

Prevent. Promote. Protect.



# **INRWISE Manual**



Last Update 12/31/2020

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Terms, Definitions and Acronyms
---------------------------------

Date	Updates Made	Author
12/02/20	Client Display: Add MAI Eligible field, Add Common Notes field	LMB
	Referral: Add multiple pre-approved reasons selection option	
12/31/20	Client Display: Add More Client Details Button, Remove Save button	LMB
	for Common Notes.	
	Referral: Date referred – No longer editable	

## **Overview**

Ryan White Integrated Statewide Eligibility (RWISE) is a web-based interface developed by TriYoung, Inc. that uses the CAREWare database to provide an interface for eligibility teams to receive, review and process eligibility for the Ryan White Program. The interface is built using the standard program interface available for CAREWare along with direct data access as needed for the custom areas of CAREWare. INRWISE was developed for the Marion County Ryan White Part A program.

# **RWISE Navigation**

RWISE Should be accessed using CHROME, or Firefox. RWISE will not behave as expected if opened in Internet Explorer.



Because RWISE is web-based users can control the size of the display by using the Chrome browser features. In Chrome, you can adjust the size by using the magnifying glass in the URL bar or selecting the 3 vertical dots and adjusting the zoom setting. Also, if you're wanting to go back to the page you came from, use the buttons within the applications, do not use the Browser back Arrow

# **Marion Portal**

The portal is where users will be able to access RWISE, RWISE Viewer, CAREWare, and other applications. **NOTE:** *Please see RWISE Viewer Manual for more information about that application.* 



Figure 1 - Portal Page

- Use Web-based internal link to Marion Portal <u>https://indyrwise.ixn.com</u> and select RWISE button. The RWISE button will take you to the <u>RWISE Login Screen</u>
- Reset Password a feature is directly linked to CAREWare. If the password is changed in RWISE it will also impact CAREWare and vice versa. The Reset Password button will take you to the <u>Reset Password Screen</u>
- **Setup Token** a feature directly linked to CAREWare. The token set up is required for 2-factor authentication set up.

# **RWISE Login**

The RWISE Login screen is where users will be able to access RWISE and are able to navigate back to the Portal.



Figure 2 RWISE Login Screen

#### Page Functions

- Enter CAREWare Username, Password, two-factor authentication token, and Domain
  - Note: RWISE BC & RWISE Super Users will log into RWISE, RWISE CM users will log into the Agency Domain
- Log In After entering your user CAREWare Username, CAREWare Password, 2-factor authentication code, and Domain you will select Log In to be taken to the RWISE Main Menu.
  - **Tip:** When entering your 2-factor authentication code, wait until the countdown ends and a new number generates before entering the six digit code onto the
    - login screen (see <u>First time log in</u> section for details)
- Open Portal Return to the Portal screen

## **RWISE Main Menu**

From the RWISE Main Menu there are several functions that can be done. You can navigate to many various areas of RWISE from the main screen as well change your password!

# Note: not all users will have the <u>Add Client</u> permission. If you believe you should have this permission and do not please contact Jill Carr (<u>JCarr@MarionHealth.org</u>) for assistance.

There will be helpful tips throughout the application.

Those Tips are identified by this symbol-

Enter search criteria	a. Partial matches will be included	
Client Last Name: Client First Name: Client URN:	RWISEUID: SSN: 7 Ryan White #:	?
Add Client		
DIVISE All Danding Deferrals		
Assigned User - Pending Referrals:	×	
Expiring Clients	1	
RWISE Updater Error Log		
My Settings		
Log Out		

Figure 3 - RWISE Main Menu

Page Functions

• <u>Search</u> - Search for a Client

screen.

• You can use the various fields to enter a search criterion to find a specific client record. Enter the criteria and select **Search** to bring up the Search Results

1

Search Tip: When searching, less is more.

- Search by date of birth
  - this can be done by entering MMDDYY into the *Client URN* field
- Search by first and last name only
  - Try searching by just the first few letters of each name
- If the client has a hyphenated last name, search for each possible entry
- If the client has a preferred name or AKA, search by that name
- Try searching by clients first and last name, but reversed

Doe

- Search by First Name: Doe Last Name: John
- <u>Add Client</u>- Add New Client
  - After searching for a client, if you are unable to find a matching record you will need to add the client to the system by selecting the **Add Client** button
- <u>**RWISE All Pending Referrals**</u> View list of pending referrals
  - When selected, you'll be taken to the list of all pending referrals for the domain you are logged into.
- Assigned User Pending Referrals View list of pending referrals for a specific user
  - Once a user ID is selected the page displayed is a list of all pending referrals for the chosen user

- *Expiring Clients* View a list of clients with an eligibility end date set to expire within the next 60 days.
  - When selected, you'll be taken to a list of all clients who are due for renewal, or pre-approved, and their expiration date falls within the next 60 days
- **RWISE Updater Error Log** View of log from the overnight updater with items that may require review and manual correction.
  - An RWISE Super User will need to check this daily for errors needing review
- *My Settings* Change Password
- Log Out Log out of RWISE, this will take you back to the RWISE login Screen
  - When logged out of RWISE you will be taken back to the RWISE login Screen

## **Search Results**

After selecting **Search** from the RWISE Main Menu the search results for the entered criteria will display. This is a list of client records that matched or closely matched the criteria you entered. If unable to find a specific record, try some of the **Search Tips** noted earlier in this document.

	RWISE								
		New Search	Log Out						
	LastName	<u>FirstName</u>	URN	EURN					
Select	testing	client	CITS1028821U	bPD4fR9L5					
Select	Test	Client	CITS0718951U	ONk+13s2c					
Select	Test	Client	CITS0408544U	GpNJey3sl					
Select	TestA	ClientA	CITS0805762U	c5DqDimnI					
Select	Test	ClientB	CITS0104781A	jE6KggJnt					

Figure 4 RWISE Search Results Screen

#### Page Functions

- New Search Return to the RWISE Main Menu
- Log Out Log out of RWISE, this will take you back to the RWISE login Screen.
- Select Navigate to the Client Display Screen for the selected client

## Add a Client

After selecting **Add Client** from the RWISE Main Menu, the RWISE Add Client screen displays. Here entry of the First Name, Last Name, Gender, and Birthday are required to create a new record.



Note: Best Practice Tips – Always search various ways for a client prior to adding a new record. Always enter the client's name as it is displayed on a legal document. Avoid entering a client into the system if you are unsure of the date of birth. These best practices help avoid duplicate client record creation and improve the programs data quality.

RWISE Add Client										
Last Name: Middle Name: Birth Date:	×	First Name: Gender: Estimated:	•							
	Add Client	Cancel								

Figure 5 RWISE Add Client Screen

Page Functions

- Add Client Add a brand-new client
- *Cancel* Return to the previous menu

When the client's information is entered and the **Add Client** button is selected, the system will check for any duplicate clients. There are **THREE** possible outcomes.

**ONE**: If there are no similar records found in the system; The client record will be added to the system, an URN and RWISEUID assigned to the client and the user will be directed to the Client Display screen.

