Provide Enterprise
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GROUPWARE TECHNOLOGIES

Data to Care

Provide Enterprise User Guide

Virginia Department of Health

Last Updated December 2024

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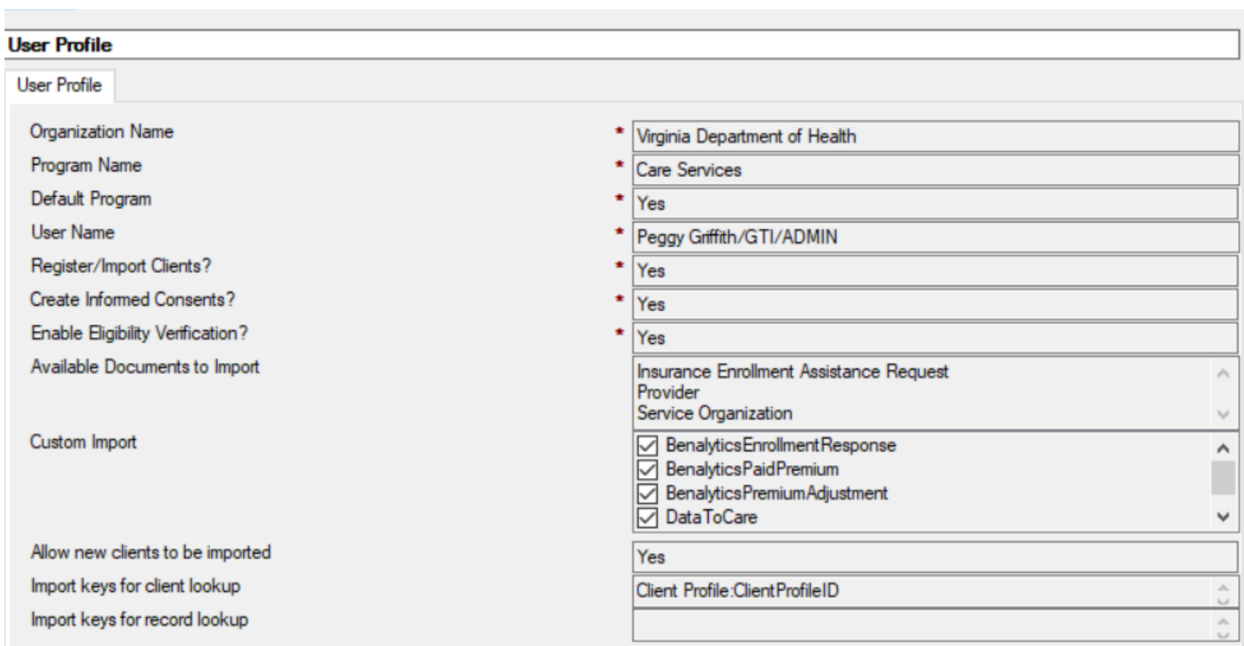
Introduction & Background

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

Security Requirements

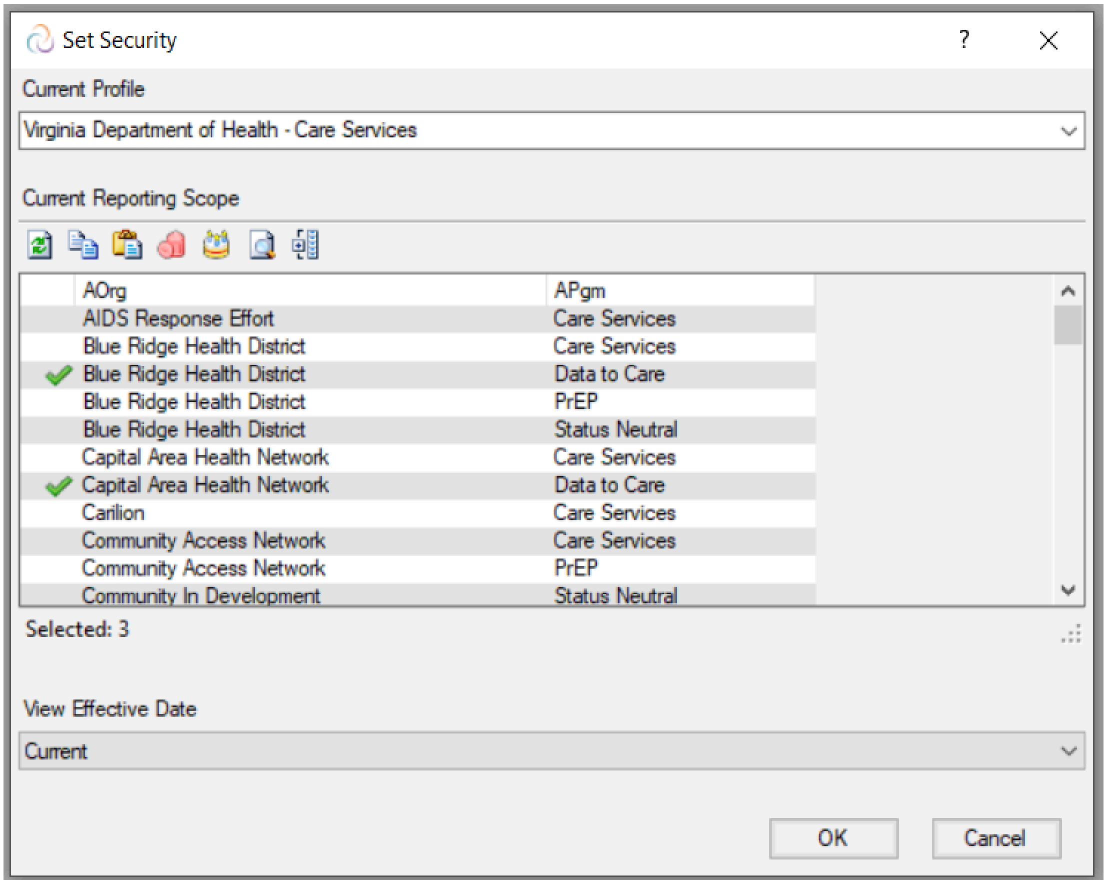
The role Provide.Users.DTC is required to perform the functions in this guide.
VDH users who will import the Out of Care file to receiving agencies will need to have Provide.Imports role as well as have the Custom Import, DataToCare checked in their user profile as shown below:


