MARION COUNTY PUBLIC HEALTH DEPARTMENT

Prevent. Promote. Protect.

2020

INRWISE Viewer Manual

TriYoung Inc.

12/31/2020

Table of Contents

Date	Updates Made	Author
12/2/20	Client Display: Add MAI Eligible field, Add Common Notes field	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

The INRWISE Viewer allows IN CAREWare users to view INRWISE eligibility information for a client within their domain.

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 & INRWISE Viewer were developed for the Marion County Ryan White TGA.

RWISE Viewer Navigation

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

Because RWISE and the RWISE Viewer are 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 Manual for more information about that application. If you need to update non-RW Part A client demographics, see the Non-Part A Mini-Module Manual.***

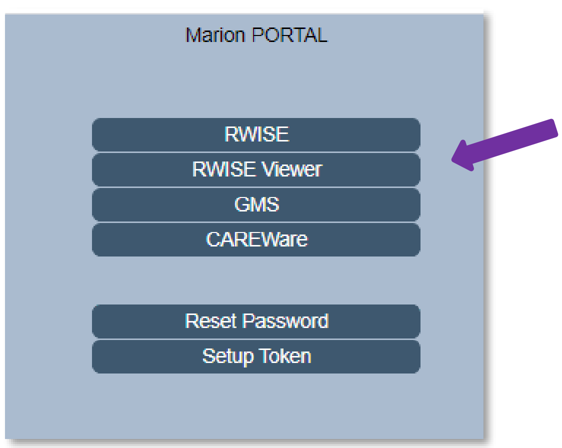


Figure 1 - Portal Page

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

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

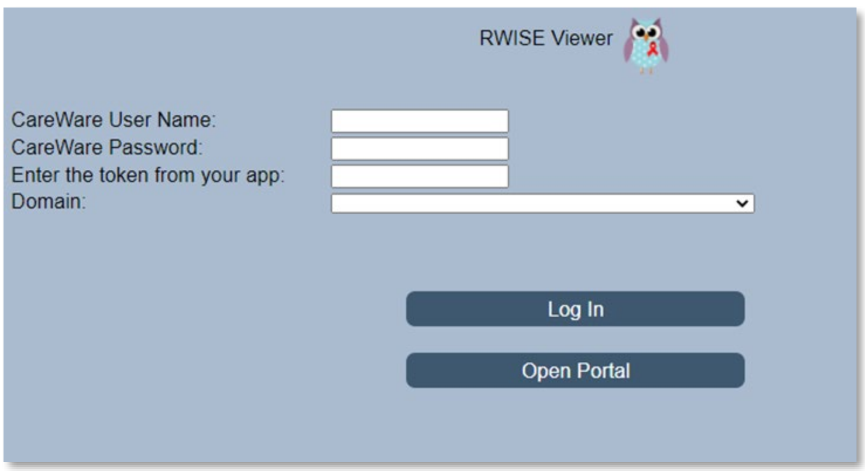


Figure 2 RWISE Viewer Login Screen

- Enter CAREWare Username, Password, two-factor authentication token, and 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 Viewer 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 Viewer Main Menu

From the RWISE Viewer Main Menu there are different functions that can be done. You can navigate to different areas of the RWISE Viewer 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 (JCarr@MarionHealth.org) for assistance.

There will be helpful tips throughout the application.

