MARION COUNTY PUBLIC HEALTH DEPARTMENT

Prevent. Promote. Protect.

2020

INRWISE Manual

Last Update

12/31/2020

TriYoung Inc.

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

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.***

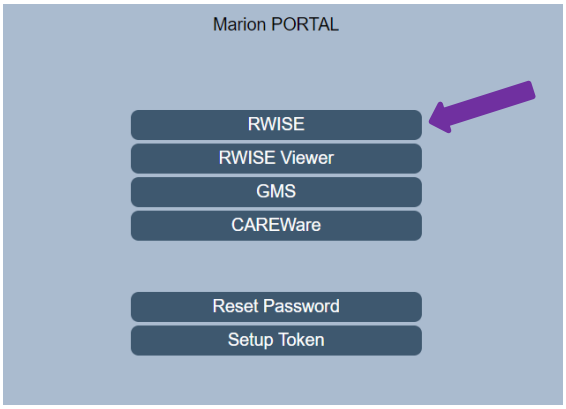


Figure 1 - Portal Page

- Use Web-based internal link to Marion Portal – https://indyrwise.ixn.com and select RWISE button. The RWISE button will take you to the *RWISE Login Screen*
- **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 *Reset Password Screen*
- **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.

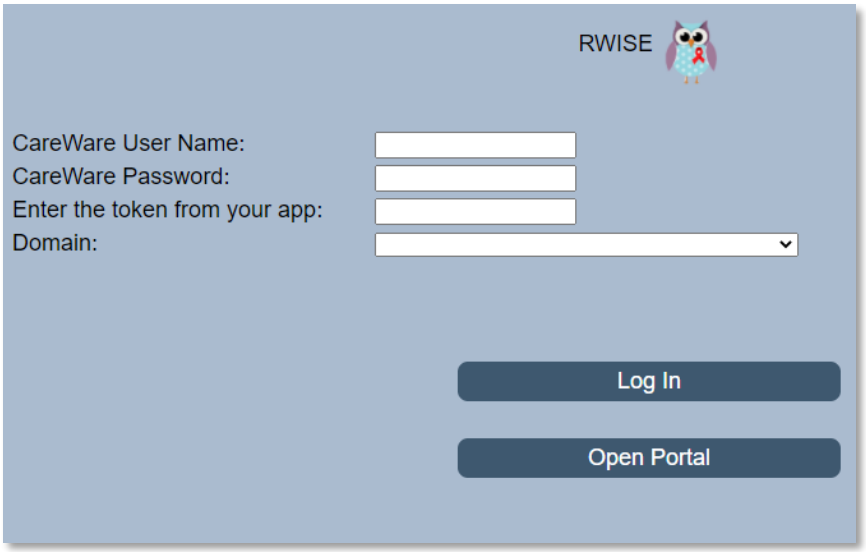


Figure 2 RWISE Login Screen

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 First time log in 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 Add Client permission. If you believe you should have this permission and do not please contact Jill Carr (JCarr@MarionHealth.org) for assistance.

There will be helpful tips throughout the application.

Those Tips are identified by this symbol-

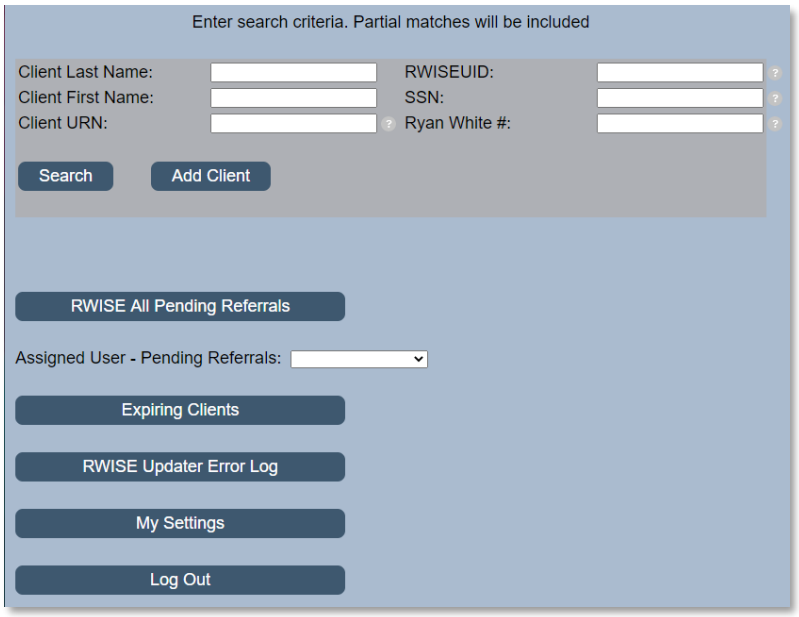


Figure 3 - RWISE Main Menu

Page Functions

- ***Search*** - Search for a Client
  - 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 screen.

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
  - i.e. Actual **First Name**: John **Last Name:** Doe
    Search by **First Name**: Doe **Last Name:** John

- ***Add Client***- 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
- ***RWISE All Pending Referrals*** – 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.

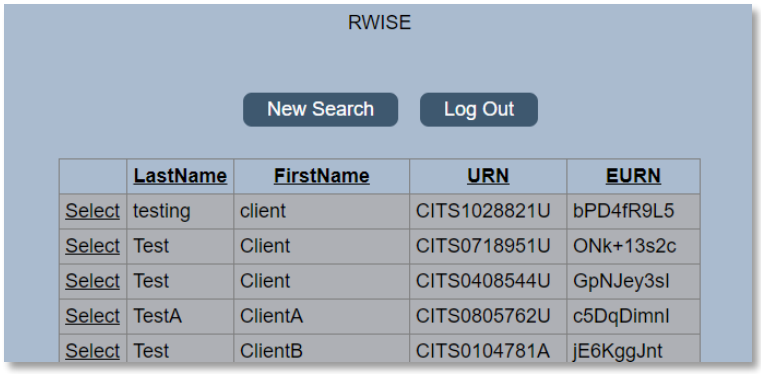


Figure 4 RWISE Search Results Screen

Page Functions

- **New S**earch – 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.

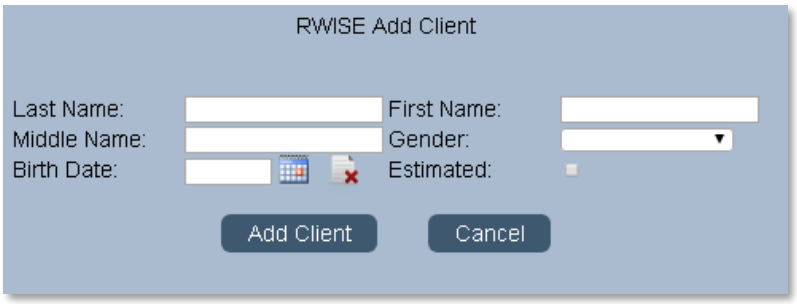


Figure 5 RWISE Add Client Screen

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.