User Profile

User Profile

Organization Name *	Virginia Department of Health
Program Name *	Care Services
Default Program *	Yes
User Name *	Peggy Griffith/GTI/ADMIN
Register/Import Clients? *	Yes
Create Informed Consents? *	Yes
Enable Eligibility Verification? *	Yes
Available Documents to Import	Insurance Enrollment Assistance Request Provider Service Organization
Custom Import	☑ BenalyticsEnrollmentResponse ☑ BenalyticsPaidPremium ☑ BenalyticsPremiumAdjustment ☑ DataToCare
Allow new clients to be imported	Yes
Import keys for client lookup	Client Profile:ClientProfileID
Import keys for record lookup	

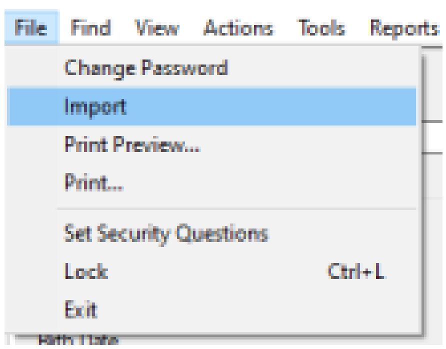
Also, From Tools > User Security, place a check mark next to the Data To Care agency programs for which data will be imported.

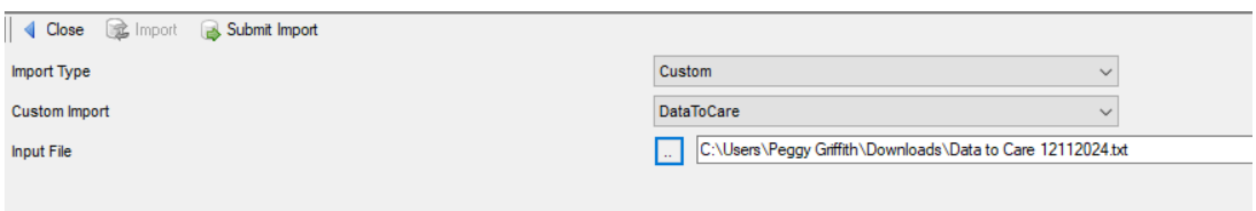

Set Security
Current Profile
Virginia Department of Health - Care Services
Current Reporting Scope
AOrg
APgm
AIDS Response Effort
Care Services
Blue Ridge Health District
Care Services
Blue Ridge Health District
Data to Care
Blue Ridge Health District
PrEP
Blue Ridge Health District
Status Neutral
Capital Area Health Network
Care Services
Capital Area Health Network
Data to Care
Carilion
Care Services
Community Access Network
Care Services
Community Access Network
PrEP
Community In Development
Status Neutral
Selected: 3
View Effective Date
Current
OK
Cancel

VDH Central Office Activities

Out of Care – Import File

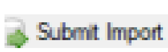
The Data to Care team at VDH will examine surveillance sources and complete the Out of Care list which will be imported into Provide Enterprise. The file must be saved as a .CSV. To import the file, go to File > Import.





Complete the fields as shown in the image above.

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

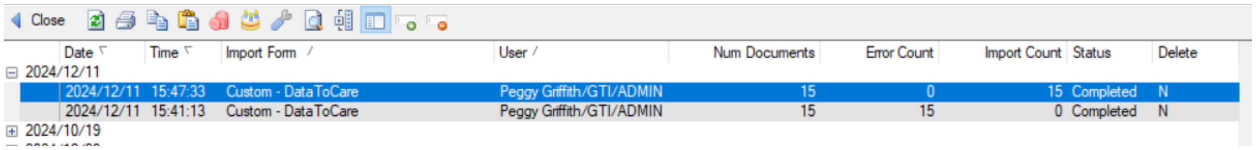


.

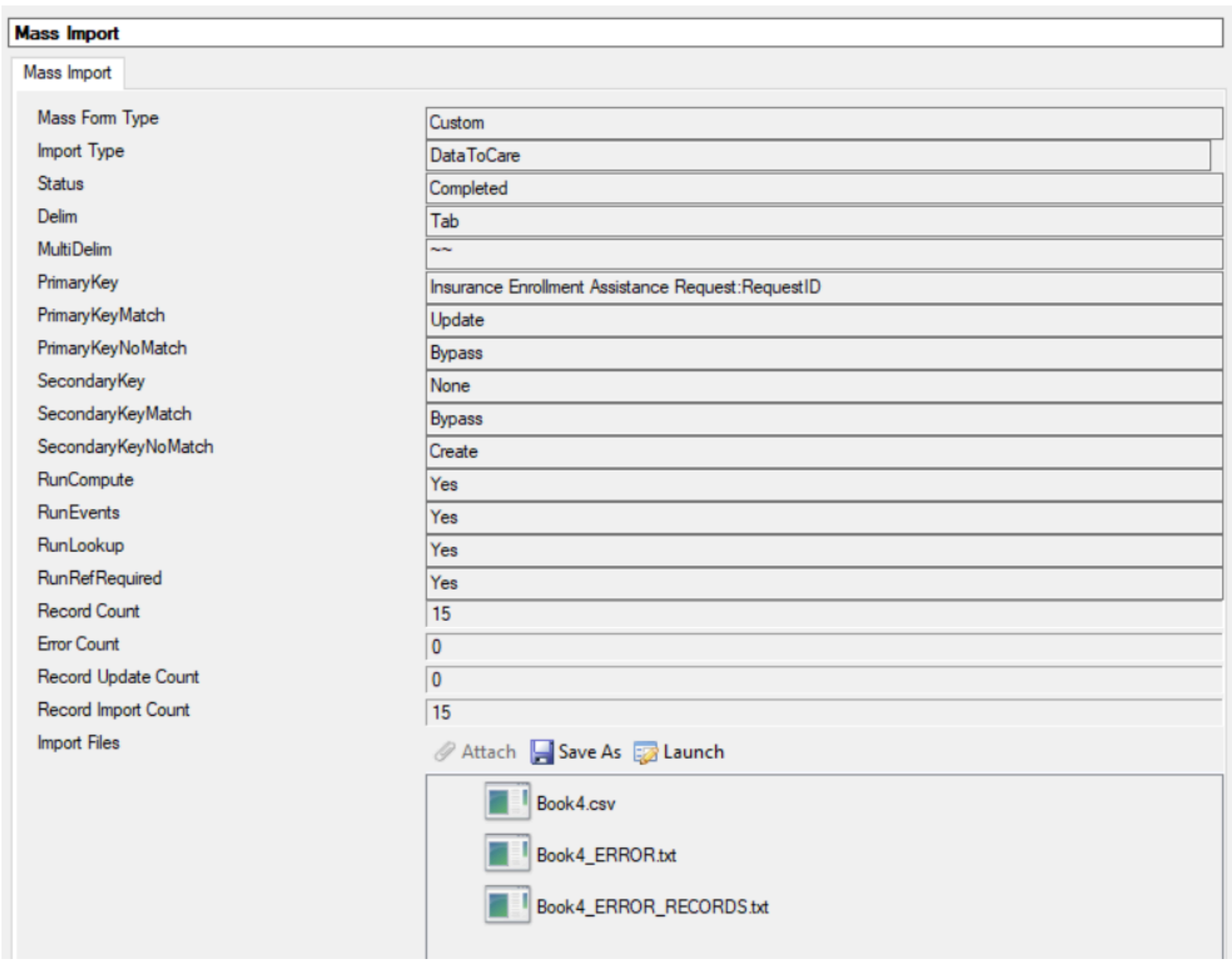
A nightly agent will process the import into Provide Enterprise.