Those Tips are identified by this symbol- 

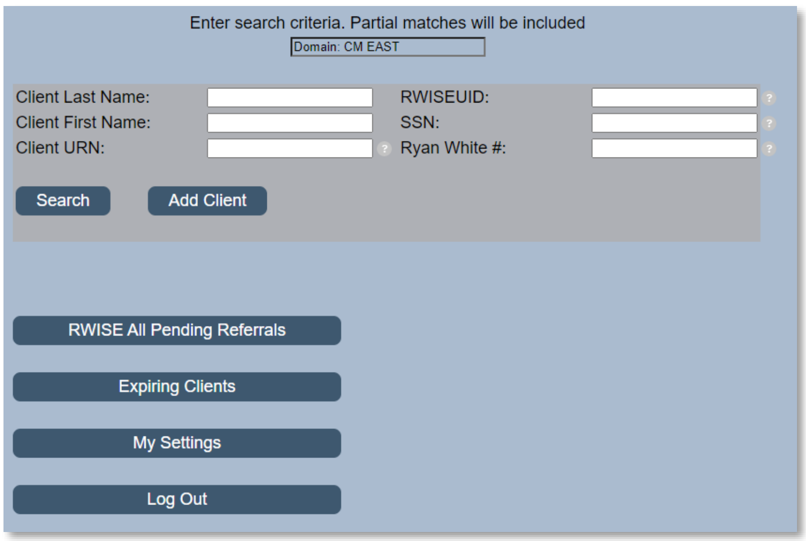


Figure 3 - RWISE Viewer Main Menu

<u>Page Functions</u>

- ***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.
- ***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
- ***My Settings*** – Change Password
- ***Log Out*** – Log out and go back to the RWISE Viewer login screen.

Search Results

After selecting **Search** from the RWISE Viewer 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.

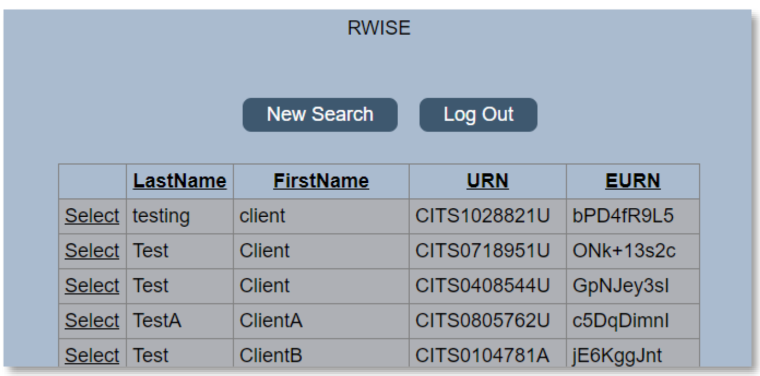


Figure 4 RWISE Search Results Screen

<u>Page Functions</u>

- **New Search** – Return to the RWISE Viewer Main Menu
- ***Log Out*** – Log out and go back to the RWISE Viewer login screen.
- **Select** – Navigate to the Client Display Screen for the selected client

Add a Client

After selecting **Add Client** from the RWISE Viewer 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.

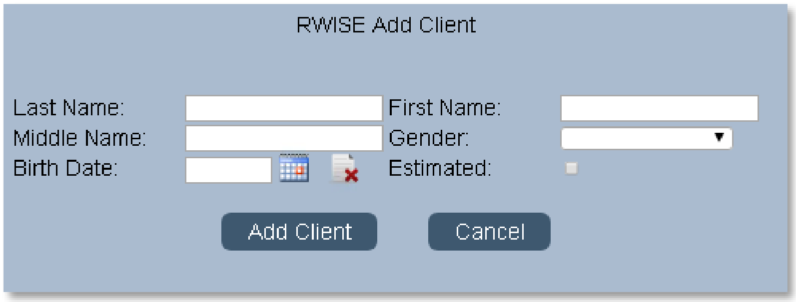


Figure 5 RWISE Add Client Screen

<u>Page Functions</u>

- ***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.

