



# Provide Enterprise

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# Status Neutral

Provide Enterprise User Guide  
Virginia Department of Health

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Last Updated December 2024



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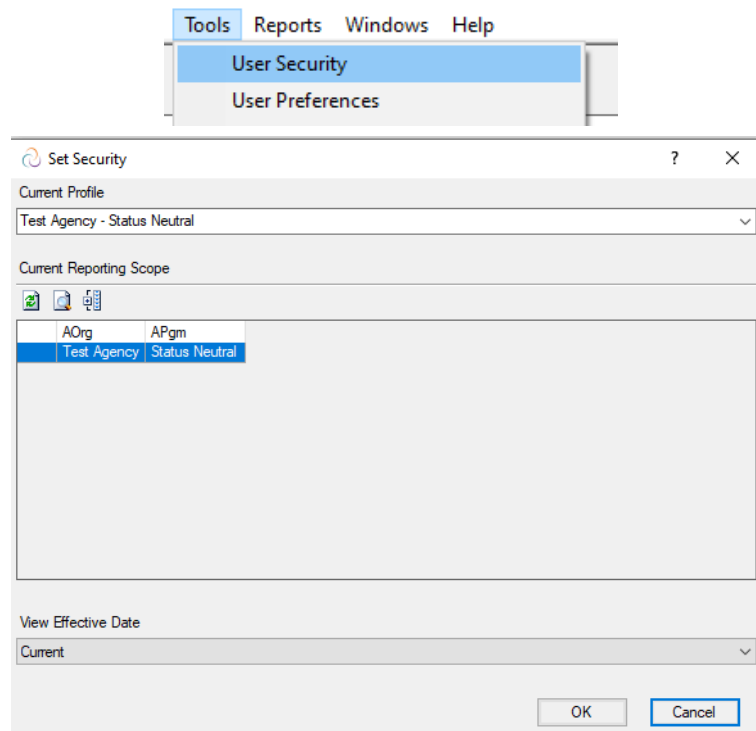
# Introduction

The Virginia Department of Health has chosen to use the Provide Enterprise (PE) system to manage their Ryan White Care and Prevention programs, which includes Status Neutral Service Navigation for individuals who may be at risk or who do not know their HIV Status.