View Import Log

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



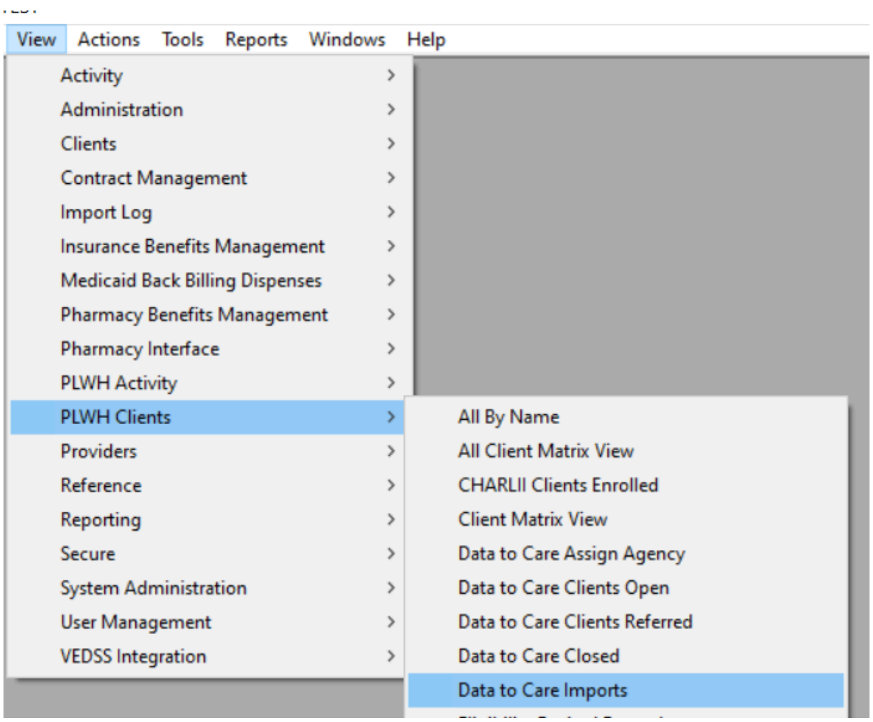
Double-click on the Import record to see details.



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

View Imported Client Records

A set of views allows you to manage Data to Care clients that have been imported. View > PLWH Clients > Data to Care Imports will display all imported records by status.



Status	DTC Number	State No	Last Name	First Name	MI	Agency Assigned	Last District	Last Region
Referred								
Referred	P10241101	RE00047280	Data1	Test1		Capital Area Health Network	Chesterfield	Central
Referred	P10241102	R000014060	Data5	Test5		Capital Area Health Network	Richmond City	Central
Referred	P10241103	G000033693	Data2	Test2		Capital Area Health Network	Henrico	Central
Referred	P10241104	C000028897	Data4	Test4		Capital Area Health Network	Richmond City	Central
Referred	P10241105	18488	Data3	Test3		Capital Area Health Network	Alexandria	Northern
Referred	P10241127	ZE00058806	Data7	Test7		Council of Community Services	Central Virginia	Southwest
Referred	P10241128	VCE0000792	Data8	Test8	J	Council of Community Services	West Piedmont	Southwest
Referred	P10241129	LE00037456	Data6	Test6		Council of Community Services		Unknown
Referred	P10241497	VAE0060164	Data12	Test12	A	Virginia Department of Health	Norfolk	Eastern
Referred	P10241580	XE00054960	Data10	Test10		VCU Health	Richmond City	Central
Referred	P10241635	K000035673	Data11	Test11		VCU Health	Piedmont	Central
Referred	P10241682	UE00050334	Data9	Test9		VCU Health	Henrico	Central
Referred	P10241782	XE00054878	Data14	Test14		Virginia Department of Health	Crater	Central
Referred	P10241807	YE00055980	Data15	Test15	M	Virginia Department of Health	Piedmont	Central
Referred	P10241980	XE00053226	Data13	Test13	L	Virginia Department of Health	Hampton	Eastern

Explanation of Status:

- Referred – The client record was successfully referred to an agency.
- Open – The client record was successfully imported, and the agency is actively working the case.
- Error – The client record was successfully imported, but an error has occurred causing the referral to the agency to fail. This can happen for one of two reasons.
  - The client was found in the database, but the agency has not provided services in the past for this client. Therefore, these records must be

reviewed by the Virginia Department of Health before making the decision to release the client to the agency.
    - The Agency name in the import file did not exactly match an agency name in Provide Enterprise.
- Closed – The client’s case is Closed with outcomes recorded.

