



*This document provides instructions for running data quality reports, making data corrections, running the RSR XML file, and transferring the file off of the remote server.*

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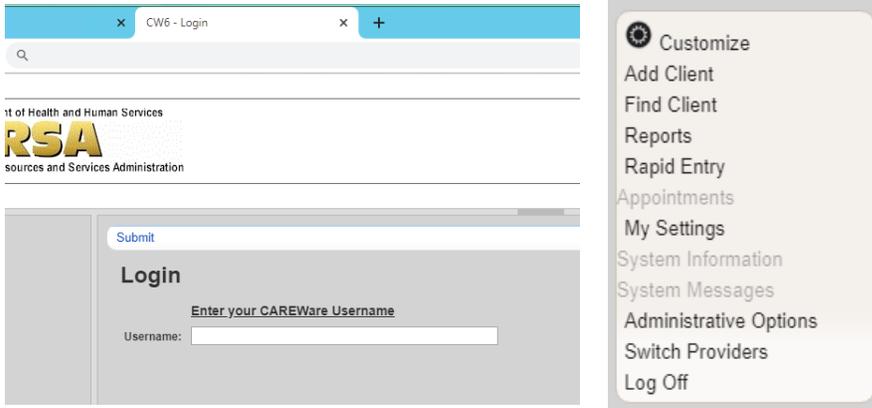
## 2020 Changes

The key changes for the 2020 RSR are:

1. New questions include:
  - a. Is the client new to the service provider? (Yes/No)
  - b. If no, did the service provider provide at least one Ryan White HIV/AIDS Program- or Ending the HIV Epidemic-funded service to the client in the previous calendar year? (Yes/No)
  - c. **Note:** You do not need to enter additional information into CAREWare. CAREWare will automatically generate this information based on the client enrollment date and service dates.
    - i. If enrollment date is missing, the first year of service is used.
    - ii. Ensure that the client has a Ryan White eligibility record entered prior to the first service date.
2. Coronavirus Aid, Relief, and Economic Security (CARES) Act recipients and subrecipients should report eligible RWHAP clients that receive services funded through the CARES Act in the 2020 RSR.
  - a. If your agency receives CARES Act funding, your RSR will include clients receiving services funded through the CARES Act automatically in CAREWare MA.
  - b. The purpose of the COVID-19 Data Report (CDR) is to provide HRSA HAB with an understanding of how CARES Act funds are being used to support Ryan White HIV/AIDS Program (RWHAP) clients.
  - c. For more information, see the [2020 RSR Instruction Manual](#) or contact the helpdesk at [CAREWareMAHelpdesk@jsi.com](mailto:CAREWareMAHelpdesk@jsi.com).

### Navigating to RSR Reports

1. To navigate to the RSR reports, first log in to the Massachusetts CAREWare system.

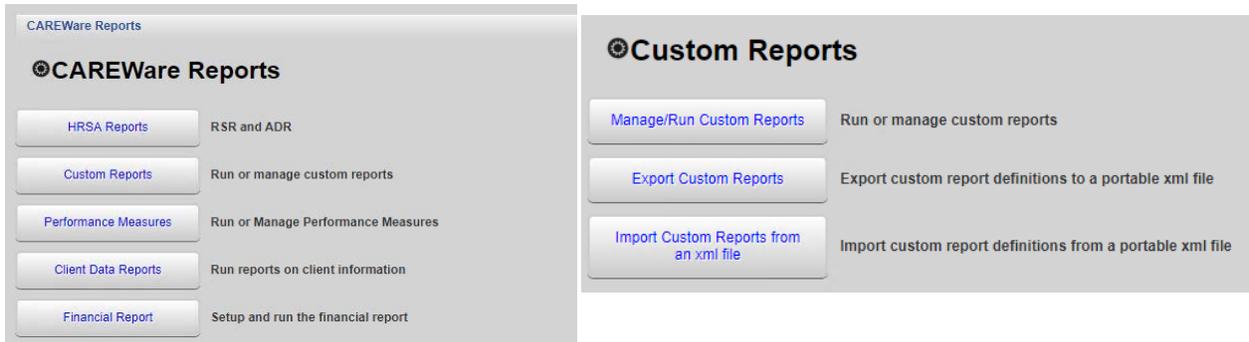


2. Click on "Reports" from the main menu.
3. This will bring up a Reports menu of different types of reports that can be run.