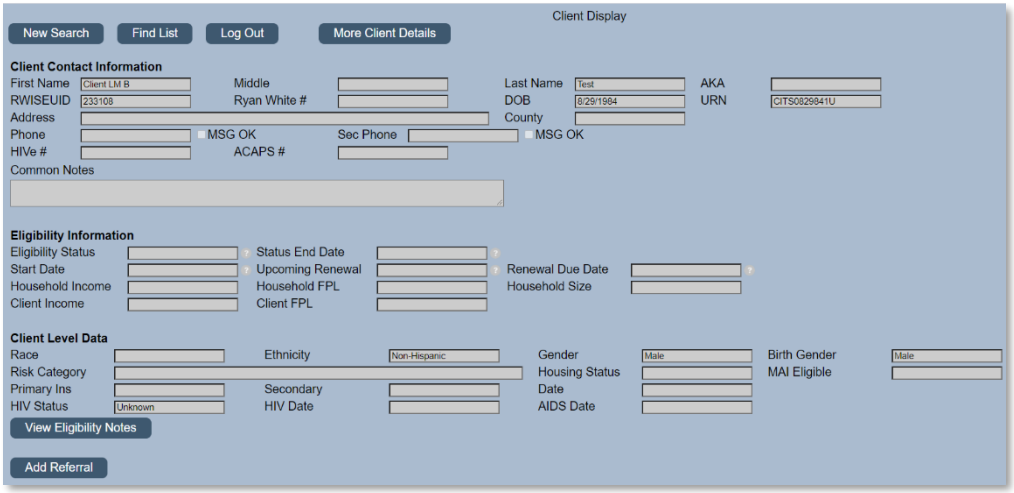


Figure 6 RWISE Client Display Screen

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.

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

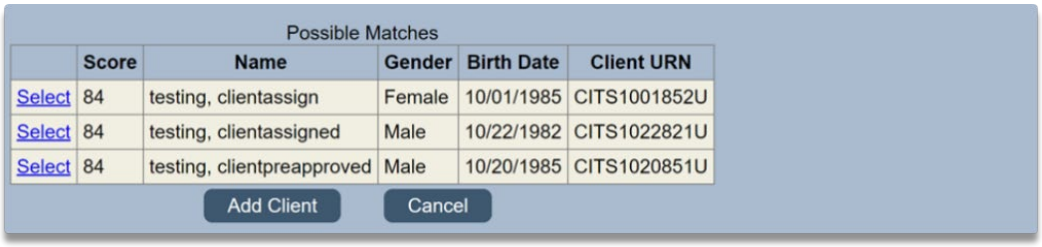


Figure 7 RWISE Possible Duplicate Found Screen

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.

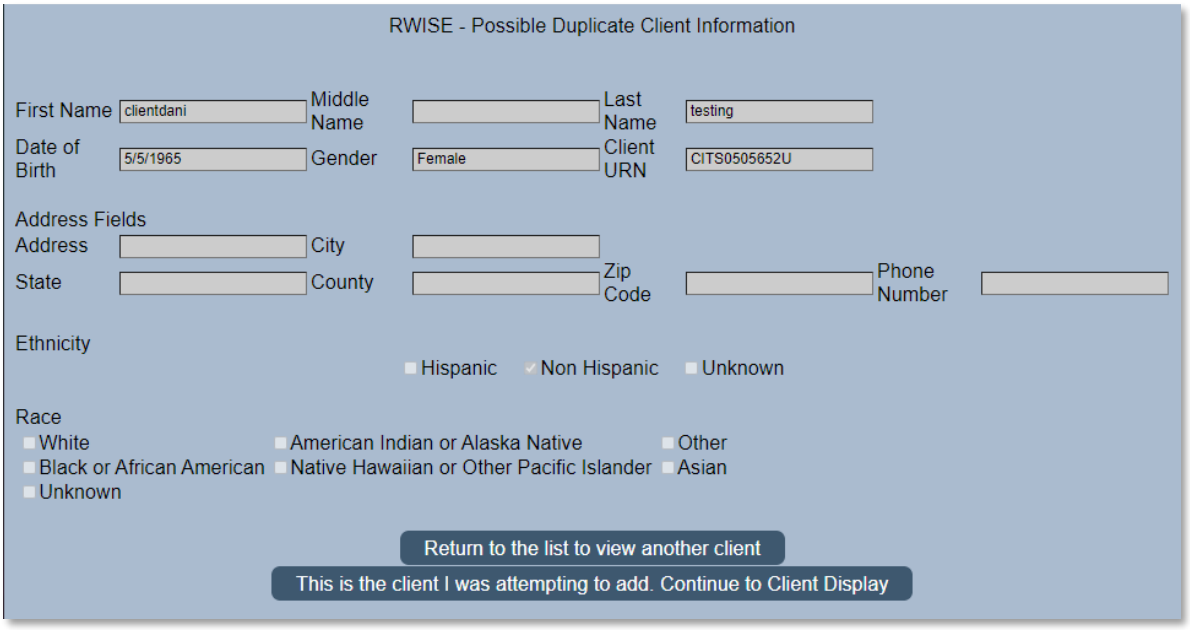


Figure 9 Possible Duplicate Client Information

- **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.

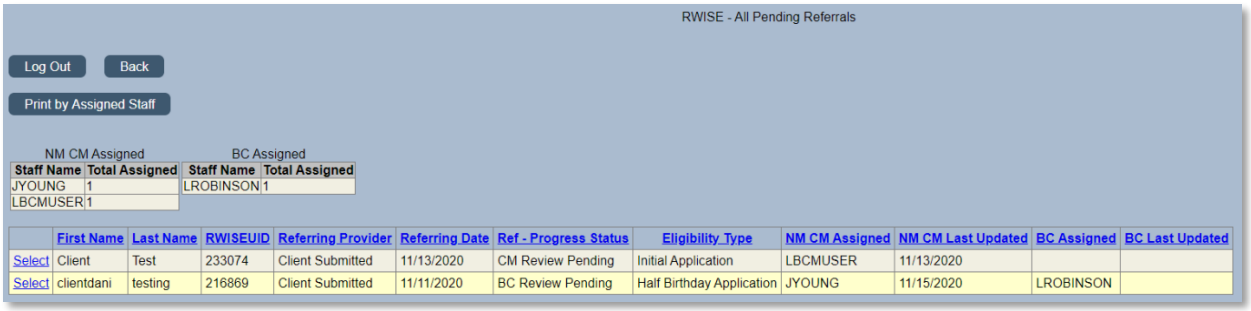


Figure 10 RWISE - All pending Referrals

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*

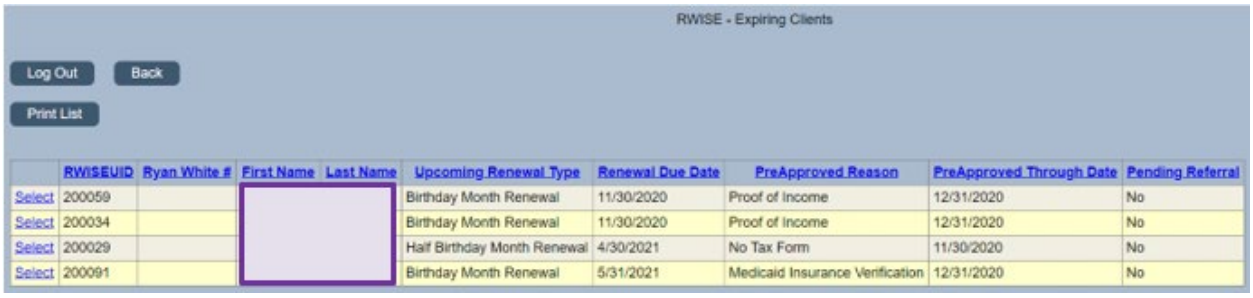


Figure 11 RWISE Expiring Clients

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.