New Search Find List Log Out More Client Deta	Client Display
Client Contact Information           First Name         Giver LL HB         Middle           RWISEUID         233108         Ryan White #           Address	Last Name Test AKA DOB 0/29/1994 URN C/TS0029941U County MSG OK
Eligibility Information Eligibility Status End Date	
Start Date Upcoming Renewal Level Automatic PL Client Income Client FPL Client Level Data	Renewal Due Date     Household Size
Race Ethnicity Iven He Risk Category Primary Ins Secondary HIV Status Unknown HIV Date View Eligibility Notes	partic Gender Male Birth Gender Male
Add Referral	

Figure 6 RWISE Client Display Screen

**TWO**: If potential matches are found a list will appear. Prior to adding the record, the system is granting the opportunity to review the record in a little more detail prior to adding a new record or not.

	Possible Matches								
	Score	Name	Gender	Birth Date	Client URN				
Select	84	testing, clientassign	Female	10/01/1985	CITS1001852U				
Select	84	testing, clientassigned	Male	10/22/1982	CITS1022821U				
Select	84	testing, clientpreapproved	Male	10/20/1985	CITS1020851U				
	Add Client Cancel								

From this screen there are additional functions available to choose from.

Figure 7 RWISE Possible Duplicate Found Screen

Page Functions

- Add Client If selected, the system will move forward and add the client record you were trying to create based on the information you entered, and you'll be taken to the Client Display screen of the new client record
- Select This will open the Client Display screen of the selected record
- Cancel When selected navigates back to the RWISE Main Menu

**THREE**: If the client information you have added, appears to already exist in another domain in the system, the Duplicate URN Client List will appear.

From this screen there are additional functions available



Figure 8 RWISE - Duplicate URN Client List Page Functions

- **Select** This will open a summary screen of the client record prior to confirming if it's the same or a new client. This screen is the *Possible Duplicate Client Information* screen
- Cancel the add client process This cancels the process, and takes you back to the RWISE Main Menu

From the *Possible Duplicate Client Information* screen, you will see a brief demographic summary of the client's record. From here you will be able to choose to either add the client or return to the list.

RWISE - Possible Duplicate Client Information								
First Name Date of Birth	Clientdani	Middle Name Gender	Female	Last Name Client URN	CITS0505652U			
Address Fie Address State	elds	City County		Zip Code		Phone Number		
Ethnicity			Hispanic Non H	lispanic	Unknown			
Race White American Indian or Alaska Native Other Black or African American Native Hawaiian or Other Pacific Islander Asian Unknown								
		This is the cl	Return to the list to lient I was attempting	view anot to add. Co	ther client	lay		

Figure 9 Possible Duplicate Client Information

- **Return to the list to view another client** This will take you back to the *RWISE Duplicate URN Client List* screen
- This is the client I was attempting to add. Continue to Client Display This will copy the existing data from the existing record found in another domain, into your domain without creating a duplicate record for the client. This client record becomes a shared record between domains. When selected, and the client's data is copied, you'll be taken to the *Client Display* screen.

## **RWISE Pending Referrals**

There are two buttons that will allow you to view a queue of the pending referrals. This list of pending referrals will be in either *BC Review Pending* or *CM Review Pending* status. In addition to the list of pending referrals, there is also a count of number of referrals assigned to each staff member. This is useful for quality assurance and enhanced service delivery.

The **RWISE All Pending Referrals** button displays All pending referrals. This list is populated based on user permission, and what domain is logged into.

- Case Managers will be able to see all pending referrals for their agency's clients
- Business Coordinators will be able to see all pending referrals

The Assigned User – Pending Referrals button display the selected user's pending referrals.

	RWISE - All Pending Referrals										
Log	Log Out Back										
Print	Print by Assigned Staff										
		_									
N	IM CM Assign	ed	BC Ass	igned							
Staff N	lame Total A	ssigned S	taff Name To	otal Assigned							
JYOUN	IG 1	LF	OBINSON 1								
LBCMU	JSER 1										
	First Name	Last Name	RWISEUID	<b>Referring Provider</b>	Referring Date	Ref - Progress Status	Eligibility Type	NM CM Assigned	NM CM Last Updated	BC Assigned	BC Last Updated
Select	Client	Test	233074	Client Submitted	11/13/2020	CM Review Pending	Initial Application	LBCMUSER	11/13/2020		
Select	clientdani	testing	216869	Client Submitted	11/11/2020	BC Review Pending	Half Birthday Application	JYOUNG	11/15/2020	LROBINSON	

Figure 10 RWISE - All pending Referrals

Page Functions

- Log Out Log out of RWISE, this will take you back to the RWISE login Screen.
- Back Return to the RWISE Main Menu
- Print by Assigned Staff A .csv document will download for printing
- Select Navigate to the RWISE Referral Screen for the selected client record

When referrals are no longer in either *BC Review Pending* or *CM Review Pending* status, they will no longer be in these lists.

## **RWISE Expiring Clients**

This button will display a list of clients who have an eligibility end date that is set to expire within the next 60 days. The list is populated based on user permission and what domain is logged into. This list will include clients who have an upcoming renewal date, as well as clients who have been placed on pre-approval.

- Case managers will see all expiring clients for their agency
- Business Coordinators will see all expiring clients

1		RWISE - Expiring Clients									
Log ( Print	Log Out Back Print List										
	RWISEUID	Byan White #	First Name Last Name	Upcoming Renewal Type	Renewal Due Date	PreApproved Reason	PreApproved Through Date	Pending Referral			
Select	200059			Birthday Month Renewal	11/30/2020	Proof of Income	12/31/2020	No			
Select	200034			Birthday Month Renewal	11/30/2020	Proof of Income	12/31/2020	No			
Select	200029			Half Birthday Month Renewal	4/30/2021	No Tax Form	11/30/2020	No			
Select	200091			Birthday Month Renewal	5/31/2021	Medicaid Insurance Verification	12/31/2020	No			

Figure 11 RWISE Expiring Clients

Page Functions

- Log Out Log out of RWISE, this will take you back to the RWISE login screen.
- Back Return to the RWISE Main Menu
- Print List A .csv document will download for printing
- Select Navigate to the Client Display Screen for the selected client

## **RWISE Client Display – Functions**

The Client Display screen is where you will find a summary of the client's current demographic and eligibility information.

1	Nou	Cooreb	Find I	int L	or Out	Mara Clian	t Detaile				Cli	ent Display		
	Client First N RWISE Addres Phone HIVe #	Contact Inflame Client/ EUID 23312 SS Reside	Find L formation 4 ence: HOMELE	ESS North, IN 80	Middle Ryan White # G OK ACAPS #	Sec Phone		Last	t Name T 3 1 Inty B MSG OM	estA 0/10/1998 oone <		AKA URN	CITS1010981U	3
*								1				Inelig	gible Reason	Over Income
	Eligibi Eligibili Start D House Client I	ility Informa ity Status Date hold Income Income	Pre-Appr 12/31/20 9 19261.67 19261.67	roved 20 7 7	Status Er Upcoming Househol Client FP	nd Date 1/31 g Renewal Hail Id FPL 151 L 151	1/2021 f Birthday Mo %	nth Renew Ren Hou	Approved newal Due usehold Siz	Reason Ir Date 4 ze 1	nsurance Cards /30/2021	Proof of Ir		
	Client Race Risk C Primar HIV St Viev Add	Level Data ategory y Ins atus w Eligibility M	Asian, Amer Hemophilia/ No Insuranc HIV-positive Notes	ican Indian or A coagulation disor e (not AIDS)	Ethnicity der Seconda HIV Date	v F	lispanic /7/2019		Gender Housing Date AIDS Da	Status ate	Male Stable/Permar 12/31/2020	ient	Birth Gender MAI Eligible	Male Eligible
					RWI	SE Referrals								
	Select	Referring	Provider mitted	Referring [ 12/31/2020	Date Referral Complete	Status Last U	pdated F	Ref Progress S Pre-Approved	status Pro	ogram Type	e			
l					Diagnosis Do									
ľ			Content		Attach Date	Attach User	File Type	e File Name	Comment					
	<u>View</u>	Certification	n by HIV Pi	rovider Stmt	12/31/2020	RWWEBAPPS	.pdf	Diagnosis1						
				Enroll	ment Services	(last 18 months	)							
	Servi	ce Date	5	Service Nam	ne	Creating User	Preapp	roved/Ineligib	le Reason					
	12/31/	/2020 RV	VISE Pre-A	Approved Init	tial Application	Ibates	Insurance	ce Cards, Proof	f of Income	•				