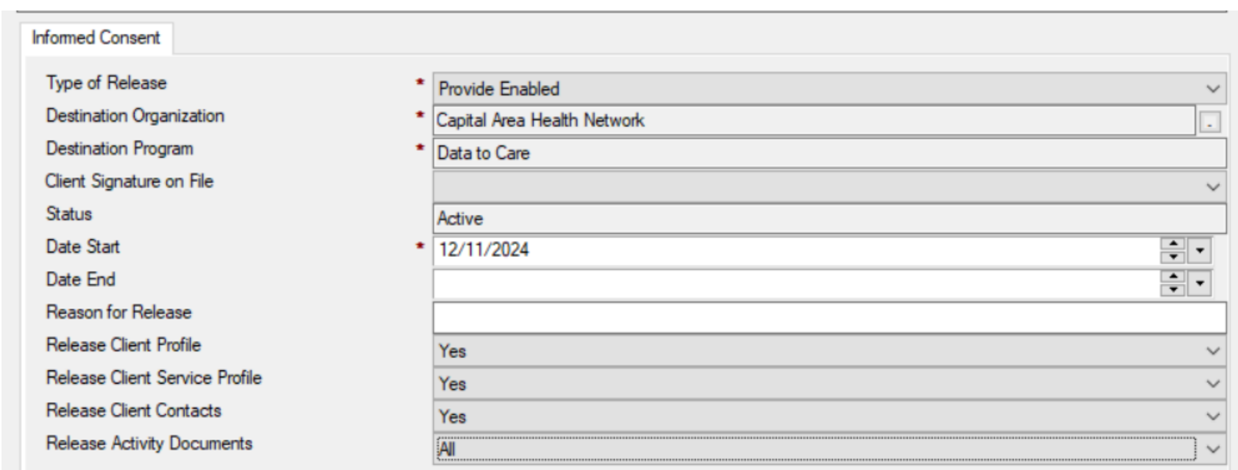
To view the details of a client case, double-click the import record. The record will display with all the data provided in the Out of Care import, along with an Error reason.

Client Not Released to Agency

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

After reviewing the record, if you are certain of the agency assignment, you may click 

to release the client to the appropriate agency.



Informed Consent

Type of Release *	Provide Enabled
Destination Organization *	Capital Area Health Network
Destination Program *	Data to Care
Client Signature on File	
Status	Active
Date Start *	12/11/2024
Date End	
Reason for Release	
Release Client Profile	Yes
Release Client Service Profile	Yes
Release Client Contacts	Yes
Release Activity Documents	All

Complete the Informed Consent record.

- Destination Organization – select the agency receiving the Data to Care client.
- Destination Program – defaults to Data to Care, based on the selection made above.
- Client Signature on File – select yes or no, but not required.
- Status – defaults to Active
- Date Start – defaults to today’s date

- Date End – if applicable, enter a date when the informed consent should be revoked.
- Reason for Release – type the reason for release
- Release Client Profile – select Yes to release the client profile to the agency. • Release Client Service Profile – select Yes to allow the agency to record services performed for the client.
- Release Client Contacts – select Yes to allow the agency to view all alternative contacts for the client.
- Release Activity Documents – select All to allow the investigator to see all activity records performed for this client. You can also select "None" or "Select" to select specific activity types.

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

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

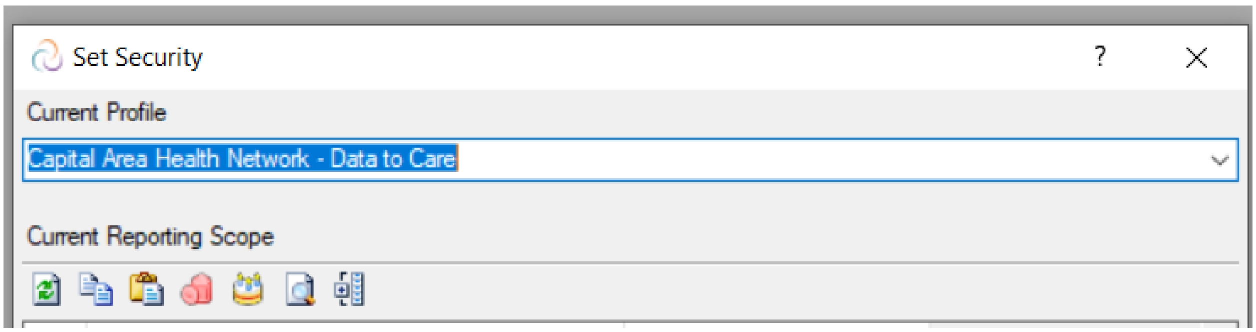
Agency Not Found

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

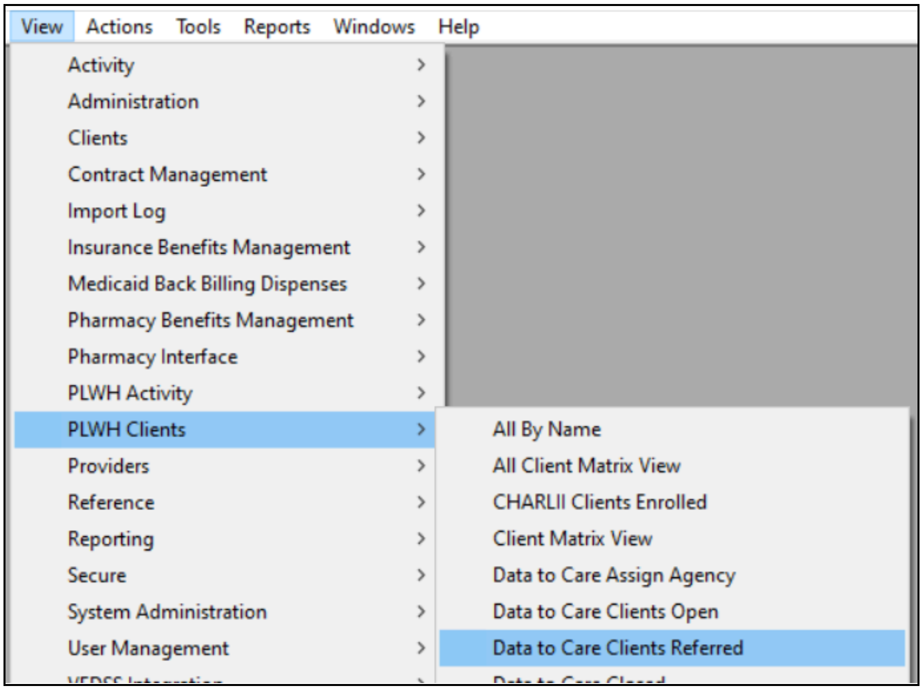
After reviewing the record, you may click Set Data to Care Agency to select the appropriate agency.