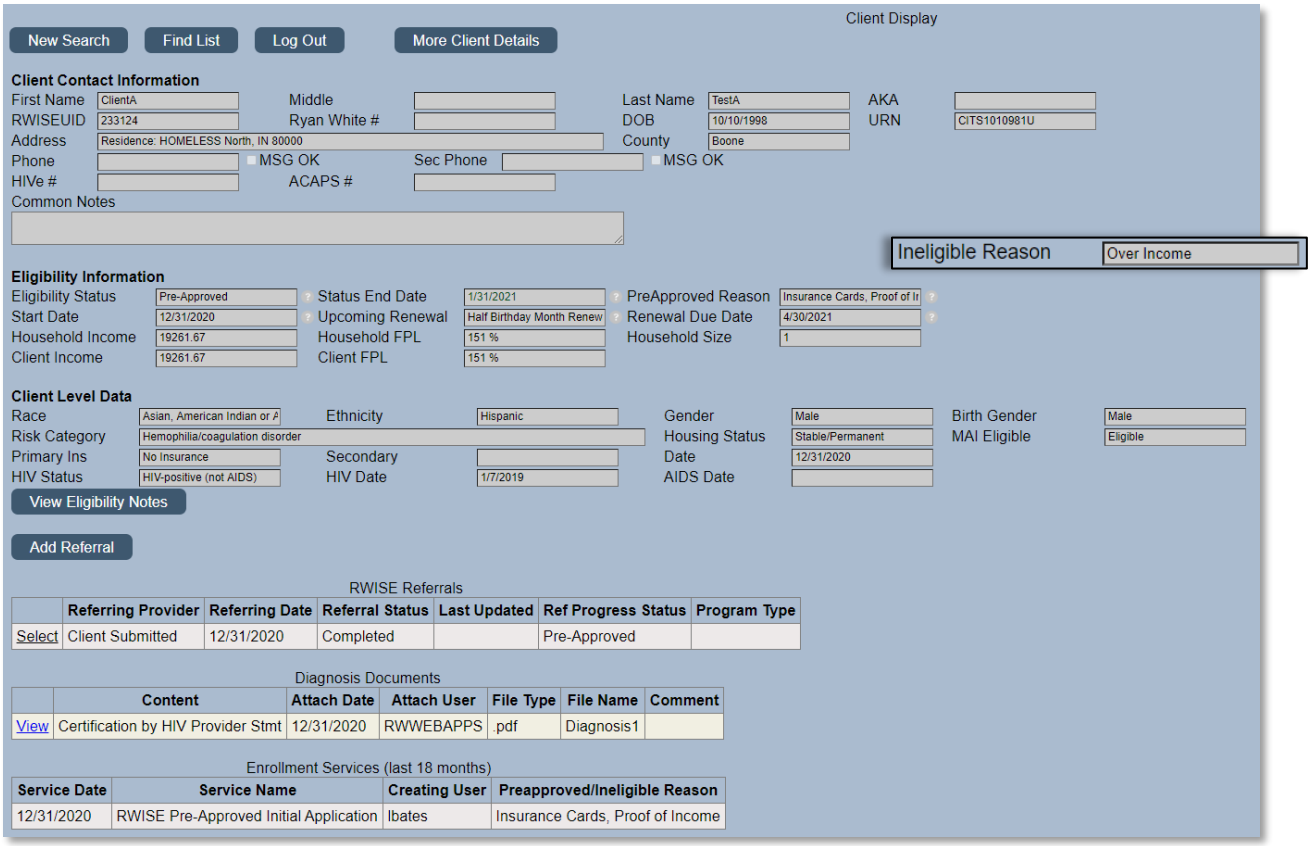


Figure 12 Client Display

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
- ***More Client Details*** – View/Add Common Notes, Client ID, & Enrollment Records based on user permissions
- ***View Eligibility Notes*** – 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.]
- Referrals 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.

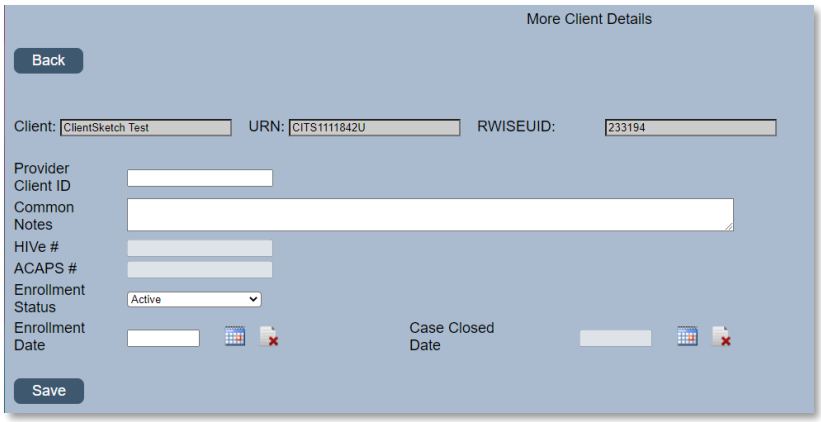


Figure 13 More Client Details - RWISE CM User View

Page Functions

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

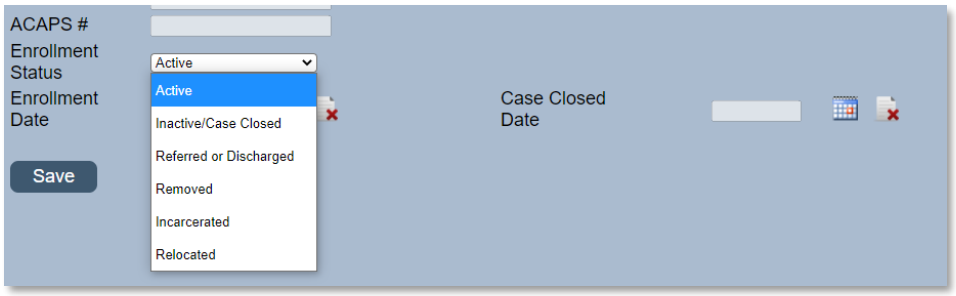


Figure 14 Enrollment Status Drop-Down

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.

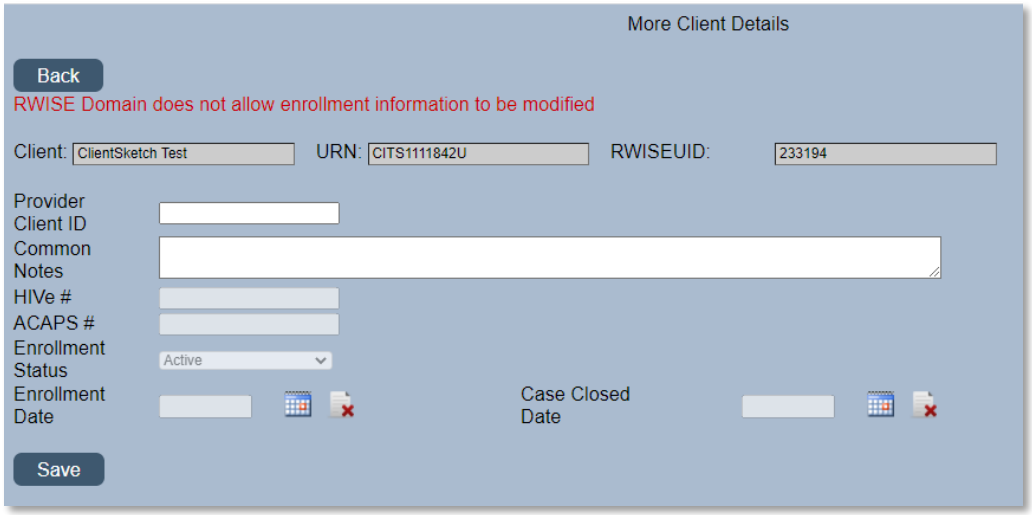


Figure 15 More Client Details - RWISE Domain

Referrals

Referrals are where eligibility documentation and notes are tracked.

