



Provide Enterprise

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PrEP

Provide Enterprise User Guide Virginia Department of Health

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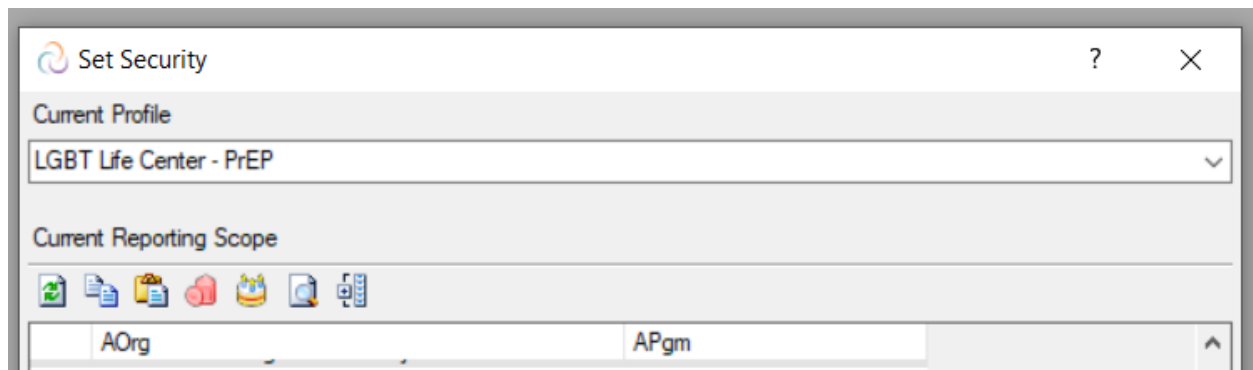
Introduction & Background

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

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

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

To perform the tasks described in this guide, you will need to confirm that your Current Profile is set to your agency's PrEP program.



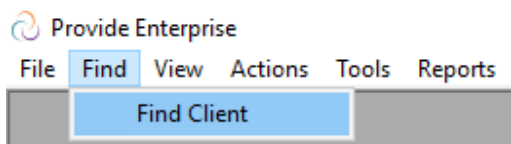


Finding Clients

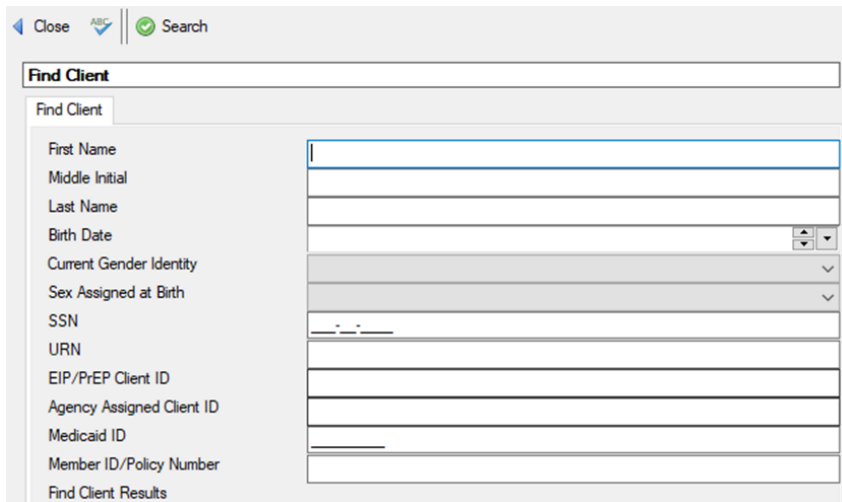
There are two ways to find PrEP clients in Provide, detailed below:

Find – Find Client

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



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

A screenshot of the 'Find Client' search form within the Provide Enterprise application. The form is titled 'Find Client' and has a 'Search' button with a magnifying glass icon. Below the title, there is a list of search criteria on the left and corresponding input fields on the right. The criteria and their input fields are: 'First Name' (text box), 'Middle Initial' (text box), 'Last Name' (text box), 'Birth Date' (calendar icon), 'Current Gender Identity' (dropdown menu), 'Sex Assigned at Birth' (dropdown menu), 'SSN' (text box with dashes), 'URN' (text box), 'EIP/PrEP Client ID' (text box), 'Agency Assigned Client ID' (text box), 'Medicaid ID' (text box), and 'Member ID/Policy Number' (text box). At the bottom of the form, there is a section labeled 'Find Client Results'.