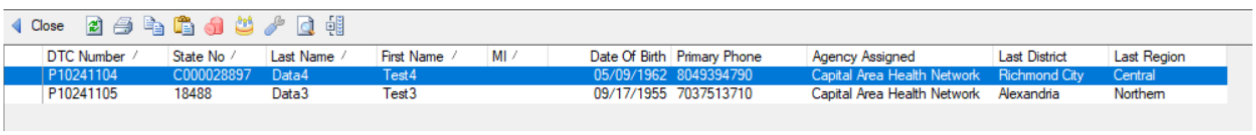
Agency Activities

*Note that agency users must have the role Provide.Users.DTC and have their Current Profile set to the agency's Data to Care program.
From Tools > User Security:



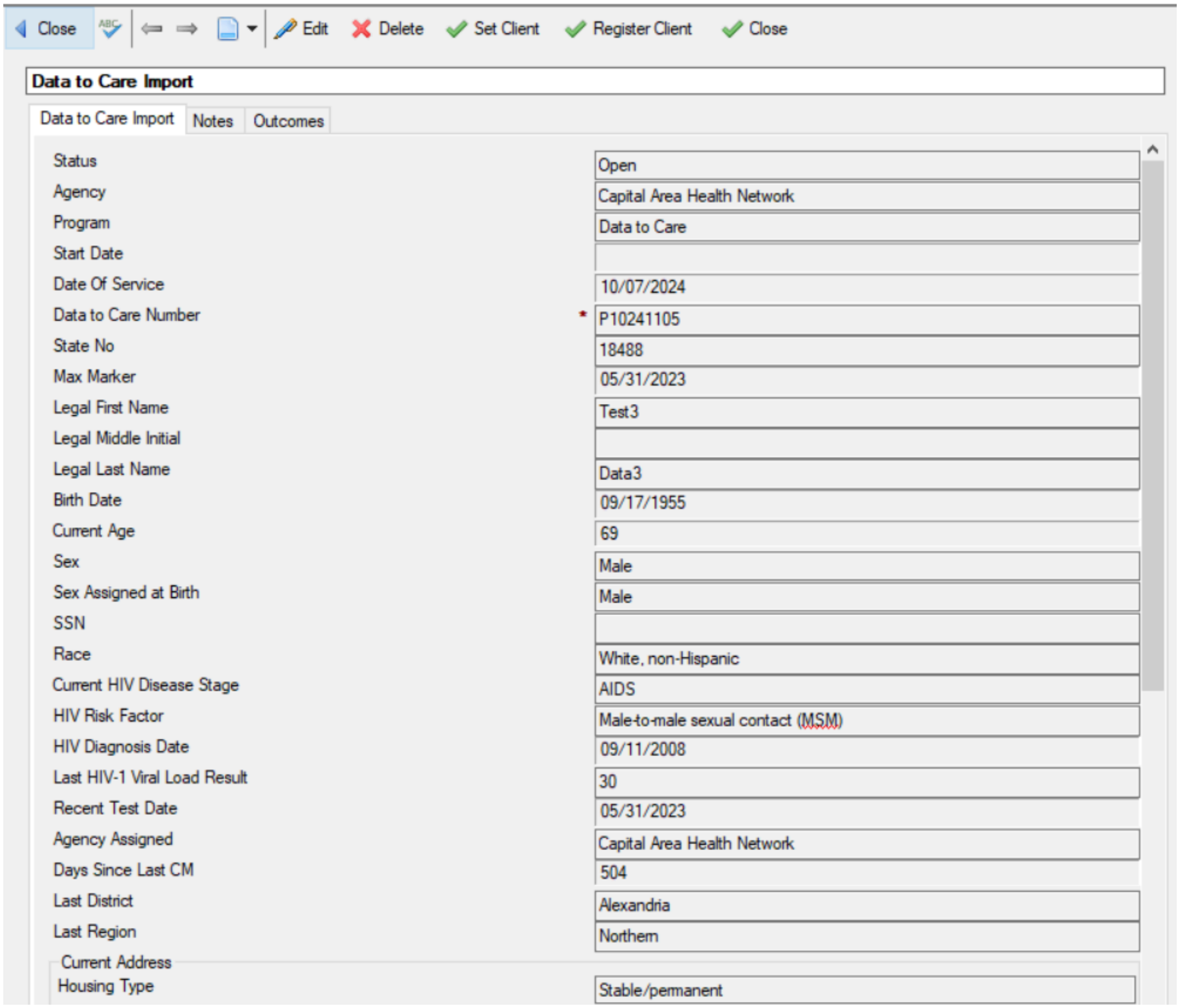
Viewing Referred Cases
At the receiving Agency, an entitled user may use the View > PLWH Clients > Data to Care Clients Referred, to see cases assigned to their agency.