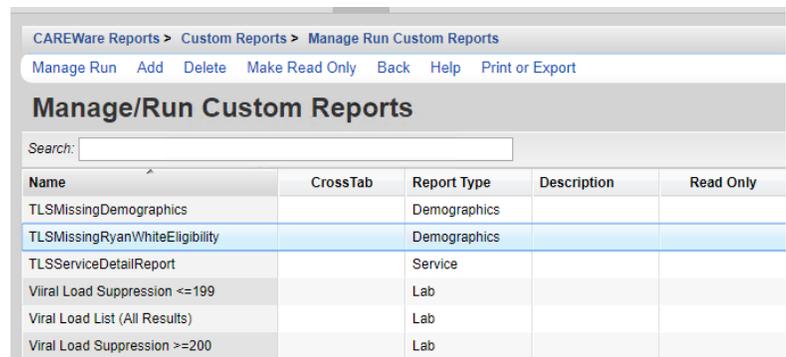
## Custom Reports

Several Custom Reports are available in CAREWare MA to help you review for data quality, in preparation for generating the RSR. To get to the Custom Reports screen, go to the reports menu and click on “Custom Reports,” then “Manage/Run Custom Reports” (below). When running Custom Reports, the desired report (1) and date span (2) will need to be specified. When done, click “Run Report” (3) (below, right).



### TLS Missing Ryan White Eligibility

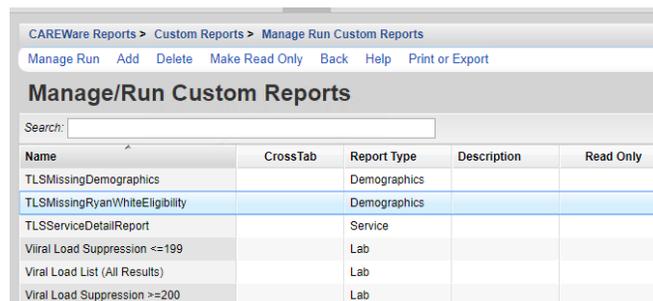
This report shows a list of clients that are not eligible for receiving Ryan White services. If your agency receives funding through the MA Department of Public Health and submits RSR report to HRSA, we recommend running this report before you submit the RSR to make sure it includes all of your Ryan White eligible clients. That way all of your eligible clients will be reported to HRSA.



Name	CrossTab	Report Type	Description	Read Only
TLSMissingDemographics		Demographics		
<b>TLSMissingRyanWhiteEligibility</b>		<b>Demographics</b>		
TLSServiceDetailReport		Service		
Viral Load Suppression <=199		Lab		
Viral Load List (All Results)		Lab		
Viral Load Suppression >=200		Lab		

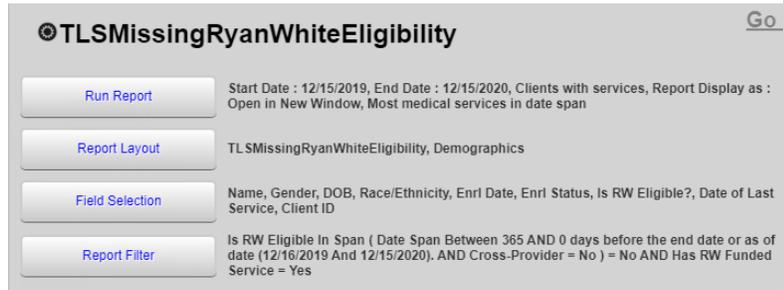
**Remember:** If your agency receives CARES Act funding, make sure that all clients who are receiving CARES Act-funded services are designated as Ryan White Eligible, and compare the total eligible number of clients to the number you reported in the CDR.

1. Select TLSMissingRyanWhiteEligibility from the list of reports and select Manage Run.



Name	CrossTab	Report Type	Description	Read Only
TLSMissingDemographics		Demographics		
<b>TLSMissingRyanWhiteEligibility</b>		<b>Demographics</b>		
TLSServiceDetailReport		Service		
Viral Load Suppression <=199		Lab		
Viral Load List (All Results)		Lab		
Viral Load Suppression >=200		Lab		

- Under the report page for TLSSMissingRyanWhiteEligibility, select Run Report.



- In the Run Report page, select Edit and modify the date range to the desired range. Then save.



- Click on "Run Report".

- The report will look like this:

**TLSSMissingRyanWhiteEligibility**

**Data Scope:** MDPH  
**Report Start Date:** 01/01/2020  
**Report End Date:** 12/31/2020

Name:	Gender:	DOB:	Race/Ethnicity:	Enrl Date:	Enrl Status:	Is RW Eligible?:	Last RW Service:
Brase, Wendell C	Male	06/30/1990	Not Specified		Active	No	12/11/2020
Davis, Betty	Female	08/19/1984	Not Specified		Active	No	04/14/2020
Gomez, Adam	Female	01/01/1960	Not Specified		Active	No	01/16/2020
Keeshan, Cynthia	Female	03/01/2000	White (non-Hispanic)	06/11/2018	Relocated	No	05/05/2020
Martin, Steve	Female	09/08/1976	White (non-Hispanic)	09/09/1987	Active	No	01/16/2020