View All PrEP Clients

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

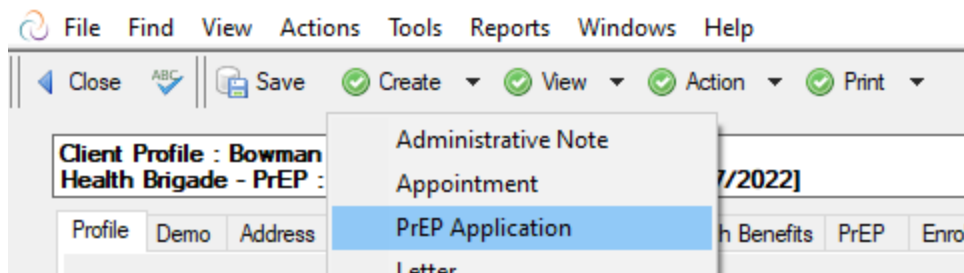
Client ID	Last Name	First Name	MI	Status	Primary Phone	Address 1	State	Zip	Historic Client
10228	Test20220315	PrEP		Open		123 Main	VA	99999-	Current
10224	FileTest20220314	PrEP		Open		123 Main	VA	99999-	Current
10215	ImageTest20220314	PrEP		Open		123 Main	VA	99999-	Current
10202	Test20220314	PrEP		Open		123 Main	VA	99999-	Current
10195	Test20220309	PrEP	A	Open	(555) 555-5555	123 Main St	VA	99999-	Current

PrEP Application

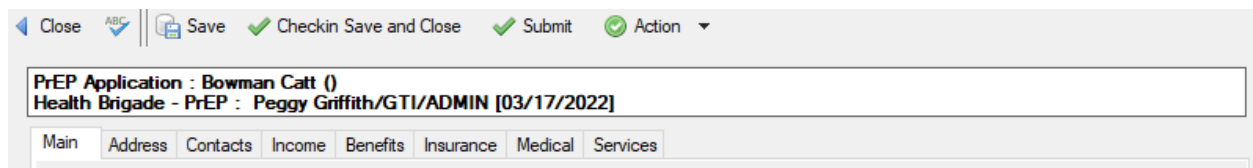
The PrEP Application in Provide is used to determine a client's eligibility to receive services from the Virginia PrEP program and, if eligible, to enroll the Client in Medication Assistance. The PrEP Application is used for new Clients applying for services.

Creating a PrEP Application

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



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



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

Main Tab

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

The screenshot displays the 'Main' tab of a PrEP Application form. The form is organized into several sections with labels on the left and input fields on the right. The 'Assessment Status' section includes fields for 'Provide Client ID' (10229), 'Application ID' (DFE7727F), 'Source' (Provider), 'Checked Out?' (Yes), 'Checked Out By' (Peggy Griffith), 'Checked Out Date' (03/17/2022), 'File Status' (In Progress), 'Date Received' (03/17/2022), 'Date Due' (03/31/2022), and 'Comments'. The 'Applicant Identification' section includes fields for 'Legal First Name' (Bowman), 'Legal Middle Initial' (Catt), 'Legal Last Name' (Catt), 'Preferred Name', 'Date of Birth' (09/26/1990), 'Current Age' (31), 'Social Security #' (- -), 'Current Gender Identity' (Male), 'Sex Assigned at Birth' (Male), and 'Gender Pronoun'. The 'Demographic Data' section includes a 'Race - Check all that apply' checkbox group (American Indian/Alaska Native, Asian, Black or African American, Native Hawaiian/Other Pacific Islander, White) and 'Ethnicity'. The 'Client Consent' section includes a 'Client Consent Document(s)' table with columns for 'Date', 'Type', and 'Delete Flag'. The table shows a single entry: '2022/03/17', 'Client Consent', and 'N'. Below the table is an 'Add Scan Document' button.

Date	Type	Delete Flag
2022/03/17	Client Consent	N

Fill in the appropriate fields:

- Provide Client ID – This will auto-populate with a unique client ID.
- Application ID – This will auto-populate with a new unique Assessment ID number.
- Source – This will auto-populate with the “Provider.”
- Checked Out? – This will default to “Yes” when you first create the Assessment as it will be automatically checked out to you.
- Checked Out By – This will default to your name.

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

Client Consent		
Client Consent Document(s)		
Date ▾	Type /	Delete Flag /
2021/06/14	Client Consent	N

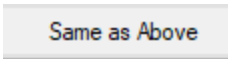
Address Tab

The Address tab of the PrEP Application is where the residence and mailing address and other contact information is collected.

The screenshot shows the 'Address' tab of the PrEP Application. The form is divided into several sections: 'Residence', 'Mailing Address', 'Telephones', 'EMessaging', and 'Proof of Residency'. The 'Residence' section includes fields for Housing Type (a dropdown menu), Housing Status (a dropdown menu), Street Address (a text field), Apt / Lot / Floor (a text field), State (a dropdown menu), County (a dropdown menu), City (a dropdown menu), and Zip Code (a text field). The 'Mailing Address' section includes a checkbox for 'Do you consent to receiving mail from the', a button 'Click to update Address ==>', a dropdown menu for 'Addressee (Care Of Line)', and fields for Street Address, Apt / Lot / Floor, State, City, and Zip. The 'Telephones' section includes fields for Primary Phone and Primary Phone Message. The 'EMessaging' section includes a checkbox for 'Okay to Send Email?' and a text field for Email Address. The 'Proof of Residency' section includes a button 'Add Scan Document' and a table with columns for Date, Type, and Delete Flag.