Opening a Case

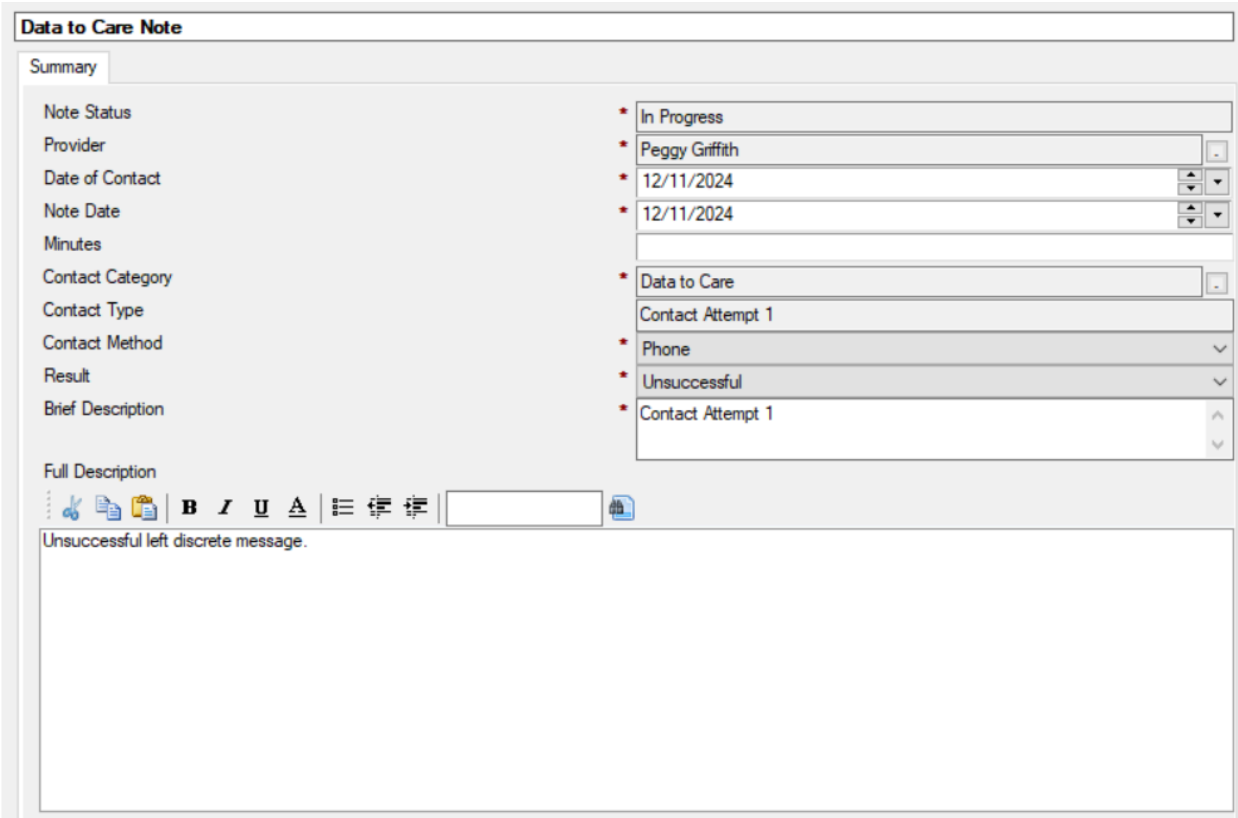
Double-click to open a Data to Care record. To acknowledge receipt and start working on the investigation click Open. This will change the status of the case from "Referred" to "Open."



You will also notice additional tabs available within the Data to Care Import form.

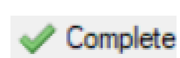
Data to Care Notes

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



Complete the required fields.

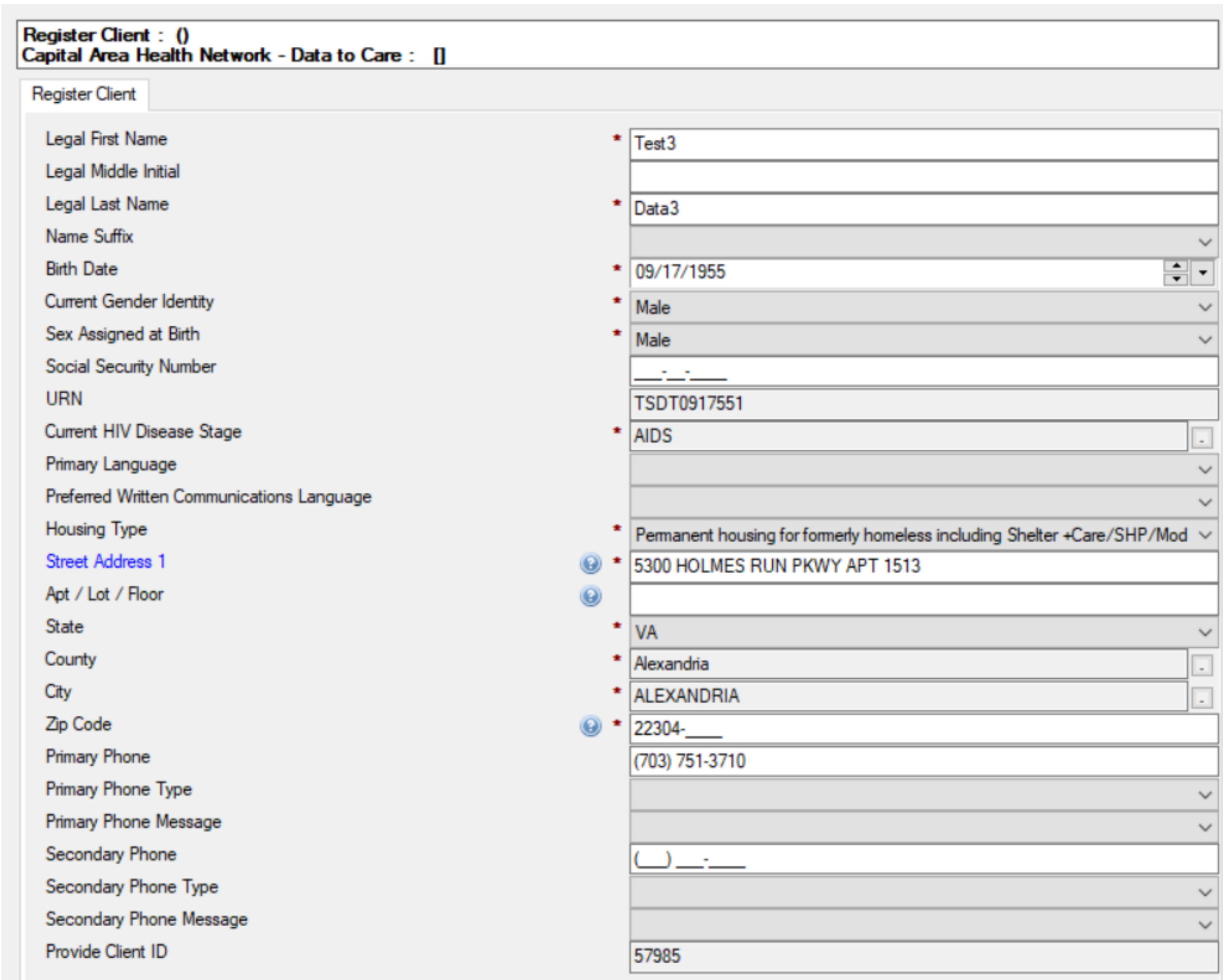
- Note Status – Defaults to In Progress.
- Provider – Defaults to your name.
- Date of Contact – defaults to today's date. If the contact attempt happened previously, select the appropriate date.
- Note Date – defaults to today's date.
- Minutes – optional – enter number of minutes spent on the contact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

When you are finished entering the details of the contact attempt, click 

. The contact information will be recorded in the Notes embedded view.

