MARION COUNTY PUBLIC HEALTH DEPARTMENT

Prevent. Promote. Protect.

2020

INRWISE Viewer
Non-Ryan White Part A Mini-Module

TriYoung Inc.

12/31/2020

Table of Contents

Date	Updates Made	Author
12/31/20	Client Display: Add More Client Details Button, Remove Save button for Common Notes. Referral: Date referred – No longer editable Remove Steps for updating Client ID(s) in CAREWare Proper	LMB

Overview

The INRWISE Viewer allows IN CAREWare users to view INRWISE eligibility information for a client within their domain. This guide will specifically detail the steps for adding and updating client records for clients who are Non-Ryan White Part A eligible.

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. To access the Non-Part A Mini Module, select RWISE Viewer

NOTE: ***Please see RWISE Manual for more information about that application. For more in-depth details regarding the RWISE Viewer, please see the INRWISE RWISE Viewer Manual***

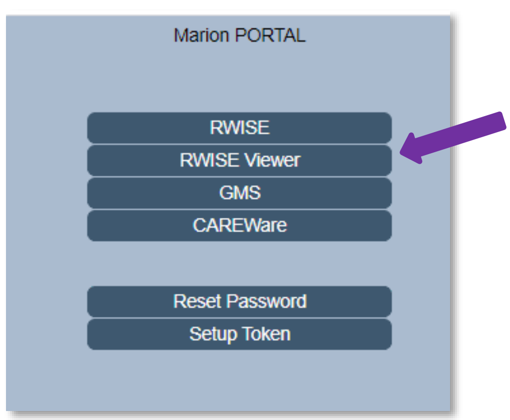


Figure 1 - Portal Page

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

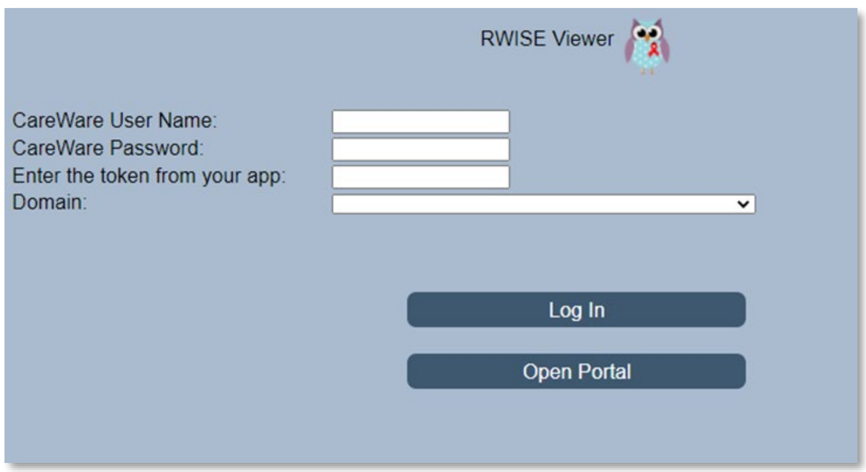


Figure 2 RWISE Viewer Login Screen

- 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 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- 

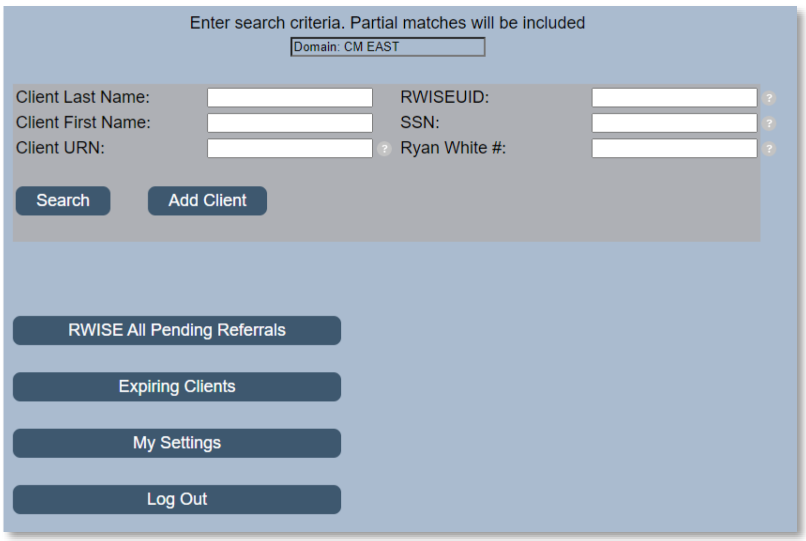


Figure 3 - RWISE Viewer Main Menu

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
- ***Expiring Clients*** – View a list of clients with an eligibility end date set to expire 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.