Fill in the appropriate fields:

- Does my agency collect housing information - Yes/No
 - If No, you will not be required to enter the Housing Type or Housing Status
- Housing Type – Select the current housing type of the client.
- Housing Status – will pre-fill dynamically based on the Housing Type selection.
- Residence Address –
 - Street Address – Enter the house number and street name for the client.

- Apt/Lot/Floor – Enter this field if appropriate.
 - State – Select the state of residence for the client.
 - County – Select the county of residence for the client.
 - City – Select the city in which the client lives.
 - Zip – Enter the zip code of residence for the client.
- Does the client consent to receiving mail from the program? - Select “Yes” or “No.”
 - If “Yes” then also enter the following fields:
 - Mail Care Of – If the Client wants their mail sent to a third-party address, then you must enter the name of the individual that the mail will be sent to.
 - Mail Street Address 1 – Either manually enter the mailing address fields starting here or if the address is the same as their residence address entered above, click the  button, and the rest of the mailing address will be copied from the residence fields.
 - Mail Street Address 2 – Enter the Unit / Lot/ Floor or PO Box
 - Mail State – Enter the State where mail is to be delivered
 - Mail City – Enter the City where the mail is to be sent
 - Mail Zip – Enter the Zip code or where the email is to be sent.
- Primary Phone Number – Enter the client’s primary phone number.
- Primary Phone Message – Select the appropriate choice if phone messages are allowed at this phone number.
- EMessaging – Indicate whether it’s OK to send system-generated messages to:
 - Okay to send Email – Select Yes or No
 - If yes, enter Email Address.
 - Okay to send text message – Select Yes or No
 - If yes, select cell phone carrier and cell phone number.
- Proof of Residency Document(s) – The embedded lists Proof of Residency Scan documents in the Client chart. If new Proof of Residency

documentation is provided by the Client, then click the “Add Scan Document” button within the embedded view.

Contacts

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

The screenshot shows a software interface with a tabbed menu at the top. The 'Contacts' tab is active. Below the tabs, there is a section titled 'Authorized Representatives'. It contains a dropdown menu for 'Number of authorized representatives' with the value '2' selected. Below this dropdown, there are two sections for 'Authorized Representative 1' and 'Authorized Representative 2'. Each section has a 'Name' field and a 'Phone' field. The 'Phone' fields have a format guide '() - _ - _'.

Fill in the appropriate fields:

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

Income Tab

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

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

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

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

Benefits Tab

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

Main Address Contacts Income **Benefits** Insurance Medical Services

Alert
It is critical that applicant report enrollment in health benefits programs. Failure to do so may lead to removal from the Medication Assistance Program.

Medicare
Status * No Benefits

Medicaid
Medicaid Checked? No
Medicaid Status? *
Comments

VA Medical Services
Status

Indian Health Services
Status

For Medicare, if Active, other variable data points are asked for as outlined and shown below:

Medicare	
Status	* Active
Effective Date	* <input type="text"/>
Medicare Coverage	* Part A & B
Comments	<input type="text"/>

- If Medicare Status is Active you need to enter:
 - Effective Date – Estimated date when coverage became effective.
 - Medicare Coverage – Type of Medicare coverage the Client has:
 - Part A Only
 - Part B Only
 - Part A & B
 - Part C (Also known as Medicare Advantage)
 - If Medicare Coverage is “Part C” then need to enter:

Carrier Name	* <input type="text"/>
Plan Name	* <input type="text"/>
Includes Pharmacy Benefit?	* <input type="text"/>

- Carrier Name – Use the UI button to try to find the Carrier and Plan in the Health Plan Directory in Provide. If it is not in the Directory select “*Other – Not Listed” and you will be prompted to enter the Carrier and Plan Name manually.
- Plan Name – Automatically set when Carrier Name selected.
- Includes Pharmacy Benefits? – If “Yes” this means that the Client Medicare Part D benefits are “rolled into” their Medicare Advantage Plan so not Part D information needs to be collected.
- If Medicare Status is Active and Coverage is anything other than Part C that includes pharmacy benefits then you need to also collect Medicare Part D information.

Medicare Prescription Drug Plan (PDP)

Status: Active

Effective Date:

Carrier Name:

Plan Name:

Comments:

- o If Medicare D Status is Active then must collect the following data points:
- o Effective Date – Estimated date when Part D coverage first became effective.
- o Carrier Name – Use the UI button to try to find the Carrier and Plan in the Health Plan Directory in Provide. If it is not in the Directory select “*Other – Not Listed” and you will be prompted to enter the Carrier and Plan Name manually.
- o Plan Name – Automatically set when Carrier Name selected.