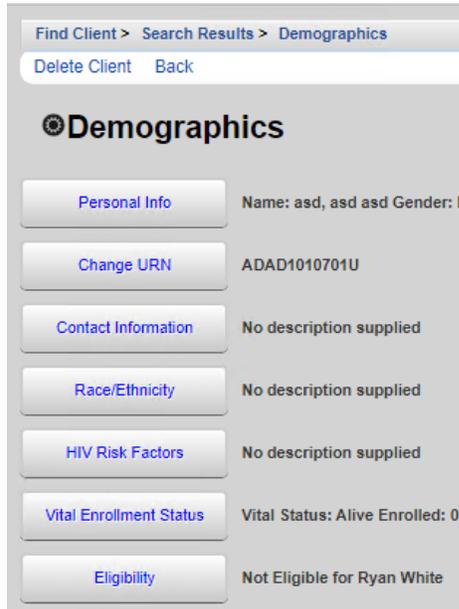
**Number of Records : 5**  
(Count is unduplicated across providers)

\* - Restricted Field

### Correcting Ryan White Eligibility Status

Follow these steps to update a client's Ryan White Eligibility Status:

1. Navigate to the client record Demographics page and select "Eligibility"



Find Client > Search Results > Demographics  
Delete Client Back

### Demographics

Personal Info	Name: asd, asd asd Gender: M
Change URN	ADAD1010701U
Contact Information	No description supplied
Race/Ethnicity	No description supplied
HIV Risk Factors	No description supplied
Vital Enrollment Status	Vital Status: Alive Enrolled: 0
Eligibility	Not Eligible for Ryan White

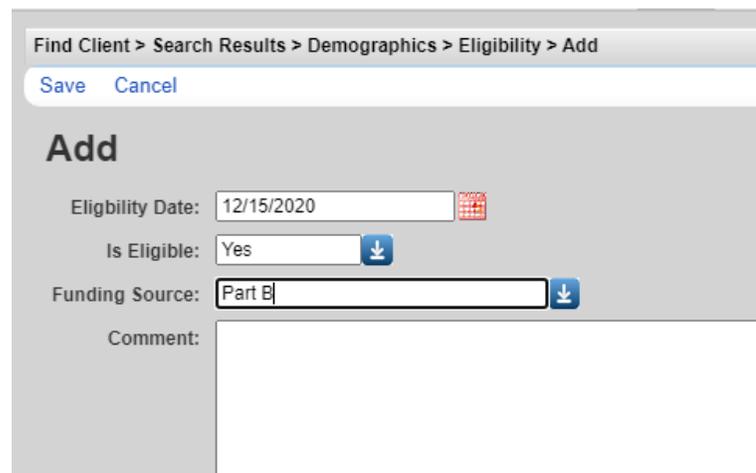
2. Click the "Add Record" link



Find Client > Search Results > Demographics > Eligibility > Add  
View Add Edit Delete Back Print or Export

### Eligibility History

3. Edit the date so it's in 2020 (use 12/31/2020 if there isn't a specific date where the client became eligible)



Find Client > Search Results > Demographics > Eligibility > Add  
Save Cancel

### Add

Eligibility Date:  

Is Eligible:  

Funding Source:  

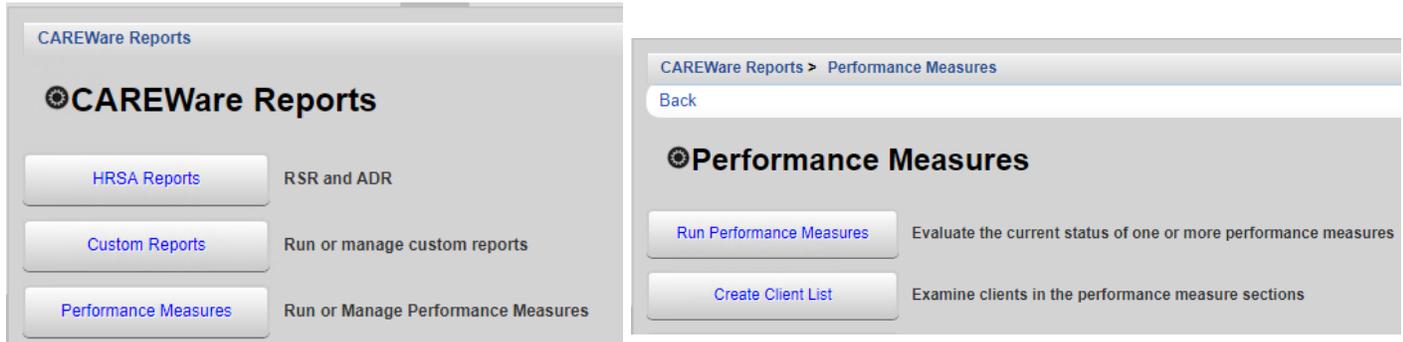
Comment:

4. Select "Part B" for the funding source and "Yes" for "Is Eligible"
5. Click Save

### Correcting Missing ZIP Codes

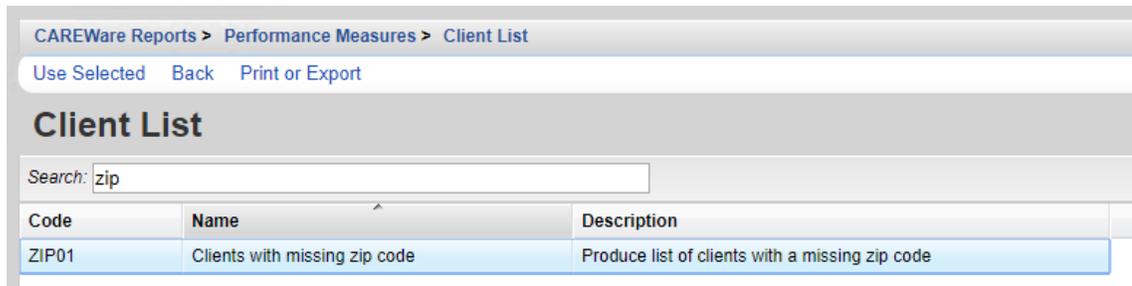
This report shows a list of clients with missing ZIP codes. Run this report before you submit the RSR to make corrections for clients whose ZIP codes were not filled in.

1. Under CAREWare Reports, select Performance Measures then Create Client List.



The image shows two screenshots of the CAREWare interface. The left screenshot shows the 'CAREWare Reports' menu with three options: 'HRSA Reports' (RSR and ADR), 'Custom Reports' (Run or manage custom reports), and 'Performance Measures' (Run or Manage Performance Measures). The right screenshot shows the 'Performance Measures' page with a 'Back' button and two main options: 'Run Performance Measures' (Evaluate the current status of one or more performance measures) and 'Create Client List' (Examine clients in the performance measure sections).

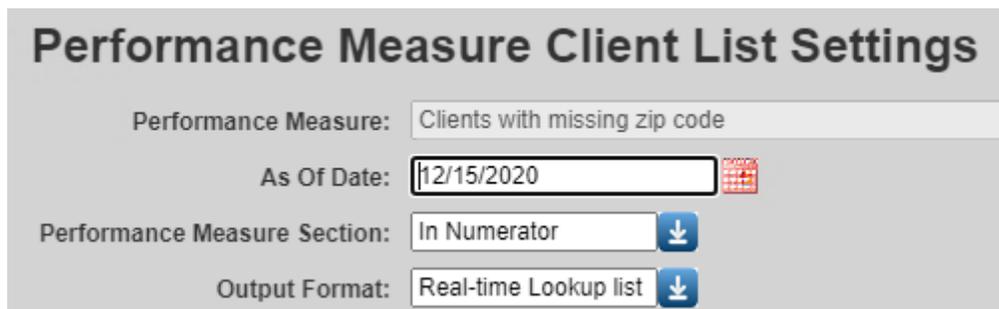
2. To find the missing ZIP code report, type “zip” into the search bar and the report will appear. Select it by highlighting the row and click Use Selected to run the report.



The screenshot shows the 'Client List' page with a search bar containing 'zip'. Below the search bar is a table with three columns: Code, Name, and Description. The table contains one row with the following data:

Code	Name	Description
ZIP01	Clients with missing zip code	Produce list of clients with a missing zip code

3. Set the As of Date to 12/31/2020 then Create Client List.



The screenshot shows the 'Performance Measure Client List Settings' form. The 'Performance Measure' field is set to 'Clients with missing zip code'. The 'As Of Date' field is set to '12/15/2020'. The 'Performance Measure Section' dropdown is set to 'In Numerator'. The 'Output Format' dropdown is set to 'Real-time Lookup list'.

4. A new tab will open with a list of clients. You can select a client by double clicking on their name, or highlighting the row and click Go To Client, which will bring you to the Demographics page of the client record where you can add their ZIP code. For clients with an unknown ZIP Code:
  - a. Use ZIP Code of service location as proxy
  - b. If that is unavailable, report client's ZIP Code as "99999"



### Clients by ZIP Code

This report will generate a list of clients and their ZIP codes. You will need to download and save this list to upload when submitting the RSR. Most ZIP codes will begin with "0", which will be dropped when it is generated in a CSV. We will walk through how you can correct this.

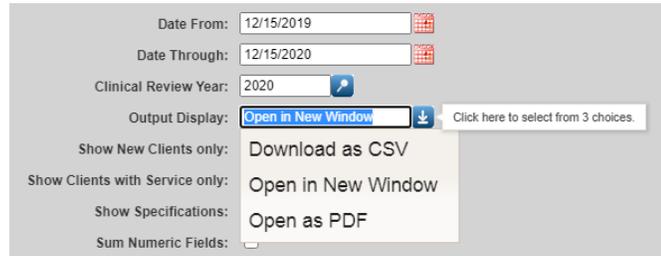
1. Select Clients by ZIP code (RSR) from the list of reports and select Manage Run.