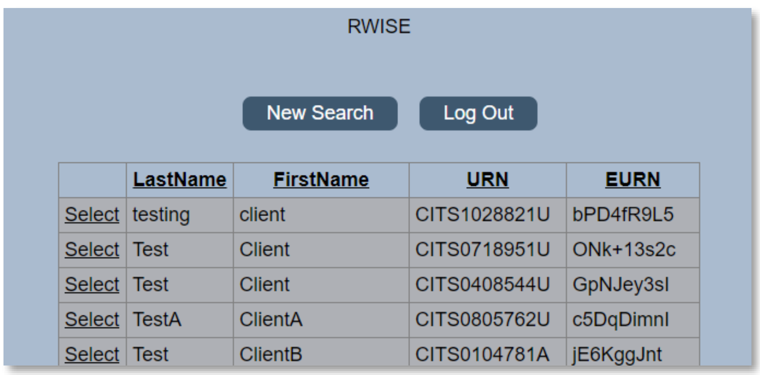


Figure 4 RWISE Search Results Screen

Page Functions

- **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.

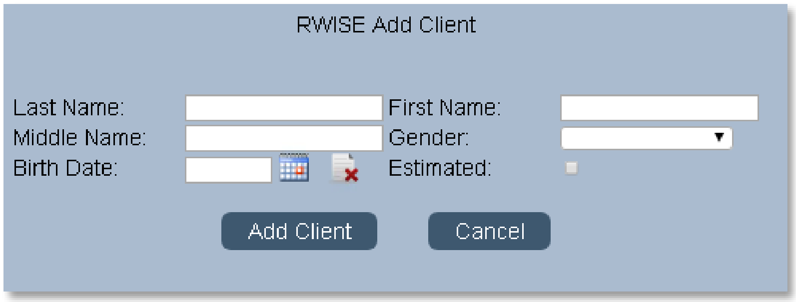


Figure 5 RWISE Add Client Screen

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.

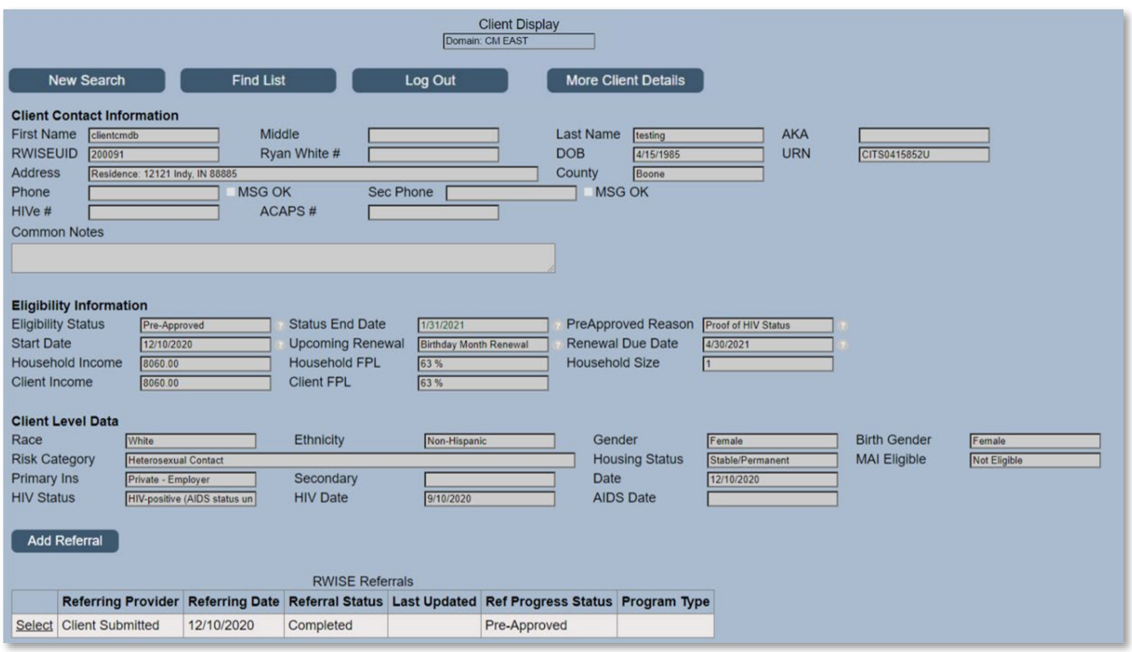
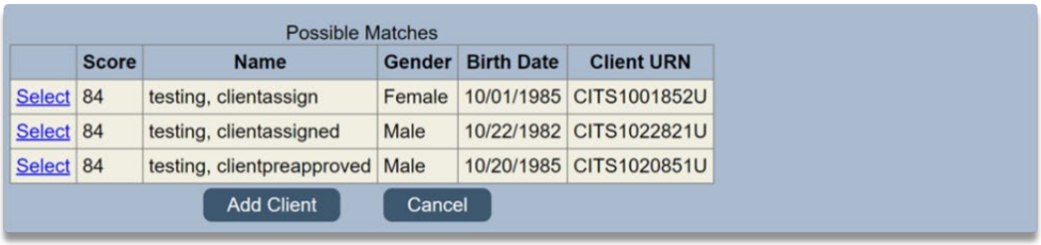