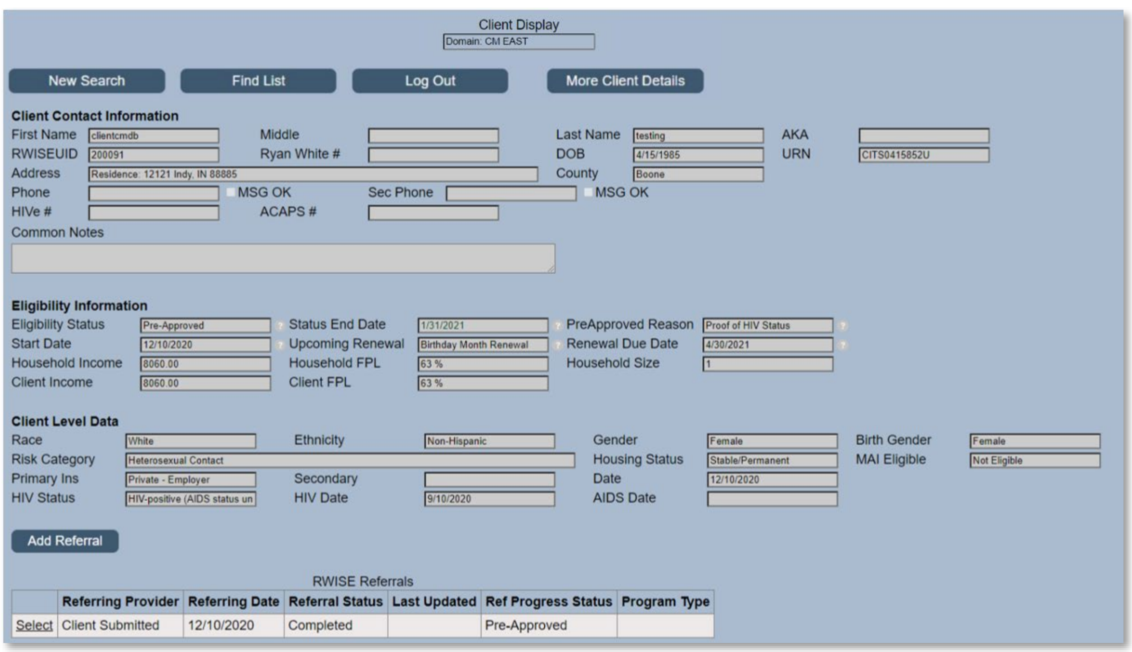


Figure 6 RWISE Client Display Screen

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.

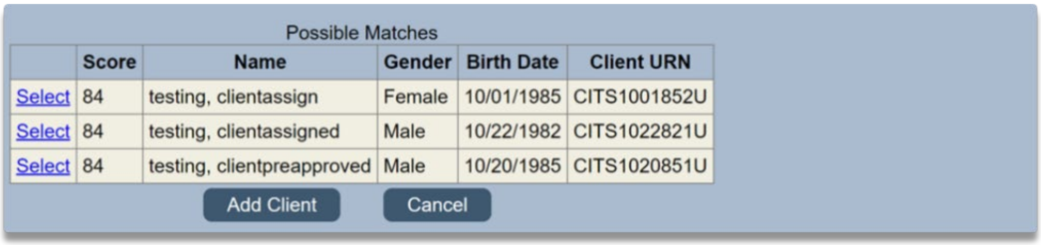


Figure 7 RWISE Possible Duplicate Found Screen

<u>Page Functions</u>

- **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 Viewer 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

<u>Page Functions</u>

- **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 Viewer 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.