#### Page Functions

- New Search Return to the RWISE Main Menu
- Find List Return back to the Search Results screen
- Log Out Log out of RWISE, this will take you back to the RWISE login Screen
- <u>More Client Details</u> View/Add Common Notes, Client ID, & Enrollment Records based on user permissions
- <u>View Eligibility Notes</u> View/Add an eligibility note to the client record
- Add Referral Create a new referral
  - When selected, this button will take you to the RWISE Referral screen
  - Note: This button will not be visible if there is a referral in a pending status

If a referral is listed

• Select – Navigate to the RWISE Referral Screen to view the selected referral

If a Diagnosis Document is listed

• View – Open/View the attached document

#### **Eligibility Definitions**

Please see the Key Terms, Definitions and Acronyms section.

#### **RWISE Referrals**

Referrals are how all activities are managed in RWISE. Think of the referrals as containers or envelopes used to submit applications and other eligibility documentation between agencies. Most commonly referrals will be used to submit documentation from agencies to the Grantees office for the Business Coordinators to process and update a client's Ryan White Eligibility.

Users will be able to see all referrals, from any agency service a mutual client. Users will be able open all historical and pending referrals listed in a client record.]

Seferrals may be created in RWISE or the RWISE Viewer 🛇

#### **Diagnosis Documents**

If listed, these documents are related to the client's HIV Diagnosis. These documents are uploaded from within a client record, through the client update function.

#### **Enrollment Services**

All activities taken to update a client's demographic or eligibility information are tracked here. In this area you will be able to see when the client record was updated and the type of service that was updated. The type of service documented is defined on selections from within a referral.

## 🔊 More Client Details

This area is where non-eligibility related data can be updated and added. RWISE CM users are now able to edit/add Common Notes, client's Provider Client ID, as well as update the client's Enrollment Status, Enrollment Date, and Case Closed Date for the Provider/Domain the user is logged into.

Back			More (	Client Details	
Client: ClientSketo	ch Test	URN: CITS1111842U	RWISEUID:	233194	
Provider Client ID					
Common Notes					
HIVe #					
ACAPS #					
Enrollment Status	Active	<b>~</b> ]			
Enrollment Date		<b></b>	Case Closed Date		
Save					

Figure 13 More Client Details - RWISE CM User View

#### Page Functions

- Back Return to the Client Display Screen
- Save Save any data changes

ACAPS # Enrollment Status Enrollment Date	Active  Active Inactive/Case Closed Referred or Discharged	×	Case Closed Date	_	
Save	Removed Incarcerated Relocated				

Figure 14 Enrollment Status Drop-Down

**Note**: Case Closed Date becomes editable when an enrollment other than *Active* is chosen. When finished, select Save

#### More Client Details - as RWISE BC User

RWISE BC users are now able to edit/add common notes as well as the RWISE Client ID [*This is not the same as the RWISEUID, the RWISEUID is a system generated client identifier*]. Users logged into the RWISE Domain are not able to edit the Enrollment Status, Enrollment Date, or Case Closed Date.

			More Client E	Details	
Back RWISE Domain (	does not allow	enrollment information to b	e modified		
Client: ClientSketch	Test	URN: CITS1111842U	RWISEUID:	233194	
Provider Client ID					
Common Notes					
HIVe #					
Enrollment Status	Active	~			
Enrollment Date		<b></b>	Case Closed Date		
Save					

Figure 15 More Client Details - RWISE Domain

# Referrals

RWISE - Referral				
Client Display Log Out	)			
Client: clientB test	URN: CITS1113754U	RWISEUID:	233075	]
Eligibility Type:	✓ ?		Date Referred:	11/30/2020
Referral Status:	Pending V (?)		Completed Date:	· · · · · · · · · · · · · · · · · · ·
Referral Comments:			(?	
Ref - Notes:			?	
Referral Progress Status:				
Business Coordinator Assigned	~			
NM Case Manager Assigned:	LBCMUSER/IU Health LifeCare	Assign 🕐	CM Completed:	() 🛄 🙀
Save				

Referrals are where eligibility documentation and notes are tracked.

#### Figure 16 RWISE Referral - Creation

Page Functions

- *Client Display* Return to Client Display
- Log Out Log out of RWISE, this will take you back to the RWISE login Screen
- Assign Allows the user to change the assigned NM Case Manager
- Save Saves the referral data and returns to Client Display screen.

Before you can save the referral you first must set the following:



#### Date Referred

- This date will default to "Today's Date". This field cannot be changed.
- > Eligibility Type Describe the main purpose for the referral
  - Birthday Application
  - Half-Birthday Application
  - Initial Application
  - Notification of Change
  - Other/Follow Up Documents
  - Re-Entry Application



**Referral Progress Status** - This field identifies where the referral/application is, in the review process between the RWISE CM and the RWISE BC

- o BC Review Pending
  - Used to mark a referral as ready to be reviewed by the Business Coordinator

- CM Review Pending
  - Used to mark a referral as under review by case management
- CM Complete BC Not Needed
  - Used when the CM is processing documentation that does not need to be forwarded to the Business Coordinator for processing/completion.

Don't forget to complete the Referral Status and the Completed Date!

- Application Processed
  - Used to complete and close the referral. This status is set automatically by the system after the Business Coordinator has processed an application.
- o Denied
  - Used if documentation was received and the client's request for Ryan White Eligibility has been denied. Once selected by the RWISE CM, the system will update the referral status as Rejected and add the Completed Date.
- Incomplete Application
  - Used if documentation received was incomplete and cannot be processed for eligibility. Once selected by the RWISE CM, the PreApproved/Incomplete Reason field displays, and a selection is required. Once the reason(s) are added and saved, the system will update the referral status as Rejected and add the Completed Date.

#### • Lost to Follow Up

 Used if documentation was received but could not be processed, and the client record could not be updated. Typically, this is used when the client does not respond to multiple outreach attempts. Once selected, the system will update the referral status as Rejected and add the Completed Date.