Figure 6 RWISE Client Display Screen

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.


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

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


RWISE - Duplicate URN Client List

The client you are adding is a possible duplicate. Resolve the duplicate URNs if it is a new client.

	Last Name	First Name	Client URN
Select	testing	clientdani	CITS0505652U

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.

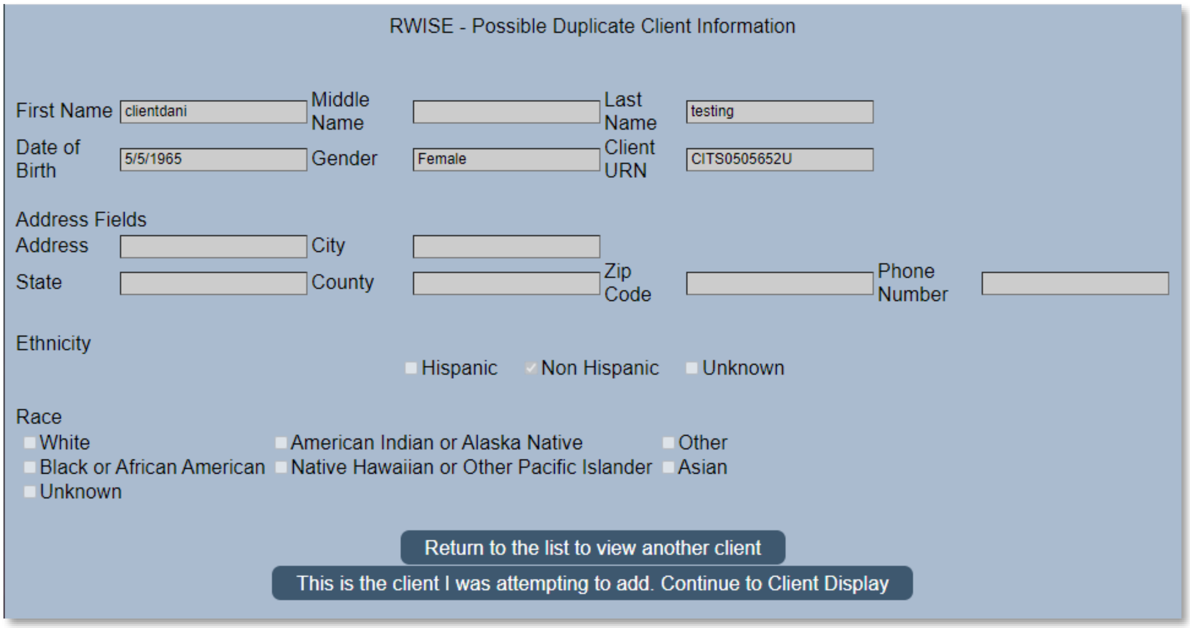


Figure 9 Possible Duplicate Client Information

<u>Page Functions</u>

- **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 Viewer Client Display

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

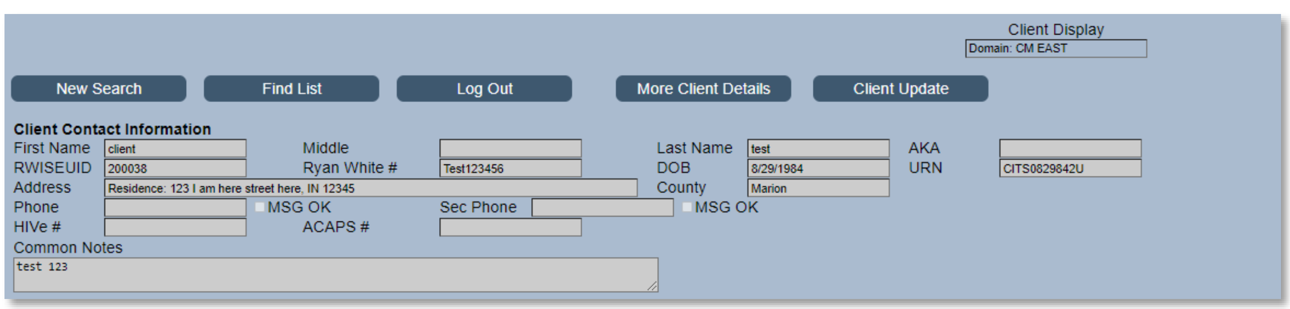


Figure 10 RWISE Viewer Client Display

<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
- ***More Client Details*** – View/Add Common Notes, Client ID(s), & Enrollment Records based on user permissions
- Client Update – Add/Edit client demographics for Non-Ryan White Part A Eligible clients

More Client Details

This area is where non-eligibility related data can be updated and added. Users with Data Entry permission are now able to edit/add Common Notes, client's Provider Client ID(s), as well as update the client's Enrollment Status, Enrollment Date, and Case Closed Date for the Provider/Domain the user is logged into. The HIVe # and ACAPS # are only editable with specific permission groups.