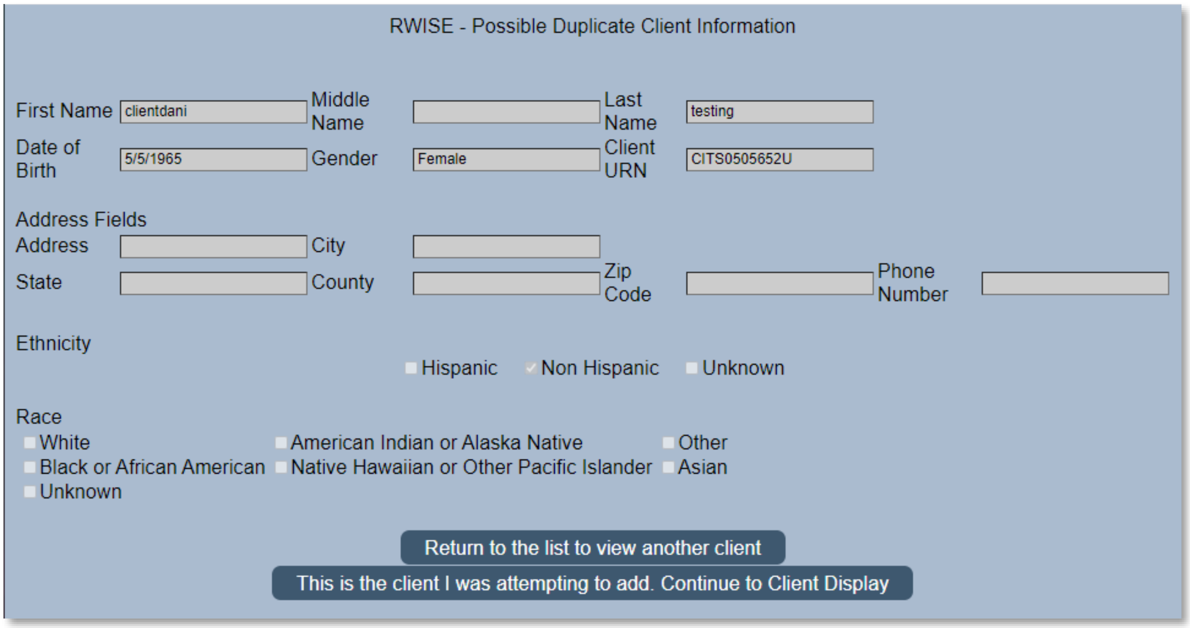


Figure 9 Possible Duplicate Client Information

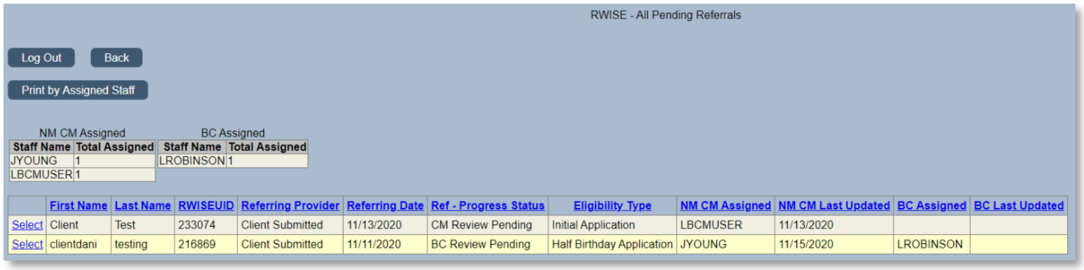
Page Functions

- **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 All Pending Referrals

This button will allow the user to view a queue of the pending referrals. This list of pending referrals will be includes any referral that is currently under review by the agency or the grantee level. 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.



Staff Name	Total Assigned
JYOUNG	1
LBCMUSER	1

Staff Name	Total Assigned
LROBINSON	1

	First Name	Last Name	RWISEUID	Referring Provider	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

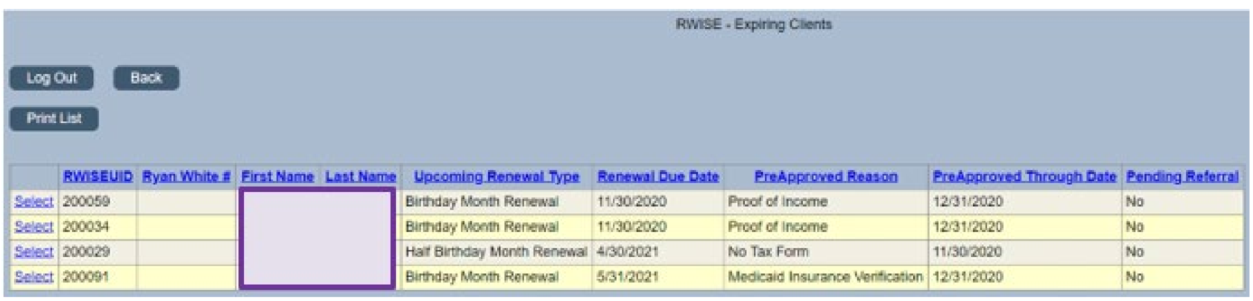
- ***Log Out*** – Log out and go back to the RWISE Viewer login screen.
- **Back** – Return to the RWISE Viewer Main Menu
- **Print by Assigned Staff** – A .csv document will download for printing
- **Select** – Navigate to the RWISE Referral Screen for the selected client record

When referrals are no longer in a 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*



	RWISEUID	Ryan 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 and go back to the RWISE Viewer login screen.
- **Back** – Return to the RWISE Viewer Main Menu
- **Print List** – A .csv document will download for printing
- **Select** – Navigate to the Client Display Screen for the selected client