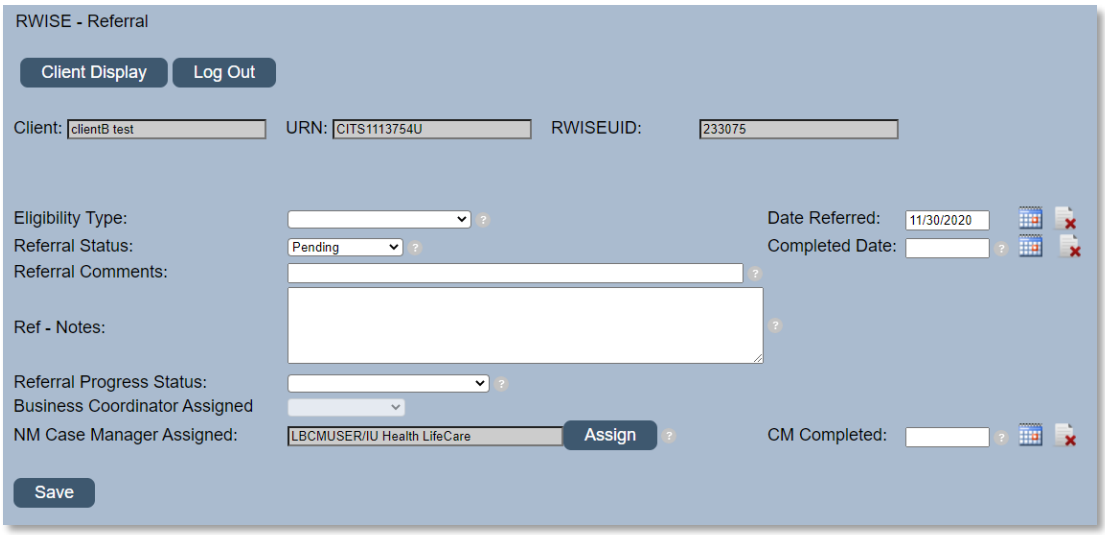


Figure 16 RWISE Referral - Creation

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***

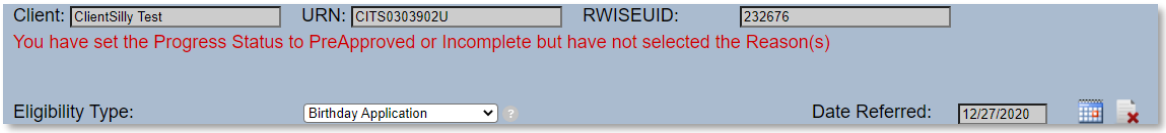
- ***Referral Progress Status*** - This field identifies where the referral/application is, in the review process between the RWISE CM and the RWISE BC
  - ***BC Review Pending***
    - Used to mark a referral as ready to be reviewed by the Business Coordinator

- ***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.
- ***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



- ***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

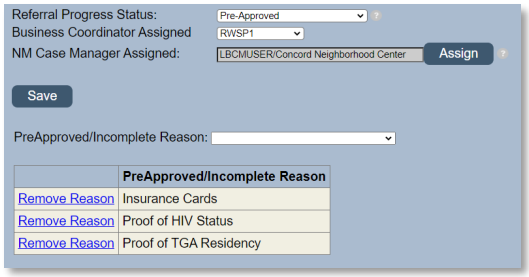


Figure 17 Pre-Approval/Incomplete Reason Selection

- ***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 Client Update Screen

These functions are only available for the Business Coordinators

Application Updates — - See Application Updates for more information

Preapproved (Status Update) — - See Preapproved (Status Update) for more information

ReEnroll Client — - See ReEnroll Client for more information

This function is only available for the Super User

Manual Update - See Manual Update 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.

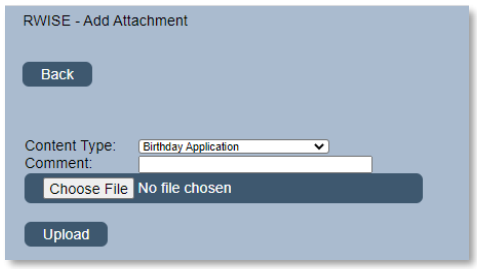


Figure 18 RWISE - Add Attachment

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
  - ***Please note:*** Attachment must be a .pdf file
- **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

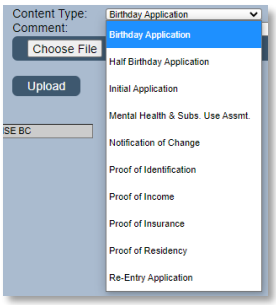


Figure 19 Attachment Content Type List

- 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	Referral Status	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 Eligibility Tabs. The Eligibility Tabs must be completed in addition to the client update when updating a client's application for processing.

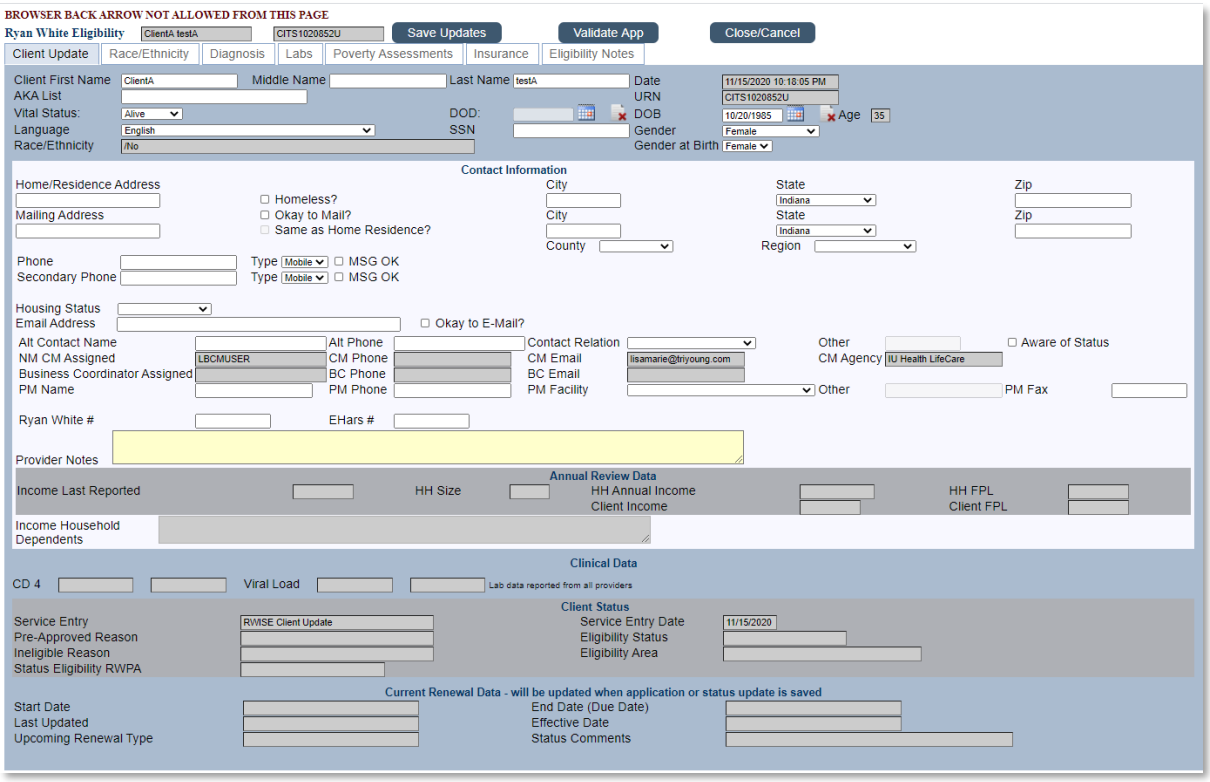
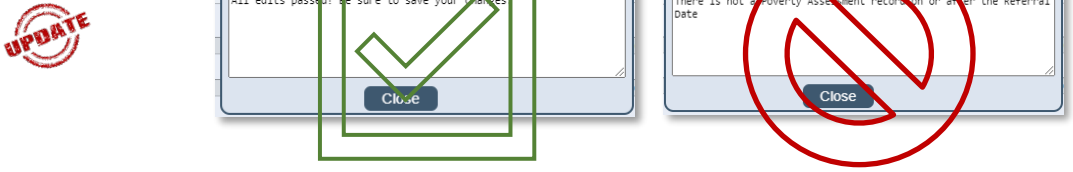


Figure 21 RWISE Client Update screen

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 Eligibility Tabs, include Race/Ethnicity, Diagnosis, Labs, Poverty Assessment, Insurance Information, and record Eligibility Notes.