Register a client

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

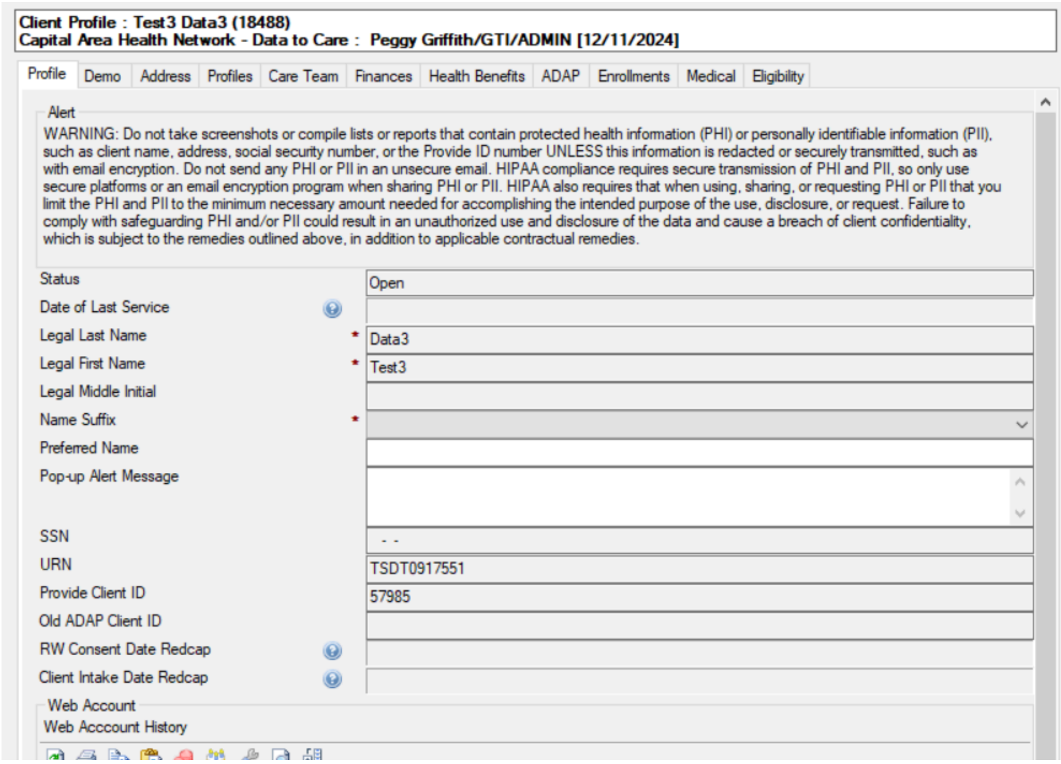


Register Client : ()
Capital Area Health Network - Data to Care : []

Register Client

Legal First Name *	Test3
Legal Middle Initial	
Legal Last Name *	Data3
Name Suffix	
Birth Date *	09/17/1955
Current Gender Identity *	Male
Sex Assigned at Birth *	Male
Social Security Number	___-__-____
URN	TSDT0917551
Current HIV Disease Stage *	AIDS
Primary Language	
Preferred Written Communications Language	
Housing Type *	Permanent housing for formerly homeless including Shelter +Care/SHP/Mod
Street Address 1 *	5300 HOLMES RUN PKWY APT 1513
Apt / Lot / Floor	
State *	VA
County *	Alexandria
City *	ALEXANDRIA
Zip Code *	22304-____
Primary Phone	(703) 751-3710
Primary Phone Type	
Primary Phone Message	
Secondary Phone	(___) ___-____
Secondary Phone Type	
Secondary Phone Message	
Provide Client ID	57985

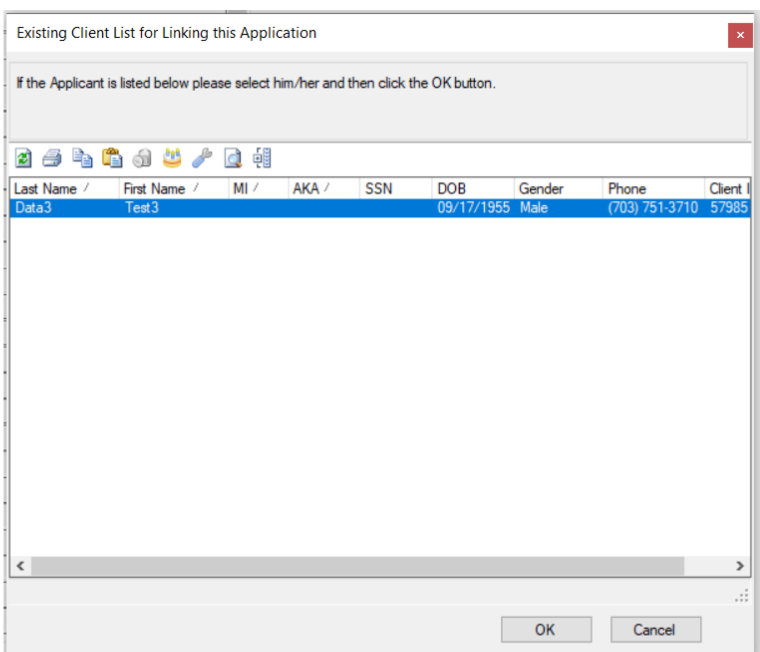
After registering the client, the Client Profile record will appear as shown below. Please note, at this point, you may need to create an informed consent to the appropriate Care Services program in order to perform an eligibility assessment.