RWISE Viewer Client Display

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

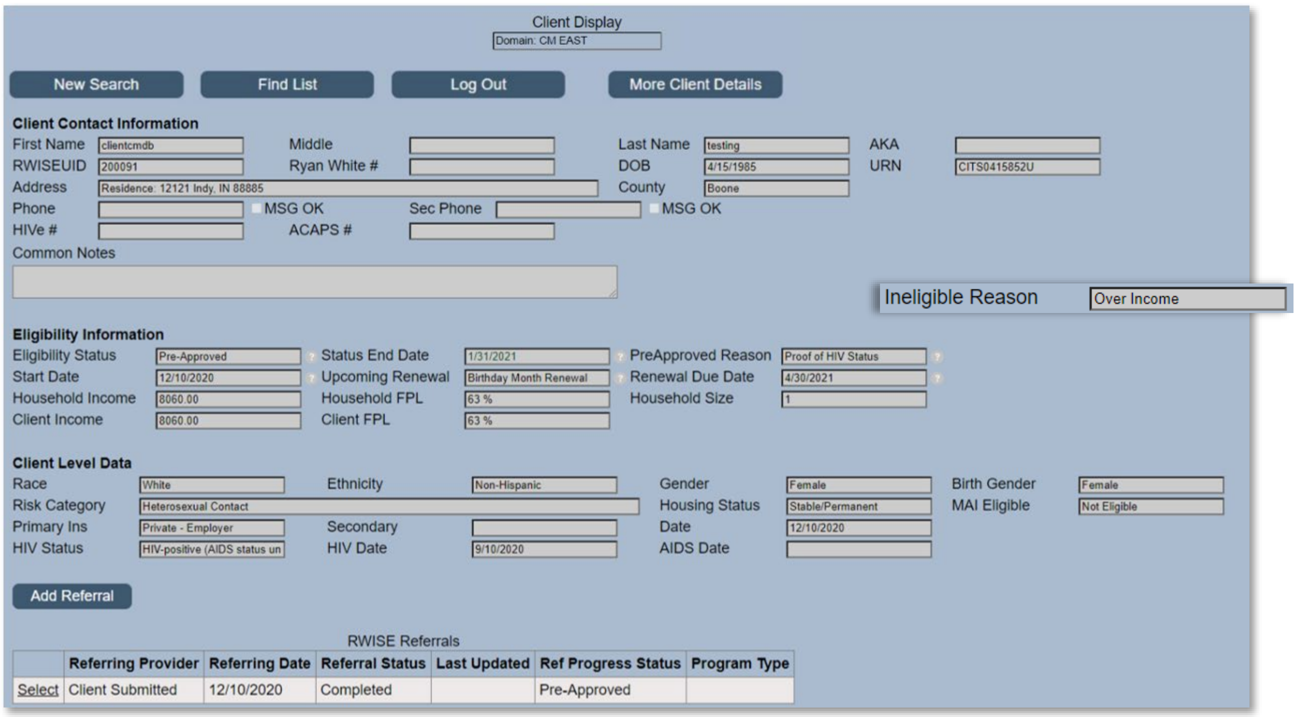


Figure 12 RWISE Viewer Client Display

<u>Page Functions</u>

- ***New Search*** – Return to the RWISE Viewer Main Menu
- ***Find List*** – Return back to the Search Results screen
- ***Log Out*** – Log out of RWISE Viewer, this will take you back to the RWISE login Screen
- ***<u>More Client Details</u>*** – View/Add Common Notes, Client ID(s), & Enrollment Records based on user permissions
- ***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 Referral Screen to view the selected 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.