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

## Security Requirements

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

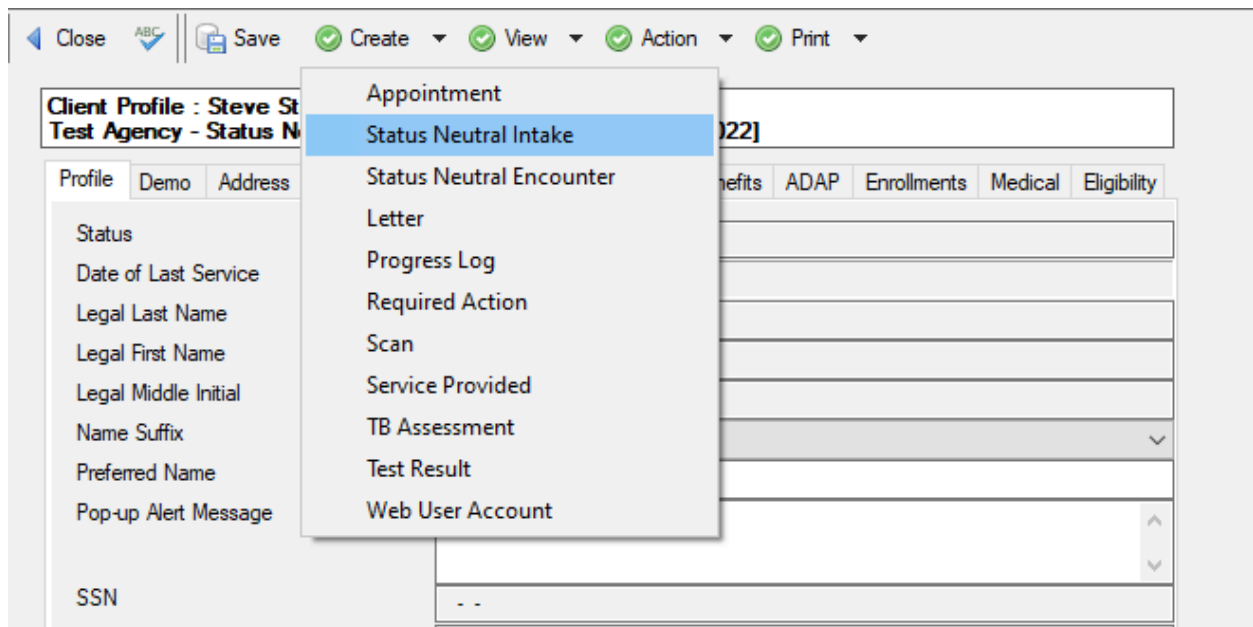


## Status Neutral Intake

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

Once the client is registered, a base Client Profile is created.

From the Client Profile, click the Create button, and select Status Neutral Intake.

The screenshot shows the 'Client Profile' page for a client named 'Steve St'. The page has a top navigation bar with buttons for 'Close', 'Save', 'Create', 'View', 'Action', and 'Print'. The 'Create' button is highlighted with a green checkmark. A dropdown menu is open from the 'Create' button, showing a list of options: 'Appointment', 'Status Neutral Intake' (which is highlighted in blue), 'Status Neutral Encounter', 'Letter', 'Progress Log', 'Required Action', 'Scan', 'Service Provided', 'TB Assessment', 'Test Result', and 'Web User Account'. The main content area on the left lists various fields for the client profile, including 'Status', 'Date of Last Service', 'Legal Last Name', 'Legal First Name', 'Legal Middle Initial', 'Name Suffix', 'Preferred Name', 'Pop-up Alert Message', and 'SSN'. On the right, there are tabs for 'Benefits', 'ADAP', 'Enrollments', 'Medical', and 'Eligibility'. The 'Benefits' tab is currently selected, showing a list of benefits with a search bar and a '222' count.

At any time in the intake process, you may click the  Save button to save your updates.

## Main tab

The screenshot shows the 'Main' tab of a client intake form. The header displays 'Status Neutral Intake : Steve Status ()' and 'Health Brigade - Status Neutral : Peggy CaseManagerTest/HB [12/06/2024]'. Below the header are tabs for 'Main', 'Demo', 'Address', 'Financial', 'Insurance', and 'Enrollments'. The 'Main' tab is active, showing two sections: 'Assessment Status' and 'Applicant Identification'. The 'Assessment Status' section includes fields for 'Provide Client ID' (57962), 'Assessment ID' (3B681228), 'File Status' (In Progress), 'Date Received' (12/06/2024), and 'Is client ONLY an ASE Client?' (No). The 'Applicant Identification' section includes fields for 'Legal First Name' (Steve), 'Legal Middle Initial' (empty), 'Legal Last Name' (Status), 'Name Suffix' (empty), 'Date of Birth' (12/06/2000), 'Current Age' (24), 'Current Gender Identity' (Male), and 'Sex Assigned at Birth' (Male). Red asterisks indicate required fields.

Assessment Status	
Provide Client ID	57962
Assessment ID	3B681228
File Status	In Progress
Date Received	12/06/2024
Is client ONLY an ASE Client?	No

Applicant Identification	
Legal First Name	Steve
Legal Middle Initial	
Legal Last Name	Status
Name Suffix	
Date of Birth	12/06/2000
Current Age	24
Current Gender Identity	Male
Sex Assigned at Birth	Male

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

The Date Received defaults to today's date, but can be edited.

Also, if the client is only an ASE Client, select "Yes" to the field: **Is client ONLY an ASE Client?**

## Demo tab

The screenshot shows the 'Demo' tab of a client intake form. The header displays 'Status Neutral Intake : Steve Status ()' and 'Test Agency - Status Neutral : Tester Statusneutral [01/08/2022]'. Below the header are tabs for 'Main', 'Demo', 'Address', 'Financial', 'Insurance', and 'Enrollments'. The 'Demo' tab is active, showing a 'Demographic Data' section. This section includes three fields: 'Race - Check all that apply' (with checkboxes for American Indian/Alaska Native, Asian, Black or African American, Native Hawaiian/Other Pacific Islander, and White), 'Asian' (with checkboxes for Asian Indian, Chinese, Filipino, Japanese, Korean, Vietnamese, and Other), and 'Ethnicity' (with a dropdown menu showing Non-Hispanic). Red asterisks indicate required fields.