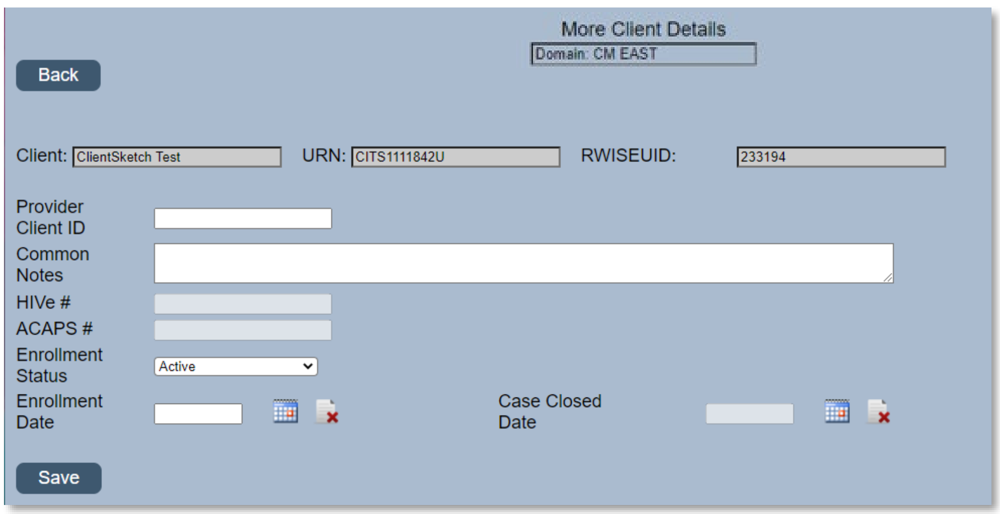


Figure 11 More Client Details Screen- Standard Data Entry Permissions

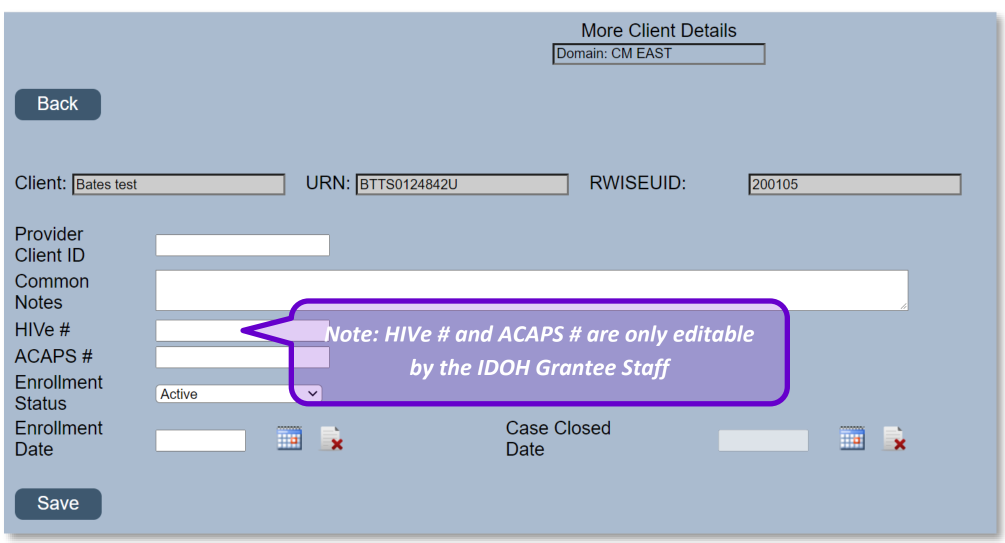


Figure 12 More Client Details Screen - IDOH Grantee Permissions

Page Functions

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

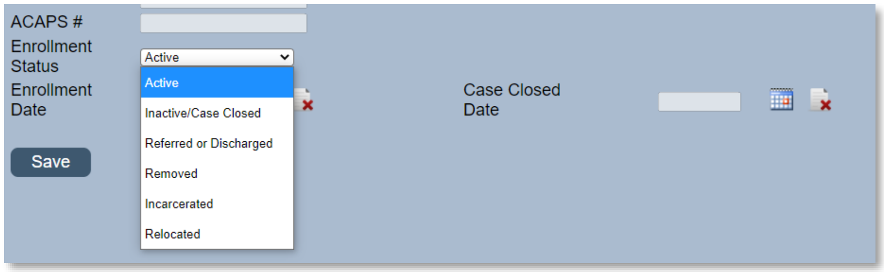


Figure 13 Enrollment Status Drop-Down

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

Client Update

Not all client records can be updated within the RWISE Viewer. If you do not see a ***Client Update*** button, this means that the client has current Ryan White Part A Eligibility, and must be updated in RWISE. If you do not have data entry access within RWISE, please contact your supervisor for the expected protocol within your agency. If the client does not have current Ryan White Eligibility or is brand new in the system you will see a ***Client Update*** button.