#### Pre-Approved

- Used if a client's Initial or Re-Entry Application is pending additional documentation is requested as allowed per internal policy.
  - If set by the RWISE CM Pre-approved identifies the referral is ready to be reviewed by the Business Coordinator, and indicates the application is pending a needed documentation
  - If set by the RWISE BC Pre-approved identifies the referral has been processed
  - When selected, the PreApproved/Incomplete Reason field becomes selectable

Note: Referral with an Eligibility Type of Initial Application, Birthday Application, Half-Birthday Application, or Re-Entry Application, cannot be set as BC Review Pending or Pre-Approved, until the application has been validated under the Client Update function

Client: ClientSilly Test	URN: CITS0303902U	RWISEUID:	232676		h
You have set the Progress Status	to PreApproved or Incomplete but	t have not selected the	Reason(s)		l
					l
Eligibility Type:	Birthday Application 💙 💈		Date Referred:	12/27/2020	L

- > **Referral Comments** –Brief description of documentation status and eligibility review
- Ref Notes Detailed description of documentation status and eligibility review
- PreApproved Reason Indicates the reason(s) why a client's eligibility has been Pre-Approved, i.e. what additional documentation is needed



Figure 17 Pre-Approval/Incomplete Reason Selection

- Business Coordinator Assigned List of Business Coordinators
- > NM Case Manager Assigned List of Case Managers who process applications
- > CM Completed Date the Case Manager's review is complete
- Completed Date Date all documents are received, the client record has been updated if necessary, eligibility can be processed, and the referral can be closed
- Attach Documents Function used to upload attachments to a referral

After the referral is saved you will be able to update the referral fields and perform additional actions depending on user permissions. You may also change any fields (except the referred date) that may have been set incorrectly during the creation process.

To update a client record you will use one of the available functions. The available functions are based on your user permissions.

#### The Client Update is the only button available for all users.

Client Updates

Used to update a client's information. When selected you'll be taken to the <u>Client Update</u> Screen

#### (1) These functions are only available for the Business Coordinators

σ	Application Updates	- See <u>Application Updates</u> for more information
	Preapproved (Status Update)	- See <u>Preapproved (Status Update)</u> for more information
	ReEnroll Client	- See ReEnroll Client for more information

#### This function is only available for the Super User

Manual Update

- See <u>Manual Update</u> for more information *When Business Coordinators should use each* 

#### function:

Application Updates is used to update the client's upcoming renewal type and notice date, as well as set Pre-Approval reasons and Status End Dates if applicable.

Client Updates is used to make a change to current information without changing eligibility status.

#### **Attach Referral Documents**

After the referral is saved, you can attach various types of documents by selecting the **Attach Documents** button. When this button is selected, you'll be taken to the RWISE – Add Attachment screen.

RWISE - Add Atta	achment		
Back			
Content Type:	Birthday Application	~	
Comment:	No file chesen		
Choose File	No lile chosen		J
Lipload			
Opioad			

Figure 18 RWISE - Add Attachment

#### Page Functions

- Back Return to the Referral Screen
- Choose File Opens your computer file folders where you will select the document you want to attach to the referral
  - () o Please note: Attachment must be a .pdf file
  - 0
- **Upload** Will attach the document you have selected to your referral. When the document has attached, you will be taken back to the referral screen.
  - Content Type Choose the appropriate drop-down option based on the document you are attaching



Figure 19 Attachment Content Type List

> Comment – **Optional field** to provide a brief explanation of the document you're uploading

### **Completing a Referral**

The referral can be completed in different ways depending on the user permissions and the desired next steps. Below are some common scenarios.

For a Business Coordinator to complete a referral they must set the referral as: **Referral Status** = Complete, Lost to Follow Up, or Rejected

#### Completed Date = Entered

**Referral Progress Status** = Application Processed, Rejected, Lost to Follow Up, Denied, PreApproved or Incomplete Application

#### CM Completed Date = Entered

For a Business Coordinator to send a referral back to the case manager for correction or review they must set the referral as:

**Referral Status** = Pending

**Completed Date** = [Cleared out]

Referral Progress Status = CM Review Pending

**CM Completed Date** = [Cleared out]

For a Case Manager to complete a notice of change or other/follow up documents without forwarding it to the Business Coordinator for review the referral must be set as:

Referral Status = Complete

**Completed Date** = Entered

Referral Progress Status = CM Completed, BC Not Needed

**CM Completed Date** = Entered

For a Case Manager to complete a notice of change, document, or application and forward the referral to the Business Coordinator for review the referral must be set as:

**Referral Status** = pending

**Completed Date** = [Cleared out]

**Referral Progress Status** = BC Review Pending

#### **CM Completed Date** = Entered

After referrals are processed for a client, a historical list of referrals is available on the Clients Display screen. Please see example below.

	RWISE Referrals									
	Referring Provider	Referring Date	<b>Referral Status</b>	Last Updated	Ref Progress Status	Program Type				
Select	Client Submitted	11/05/2020	Pending		CM Review Pending					
Select	Client Submitted	10/28/2020	Completed		Application Processed					
Select	Client Submitted	10/27/2020	Completed		Pre-Approved					

Figure 20 Referral History

# **Client Update**

From the referral, the Client Update button brings you to the client update screen, where data entry can be completed/reviewed. In addition to the general contact information available on this main display, you will be able to update the client's Race/Ethnicity, Diagnosis, Labs, Poverty Assessment, Insurance Information, and record Eligibility Notes. These are sectioned out into <u>Eligibility Tabs</u>. The Eligibility Tabs must be completed in addition to the client update when updating a client's application for processing.

BROWSER BACK ARROW NOT ALLOWED FROM THIS PAGE
Ryan White Eligibility ClientA testA CITS1020832U Save Updates Validate App Close/Cancel
Client Update Race/Ethnicity   Diagnosis Labs Poverty Assessments Insurance Eligibility Notes
Client First Name     ClientA     Middle Name     Last Name     Date     11/15/2020 10:18:05 PM       AKA List     URN     CITS1020852U       Vital Status:     Alve     DOD:     IIII × DOB     1020/1965 IIII × Age 35       Language     English     SSN     Gender at Birth Female ▼       Race/Ethnicity     No     Gender at Birth Female ▼
Contact Information
Home/Residence Address     City     State     Zip       Mailing Address     Okay to Mail?     City     State     Zip       Mailing Address     Okay to Mail?     City     State     Zip       Same as Home Residence?     Indiana     V     Image: City     State       Phone     Type (Mobile V ) MSG OK     NSG OK     Region     V
Housing Status  Email Address  Okay to E-Mail?
Alt Contact Name     Alt Phone     Contact Relation     Other     Aware of Status       NM CM Assigned     LBCMUSER     CM Phone     CM Email     Iisamarie@tiryoung com     CM Agency (IU Heatth LifeCare       Business Coordinator Assigned     BC Phone     BC Email     CM Phone     PM Facultity     V Other
Ryan White # EHars #
Provider Notes
Annual Review Data Income Last Reported HH Size HH Annual Income HH FPL Client Income Client FPL
Income Household Dependents
Clinical Data
CD.4 Viral Load Lab data reported from all providers
Service Entry     RMSE Client Update     Service Entry Date     11/52020       Pre-Approved Reason     Eligibility Status     Interplate     Service Entry Date       Ineligible Reason     Eligibility Area     Service Entry Date
Start Date       End Data - will be updated when application or status update is saved         Start Date       End Date (Due Date)         Last Updated       Effective Date         Upcoming Renewal Type       Status Comments

Figure 21 RWISE Client Update screen

#### Page Functions

- **Save Updates** Save any changes made to the contact information page and post a client update service to the client record. Once selected you'll be taken back to the referral.
- Validate App Validates the client's record for completeness based on programmatic and HRSA/RSR Requirements.