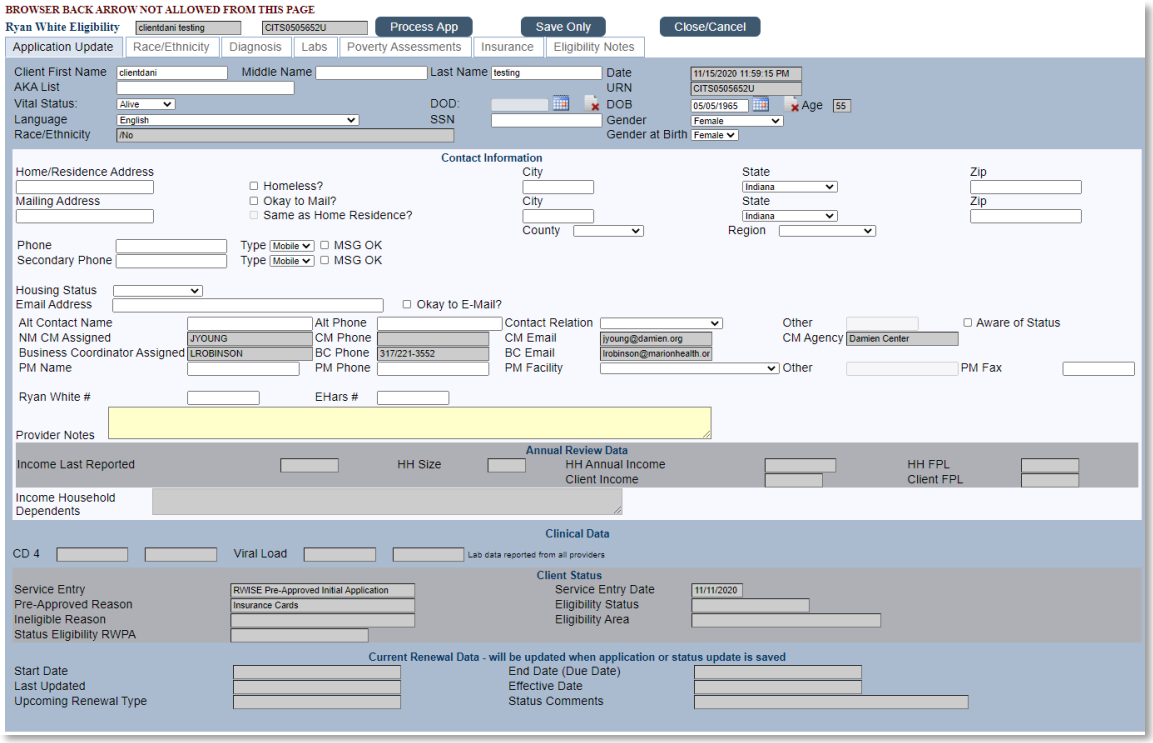


Figure 22 RWISE Application Update Screen

Page Functions

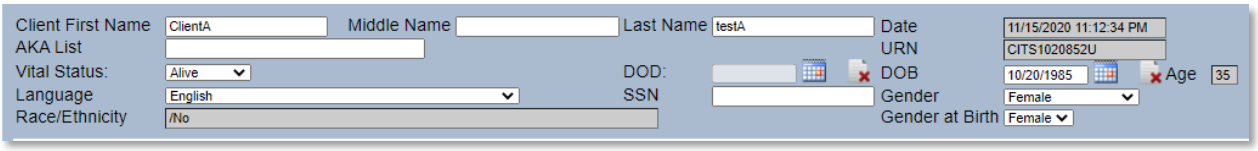
- ***Process App*** – Validates the client's record for completeness based on programmatic and HRSA/RSR Requirements.
- ***Save Only –*** Save any changes made to the contact information page without posting a service or changing the client's eligibility information. Once selected you'll be taken back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

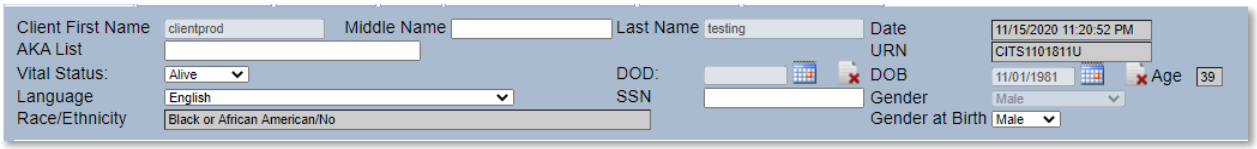
Demographic Information

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



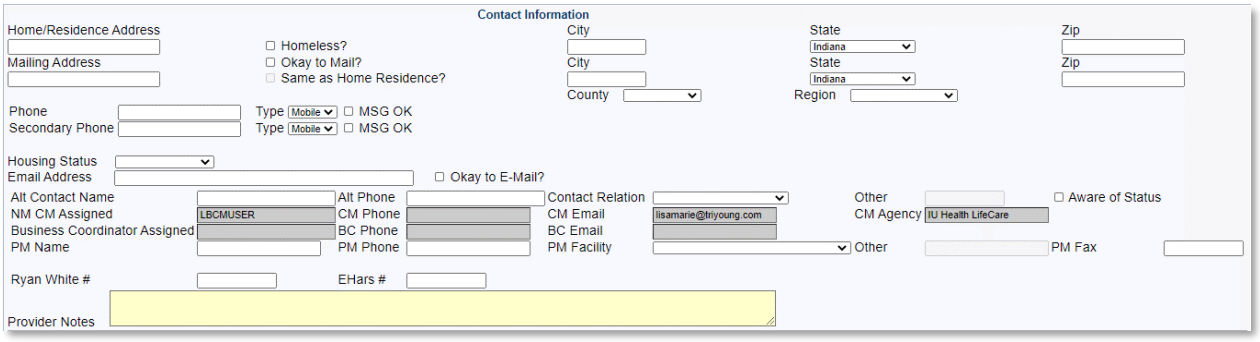
From a Case Manager View



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.

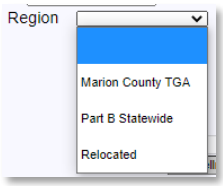


- When entering the **Home/Residence Address** the mailing address will remain grayed out until you select the **Okay to Mail** check box. If the Home/Residence address is the same as the **Mailing Address** select the **Same as Home Residence** check box. If the

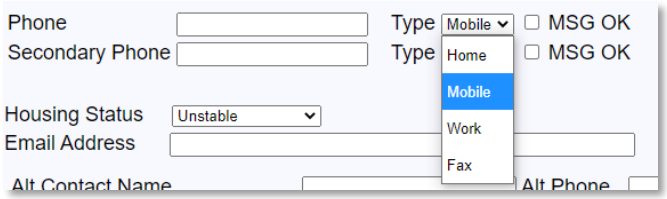
Mailing Address is different than the Home/Residence address, select the Okay to Mail check box and enter the mailing address information. If the client is homeless, select the **Homeless?** check box and both the home and mailing address will be grayed out.