Demographic Data	
Race - Check all that apply	<input type="checkbox"/> American Indian/Alaska Native <input checked="" type="checkbox"/> Asian <input type="checkbox"/> Black or African American <input type="checkbox"/> Native Hawaiian/Other Pacific Islander <input type="checkbox"/> White
Asian	<input type="checkbox"/> Asian Indian <input checked="" type="checkbox"/> Chinese <input type="checkbox"/> Filipino <input type="checkbox"/> Japanese <input type="checkbox"/> Korean <input type="checkbox"/> Vietnamese <input type="checkbox"/> Other
Ethnicity	Non-Hispanic

Complete the required fields containing demographic data for the client.

## Address

The screenshot shows a software interface with a title bar containing "Status Neutral Intake : Steve Status ()" and "Test Agency - Status Neutral : Tester Statusneutral [01/08/2022]". Below the title bar is a tabbed menu with "Main", "Demo", "Address", "Financial", "Insurance", and "Enrollments". The "Address" tab is selected. The form contains the following fields:

- Residence**
  - Housing Type: \* Renting and living in an unsubsidized room or house or apartment (dropdown)
  - Housing Status: Stable/Permanent
  - Street Address: \* 123 Sunshine Way
  - Apt / Lot / Floor: \*
  - State: \* VA (dropdown)
  - County: \* Accomack
  - City: \* Accomack
  - Zip Code: \* 53202- (with a dropdown arrow)
- Telephones**
  - Primary Phone: ( ) - -
  - Secondary Phone: ( ) - -

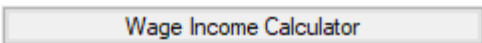
The address tab displays address and phone information captured from the registration process. Check to make sure all required fields are entered correctly.

## Financial tab

The screenshot shows the "Financial" tab selected in the same software interface. The form contains the following fields and buttons:

- Total Household Size: \*
- Current Monthly Household Income
- Wage Income Calculator: A button labeled "Wage Income Calculator"
- Gross wages, salaries, tips, etc.: \*

Enter the required financial information.

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

**Dialog Income Calculator**

Wage Income Calculator

Number of Jobs  
Number of Current Jobs \* 1

Job #1  
Pay Frequency \* Monthly

Pay Stub 1 Amount \* \$1,000.00

Other  
Other Monthly Wage Income

Self Employed  
Estimated Monthly Income

Totals  
Income Calculation \* \$1,000.00

Comments

## Insurance Tab

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

Main Demo Address Financial **Insurance** Enrollments

Medicare  
Status \* No Benefits

Medicaid  
Medicaid Status? No Benefits



Primary Private Insurance  
Status \* Active

Policy Source \* Employer

Parents Insurance Yes

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

## Enrollments tab






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

**Status Neutral Enrollment : Steve Status ()**  
**Health Brigade - Status Neutral : Peggy CaseManagerTest/HB [12/06/2024]**

Status Neutral Enrollment

Enrollment Status	Pending
Program Code	* SN
Referral Source	* HIV test
Was psychosocial screening done?	* Yes
Date	12/06/2024
Were needs identified?	* Yes
Was PrEP/nPEP Behavioral screening done?	* Yes
Date	12/06/2024
Were needs identified?	* Yes


Encounters

Status	Date	Provider	Deleted?


Complete the required fields:

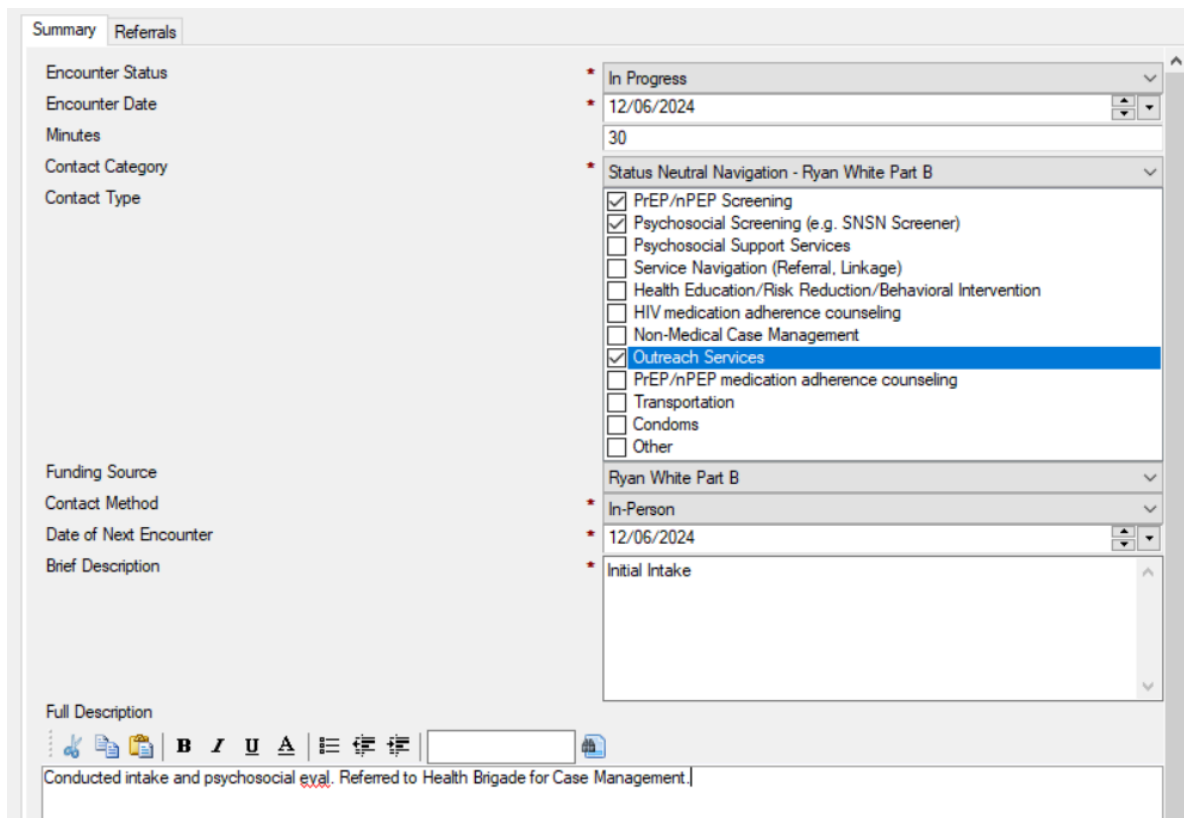
- Enrollment Status – defaults to Pending, change status to Enrolled, Complete, or Denied as appropriate.
- Program Code - select SN or ASE
- Referral Source – make the appropriate selection for how the client was referred to Status Neutral.
- Was psychosocial screening done? – Indicate Yes or No. If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

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

[Document the Encounter](#)



After you have saved the Enrollment record, click the  **Add Encounter** button to document the encounter. You may document other encounters later from the Client Profile by using the Create > Status Neutral Encounter activity.



The screenshot shows the 'Add Encounter' form with the following details:


- Summary Tab:**
  - Encounter Status: In Progress
  - Encounter Date: 12/06/2024
  - Minutes: 30
  - Contact Category: Status Neutral Navigation - Ryan White Part B
  - Contact Type:
    - ☒ PrEP/nPEP Screening
    - ☒ Psychosocial Screening (e.g. SNSN Screener)
    - ☐ Psychosocial Support Services
    - ☐ Service Navigation (Referral, Linkage)
    - ☐ Health Education/Risk Reduction/Behavioral Intervention
    - ☐ HIV medication adherence counseling
    - ☐ Non-Medical Case Management
    - ☒ Outreach Services
    - ☐ PrEP/nPEP medication adherence counseling
    - ☐ Transportation
    - ☐ Condoms
    - ☐ Other
  - Funding Source: Ryan White Part B
  - Contact Method: In-Person
  - Date of Next Encounter: 12/06/2024
  - Brief Description: Initial Intake
- Referrals Tab:** (Empty)
- Full Description:**
  - Conducted intake and psychosocial eval. Referred to Health Brigade for Case Management.