For Medicare and Medicare D when Status is Active you will also be asked to collect in a Scan document Proof of Coverage documentation. Click the “Create” and “Scan” to scan or upload documents.

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

Action

Check Medicaid Enrollment

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

Medicaid

Medicaid Checked?: No

Medicaid Changed?: Yes

Medicaid Status?: Active

Date Effective (Active, Applied, Denied): 06/14/2021

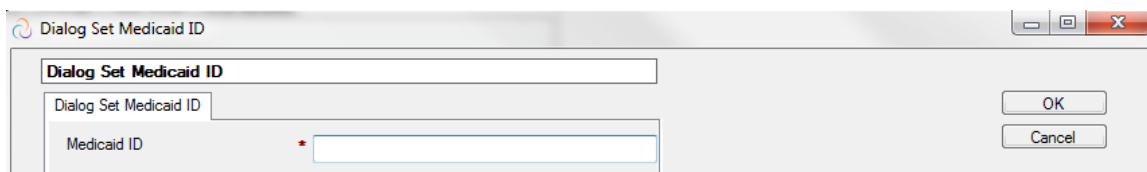
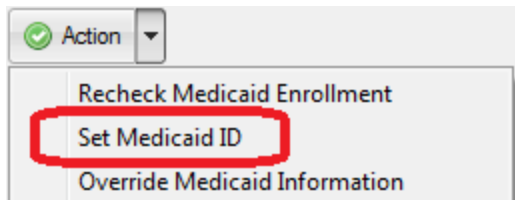
Category: HMO

Medicaid ID Number:

Comments:

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

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



Type the 10-digit Medicaid ID, and click on “OK”.

Then, execute the Action “Recheck Medicaid Enrollment”.

Insurance Tab

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

Alert
It is critical that applicant report enrollment in health benefits programs. Failure to do so may lead to removal from the Medication Assistance Program.

Primary Private Insurance

Status * Active

Effective Date *

Policy Source *

Insurance Company Name *












































Insurance Plan Name

Private Member ID

Pharmacy Coverage Included? *

Comments

Private Proof of Coverage Document(s)

- Insurance Company Name – Click the UI button to get a list of Plans by Carrier that are in the Health Plan Directory in Provide to pick from. The list varies by the Policy Source selected above.
- Insurance Plan Name – Enter the plan name.
- Private Member ID – Enter the member ID found on the insurance card.
- Pharmacy Coverage Included? – Indicate if this policy includes pharmacy coverage. Click “Yes” or “No.”
- Comments

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

Medical Tab

The Medical tab is where you document key medical related information about the client.

Main Address Contacts Income Benefits Insurance Medical Services

HIV Status
 Stage of Disease * HIV Negative
 Date of last negative HIV test * 12/11/2024
 Test Reviewed By * Dr. Smith
 The Reviewer must be a prescriber with credentials MD, NP, PA, or RPh

Allergies
 List all
 Add Allergy Record

Deleted /	Status /	Allergy Name /	Date Started ▾	Date Ended
N	Active	Bicillin C-R	2024/12/11	

STI Diagnosis
 Check all that apply

☐ Syphilis
☐ Gonorrhea
☐ Chlamydia

Used Substances
 Check all that apply



☐ Alcohol (ex. beer, wine, liquor)
☐ Amphetamines (ex. meth, speed, non-prescription use of Adderall)
☐ Cocaine or crack-cocaine
☐ MDMA (ex. molly, ecstasy)
☐ Hallucinogens (ex. LSD, acid, mushrooms)
☐ GHB
☐ Marijuana (ex. joints, blunts, edibles)
☐ Opiates (ex. heroin, Fentanyl, OxyContin, or Morphine)

Injected Substances
 Check all that apply

☐ Amphetamines (ex. meth, speed, non-prescription use of Adderall)
☐ Cocaine or crack-cocaine
☐ Opiates (ex. heroin, Fentanyl, OxyContin or Morphine)
☐ Other (specify)

Risk Categories

Fill in the appropriate fields:

- Stage of Disease – Click the  button to select the client’s current stage of HIV.
NOTE: Once set to AIDS it can only be reset to HIV+ by Central Office staff.
- Date of last negative HIV Test
- Test Reviewed By - Click the  to search for a provider in the database, or you may simply type the provider information.
- Allergies – click “Add Allergy Record” to document any allergies to medications or other allergies.
- STI Diagnosis – check all that apply.
- Used Substances – check all that apply.

- Injected Substances – check all that apply.
- Risk Categories – check all that apply.

