Provide Enterprise

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Status Neutral

Provide Enterprise User Guide

**Virginia Department of Health**

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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.
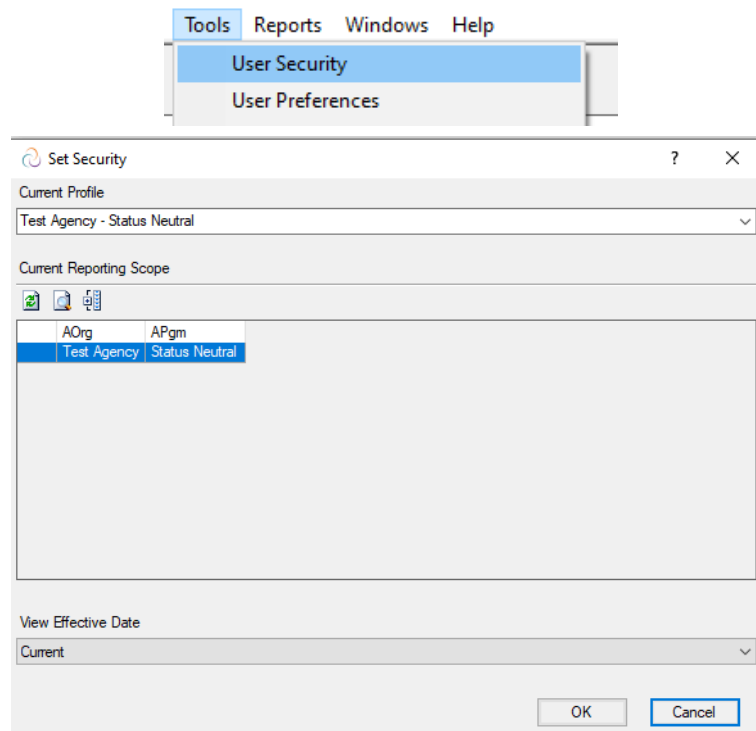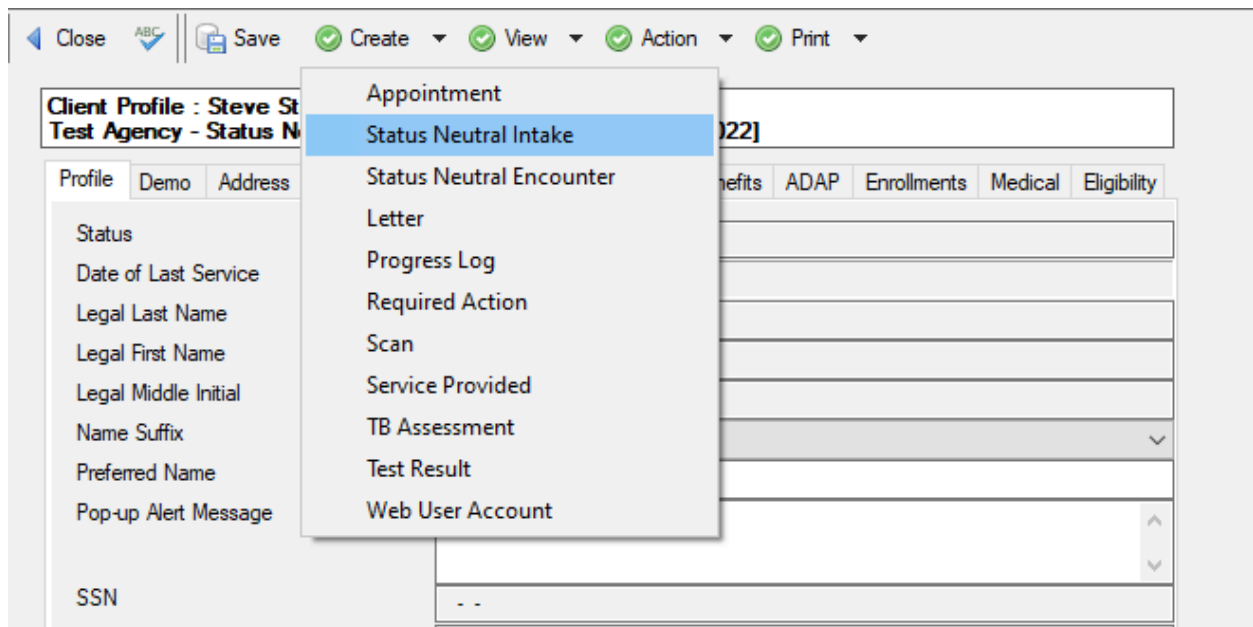
Status Neutral Intake

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.