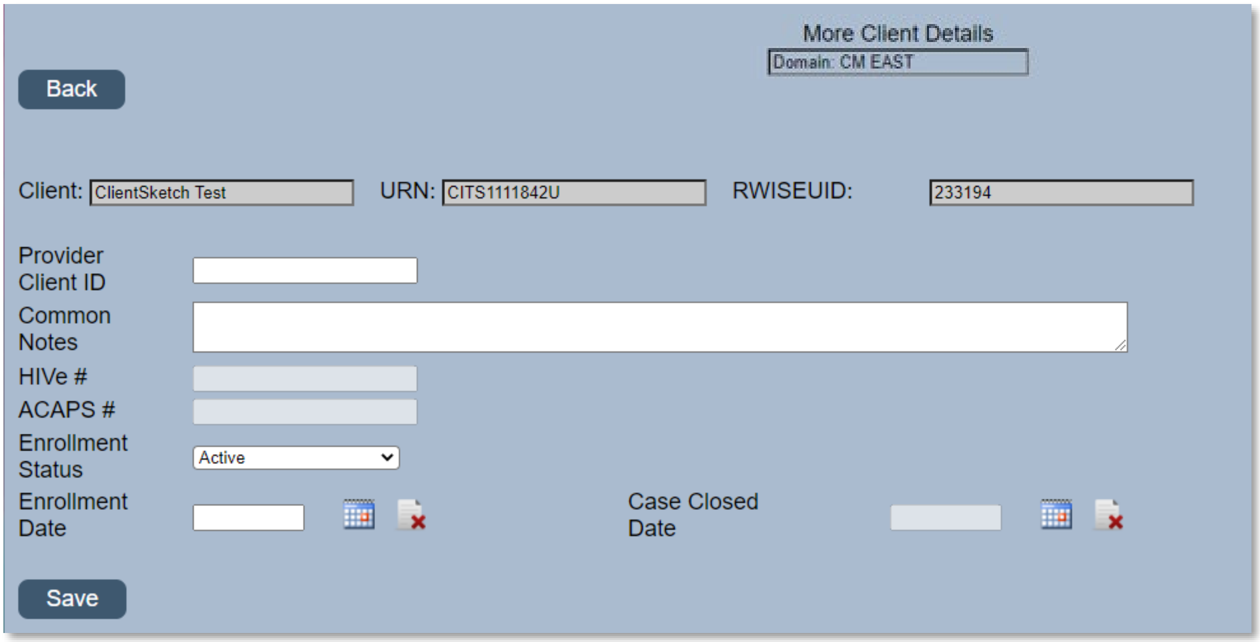


Figure 13 More Client Details Screen

<u>Page Functions</u>

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

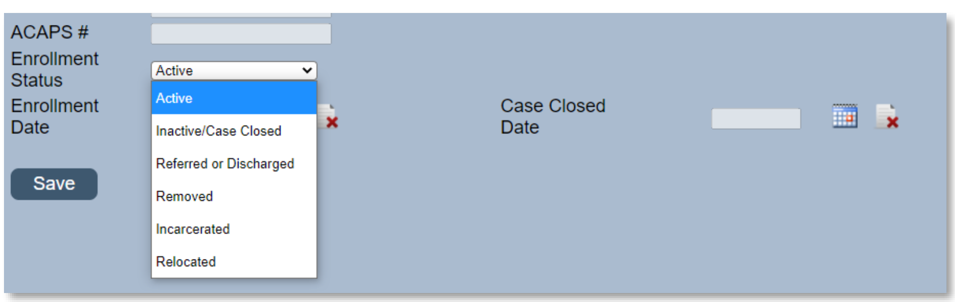


Figure 14 Enrollment Status Drop-Down

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

Client Contact Information

The first section is **Client Contact Information**. This section contains clients **First Name**, **Middle** name, **Last Name**, **AKA**, **RWISEUID**, **DOB**, **URN**, **Address**, **County**, **Phone** and **MSG OK**.

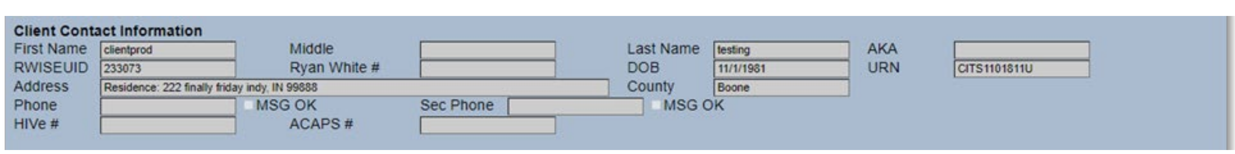


Figure 15 Client Display -Client Contact Information

Eligibility Information

The second section is **Eligibility Information.** This section contains the client's eligibility details. **Eligibility Status** is the client's eligibility status for Ryan White Part A/C. **Status End Date** is when their eligibility is set to end. When the client's eligibility expires the date will appear red in color. **Ineligible Reason** will indicate the reason a client is not eligible. The **Start Date** is the date the client 's eligibility status began. **Upcoming Renewal** indicates the next type of renewal due for the client and **Renewal Due Date** is the date the renewal is due. **Household Income** is the income for the client's entire household. **Household FPL** is the Federal Poverty Level for the client's household. **Household Size** is the number of people in the client's household. **Client Income** will display just the income for the client only. **Client FPL** is the Federal Poverty Level for the client only.

