NOLA PrEPP & EC3 DATA ENTRY INSTRUCTIONS

The data entry instructions in this section are for NOLA PrEPP & EC3 staff *only* and do not pertain to Ryan White Part B, Ryan White Part A, or other programs.

NOLA PrEPP & EC3 Form Directory

Form Name	Location in CAREWare
Peer Navigation Checklist	Demographics Tab Service Tab: Peer Navigation Checklist Referrals Tab
PEP & PrEP Navigation Checklist	Demographic Tab Service Tab: PEP and PrEP Navigation Checklist Referrals Tab
Navigation Activity Log	Service Tab: Navigation Activity Log Referrals Tab

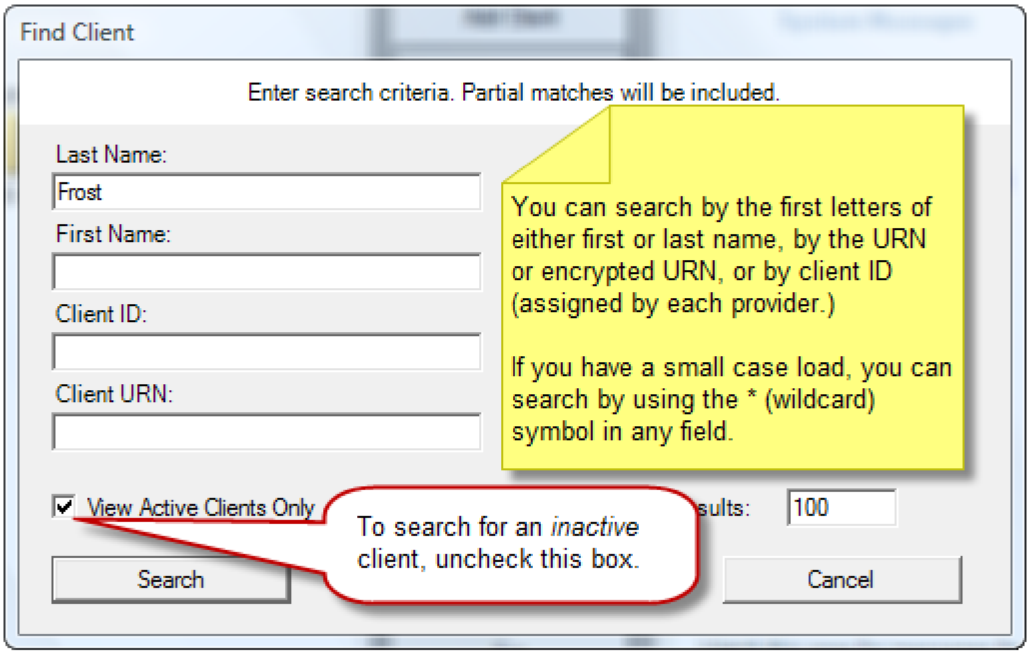
Contents

A. Finding and opening a client record

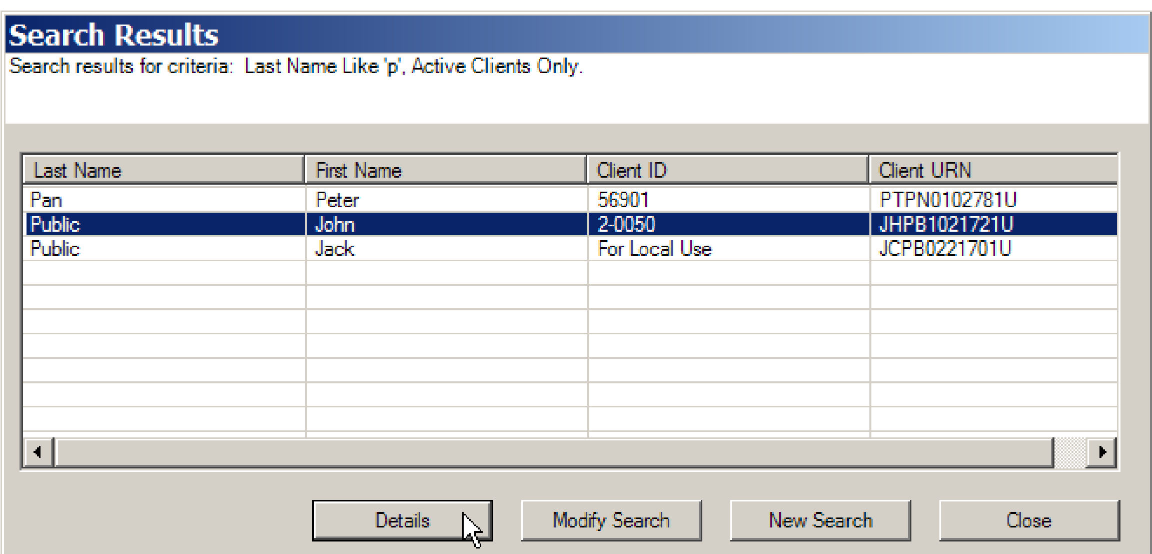
Gather your client's legal name, legal date of birth, and current gender prior to searching.