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

Main tab

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

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

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

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

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

Demographic Data

Race - Check all that apply	* ☐ American Indian/Alaska Native ☑ Asian ☐ Black or African American ☐ Native Hawaiian/Other Pacific Islander ☐ White
Asian	* ☐ Asian Indian ☑ Chinese ☐ Filipino ☐ Japanese ☐ Korean ☐ Vietnamese ☐ Other
Ethnicity	* Non-Hispanic

Complete the required fields containing demographic data for the client.
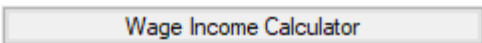
Address

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

Enter the required financial information.

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

Insurance Tab

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

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:
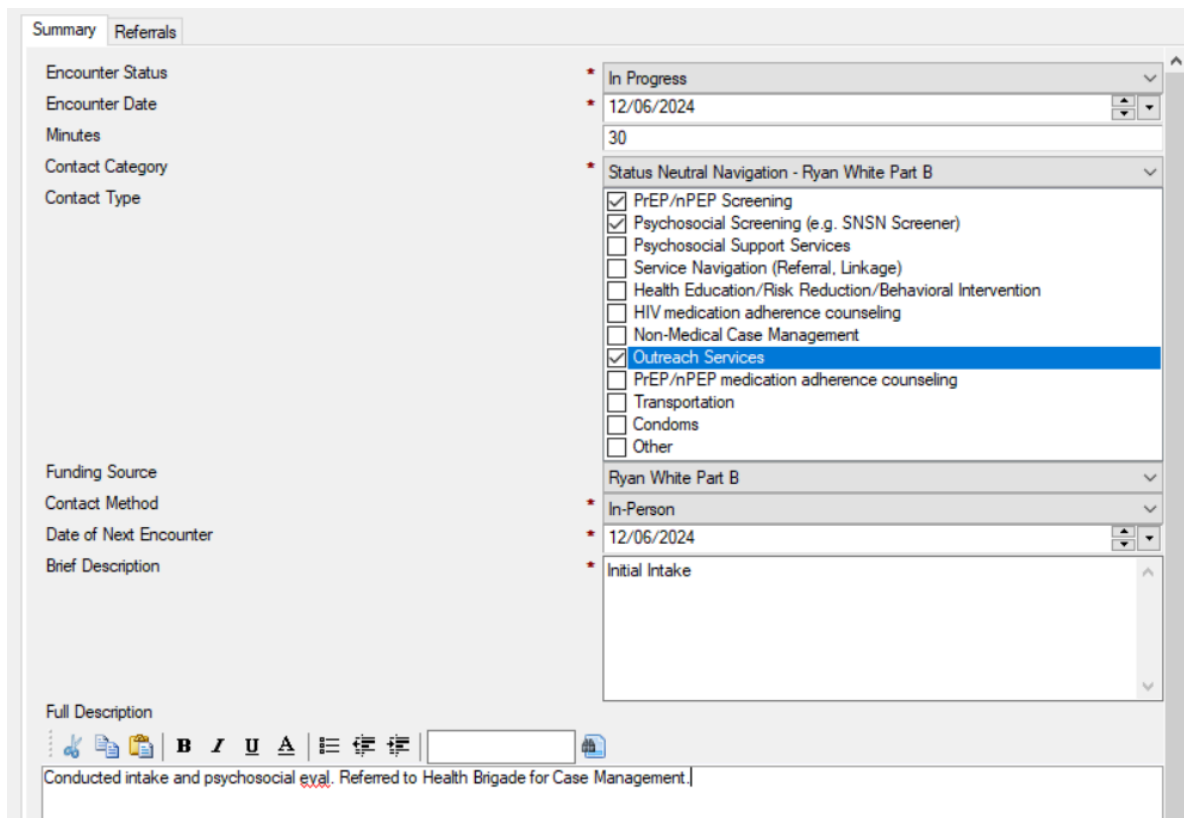
- Enrollment Status – defaults to Pending, change status to Enrolled, Complete, or Denied as appropriate.
- Program Code - select SN or ASE
- Referral Source – make the appropriate selection for how the client was referred to Status Neutral.
- Was psychosocial screening done? – Indicate Yes or No. If 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.