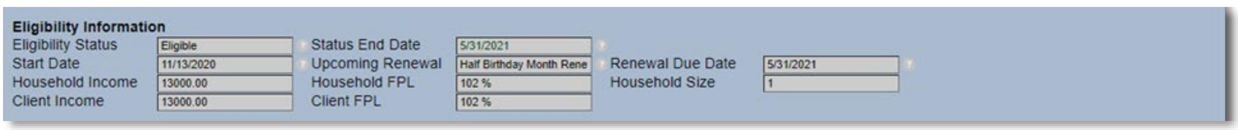


Figure 16 Client Display - Eligibility Information

Client Level Data

The **Client Level Data** section provides details about the client such as **Race**, **Ethnicity**, **Gender**, **Birth Gender**, **Risk Category**, **Housing Status**, **Primary** Insurance, **Secondary** Insurance and **Date** of last assessment. This section also includes **HIV Status**, **HIV Date** and **AIDS Date**. Also listed is if your client is **MAI** Eligible or not.

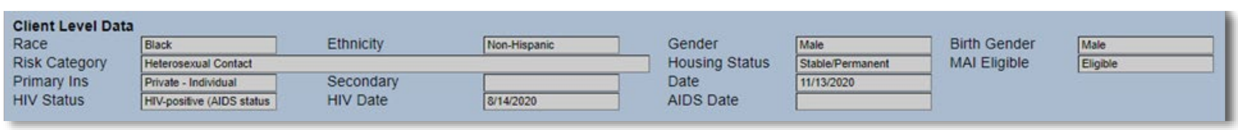


Figure 17 Client Display - Client Level Data

RWISE Referrals

The **RWISE Referrals** Section will provide a list of completed referrals and a pending referral if there is one in process.

RWISE Referrals

	Referring Provider	Referring Date	Referral Status	Last Updated	Ref Progress Status	Program Type
Select	Client Submitted	11/06/2020	Pending		CM Review Pending	
Select	Client Submitted	11/03/2020	Completed		Pre-Approved	
Select	Client Submitted	11/03/2020	Completed		Application Processed	

Figure 18 Client Display - RWISE Referrals

Completed Referrals can be viewed, but not edited. **Pending** referrals can be viewed, and the ***Referral comments*** and ***Ref-Notes*** can be edited. You can also Attach Documents.

- 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.

- Please note: Referrals may be created in RWISE or the RWISE Viewer

Referrals are where eligibility documentation and notes are tracked.

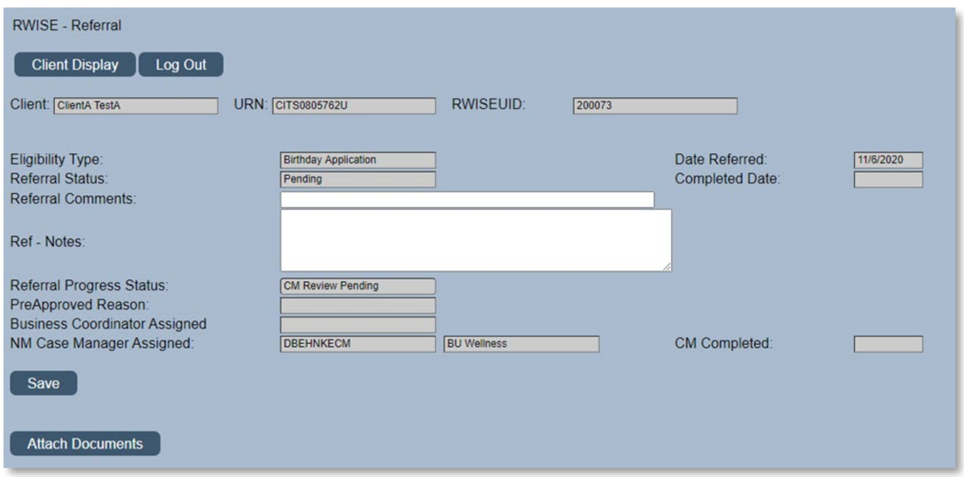


Figure 19 RWISE Referral - Creation

<u>Page Functions</u>

- ***Client Display*** – Return to Client Display
- ***Log Out*** – Log out and go back to the RWISE Viewer login screen.
- ***Save*** – Saves the referral data and returns to Client Display screen.
- ***Attach Documents*** **–** Function used to upload attachments to a referral

  - ***Referral Comments*** –Brief description of documentation uploaded, and reason referral was created
  - ***Ref-Notes Comments*** –Detailed description of documentation uploaded, and reason referral was created

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.