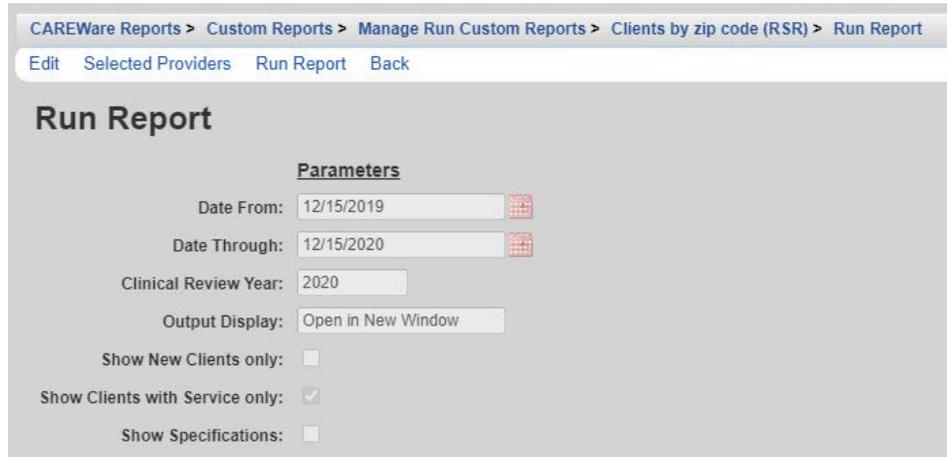
2. Under the report page for Clients by ZIP code, select Run Report.



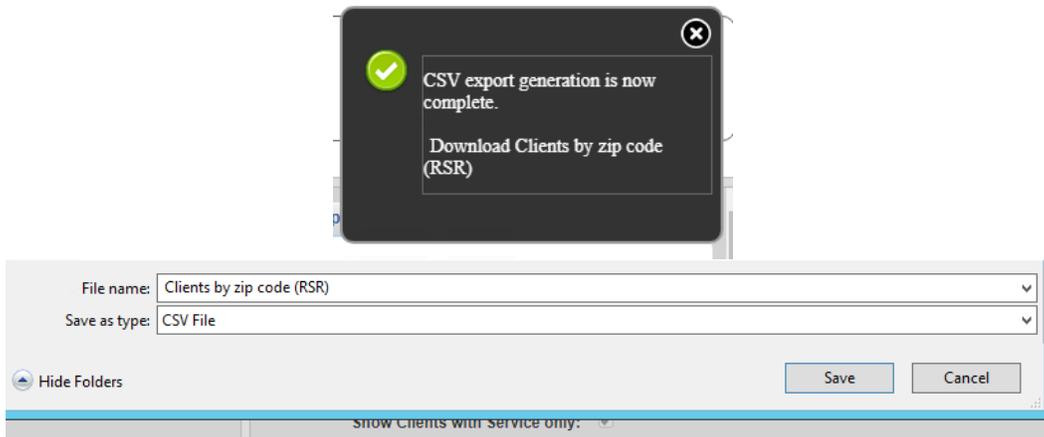
- In the Run Report page, select Edit and modify the date range to the desired range. In the Output Display, choose Download as CSV. Then save.



- Click on "Run Report".



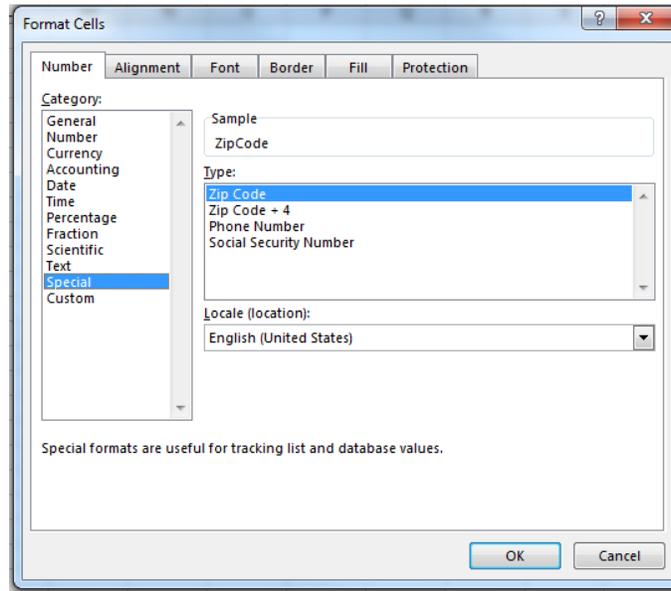
- Click Download Clients by ZIP code (RSR) in the pop-up window and save the file to your agency folder.



For the next step, you will need to retrieve the file from the SFTP site. For instructions on how to log in to the SFTP site, please see page 14 of this guide.

- For ZIP codes starting with “0” you will need to reformat the column before you upload the RSR. To do this, open the file in Excel, then highlight the column with the ZIP codes and right-click within the highlighted area to select Format Cells.