Services Tab

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

Current Status

PrEP Medication Assistance Enrollment Records

Date Effective ▾	Date End ▾	Status	Benefit Level	Medication Pickup Site	Deleted? /
------------------	------------	--------	---------------	------------------------	------------

Medication Assistance

Core PrEP Eligible? Yes

What program is used to supply PrEP Medications? * 1 - Gilead Advancing Access ▾

Will medication be filled by VDH Pharmacy Services? No ▾

Medication Sent To Local Health Department ▾

Medication Pickup Site * Accomack ▾


- Core PrEP Eligible? – defaults to Yes or No based on criteria.
- What program is used to supply PrEP Medications? - select the appropriate program.
- Will medication be filled by VDH Pharmacy Services? Yes/No
- Medication Sent to - Select Local Health Department or Alternative Delivery Site.
 - If Alternative Pickup site, you will be prompted to enter the details.
 - If Local Health Department, you will be prompted to select the pickup site.
- Medication Pickup Site – select the access site where the client will be picking up medications.

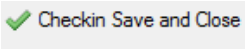
When complete, click on



.

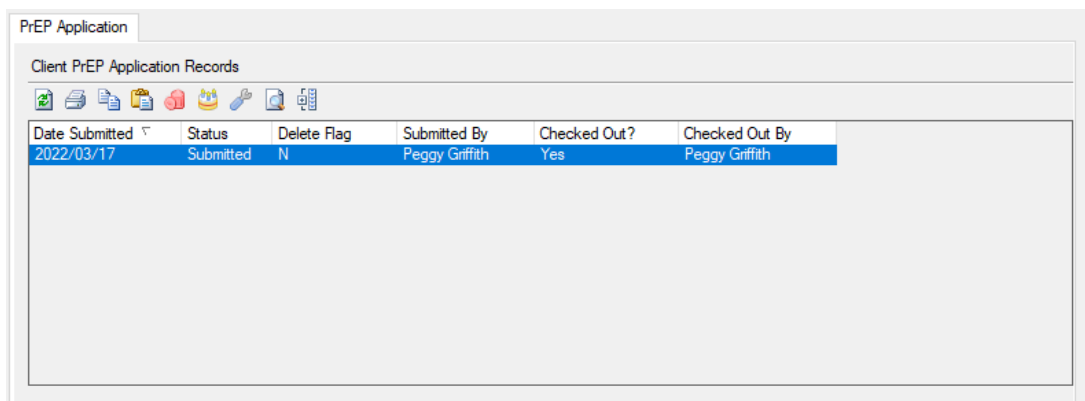
Saving PrEP Applications in Progress

To save an PrEP Application “In Progress”, click on . The PrEP Application will still be “Checked-Out” by you.

If you want to save the PrEP Application “In Progress” and allow another team member to “work” the application, click on .

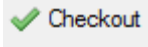
To open an PrEP Application that has been saved “In Progress”, in the Client Profile click on the “View - PrEP Applications” from the Client Profile Button Bar.

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



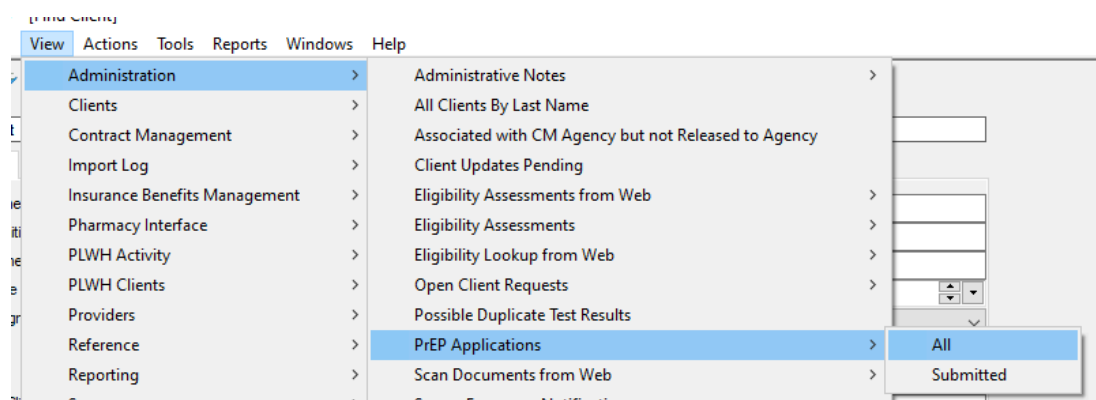
The screenshot shows a web application window titled "PrEP Application". Inside, there is a section labeled "Client PrEP Application Records". Below this label is a toolbar with several icons. Below the toolbar is a table with the following data:

Date Submitted	Status	Delete Flag	Submitted By	Checked Out?	Checked Out By
2022/03/17	Submitted	N	Peggy Griffith	Yes	Peggy Griffith