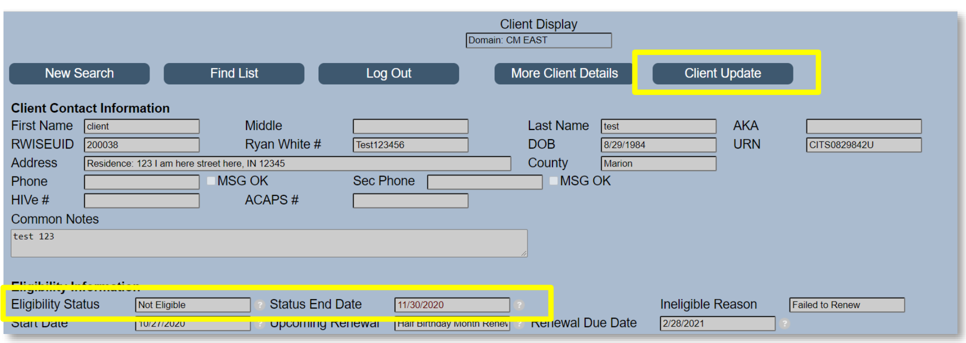


Figure 14 Non-Part A Eligible Client

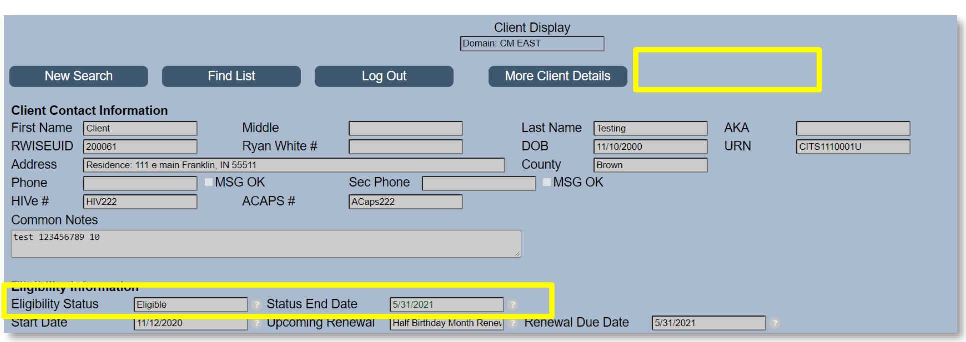


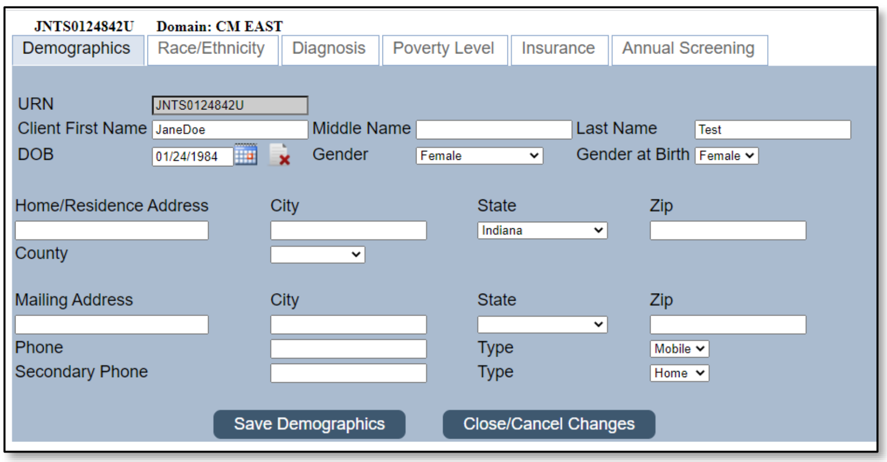
Figure 15 Part A Eligible Client - Client Display

From the client update you will be able to update the client's Name, Date of Birth, Gender, Residential/Mailing Address, Phone Number(s), Race/Ethnicity, Diagnosis, Poverty Assessment, Insurance Assessment, and Housing Assessment.

Each tab contains data elements required for the RSR and other HRSA required reporting. Please check with your agency or the Grantee office if you are unsure what data is required for specific client.

*Be sure to click the applicable SAVE button at the bottom of the data area for **EACH** tab, to save your data entry.*