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

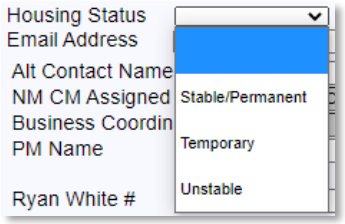
  - When setting a client to out of state, or TGA, select **Relocated** from the Region Drop down.



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.



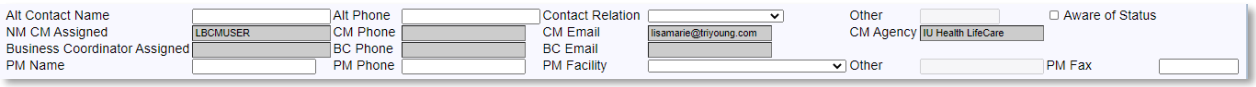
The **Housing Status** has a dropdown with three options to choose from ***Stable/Permanent***, ***Temporary*** and ***Unstable***.



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

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

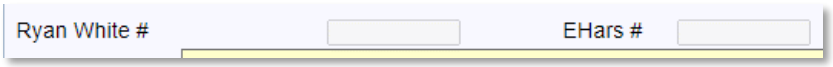
and allow you to type.



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

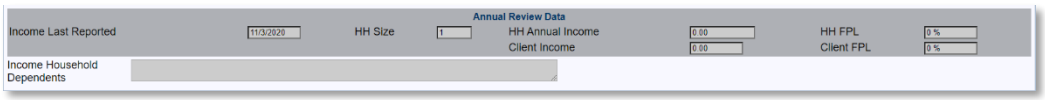
From a Business Coordinator View

From a Case Manager View



Please note: *The Case Manager is unable to edit these fields.*

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**.



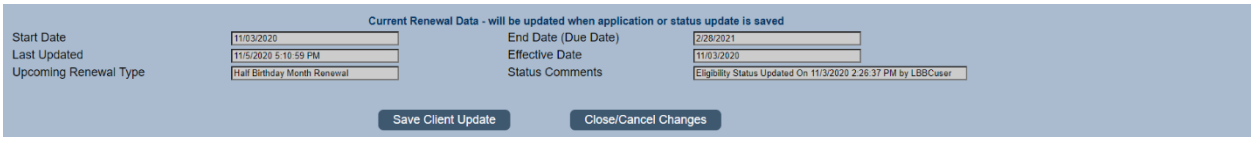
The **Clinical Data** section of the **RWISE Eligibility Screen** will be grayed out. The Clinical Data will be imported in the ***Labs*** tab. Please reference **RWISE Eligibility Tabs**.

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**.



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

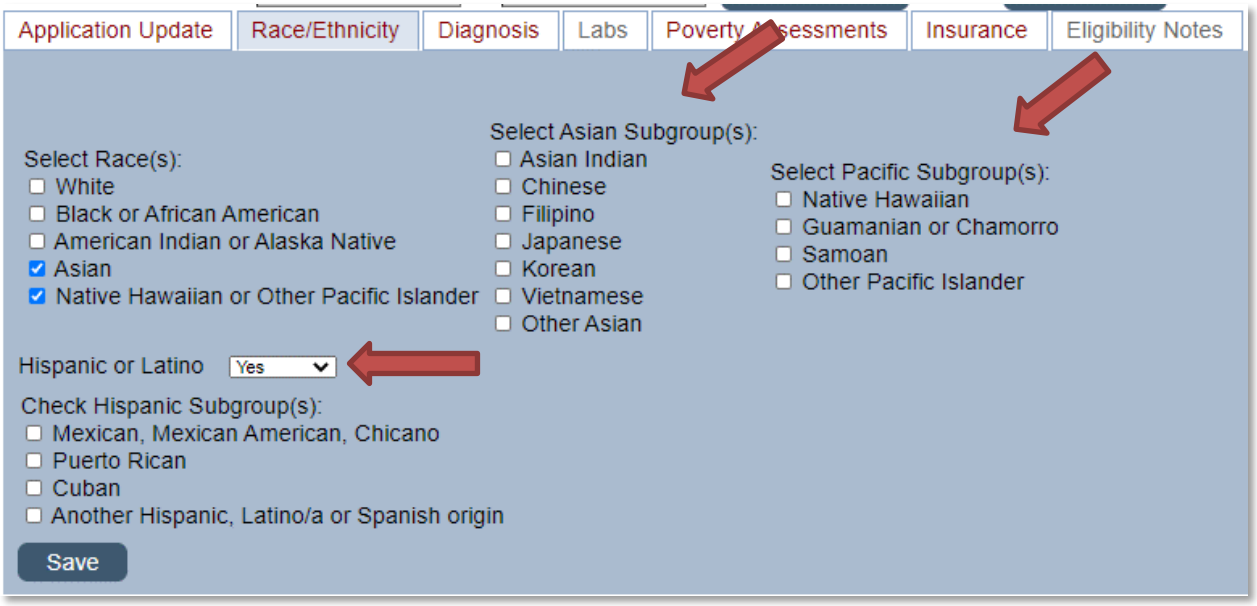


Figure 23 Race/Ethnicity Screen

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.

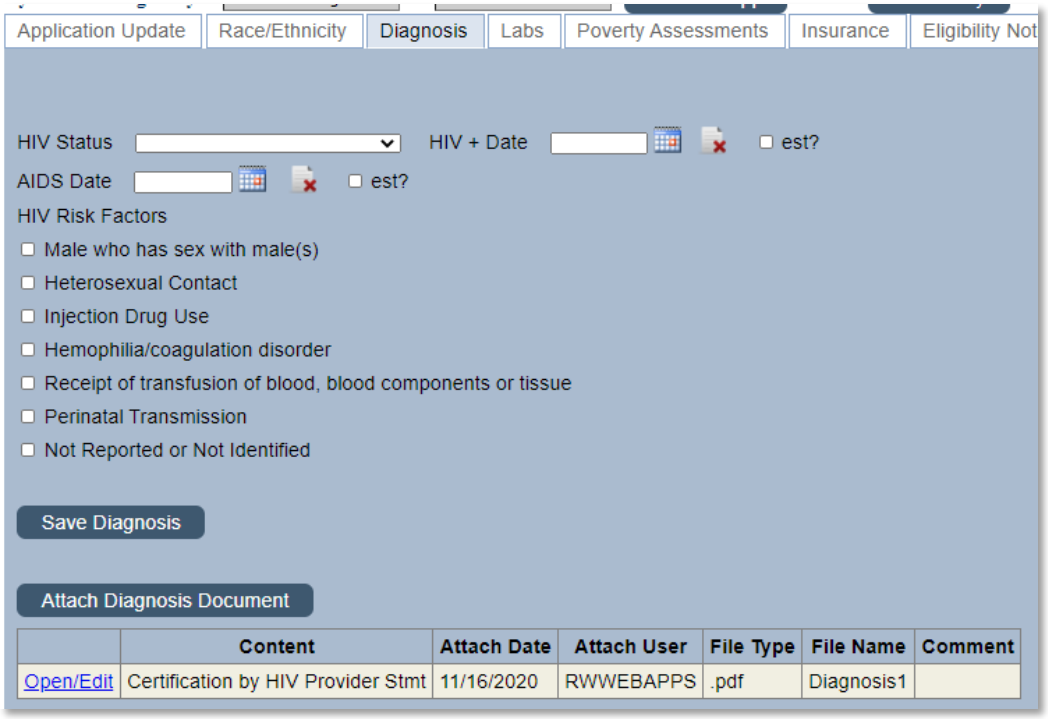


Figure 24 RWISE Diagnosis Screen

- 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.