The Validation must pass all quality checks before the referral will consider the application Validated.





• **Close/Cancel**- closes out the Client Update page and cancels any changes. Once selected you'll be taken back to the referral.



**Please note:** Data collected from this screen is required for the Ryan White Services Report (RSR) submitted to the Health Resources and Services Administration (HRSA).

## **Application Update**

The Application Update is only available for the Business Coordinator. From the referral, the Application Update button brings you to the Application Update screen. Here the BC can review or edit information entered by the CM. The client's information is broken into sections. These sections called <u>Eligibility Tabs</u>, include Race/Ethnicity, Diagnosis, Labs, Poverty Assessment, Insurance Information, and record Eligibility Notes.

BROWSER BACK ARROW NOT A Ryan White Eligibility clientda	ALLOWED FROM THIS PAGE ni testing CITS0505652U Proces	ss App Save Only	Close/Cancel	
Application Update Race/E	thnicity Diagnosis Labs Poverty Asses	sments Insurance Eligibility Notes		
Client First Name AKA List Vital Status: Alive V Language English Race/Ethnicity (No	Middle Name	Last Name lessing Date URN DOD: X DOB SSN Gender Gender at	11/15/2020 11 59:15 PM CIT50505552U COS05/1965 IIII ★ Age 55 Female ▼	
Homo/Dosidonos Addross		Contact Information	State	Zin
Mailing Address Phone Secondary Phone	Homeless?     Okay to Mail?     Same as Home Residence?     Type Mobile      NGG OK     Type Mobile      NGG OK	City City County	State	Zip Zip
Housing Status Email Address Alt Contact Name NM CM Assigned Business Coordinator Assign PM Name	V Alt Phone JYOUNG CM Phone LROBINSON BC Phone PM Phone	Kay to E-Mail? Contact Relation CM Email Ivourg@damie 52 BC Email PM Facility	Other     CM Agency Damen Center     ionhealth.or     Other	Aware of Status     PM Fax
Ryan White #	EHars #			
Income Last Reported	НН 5	Annual Review Data Size HH Annual Income Client Income	e HH	FPL
Income Household Dependents		11		
CD 4	Viral Load	Clinical Data		
Service Entry Pre-Approved Reason Ineligible Reason Status Eligibility RWPA	RVIISE Pre-Approved Initial Application Insurance Cards	Client Status Service Entry Date Eligibility Status Eligibility Area	11/11/2020	
Start Date Last Updated Upcoming Renewal Type	Current Re	newal Data - will be updated when application o End Date (Due Date) Effective Date Status Comments	r status update is saved	

Figure 22 RWISE Application Update Screen

Page Functions

- **Process App** Validates the client's record for completeness based on programmatic and HRSA/RSR Requirements.
- **Save Only** Save any changes made to the contact information page without posting a service or changing the client's eligibility information. Once selected you'll be taken back to the referral.
- **Close/Cancel** closes out the Client Update page and cancels any changes. Once selected you'll be taken back to the referral.



**Please note:** Data collected from this screen is required for the Ryan White Services Report (RSR) submitted to the Health Resources and Services Administration (HRSA).

#### **Demographic Information**

This section includes Client First, Middle Name, Last Name, Date, AKA List, URN, Vital Status. DOD, DOB, Age, Language, SSN, Gender, Gender at Birth, Race/Ethnicity

#### From a Business Coordinator View



#### From a Case Manager View

Client First Name	clientprod	Middle Name	Las	st Name	testing		Date	11/15/2020 1	1:20:52 PM	Λ	
AKA List							URN	CITS110181	IU		
Vital Status:	Alive 🗸		DC	D:		🇰 🍃	DOB	11/01/1981		🗙 Age	39
Language	English		✓ SS	N			Gender	Male	~		
Race/Ethnicity	Black or African American/N	0					Gender at Birth	Male 🗸			

1

**Please note:** The Case Manager is unable to edit the First Name, Last Name, Date of Birth, or Gender Fields.

#### **Contact Information**

This section below includes: Home/Residence Address, Mailing Address, City, State, Zip Code, County, Region, Phone numbers, Housing Status, Email Address, Alternate Contact information, Non-Medical Case Management Contact information, Business Coordinator Contact information, Primary Medical information and a section for Provider Notes.

	Contact Information		
Home/Residence Address	City	State	Zip
□ Homeless?		Indiana 🗸	
Mailing Address   Okay to Mail?	City	State	Zip
Same as Home Residence?		Indiana 🗸	
	County	Region V	
Phone Type Mobile V  MSG OK			
Secondary Phone Type Mobile V  MSG OK			
Housing Status			
Email Address	Okay to E-Mail?		
Alt Contact Name Alt Phone	Contact Relation	✓ Other	Aware of Status
NM CM Assigned LBCMUSER CM Phone	CM Email lisamarie@triyoung.com	CM Agency IU Health LifeCare	
Business Coordinator Assigned BC Phone	BC Email		
PM Name PM Phone	PM Facility	✓ Other	PM Fax
Ryan White # EHars #			
Browider Notes			

• When entering the Home/Residence Address the mailing address will remain grayed out until you select the Okay to Mail check box. If the Home/Residence address is the same as the Mailing Address select the Same as Home Residence check box. If the

Mailing Address is different than the Home/Residence address, select the Okay to Mail check box and enter the mailing address information. If the client is homeless, select the **Homeless?** check box and both the home and mailing address will be grayed out.

• When selecting the **County** from the dropdown, the **Region** will auto populate.

County	Boone 💊	Region	Marion County TGA 🗸
--------	---------	--------	---------------------

 When setting a client to out of state, or TGA, select **Relocated** from the Region Drop down.

Region	<b>~</b>
	Marion County TGA
	Part B Statewide
	Relocated

The **Phone** and **Secondary Phone** have a dropdown that allows you to select the **Type** of phone number and a check boxes, **MSG OK**, indicating a message can be left at that phone number and **Contact OK**, indicating it is okay to contact the client at this number.

Phone Secondary Phone	Туре Туре	Mobile 🗸 Home	☐ MSG OK ☐ MSG OK
		Mobile	
Email Address	_	Work	
Alt Contact Name	_		Alt Phone

The Housing Status has a dropdown with three options to choose from *Stable/Permanent*, *Temporary* and *Unstable*.

Housing Status Email Address	~	l
Alt Contact Name	i	l
NM CM Assigned	Stable/Permanent	l
<b>Business Coordin</b>	Ī	l
PM Name	Temporary	l
Ryan White #	Unstable -	

The **Email Address** will have an **Ok to E-mail?** checkbox which should be selected if the email address can be used for communication.

Email Address	Okay to E-Mail?

The dropdowns **Contact Relation** and **PM Facility** have an "**Other**" field that will remain grayed out unless you select "Other" from the dropdown. Once you select "Other" the field will open

and allow you to type.

Alt Contact Name		Alt Phone	Contact Relation	<b>~</b>	Other	Aware of Status	,
NM CM Assigned	LBCMUSER	CM Phone	CM Email	lisamarie@triyoung.com	CM Agency IU Health LifeCare		
Business Coordinator Assigned		BC Phone	BC Email				
PM Name		PM Phone	PM Facility	v	Other	PM Fax	

The Ryan White # and Ehars # are listed as additional unique client identifiers.