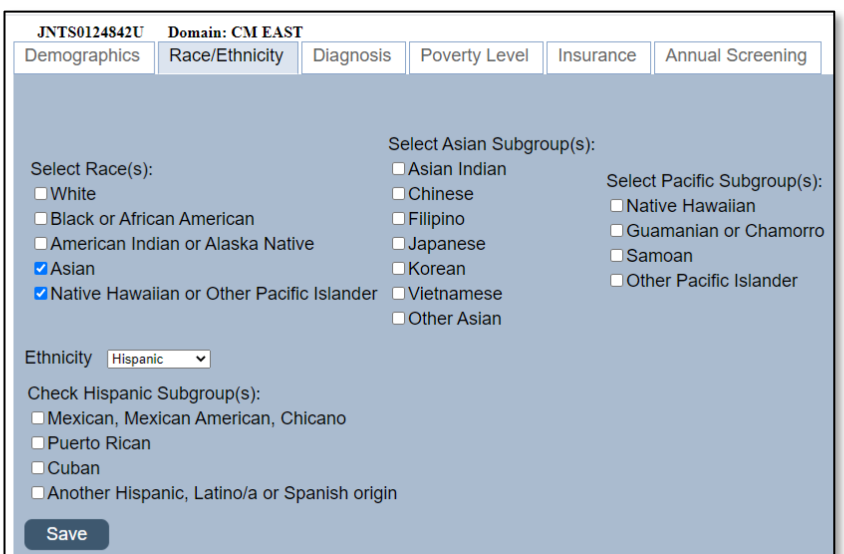
a. **Demographics**



b. **Race/Ethnicity**

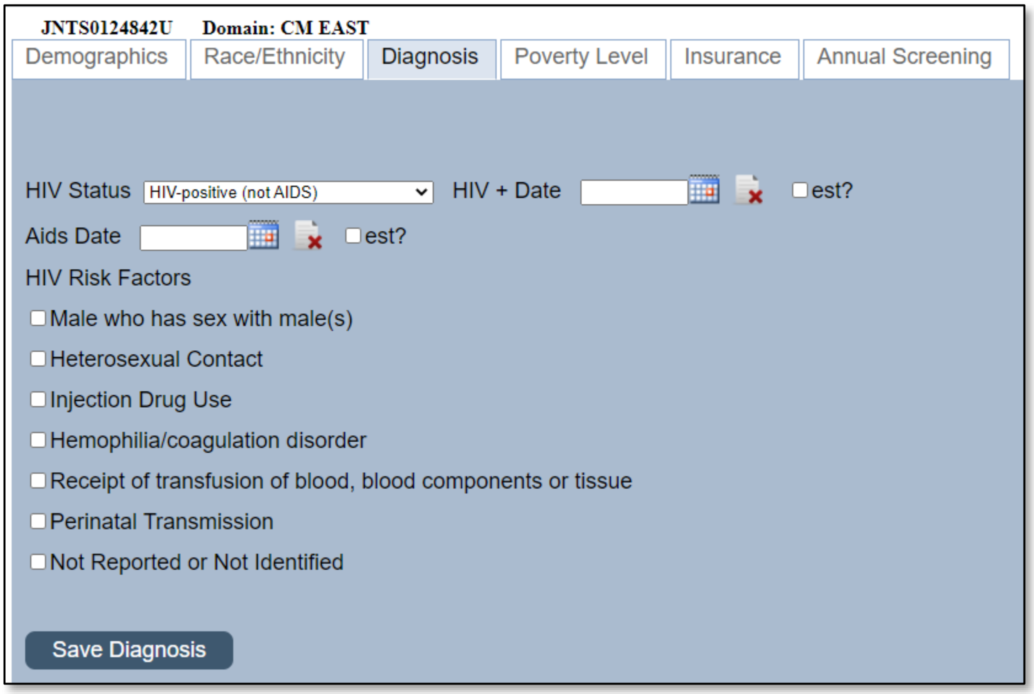
a. Select All that Apply

Note: additional subgroups display depending on your initial race/ethnicity selections