Set Client

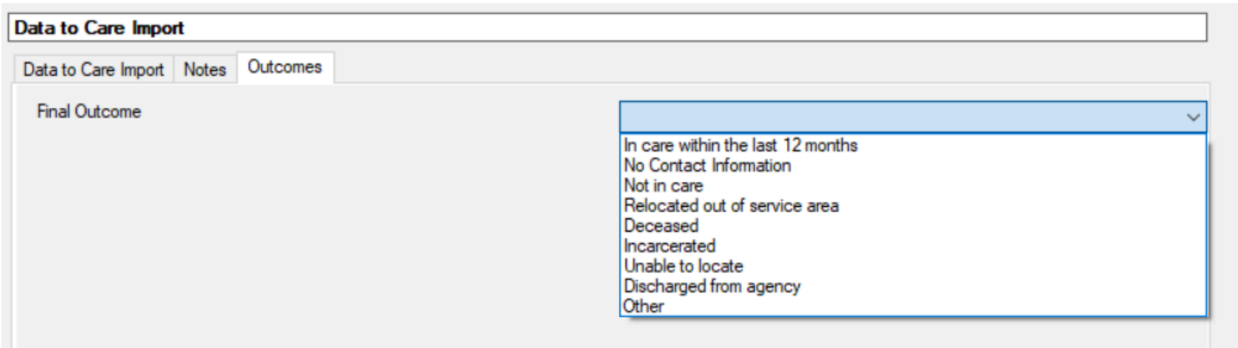
If your investigation finds that the client record already exists, click 

. A dialog box will appear with potential matching clients to select. Make the selection and click OK.



Documenting Outcomes

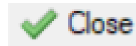
You will notice a new tab on the import record called Outcomes.



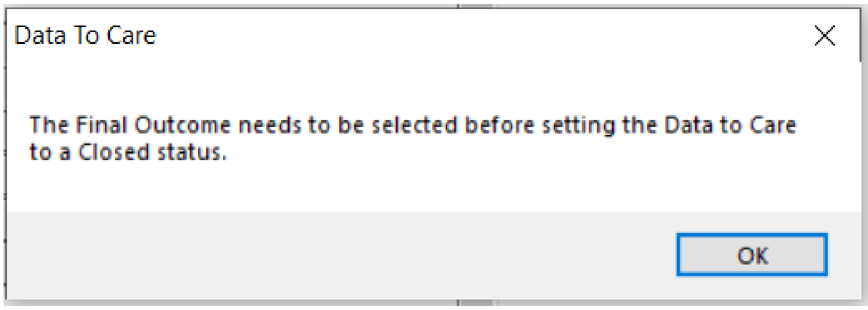
Complete the required fields.

- Final Outcome – upon selecting an outcome, the following fields become required.
  - In care within the last 12 months
    - Date of most recent/future care marker
    - Evidence of Care
    - Provider name
  - No Contact Information
  - Not In care
    - Barrier to Care
    - Reengagement Status
  - Relocated out of service area
    - State Relocated
    - Date Client Moved
  - Deceased
    - Date of Death
    - Death Source of Information
  - Incarcerated
    - DOC/Jail Facility Name
    - Expected Date of Release
  - Unable to locate
  - Discharged from Agency
  - Other

Closing a Data to Care Case

From the Data to Care import record, click the 

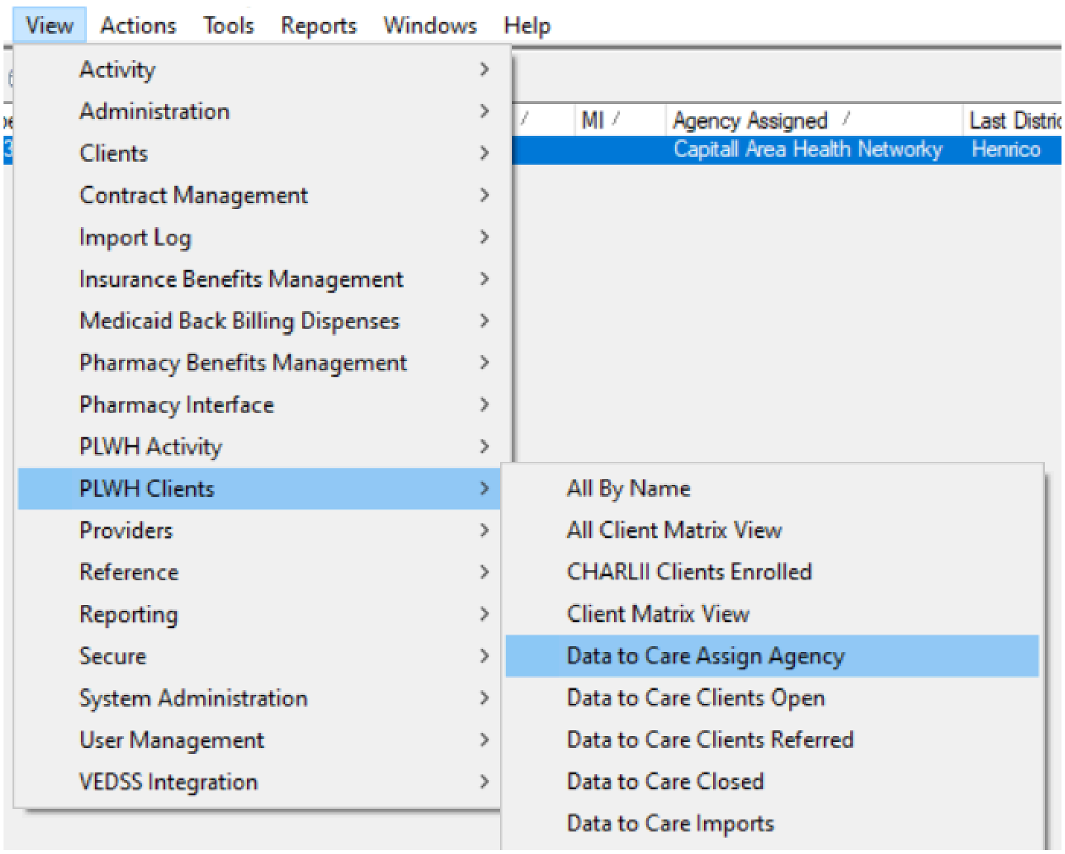
button. If you have not already documented outcomes, you will be prompted to complete the final outcome prior to closing.



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

Data to Care Views

There are several views that may help you manage your Data to Care cases.



- Data to Care Assign Agency - displays import records that are in a status of “Imported” where the agency cannot be determined. This is typically due to a misspelling in the agency name.
- Data to Care Clients Open - displays records that are currently in a status of “Open” indicating that the cases are actively being worked.
- Data to Care Clients Referred - displays records that are currently in a status of “Referred” and waiting for the assigned agency to investigate.
- Data to Care Closed - displays records that have been investigated and are in a status of “Closed.”

- Data to Care Imports - displays all records within your reporting scope, filtered by status.