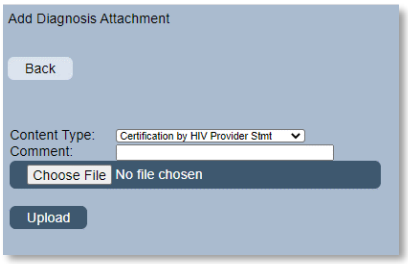
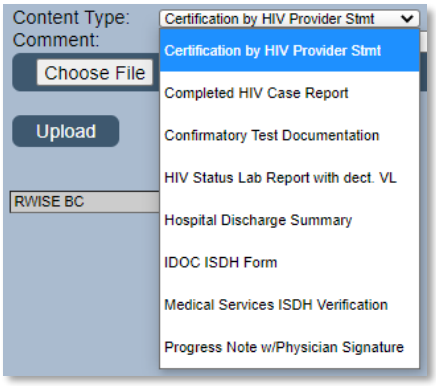


Figure 25 RWISE – Add Diagnosis Attachment

- **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



  - 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

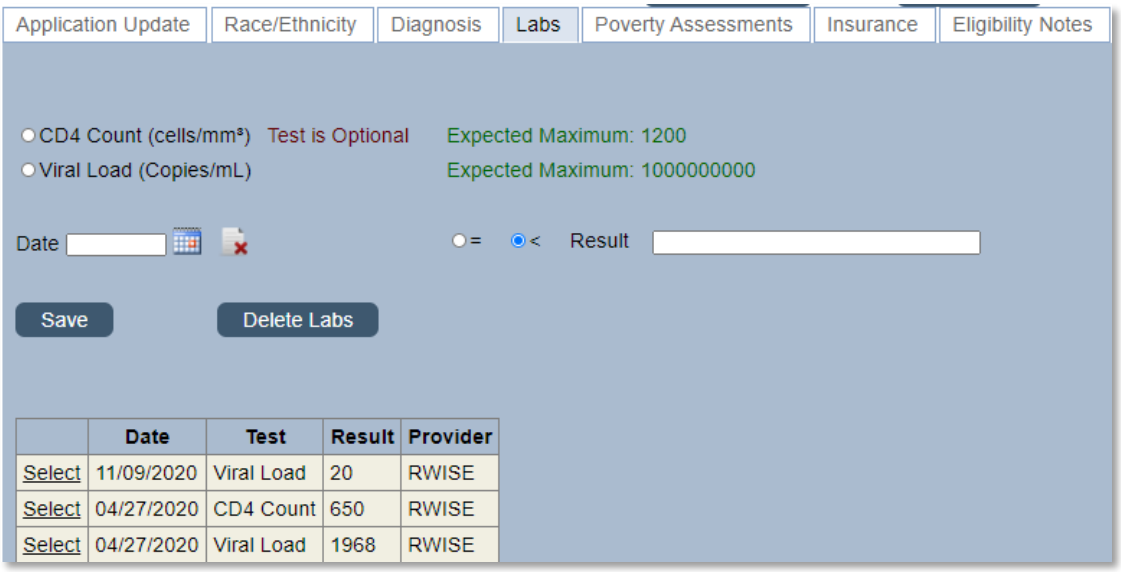


Figure 26 RWISE Labs Screen

- **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.

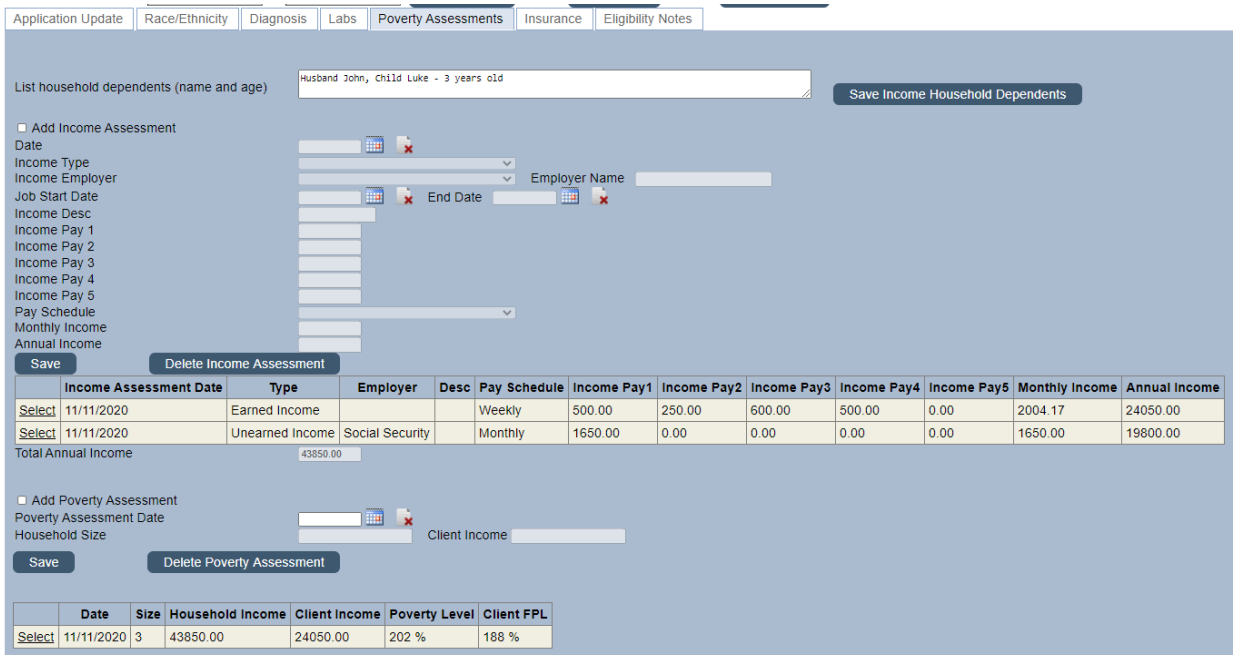


Figure 27 RWISE Poverty Assessment Screen

- **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.

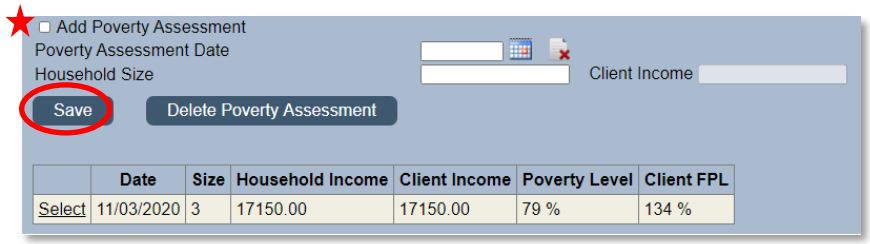
- To add an Income Assessment, the **Add Income Assessment** box must be checked. This section requires:
  - **Date**,
  - **Income Type** (Business Income, Child Support Income, Earned Income, Long Term Disability (LTD), Retirement Income, Unearned Income, Unemployed/No Income, Unemployment Income),
  - **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**.

- 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.