Ryan White # EHars # EHars #	rom a busine	ess coordinator view		
	Ryan White #		EHars #	
rom a Case Manager View	rom a Case N	lanager View		

The **Annual Review Data** section of the **RWISE Eligibility Screen** will be grayed out. The Annual Review Data will be completed in the **Poverty Assessments** tab. Please reference **RWISE Eligibility Tabs**.

			Annual Review Data			
Income Last Reported	11/3/2020	HH Size	1 HH Annual Income	0.00	HH FPL	0 %
			Client Income	0.00	Client FPL	0 %
Income Household Dependents			ł.			

The **Clinical Data** section of the **RWISE Eligibility Screen** will be grayed out. The Clinical Data will be imported in the **Labs** tab. Please reference **RWISE Eligibility Tabs**.

Clinical Data
CD 4 Viral Load Lab data reported from all providers

The **Client Status** section record the client's Ryan White eligibility information.



- Service Entry will automatically populate and will post to the *Enrollment Services* section of the client Display screen.
- **Service Entry Date** is the date the referral was created and will automatically populate.
- Eligibility Status will automatically populate and is also visible in the *Eligibility Information* section of the Client Display screen.

- Pre-Approved Reason will automatically populate based on the referral selection/current status and will post to the *Eligibility Information* section of the Client Display screen
- **Ineligible Reason** is the reason the client is no longer eligible for Ryan White services. There are several reasons a client can be deemed not eligible, some examples include Over Income, Incomplete Application, Deceased, did not submit Renewal, etc.
- Eligibility Area is where the client is eligible to receive Ryan White Service. This field is automatically populated from the information entered in the **County** dropdown.
- Status Eligibility RWPA will indicate either Eligible, Not Eligible, or Pending. This field is automatically populated from the information entered in the **County** dropdown.

The **Client Renewal Data** includes the **Start Date**, **End Date** (Due Date), when the status was Last Updated, the Effective Date, the Upcoming Renewal Type and Status Comments.

Current Renewal Data - will be updated when application or status update is saved						
Start Date	11/03/2020	End Date (Due Date)	2/28/2021			
Last Updated	11/5/2020 5:10:59 PM	Effective Date	11/03/2020			
Upcoming Renewal Type	Half Birthday Month Renewal	Status Comments	Eligibility Status Updated On 11/3/2020 2:26:37 PM by LBBCuser			
	Save Client Update	Close/Cancel Char	nges			

## **RWISE Eligibility Tabs**

The RWISE Eligibility Tabs are additional areas of information of a client record that need to be collected. These different sections are required for RSR reporting and/or programmatic tracking. These data elements must be completed when processing a client's application, in addition to the client/application update screen.



- You can complete the various tabs in any order.
- Each Tab must be saved individually except the client update tab.
- When finished to save your updates, select Save update.

The tabs include Race/Ethnicity, Diagnosis, Labs, Poverty Assessments, Insurance and **Eligibility Notes.** 

#### **Race/Ethnicity**

Application Update Race	e/Ethnicity D	agnosis	Labs	Poverty	sessments	Insurance	Eligibility Notes
Select Race(s): White Black or African America American Indian or Alas Asian Native Hawaiian or Othe Hispanic or Latino Mexican, Mexican Amer Puerto Rican Cuban Another Hispanic, Latino Save	an ska Native er Pacific Island s): rican, Chicano b/a or Spanish o	Select Asia Chii Filip Jap Kor Viet Oth	Asian Su an Indian nese bino anese ean mamese er Asian	bgroup(s):	Select Pacific Native Hat Guamania Samoan Other Pac	: Subgroup(s): waiian in or Chamorra	

Figure 23 Race/Ethnicity Screen

This tab allows you to document the clients **Race** and **Ethnicity** as well as Subgroup(s).

When a **Race** with subgroups is selected, an additional list will appear. Please see the two examples above which include Asian Subgroup (s) and Pacific Subgroup(s) The **Ethnicity** dropdown contains two options, *Hispanic* and *Non-Hispanic*. If Hispanic is selected, the Hispanic Subgroups will appear. Please see the above example.

Once you have completed all data entry in this tab, hit the **Save** button to record the entry.

#### Diagnosis

The **Diagnosis** tab is used to record proof of HIV/AIDS diagnosis and risk factors.

Application Update	Race/Ethnicity Diag	nosis Labs	Poverty Asses	sments	Insurance	Eligibility Not
HIV Status	~	HIV + Date		🗼 🗆 es	st?	
AIDS Date	🔤 🧾 🗽 🗆 est?					
HIV Risk Factors						
Male who has sex	with male(s)					
Heterosexual Cor	ntact					
Injection Drug Us	e					
Hemophilia/coagu	ulation disorder					
Receipt of transfu	ision of blood, blood com	ponents or tissu	le			
Perinatal Transmi	ission					
Not Reported or N	Not Identified					
Save Diagnosis						
Attach Diagnosis	Document					
	Content	Attach Date	Attach User	File Type	File Name	Comment
Open/Edit Certifica	tion by HIV Provider Stm	t 11/16/2020	RWWEBAPPS	.pdf	Diagnosis1	

Figure 24 RWISE Diagnosis Screen

- Save Diagnosis Saves changes made to Diagnosis page
- Attach Diagnosis Document Allows the user to upload the client's proof of status
  - > HIV Status is required for all clients
  - > **HIV + Date** is required for all HIV+ clients
  - > AIDS Date is required for all clients with CDC defined AIDS status
  - HIV Risk Factors Select all that apply

#### Attach Diagnosis Document

After the referral is saved, you can attach various types of documents by selecting the **Attach Documents** button. When this button is selected, you'll be taken to the RWISE – Add Attachment screen.

Add Diagnosis At	achment		
Back			
Content Type: Comment:	Certification by HIV Provider Stmt	•	
Choose File	No file chosen		

Figure 25 RWISE – Add Diagnosis Attachment

- **Back** Return to the Diagnosis Tab
- **Choose File** Opens your computer file folders where you will select the document you want to attach to the client record

• Please note: Attachment must be a .pdf file

- **Upload** Will attach the document you have selected the Diagnosis Tab and the Client Display. When the document has attached, you will be taken back to the Diagnosis Tab.
  - Content Type Choose the appropriate drop-down option based on the document you are attaching

Content Type:	Certification by HIV Provider Stmt
Choose File	Certification by HIV Provider Stmt
Chicose The	Completed HIV Case Report
Upload	Confirmatory Test Documentation
	HIV Status Lab Report with dect. VL
RWISE BC	Hospital Discharge Summary
	IDOC ISDH Form
	Medical Services ISDH Verification
	Progress Note w/Physician Signature

> Comment – **Optional field** to provide a brief explanation of the document you're uploading

#### Labs

The **Labs** tab collects the CD4 and Viral Load Lab values. This tab will display the most recently reported Lab values for CD4 and Viral Load.