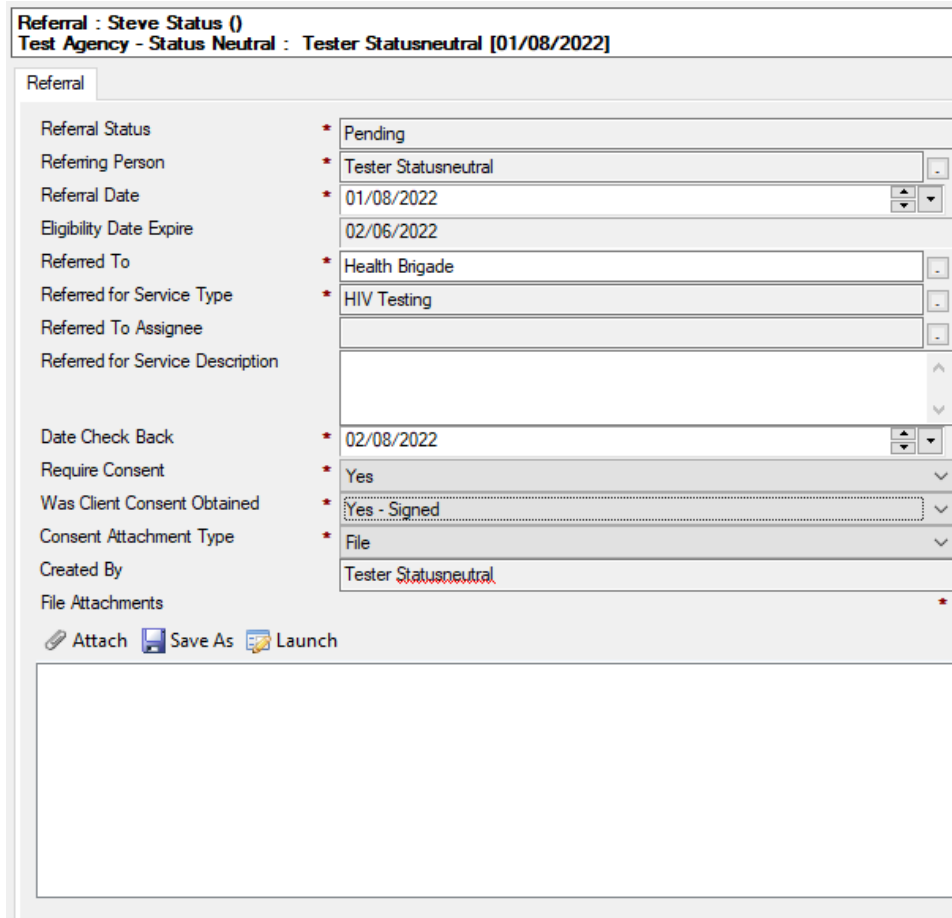
Complete the required fields for the encounter.

- Status – defaults to In Progress. When you have completed all the documentation for this encounter, change the status to “Complete.”
- Encounter Date – enter the date of the encounter.
- Minutes- enter the number of minutes for the encounter.
- Contact Category – Select the appropriate Contact Type from the list.
- Contact Type - select any of the services that were covered during the encounter.
- Funding Source - select the funding source for the encounter.
- Contact Method – Select the appropriate method to indicate how the encounter was conducted.
- Date of Next Encounter – Enter the date for your next encounter.
- Brief Description – Enter a brief subject of the encounter.
- Full Description – Enter any detailed notes about the encounter and next steps.

## Referral Tracking

From the Encounter, you may track any resulting referrals on the Referrals tab. Click the




 **Add Referral** to create a referral.



**Referral : Steve Status ()**  
**Test Agency - Status Neutral : Tester Statusneutral [01/08/2022]**

Referral

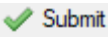
Referral Status	* Pending
Referring Person	* Tester Statusneutral
Referral Date	* 01/08/2022
Eligibility Date Expire	02/06/2022
Referred To	* Health Brigade
Referred for Service Type	* HIV Testing
Referred To Assignee	
Referred for Service Description	
Date Check Back	* 02/08/2022
Require Consent	* Yes
Was Client Consent Obtained	* Yes - Signed
Consent Attachment Type	* File
Created By	Tester Statusneutral
File Attachments	

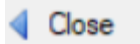
 **Attach**  **Save As**  **Launch**

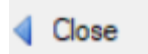
Complete the required fields and attach the appropriate consent.