Insurance

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

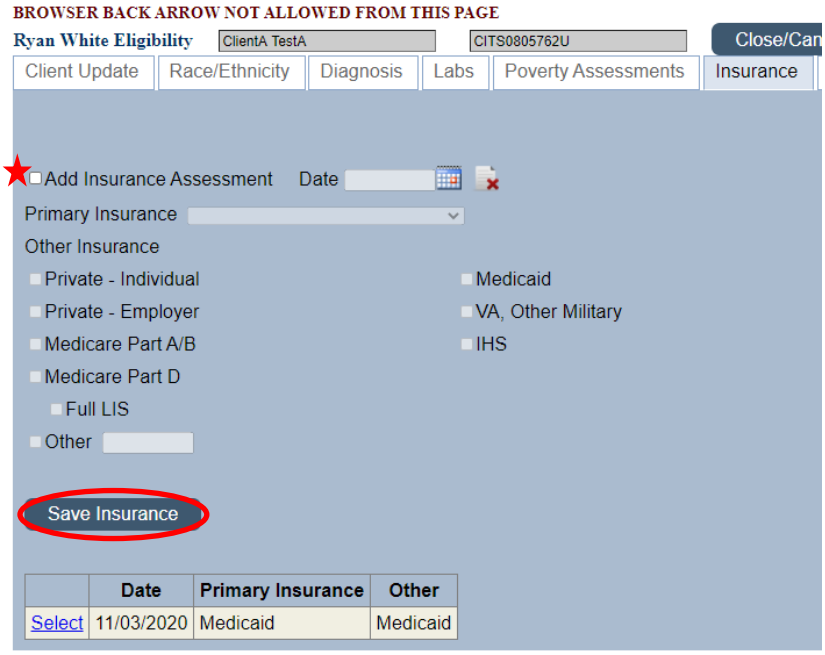
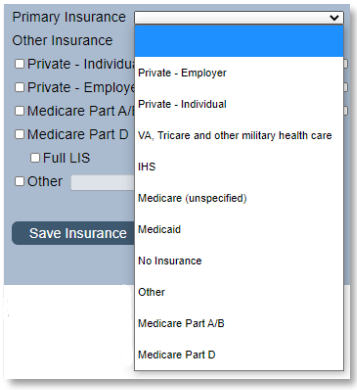


Figure 28 RWISE Insurance Screen

- 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:

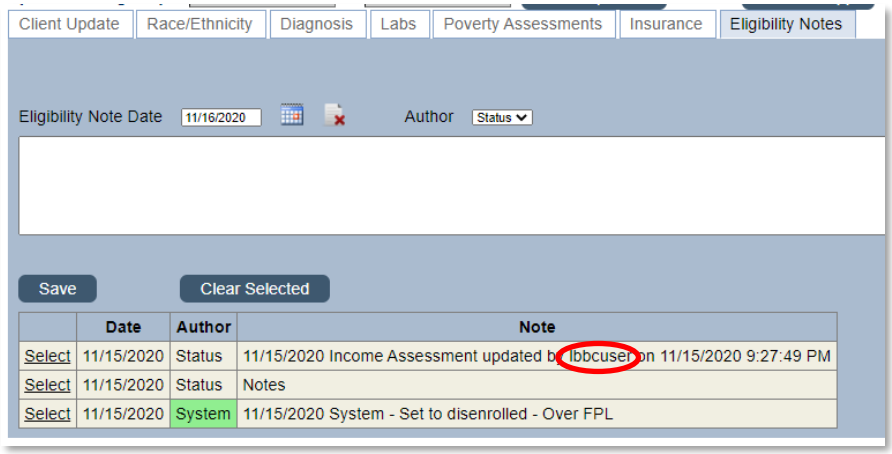


Figure 29 RWISE Eligibility Notes Screen

- **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 ReEnroll 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.*

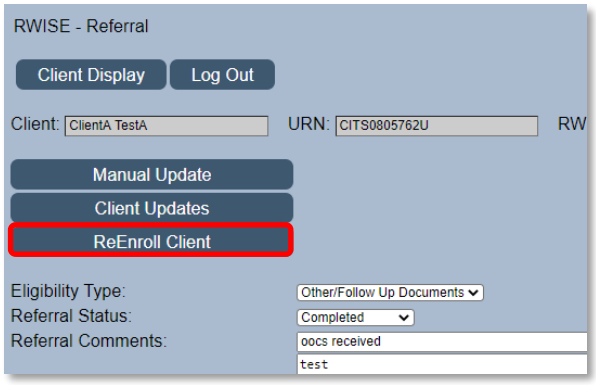


Figure 30 RWISE Referral - ReEnroll Client

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

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.*

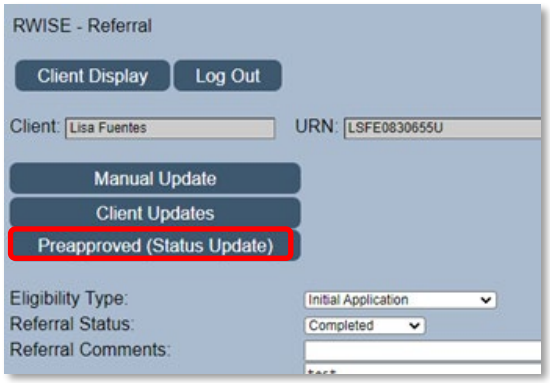


Figure 32 RWISE Referral – Preapproved (Status Update)

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.

Figure 33 Referral Screen - Manual Update

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

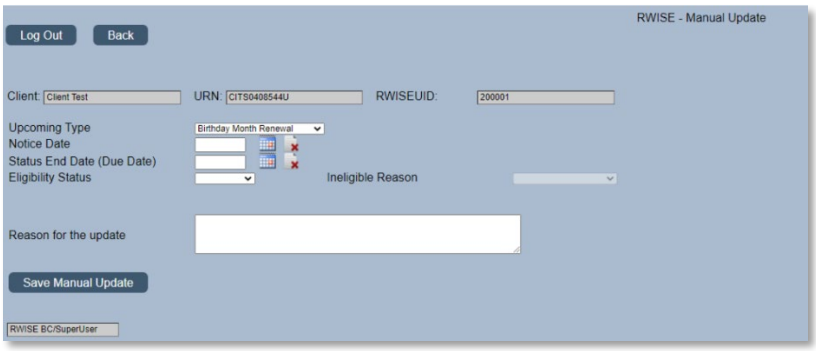


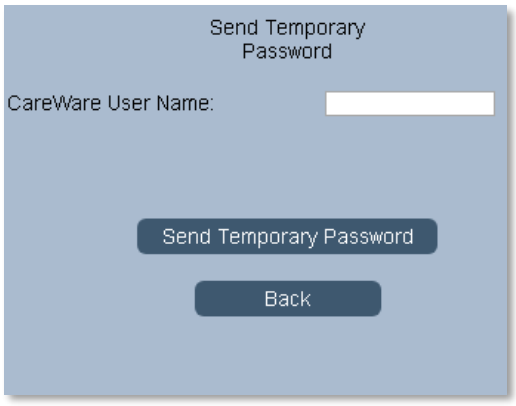
Figure 34 Manual Update Screen

- **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 –*** 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.

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

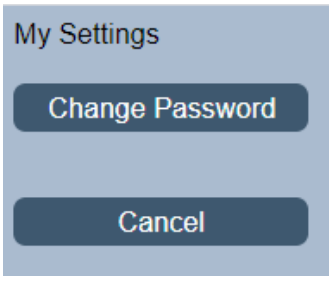


Figure 35 My Settings Screen

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

Figure 36 Change Password Screen

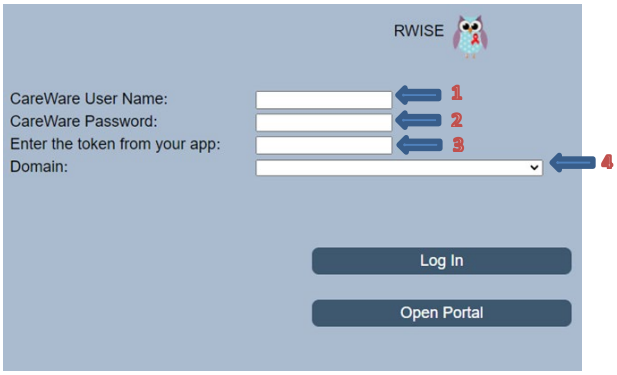
The reset password feature is directly linked to CAREWare. If the password is changed in the RWISE Viewer it will also impact CAREWare password and vice versa.

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 half-birthday 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.