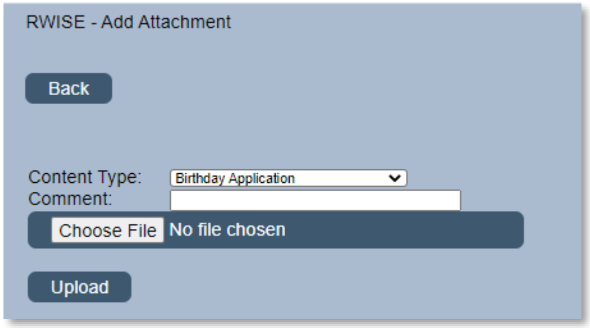
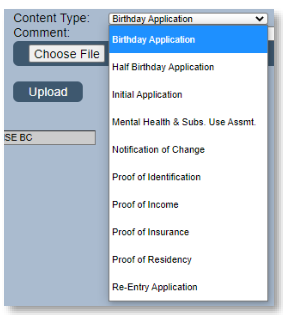


Figure 20 RWISE - Add Attachment

Page Functions

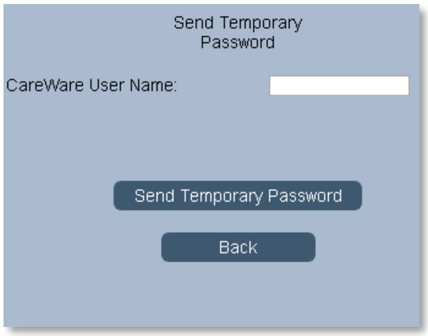
- **Back** – Return to the Referral Screen
- **Choose File** – Opens your computer file folders where you will select the document you want to attach to the referral
    - ***Please note:*** Attachment must be a .pdf file
- **Upload** – Will attach the document you have selected to your referral. When 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



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

Reset Password

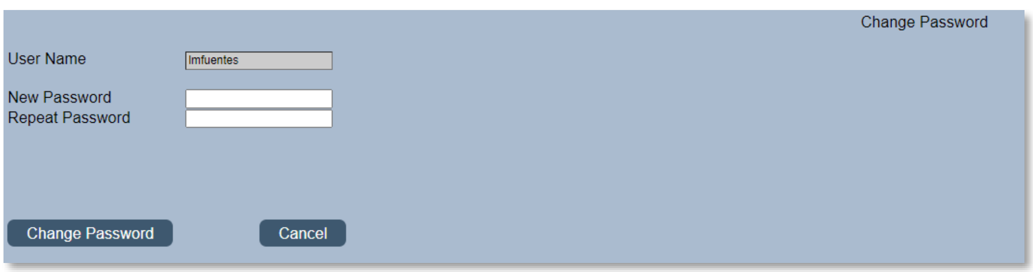
From the RWISE Portal screen, when the Reset Password button is selected you will be taken to the ***Send Temporary Password Screen***



<u>Page Functions</u>

- ***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

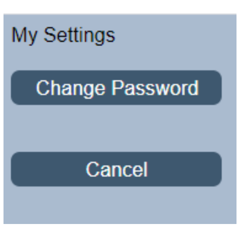


Figure 21 My Settings Screen

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

Figure 22 Change Password Screen

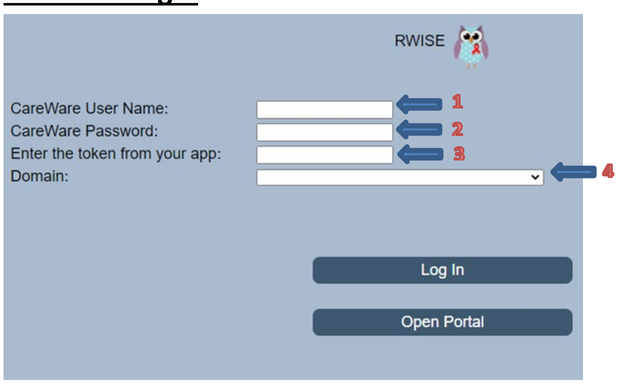
The reset password feature is directly linked to CAREWare. If the password is changed in the RWISE Viewer it will also impact CAREWare password and vice versa.

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.