date' with a date picker set to '12/01/2024'; and 'Legal Last Name' with a text field.

Update Client

Anytime you update a client, the client's information will be updated overnight in Provide®. If you want or need to update the client's information immediately, click on the **Action – Update Client** in the Client Profile.



This **Update Client** button will pull changes from the following records:

- Address Update Records
- Income Update Records
- Health Benefits Update Records
- Eligibility History Records
- Death Documentation

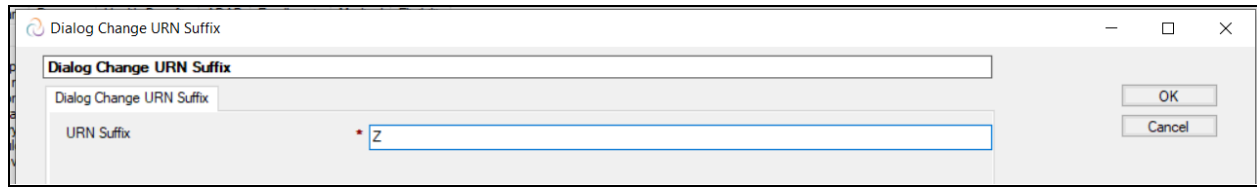
Eligibility Termination

This feature is used to terminate a client's Ryan White eligibility for any reason. Please note that if a client's profile is updated to a state which makes them no longer eligible (such as moving out of state, income above FPL limits), Provide Enterprise will automatically terminate eligibility and enrollment through a daily agent.

A screenshot of a 'Dialog Eligibility Termination' form. The form has a title bar 'Dialog Eligibility Termination' and a tab 'Dialog Eligibility Termination'. It contains two fields: 'Date Terminated Effective' with a date picker set to '12/04/2024' and 'Reason Terminated' with a dropdown menu set to 'Other'. There are 'OK' and 'Cancel' buttons on the right side.

Set URN Suffix

In the rare event that multiple “unique” client records exist with similar names and exact match on date of birth and gender, there may be a need to use a URN suffix to differentiate the client for the RSR purposes.



Once you have entered the URN suffix, it will appear on the client profile in the URN Suffix field. This will be used to calculate the eURN identifier for the RSR.