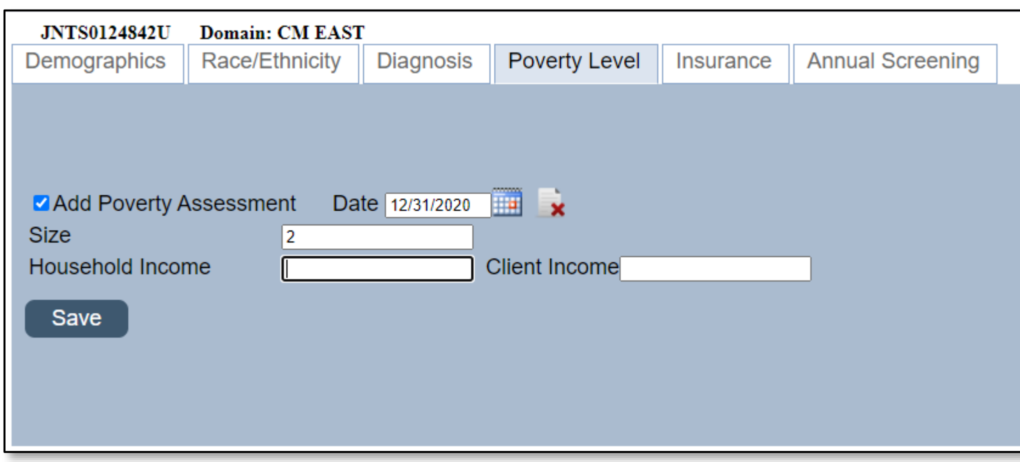
c. **Diagnosis**

Note: AIDS Date is required if HIV Status = CDC Defined AIDS



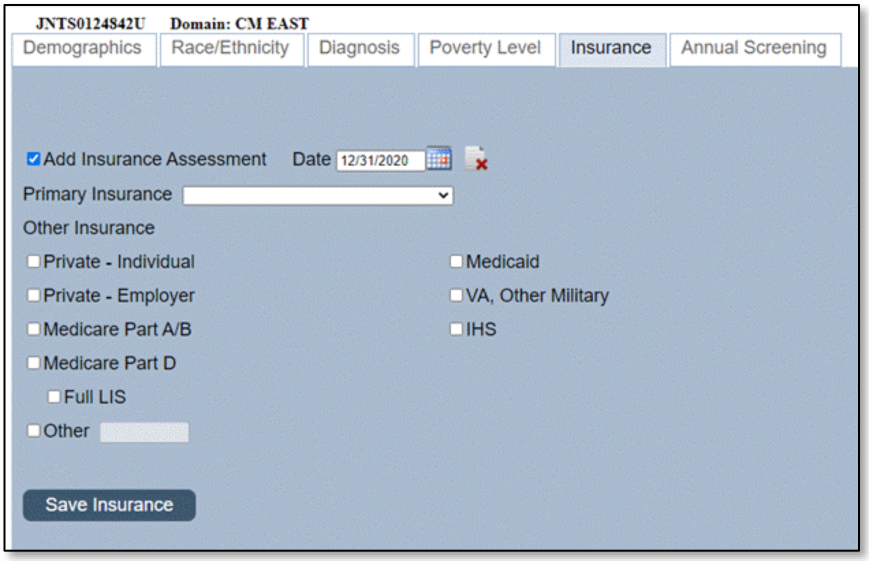
d. **Poverty Level**

Note: the Client Income field only becomes editable if the Household Size >1



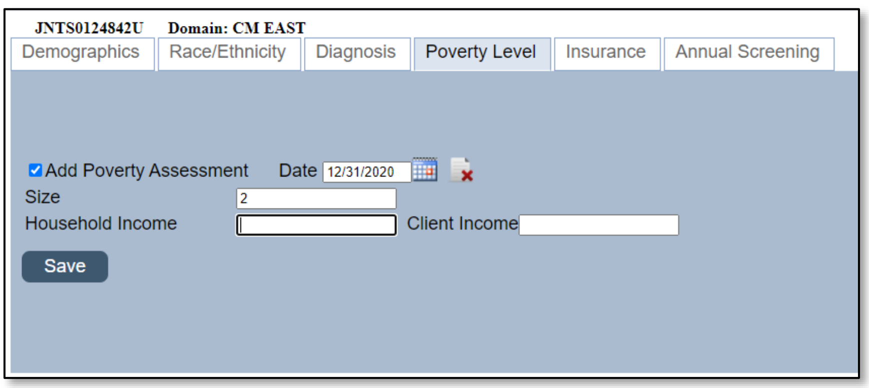
e. **Insurance**

Note: The drop-down indicates the client's ***Primary Insurance***. *Use