Please note: CD4 should not be entered as a percentage

Applicat	tion Update	Race/Ethn	icity [	Diagnosis	Labs	Poverty Assessments	Insurance	Eligibility Notes
OCD4	Count (cells/i	mm <sup>®</sup> ) Test is	Optiona	al Exped	cted Ma	ximum: 1200		
○Viral	Load (Copies	s/mL)		Exped	cted Ma	ximum: 1000000000		
Date		×		<b>•</b> =		Result		
Save		Delete L	abs					
	-							
	Data	Teat	Decult	Dravidar				
	Date	lest	Result	Provider				
<u>Select</u>	11/09/2020	Viral Load	20	RWISE				
Select	04/27/2020	CD4 Count	650	RWISE				
Select	04/27/2020	Viral Load	1968	RWISE				

Figure 26 RWISE Labs Screen

- Save Saves date and result entered
- **Select** Populates the selected results
- Delete Labs after a result is selected, the user may delete the value

#### **Poverty Assessment**

The **Poverty Assessments** tab pictured below, will capture one of the Annual Data Review assessments needed. To help calculate the poverty assessment, this tab also includes an Income Assessment.

Application Update Race/Ethnicit	y Diagnosis Lab	s Poverty Assess	ments Insurar	nce Eligibility	Notes					
List household dependents (name a	nd age)	ohn, Child Luke - 3 ye	ars old				Save Income	e Household De	ependents	
Add Income Assessment Date Income Type Income Employer Job Start Date Income Pay 1 Income Pay 2 Income Pay 3 Income Pay 5 Pay Schedule Monthly Income Annual Income Save Delete Income	ome Assessment	End D	Emple	oyer Name						
Income Assessment Date	Туре	Employer Des	Pay Schedule	Income Pay1	Income Pay2	Income Pay3	Income Pay4	Income Pay5	Monthly Income	Annual Income
Select 11/11/2020	Earned Income		Weekly	500.00	250.00	600.00	500.00	0.00	2004.17	24050.00
Select 11/11/2020	Unearned Income S	ocial Security	Monthly	1650.00	0.00	0.00	0.00	0.00	1650.00	19800.00
Select   11/11/2020         Unearned Income         Social Security         Monthly         1650.00         0.00         0.00         0.00         1650.00         19800.00           Total Annual Income         43850.00         43850.00         Client Income         100         0.00         0.00         0.00         1650.00         19800.00           Add Poverty Assessment         Poverty Assessment Date         Client Income         Client Incom										

Figure 27 RWISE Poverty Assessment Screen

- Save Income Household Dependents When selected, saves the data entered in the, list of household dependents text box.
- Save when selected, the associated Assessment is saved and posted to the client's record
- **Delete Income Assessment** When an income record is selected, it will populate the fields above. The user may delete the record if desired.
- **Delete Poverty Assessment** When a poverty record is selected, it will populate the fields above. The user may delete the record if desired.



*Please Note:* When creating an Income Assessment and Poverty Assessment, the date of the referral will auto-populate.

- To add an Income Assessment, the Add Income Assessment box must be checked. This section requires:
  - > Date,
  - Income Type (Business Income, Child Support Income, Earned Income, Long Term Disability (LTD), Retirement Income, Unearned Income, Unemployed/No Income, Unemployment Income),
  - > Income Pay 1-5 fields (to record individual checks and award statements)
  - > Pay Schedule (Annual, Bi-Monthly, Bi-Weekly, Monthly, Seasonal, Weekly).
  - > Monthly Income and Annual Income fields will automatically populate
    - Except in the following cases:

- when client has zero income (user must enter 0.00 into an Income Pay, and the Annual Income fields)
- when Seasonal pay schedule is chosen (user must enter income pay, and annual income fields)

Once you have completed this section, hit the **Save** button to record the data.

If you wish to add additional income sources, please follow the steps above until income from all sources have been entered. All entries with the *same date* will automatically be added together to give you the **Total Annual Household Income**.

-						ungionity						
Add 1 Date Income Job Sta Income Income Income Income Income	sehold dependents (name ar Income Assessment Type Employer t Date Desc Pay 1 Pay 2 Pay 2 Pay 3 Pay 4 Pay 5	d age) Husband	I John, Child Luke	- 3 year	rs old ✓ Emplo te	yer Name			Save Income	Household De	pendents	
Pay Scr Monthly	Income				~							
annuar	ncome											
Save	Delete Inco	ome Assessment										
	Income Assessment Date	Туре	Employer	Desc	Pay Schedule	Income Pay1	Income Pay2	Income Pay3	Income Pay4	Income Pay5	Monthly Income	Annual Incom
									500.00	0.00		
Select	11/11/2020	Earned Income			Weekly	500.00	250.00	600.00	500.00	0.00	2004.17	24050.00

- To add a Poverty Assessment, the **Add Poverty Assessment** box must be checked. This section requires
  - Poverty Assessment Date,
  - Household Size
  - **Client Income** if more people than just the client are in household. Once you have completed this section, hit the **Save** button to record the data.

$\overline{}$
---------------

#### Insurance

The Insurance Tab is where you will document the client insurance information.

BROWSER BACK AN	RROW NOT ALLO	WED FROM	THIS PAG	E	
Ryan White Eligibil	lity ClientA TestA		CI	TS0805762U	Close/Car
Client Update	Race/Ethnicity	Diagnosis	Labs	Poverty Assessments	Insurance
	Accordment F	) oto			
	Assessment L	Jale		×	
Primary Insurance	e		~		
Other Insurance					
Private - Individ	lual		= N	ledicaid	
Private - Emplo	oyer		V	A, Other Military	
Medicare Part /	A/B		= IF	IS	
Medicare Part I	D				
Full LIS					
Other					
Save Insurance	e				
Date	Primary Inst	urance Oth	ner		
Select 11/03/202	20 Medicaid	Med	caid		

Figure 28 RWISE Insurance Screen

- To add an Insurance Assessment, the Add Insurance Assessment box must be checked.
  - **Date** will automatically populate with the referral date.
  - **Primary Insurance** can be selected from the dropdown.



• **Other Insurance:** The checkboxes shown here are to identify clients secondary/other insurances as applicable.

Once you have completed this section, hit the **Save Insurance** button to record the data.

**Please Note:** When Add Insurance Assessment is selected, the date of the referral will auto-populate the date field to allow for client's eligibility to begin on date the application was submitted.

### **Eligibility Notes**

The **Eligibility Notes** tab is where any notes regarding the client's eligibility is recorded. Please see below:



#### Figure 29 RWISE Eligibility Notes Screen

- Save Saves the notes entered in the text field
- Clear Selected Clears out the message listed in the open text field
- Select Displays the selected Eligibility Note record in the open text field.



#### Please note:

Some **Eligibility Notes** added are by the system. When the system changes the client's eligibility, it will be marked as **System**. Other times, the system is tracking an activity by a user. See example circled in red in the image above.

# **Re-enroll Client**

Located in the referral, the ReEnrol Client Button will only become available if the client's current eligibility status is Not Eligible and the Upcoming Renewal Due Date is in the future. When selected this will update the client's **Eligibility Status** from *Not Eligible* to *Eligible*.

RWISE - Referral	
Client Display Log Out	
Client: ClientA TestA	JRN: CITS0805762U RW
Manual Update	)
Client Updates	
ReEnroll Client	
Eligibility Type:	Other/Follow Up Documents V
Referral Status:	Completed V
Referral Comments:	oocs received
	test

Figure 30 RWISE Referral - ReEnroll Client

When the **ReEnroll Client** button is selected, the **RWISE – Re-enroll Client** screen will display.