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

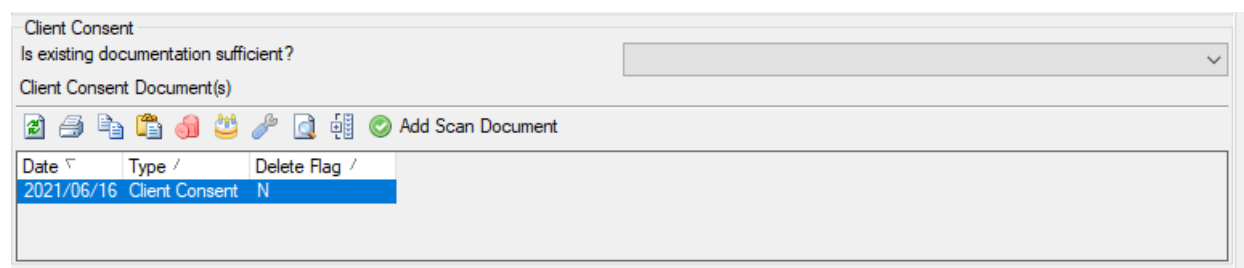
Reviewing and Completing a PrEP Application

After a PrEP Application has been submitted, a supervisor will review the assessment for quality assurance and to approve the request for services. Supervisors will use the View – Administration – PrEP Applications from the menu bar to see a list of submitted PrEP Applications ready for review.



Double-click on the submitted PrEP Application that you are ready to review and

complete. Click the  Edit from the button bar. Navigate through the tabs and check for accuracy and completion. On tabs that require scanned documentation, a new question appears asking if the existing documentation is sufficient. Select “Yes” or “No.”



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

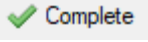
- Main
- Address
- Income

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

To indicate on the application that you have reviewed the application, click

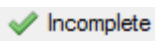


. This will set the Date Reviewed and Reviewed By fields so that others know you are reviewing the application.


When all information is complete, click  from the button bar. Click OK to complete the enrollment.

When a PrEP Application is processed, the updated information will be pushed to the client profile overnight. However, if you want the information to be pushed to the client profile immediately, in the client profile, click on “Action – Update Client”.

Marking a PrEP Application Incomplete

If the application is incomplete, you will need to click on .

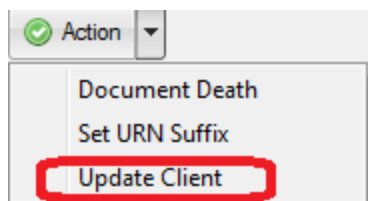
Rejecting a PrEP Application

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

Update Client

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

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



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

Working with PrEP Enrollments

View PrEP Enrollment

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

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

Profile

Demo

Address

Profiles

Care Team

Finances

Health Benefits










PrEP

Enrollments

Medical










Eligibility

Medication Assistance Enrollment Records



Date Effective ▾	Date End ▾	Status	Benefit Level	Medication Pickup Site	Deleted? /
2022/03/17		Enrolled	PrEP Medication Assistance	Accomack	N

PrEP Client Notes



Add PrEP Client Note

Deleted	Date ▾	Note Type	Program	Entered By
---------	--------	-----------	---------	------------

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

Close ABC Withdrawal View

PrEP Medication Assistance Enrollment : Bowman Catt ()
Health Brigade - PrEP : Peggy Griffith/GTI/ADMIN [03/17/2022]

PrEP Medication Assistance Enrollment

Status	Enrolled
Date Enrolled	03/17/2022
Benefit Level	PrEP Medication Assistance
Benefit Effective Date	* 03/17/2022
Medicare Effective Date	
Medicare Carrier Name	
Medicare Plan Name	
Medicaid Date Effective	
Private Effective Date	
Insurance Company Name	
Insurance Plan Name	

Withdrawal

To withdraw a client from their enrollment, click the  **Withdrawal** button.

PrEP Medication Assistance Withdrawal


Status	In Progress
Date Enrolled	03/17/2022
Date of Withdrawal	03/17/2022
HIV Status	* Non-reactive
HIV Test Date	03/17/2022
Withdrawal Type	* Withdrawal by Clinician
Reason for Withdrawal	* <ul style="list-style-type: none"> <input type="checkbox"/> Reactive HIV Test Result <input type="checkbox"/> Development of Renal Disease <input type="checkbox"/> Use of Medication for unintended purposes <input type="checkbox"/> Non-adherence to medication or appointments <input type="checkbox"/> Other
Attachment Type	* File
File Attachments	

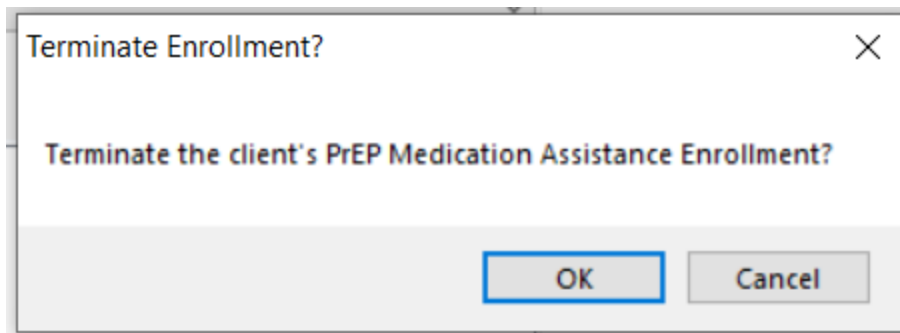
Attach Save As Launch

Complete the fields:

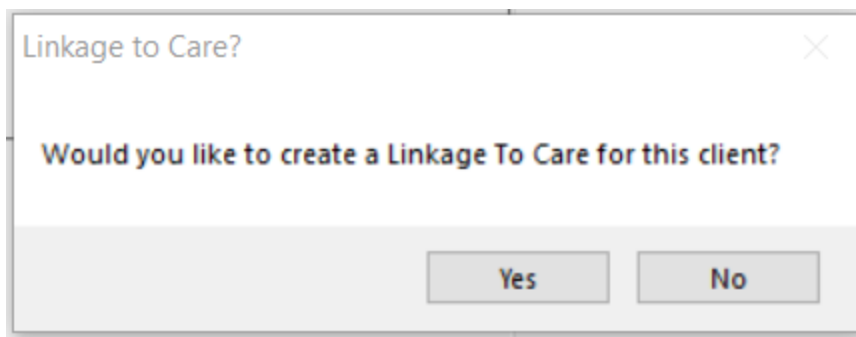
- Status – defaults to In Progress.
- Date Enrolled – defaults to date the client was enrolled in PrEP.
- Date of Withdrawal – enter the date of withdrawal from PrEP.
- HIV Status – select “Reactive” or “Non-reactive.”
- HIV Test Date – enter the date of the last HIV test.
- Withdrawal Type – Select “Withdrawal by Clinician” or “Self-Withdrawal.”

- Reason for Withdrawal – Select the appropriate reason for withdrawal. Note the list of reasons is different depending on the Withdrawal Type selected.
- Attachments – Attach any supporting documentation as necessary.

When you are finished entering information click the  **Process** button. Click OK to terminate the client's PrEP Medication Assistance Enrollment.

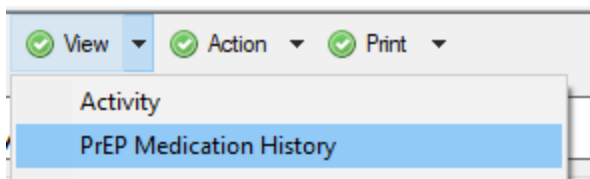


If you would like to link the client to Care immediately, select Yes to start the Linkage process (covered later in this guide). Otherwise, click No.



View PrEP Medication History

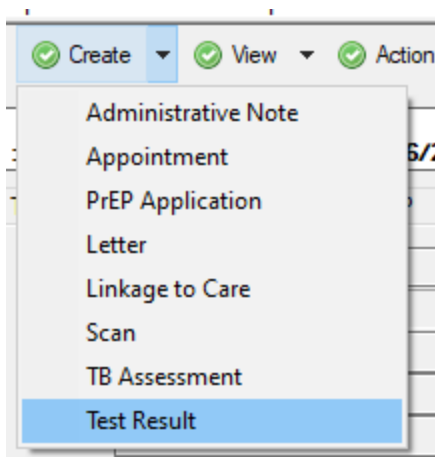
From the Client Profile, navigate to View > PrEP Medication History. This view will show all of the medication fills that have occurred for this client.



PrEP Medication History									
PrEP Pharmacy Transaction History									
Pharmacy	Import Date	Fill Date	Status	Cost Status	Rx ID /	NDC	D Code	On Formulary	
Central Pharmacy	2022-04-04	2022-02-08	Error	Pending	06250860	70710136703	d05352	Yes	

Recording Lab Test Results

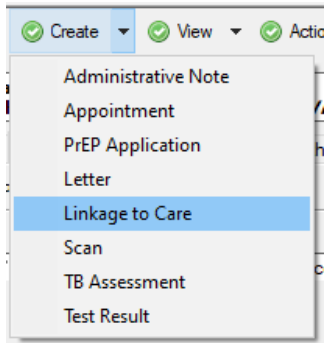
From the Client Profile, navigate to Create > Test Result. This will open a form to record test results and attach proof documentation.



Test Result		Attachments
Test Name	* HIV Verification	
Test Date	* 05/26/2022	
Test Result Status	* Final	
Test Result Keyword	* Negative	
Test Result Modifier	* =	
Test Completed By		
Entry Mode	Manual	
Test Result Comments		

Create Linkage to Care

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



Linkage to Care

Linkage to Care **Consent**

Status

In Progress

Referring PrEP Agency

Virginia Department of Health

Agency Referred To

*

PrEP Client ID

10233

Client Contact Instructions

Date Positive Confirmed

*

Client Information

Legal First Name

Daisy

Legal Middle Initial

Legal Last Name

Catt

Birth Date

05/26/2000

Gender

Female

Sex Assigned at Birth

Female

SSN

987-55-1515

Current HIV Disease Stage

HIV Negative

Primary Language

Preferred Written Communications Language

English

Races - All Identified With

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

Ethnicity

Non-Hispanic

Housing Type

Renting and living in an unsubsidized room or house or apartment

[Address 1](#)

123 Any St

Apt / Lot / Floor

State

VA

County

Accomack

City

Accomac

Zip Code

23212-

Primary Phone

() -

Primary Phone Type

Primary Phone Message

Secondary Phone

() -

Secondary Phone Type

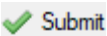
Secondary Phone Message

Email Address

Complete the appropriate fields.