the checkboxes to select a* ***Secondary or Other Insurance Payer*** *if applicable*



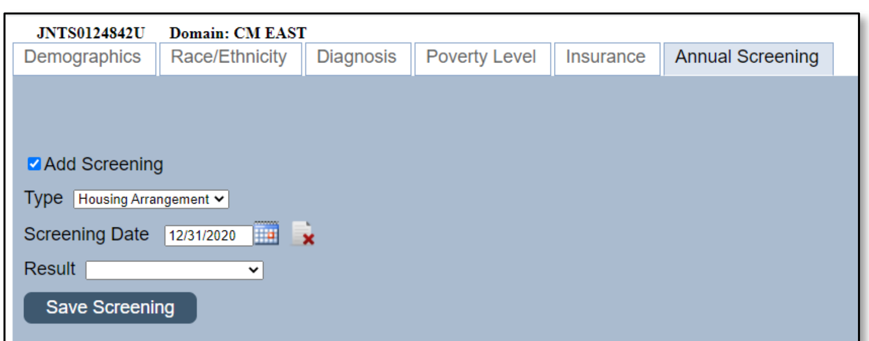
f. **Poverty Level**

Note: The Client Income field only becomes editable if the Household Size >1



g. **Annual Screening**

Note: as of 2020 the only required annual screening for RSR is the Housing Arrangement



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.