Log Out Back	RWISE - Re-enroll Client
Referred Client:     ClientA TestA       URN:     CITS0805762U	
Reason for re-enrolling	
Save	

Figure 31 RWISE Re-Enroll Client Screen

- Log Out Log out of RWISE, this will take you back to the RWISE login Screen
- **Back** When selected, you'll be taken back to the Referral screen
- **Save** When completed with the Manual Update, this will save and post the updates to the client record.
  - Document the reason you are re-enrolling the client. This note will post to the Eligibility Notes section.

# **PreApproved (Status Update)**

Located in the referral, the Preapproved (Status Update) Button will only become available if the client's current eligibility status is Not Eligible and the Upcoming Renewal Due Date is in the future. When selected this will update the client's **Eligibility Status** from *Pre-Approved* to *Eligible*.

RWISE - Referral	
Client Display Log Out	
Client: Lisa Fuentes	URN: [LSFE0830655U
Manual Update	
Client Updates	
Preapproved (Status Update)	
Eligibility Type	Initial Application
Referral Status:	Completed V
Referral Comments:	
	tart

Figure 32 RWISE Referral – Preapproved (Status Update)

When the **Preapproved (Status Update)** button is selected, the button will disappear, and client status will be changes to Eligible. Once Updated, you will go back into the referral and complete the referral and make any add any applicable notes

# **Manual Update**

Located on the referral screen, this function allows a **RWISE SuperUser** to fix data entry issues or manually make changes to eligibility as needed. The Manual Update Button in INRWISE will only be visible to a user with **RWISE Super User** permissions.

RWISE - Referral Client Display Log Out	)	
Client: Client Test	URN: CITS0408544U	RWISEUID:
Manual Update		
Application Updates		
Client Updates		
Eligibility Type:	Birthday Application V	
Referral Status:	Completed V	
Referral Comments:		

Figure 33 Referral Screen - Manual Update

When the Manual Update button is selected, the RWISE- Manual Update screen will display.

Log Out Back		RWISE - Manual Update
Client: Client Test	URN: [CITS0408544U RWISEUID: 200001	
Upcoming Type Notice Date Status End Date (Due Date) Eligibility Status	Eirbday Month Renewal	×
Reason for the update		
Save Manual Update		
RWISE BC/SuperUser		

Figure 34 Manual Update Screen

- Log Out Log out of RWISE, this will take you back to the RWISE login Screen
- **Back** When selected, you'll be taken back to the Referral screen
- **Save Manual Update** When completed with the Manual Update, this will save and post the updates to the client record.
  - > **Upcoming Type** Select the appropriate upcoming renewal from the drop-down
  - Notice Date End of the month, this should always match the Upcoming Renewal Due Date
  - Status End Date (Due Date) This will most often match the upcoming renewal due date unless the client is pre-approved
  - > Eligibility Status Select the appropriate status from the drop-down
    - Ineligible Reason will become editable if Not Eligible is the Selected Eligibility Status
  - Reason for the update Document the reason you are performing a manual update. This note will post to the Eligibility Notes section

# **Reset Password**

From the RWISE Portal screen, when the Reset Password button is selected you will be taken to the *Send Temporary Password Screen* 

Send Temporary Password		
CareWare User Name:		
Send Temporary Password		
Back		

- Send Temporary Password Request a temporary password
- **Back** Return to the RWISE Login screen

After successfully logging in with your temporary password, you will be prompted to enter a new, permanent password.

		Change Password
User Name	Imfuentes	
New Password Repeat Password		
Change Password	Cancel	

Once your new password has been set, you will be prompted to log in again.

#### **My Settings**

- Change Password Opens Change Password screen
- *Cancel* Return to Main Menu



Figure 35 My Settings Screen

**Change Password** button will open the Change Password screen. Enter a **New Password** and **Repeat Password** then select the **Change Password** button

		Change Password
User Name	Imfuentes	
New Password Repeat Password		
Change Password	Cancel	

Figure 36 Change Password Screen

The reset password feature is directly linked to CAREWare. If the password is changed in the RWISE Viewer it will also impact CAREWare password and vice versa.

## First time log in

The first time you log into RWISE (or CAREWare) you will need to set up Two factor authentication (2FA,) a type of multi-factor authentication (MFA,) is way to protect access to data systems by requiring both something the user knows, like a password, and something the user possesses (such as biometrics or a code from a token device/app) to login. Use of 2FA is required for use of INCAREWare and INRWISE.

In summary, moving forward, IN CAREWare and INRWISE login will require three inputs from the user: 1) username, 2) password, 3) two factor token and 4) Domain.

#### **INRWISE Login**



For assistance with 2-factor authentication set up, please contact Jill Carr (JCarr@MarionHealth.org)

# **Key Terms, Definitions and Acronyms**

#### AKA – Also known as

**Birthday Month Renewal** – Complete Application due annually during the client's birthday month. This is also for client's who were eligible in the past, but at one point did not renew their eligibility. It requires a full application and all the required supporting documents.

**Application Updates** – used by Business Coordinators for initial applications and eligibility recertification. This function will update the client's upcoming renewal type and notice date.

**Client Updates**: used to make a change to current information *without* changing eligibility status.

CM – Case Manager

DOB – Date of Birth

DOD – Date of Death

**Eligibility Status** – Client's current Ryan White Part A, Ryan White Part C, and if applicable, MAI (Minority Aids Initiative) Eligibility

Pending –Eligible for services, but client's upcoming renewal is due this month
 Eligible – Eligible for Services
 Pre-Approved – Eligible for Ryan White Services, but additional information is needed for continued eligibility
 Not Eligible – Not Eligible for Ryan White Services

**Eligibility Type:** the type of request that requires review and processing (annual recertification or 6 month)

FPL- Federal Poverty Level

**Half Birthday Month Renewal** – 6-month Attestation, due annually during the client's halfbirthday month (6 months before/after the birthday month)

**Initial Application** – Client new to Ryan White Services requiring a full application and all the required supporting documents.

**Legacy RISE Original Due Date** – Client's due date from Historical system RISE. If you have questions about the type of renewal that is due, please contact your Grantee's office for guidance.

MAI – Minority AIDS Initiative

MSG OK – Message Okay

NM – Non-Medical

**Re-Entry Application** – Complete Application is due, client has been ineligible for 2 or more years

**Referrals** – This is how all activities are managed. A referral is created directly in RWISE. Consider the referral a container or envelop that needs processing

**Referral Progress Status** – Indicates the overall status of the referral (pending, completed, rejected, lost to follow-up)

Renewal Due Date – Indicates when the client's upcoming renewal is due by

RW – Ryan White

RWISE - Ryan White Integrated Statewide Eligibility

**RWISE UID** – System calculated unique identifier that can be used to identify clients in other systems

RWPA – Ryan White Part A

RSR – Ryan White Services Report

**SSN** – Social Security Number

*Status End Date* – Date the client's current eligibility status ended if ineligible, or will end if appropriate documentation is not submitted

**Upcoming Renewal** – Field Identifying the next type of renewal the client must submit to maintain/gain Ryan White eligibility

**URN:** Unique Reference Number is a code that is assigned to the client.