- Referral Status – defaults to Pending
- Referring Person – defaults to your user name
- Referral Date – defaults to today's date
- Referred To – Select the agency receiving the referral
- Referred for Service Type – Select the appropriate service for the referral
- Referred to Assignee – if applicable, select an individual to receive the referral. Otherwise, leave blank.
- Referred for Service Description – brief description of the service to be provided by the receiving organization.

- Date Check Back – defaults to one month from date of referral
- Require Consent – Defaults to Yes
- Was Client Consent Obtained – Yes or No, If Yes attach the signed consent form.

When all the information has been entered, click  **Submit** button. You will be returned to the Status Neutral Encounter.

When you are finished entering information on the Encounter, click  **Close** and Yes to save your changes. You will be returned to the Status Neutral Enrollment form.

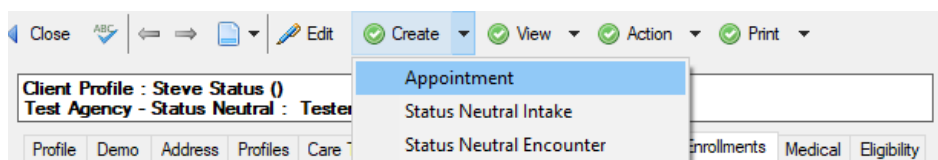
When you are finished entering information on the Enrollment, click  **Close** and Yes to save your changes. You will be returned to the Status Neutral Intake form.

When you are finished entering all information regarding the Intake, click  **Complete**.

## Other Activities

### Appointments

Track appointments made for the client from the Client Profile by clicking Create > Appointment.





**Appointment : Steve Status ()**  
**Test Agency - Status Neutral : Tester Statusneutral [01/08/2022]**

Appointment

Status	* Scheduled
Type	* Ambulatory Outpatient Medical Care
Provider Agency	Neighborhood Health
Appointment With	John Smith
Appointment Date	* 01/14/2022
Appointment Start Time	8:00 AM




Complete the required fields to track the appointment.

- Status – defaults to scheduled.
- Type – select the appropriate appointment type
- Provider Agency – type or select the service organization where the appointment will take place.
- Appointment With – type or select the individual provider
- Appointment Date – enter date of appointment
- Appointment Start Time – enter time of appointment


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




## Viewing Activity

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

 View  Action  Print


Activity

 Close

	Form	Deleted	Summary
Appointment			
Appointment			2022/01/14: Scheduled - Ambulatory Outpatient Medical Care at ABC Clinic with John Smith
Referral			
Referral			2022/01/08: Open - HIV Testing to Health Brigade
Scan			
Scan			2022/01/08: Client Consent
Status Neutral Encounter			
Status Neutral Encounter			No Description

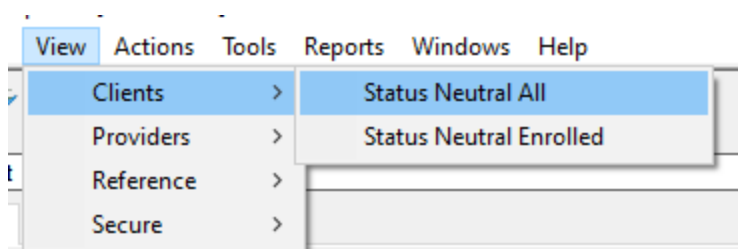
## Editing Appointments


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

## Views

### Status Neutral Views

Provide Enterprise allows you to quickly view your Status Neutral clients. To access these views, navigate to View > Clients.



The “Status Neutral All” view shows all clients with a record in your Status Neutral Program. You can use the  button to categorize the list by any of the columns.