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.
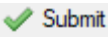
Complete the required fields and attach the appropriate consent.
- Referral Status – defaults to Pending
- Referring Person – defaults to your user name
- Referral Date – defaults to today's date
- Referred To – Select the agency receiving the referral
- Referred for Service Type – Select the appropriate 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.

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 or to save the appointment.

Viewing Activity

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

Editing Appointments

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

Views

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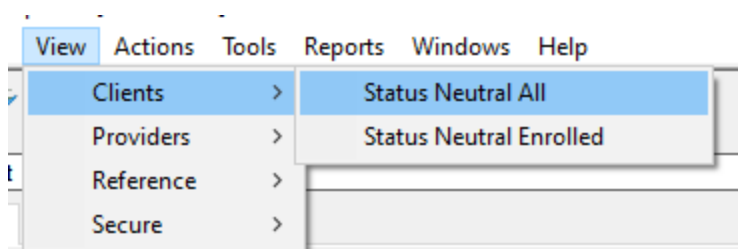
The "Status Neutral All" view shows all clients with a record in your Status Neutral Program. You can use the 🔳 button to categorize the list by any of the columns.

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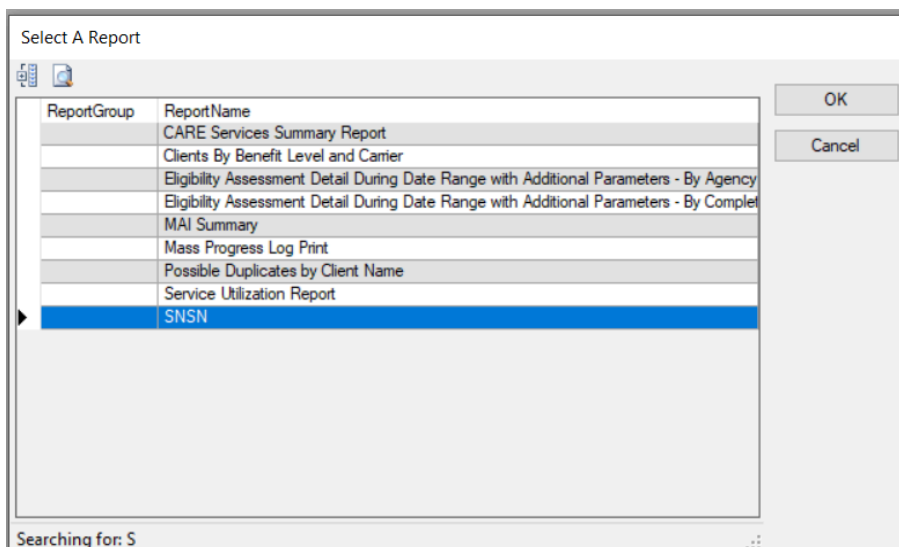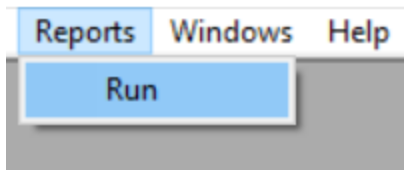
You will be required to enter start and end date parameters for which you would like to report. Click OK.

The report will be displayed.

SNSN Report
1/1/2024 - 12/7/2024

23 total clients served from 1/1/2024 to 12/7/2024   100% of all clients (n=23) received psychosocial screening during intake   100% of all clients (n=23) received PrEP/nPEP screening during intake   4% of clients (n=1) reported MSM exposure category   0% of all clients (n=0) were eligible for Ryan White Services

Clients by Agency		
Fredericksburg Area Health and Support S	16	89%
Council of Community Services	1	6%
Virginia Department of Health	1	6%

All Clients by HIV/AIDS Status		
HIV Negative	18	100%

% of All Clients by Race/Ethnicity

83

% of All Clients by Gender

57

39

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.