	A	B	C
1	ZipCode	CountOfClients	
2	1610	1	
3	1852	2	
4	2110	1	
5	2141	1	
6	2389	1	
7	2657	1	
8			



- In the formatting window that opens, select Special and then choose “Zip Code” from the list. Then save. Your Zip Code column should now include the leading “0.”

	A	B
1	ZipCode	CountOfClie
2	01610	1
3	01852	2
4	02110	1
5	02141	1
6	02389	1
7	02657	1
8		

### HRSA Reports

Click on “HRSA Reports” to get started.



### RSR Validation Report

The RSR Validation report provides a list of all errors, warnings and alerts that are built into HRSA's Electronic Handbook (EHB). Warnings and alerts indicate areas where data may be incorrect or missing. However, not all warnings or alerts may need to be corrected. Warnings must have a comment explaining the data in the EHB.

1. From the HRSA Reports menu, click on “RSR Validation Report”.



- From the RSR Settings page, select Edit to adjust the reporting year. Then click Save and Run.



CAREWare Reports > HRSA Reports > RSR Validation Report Settings

Edit Edit Filter Filter By Funding Source Run Help Back

### RSR Validation Report Settings

Year:

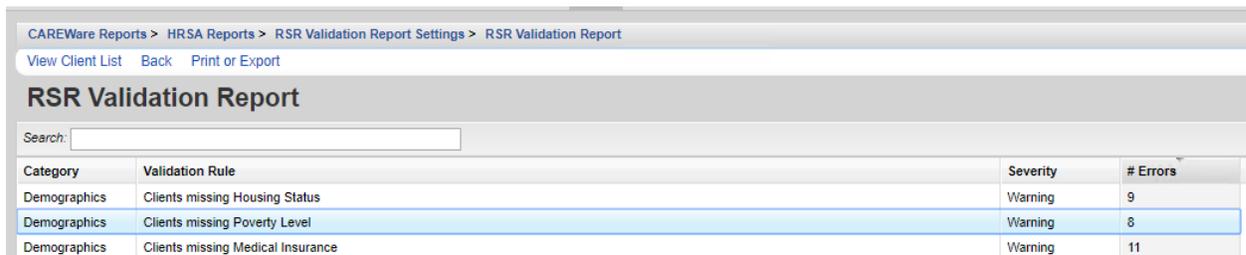
Provider Name:

Cross Provider Labs:

Cross Provider ART:

Apply Filter:

- Click View RSR Validation Report from the pop-up to open the report table. From the table, you can click any row with errors that need correcting by highlighting the row and clicking View Client List or double clicking the highlighted row.



CAREWare Reports > HRSA Reports > RSR Validation Report Settings > RSR Validation Report

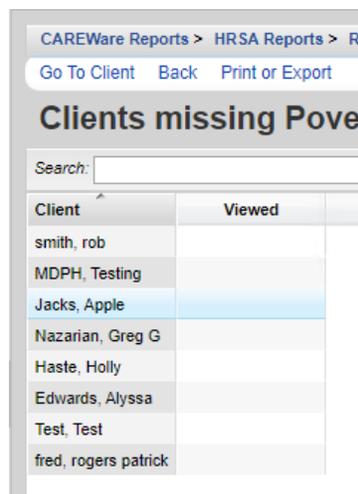
View Client List Back Print or Export

### RSR Validation Report

Search:

Category	Validation Rule	Severity	# Errors
Demographics	Clients missing Housing Status	Warning	9
Demographics	Clients missing Poverty Level	Warning	8
Demographics	Clients missing Medical Insurance	Warning	11

- Choose the client of interest and then click “Go to Selected Client” to be brought directly to their record. Errors must be fixed before the RSR can be submitted.



CAREWare Reports > HRSA Reports > RSR Validation Report Settings > RSR Validation Report

Go To Client Back Print or Export

### Clients missing Poverty Level

Search:

Client	Viewed
smith, rob	
MDPH, Testing	
Jacks, Apple	
Nazarian, Greg G	
Haste, Holly	
Edwards, Alyssa	
Test, Test	
fred, rogers patrick	

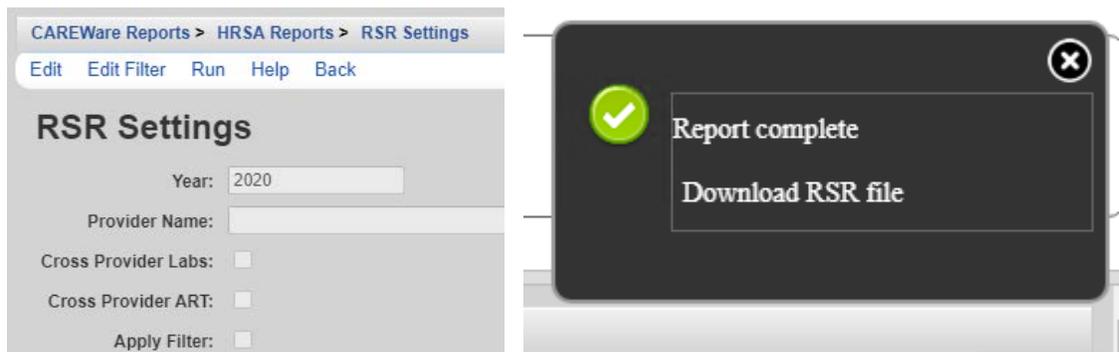
## RSR Client Report Viewer

The Client Report Viewer shows frequencies of the data included in the RSR file, including a count of missing data.