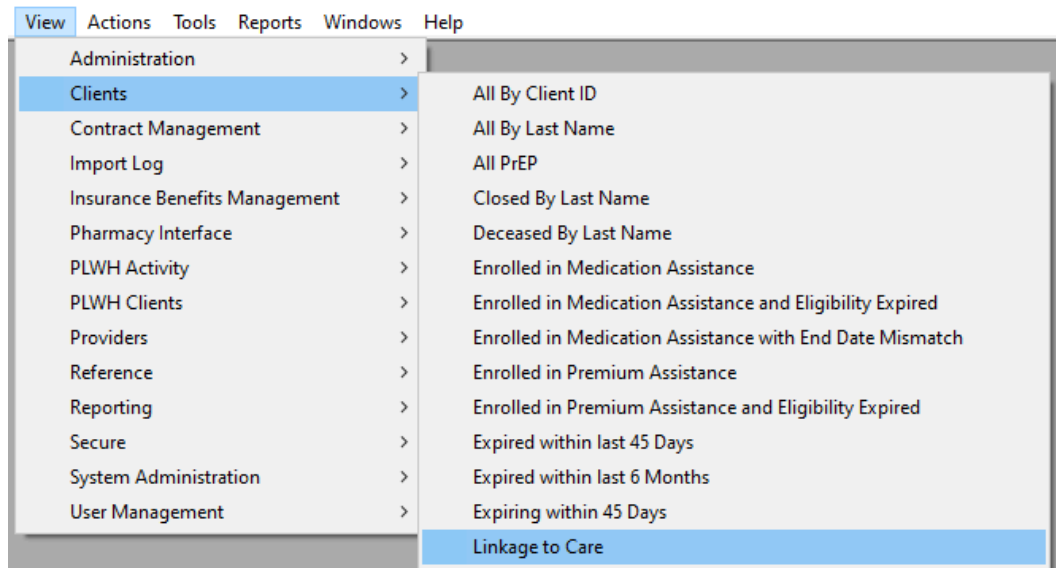
- Status – defaults to In Progress
- Referring PrEP Agency – defaults to your agency
- Agency Referred To – select the care agency to which you are linking the client.
Note that this could be your agency.
- Client Contact Instructions – free-form notes for any instructions
- Date Positive Confirmed –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

The Client Information section defaults from the PrEP Client Profile.

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

Receiving Agency – Linkage to Care


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




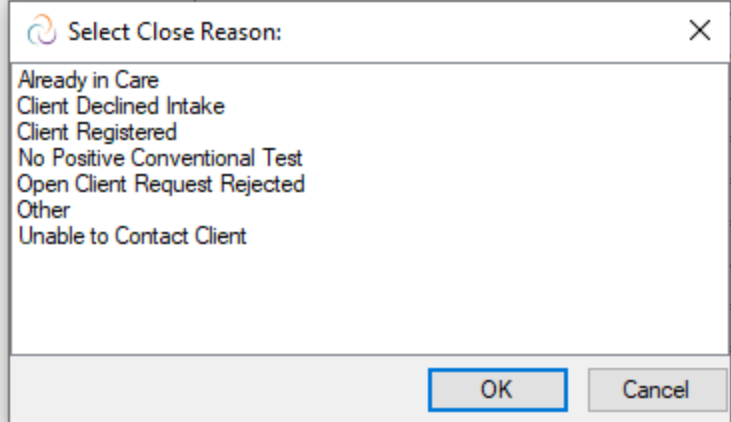
A view will be presented showing a list of clients submitted to care. Double click the record to open it.

Status /	Status Date /	Referred By /	Referred To /	Client ID	Last Name /	First Name /	MI /	DOB /	Primary Phone	Close Rea
Submitted to Care										
Submitted to Care	2022/05/26	Virginia Department of Health	Health Brigade	10233	Catt	Daisy		2000/05/26		

From within the Linkage to Care record, click  **Acknowledge** to acknowledge receipt of the referral.

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

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



A dialog box titled "Select Close Reason:" with a close button (X) in the top right corner. The dialog contains a list of reasons for closing a request:

- Already in Care
- Client Declined Intake
- Client Registered
- No Positive Conventional Test
- Open Client Request Rejected
- Other
- Unable to Contact Client

At the bottom of the dialog are two buttons: "OK" and "Cancel".