Client ID	Last Name	First Name	MI	Status	Primary Phone	Address 1	City	State	Zip	Historic Client
10357	Status	Steve		Open		123 Sunshine Way	Accomac	VA	53202-	Current
10346	Smurf	Happy		Open		123 Happy Place	Accomac	VA	23212-	Current
10344	Smart	Suzie		Open	(414) 577-7897	123 Smart Street Apt 123	Accomac	VA	23212-	Current
10343	Smart	Suzie		Open	(414) 577-7897	123 Smart Street	Accomac	VA	23212-	Current
10341	Status	Sarah		Open	(804) 444-4444	123 Any Street	Accomac	VA	23212-	Current
10317	Tester	Josie		Open		123 Any St	Accomac	VA	23212-	Current

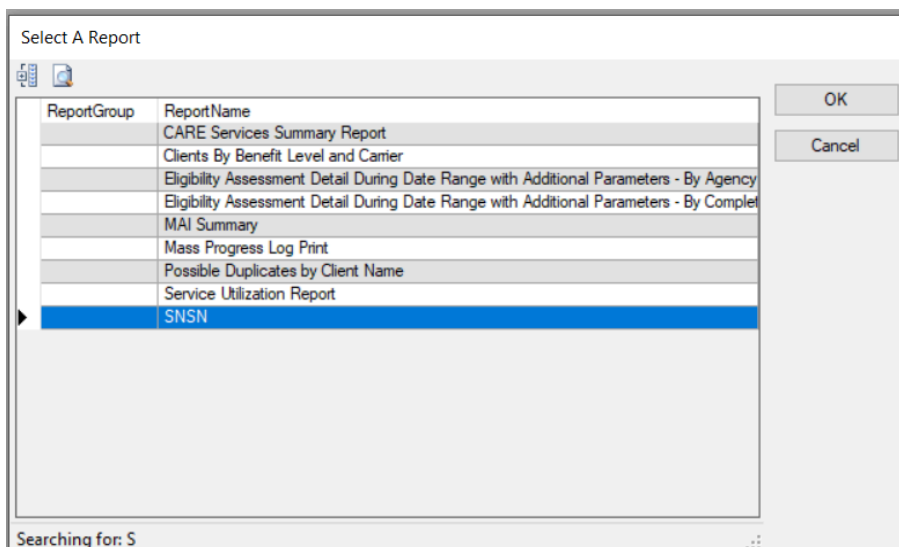
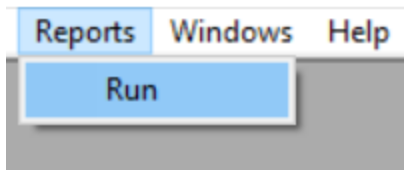
The “Status Neutral Enrolled” view shows all the clients currently enrolled in Status Neutral.

Last Name	First Name	MI	Provide ID	Date Of Birth	Primary Phone
Smurf	Happy		10346	01/05/1982	
Status	Sarah		10341	10/01/1982	(804) 444-4444
Status	Steve		10357	10/01/1991	

# SNSN Report

To run the SNSN Report, go to Reports > Run. and Select the SNSN Report. Click OK.

\*\*Reminder - The results of the report will be based on your reporting scope.



You will be required to enter start and end date parameters for which you would like to report. Click OK.