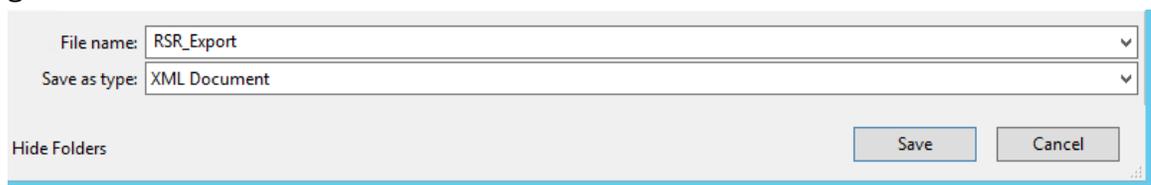
1. From the HRSA Reports menu, click on “RSR Client Report”.



2. Make sure the Report Year is 2020 and click “Run” to generate the report. Once it is finished, click Download RSR file in the pop-up window in the top right corner of the page.



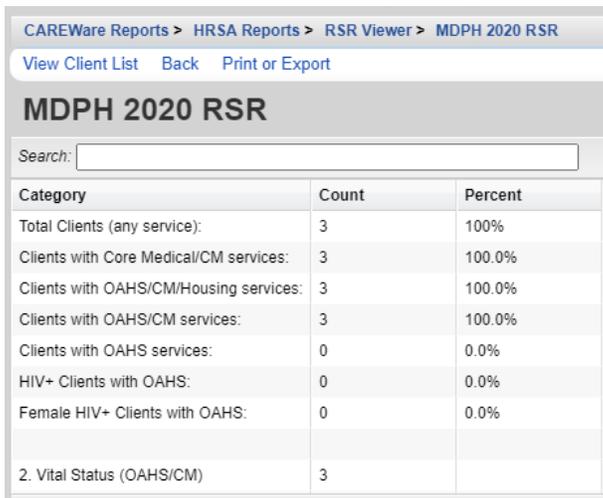
3. A new download folder will open prompting you to save the RSR export file. Save this file to your agency’s designated folder on the G drive where you will need to access it later in this guide.



- From the HRSA Reports page, select RSR Viewer, then click Choose File to upload the RSR export file saved in your agency's folder.



- Once the file has finished uploading, click View RSR File. A new window will open where you can view the components of the RSR. To select a category, highlight the row and click View Client List, or just double click the row.



CAREWare Reports > HRSA Reports > RSR Viewer > MDPH 2020 RSR

[View Client List](#) [Back](#) [Print or Export](#)

**MDPH 2020 RSR**

Search:

Category	Count	Percent
Total Clients (any service):	3	100%
Clients with Core Medical/CM services:	3	100.0%
Clients with OAHS/CM/Housing services:	3	100.0%
Clients with OAHS/CM services:	3	100.0%
Clients with OAHS services:	0	0.0%
HIV+ Clients with OAHS:	0	0.0%
Female HIV+ Clients with OAHS:	0	0.0%
2. Vital Status (OAHS/CM)	3	

- Within the category field you clicked, you can select the client record you wish to review. Once you have viewed the client, an X will appear under the Viewed column to reflect which clients have been reviewed.



CAREWare Reports > HRSA Reports > RSR Viewer > MDPH 2020 RSR > Total Clients (any service):

[Go To Client](#) [Back](#) [Print or Export](#)

**Total Clients (any service):**

Search:

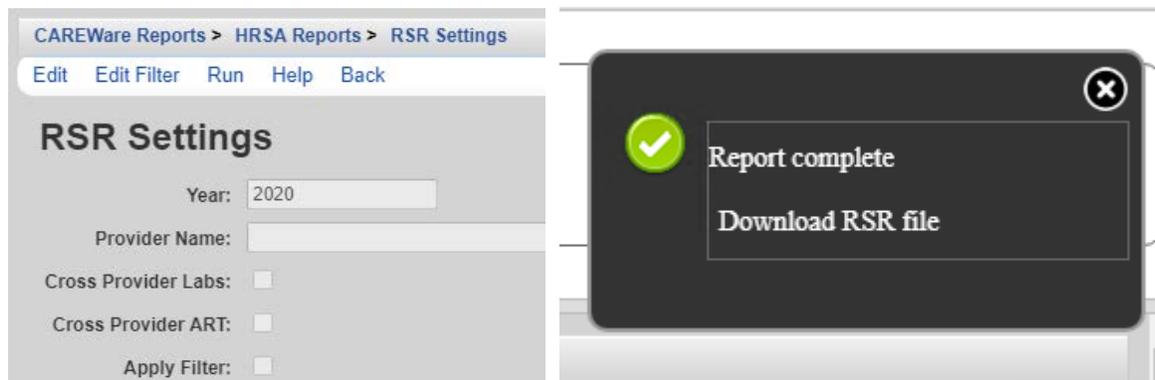
Client	Viewed
	X
	X
	X
	X

### Running the RSR

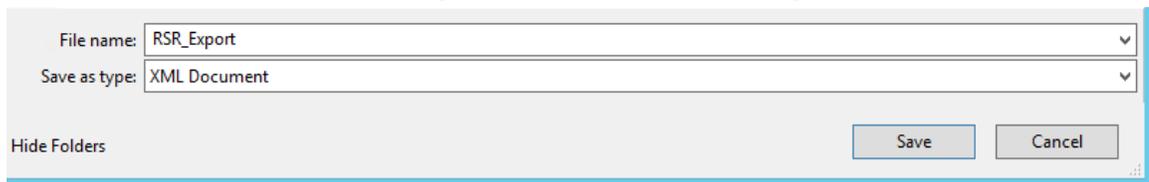
1. From the HRSA Reports menu, click on “RSR Client Report”.



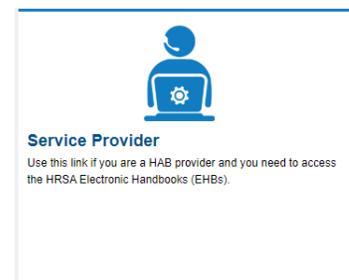
2. Make sure the Report Year is 2020 and click “Run” to generate the report. Once it is finished, click Download RSR file in the pop-up window in the top right corner of the page.



3. A new download folder will open prompting you to save the RSR export file. Save this file to your agency’s designated folder on the G drive where you will need to access it through the SFTP site. Instructions for accessing the SFTP are on the last page of this document.

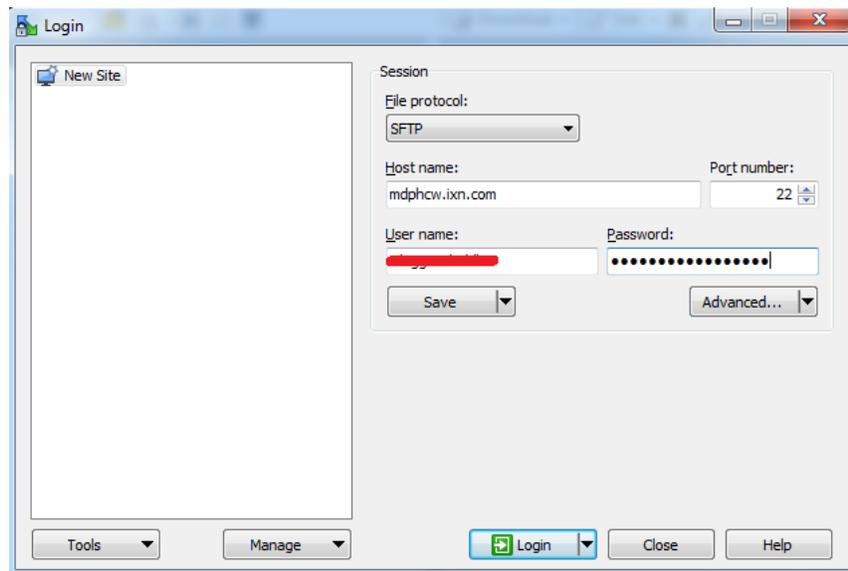


4. Once the file has been transferred from the SFTP to your machine, the XML file will need to be uploaded to the HRSA EHB. [Click here](#) to access the HRSA EHB, and click on “Service Provider”.



### Connect to Secure File Transfer Protocol (SFTP) Site

1. Download WinSCP (<https://winscp.net/eng/download.php>) and install it on your computer
2. A login screen will appear.
  - a. For the host name, enter “mdphcw.ixn.com”
  - b. The port number should be 22 by default. Do not change it.
  - c. Enter your username and password for the CAREWare remote server (*not* the CAREWare application itself).



- d. Click “Login”
3. Your computer’s documents folder will be shown in the window on the **left** side of the screen. On the **right** side, you will see white space or any files that you’ve saved to the D drive from CAREWare. Only users at your agency and JSI will be able to view these files.
  4. To transfer files onto the server, navigate to your file in the left window. Select it, then drag it to your to the right window.
  5. To transfer files from the server to your machine, select the file in the right window and drag it to the left window where you’d like to save the file.
  6. That’s it! Click the X in the upper right corner of the window to disconnect.