Enter Parameter Values

Please enter the start date to report on:
Start

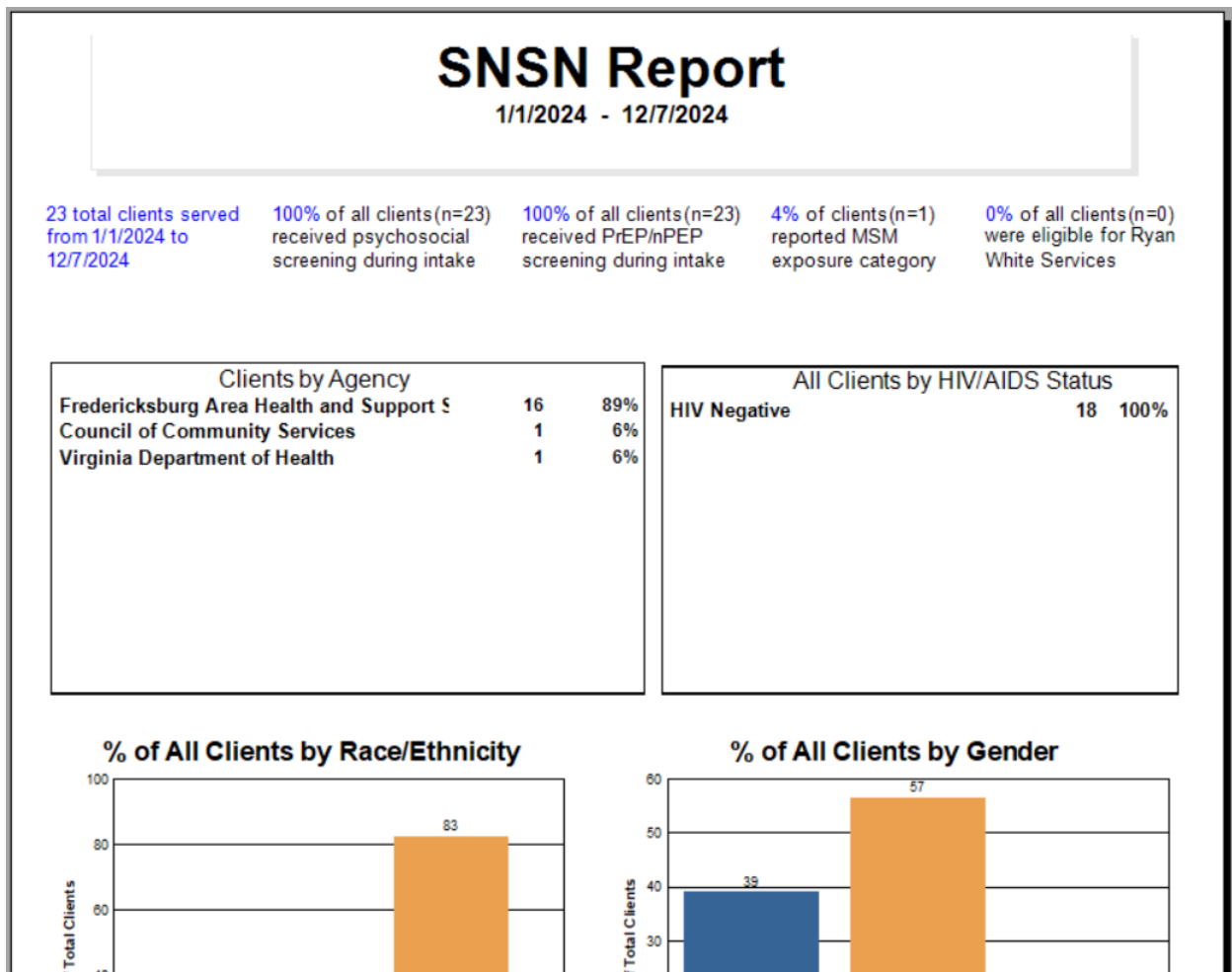
01/01/2024

Please enter the end date to report on:
End

12/06/2024

OK
Cancel

The report will be displayed.



## Top Line Totals

- Total Clients Served - All Clients with a Status Neutral Enrollment where the Psychosocial Date is between the date parameters chosen.
- % Received Psychosocial - PsychosocialScreen = Yes in SN Enrollment
- % Received PrEP/nPEP - PrepScreen = Yes in SN Enrollment
- % MSM - Client Profile CMACondHIVTransRoutO - contains MSM
- % Eligible for RW Services - Had a service provided (vwRSR\_2020\_Services-which includes both Services Provided and SN Encounters) where the RW Eligible Flag = Yes

## Clients by Agency

Displays the number of enrolled clients by agency where the activity date is between the date parameters chosen.

## All Clients by HIV/AIDS Status

Displays the number of enrolled clients by HIV Stage, where the Activity Date is between the date parameters chosen.

## Percent Clients By Race/Ethnicity

Displays number of enrolled clients by Race/Ethnicity where the Psychosocial Date is between the date parameters chosen.

## Percent Clients By Gender

Displays number of enrolled clients by Gender where the Psychosocial Date is between the date parameters chosen.

## Percent Clients By HIV Risk/Exposure Category

Displays number of enrolled clients by CMACondHIVTransRoutO where the Psychosocial Date is between the date parameters chosen.

## Identified Service Needs

- Referrals, where CLAReferDate is between the date parameters chosen.



## Encounters

All Status Neutral Encounters where the activity date is between the date parameters chosen.