Click on Find Client to bring up the search screen.

Enter search text into any of the fields and press *Search.*



The results window will provide a list of clients who match the criteria entered into the search screen.



Select the matching client and click *Details* to open their record. You can also double-click the client row.

If the results do not contain the client you are searching for, select *Modify Search* and edit your search criteria. To begin again, select *New Search* and to leave the search process, select *Close*.

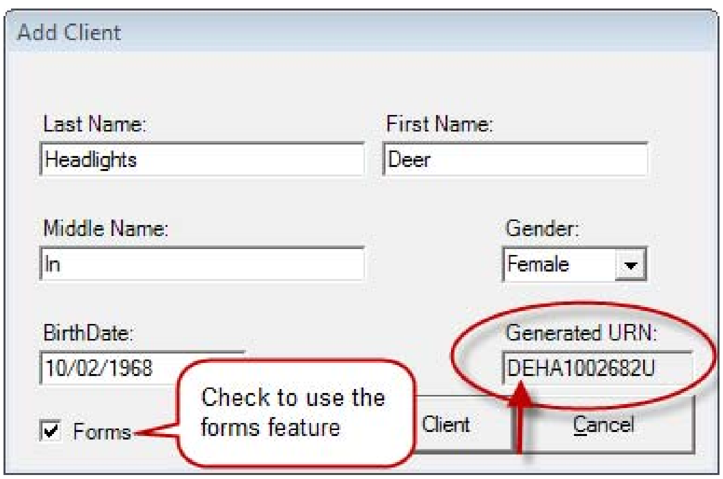
If you cannot find an existing client after thoroughly searching, contact Megan Wright at 504-568-7526 for assistance. *Do not add a new client record if you have reason to believe the client has been enrolled in NOLA PrEPP or EC3 already.*

B. Adding a client for data entry

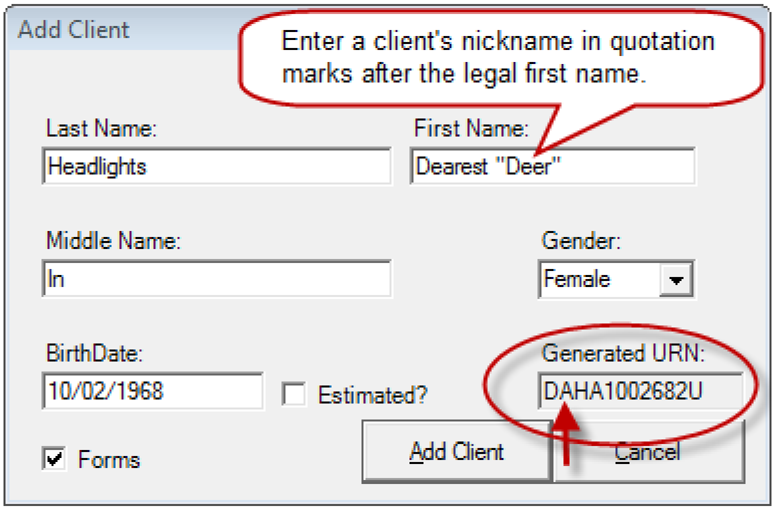
ALWAYS SEARCH FOR A CLIENT BEFORE ADDING A NEW RECORD

Gather your client's legal name, legal date of birth, and current gender prior to starting the process to add a record. *If your client declines to report a gender or reports a gender that is not in the dropdown list, you will need to select one. A gender from this list is required to create a client record. You will be able to enter the client's reported gender identity in a different field later.*

To add a new client, select *Add Client* from the main menu. Enter the client's name, gender, & birth date. Do not use an estimated birthdate and do not check the *Estimated?* box. Once all the information is completed, select *Add Client*.



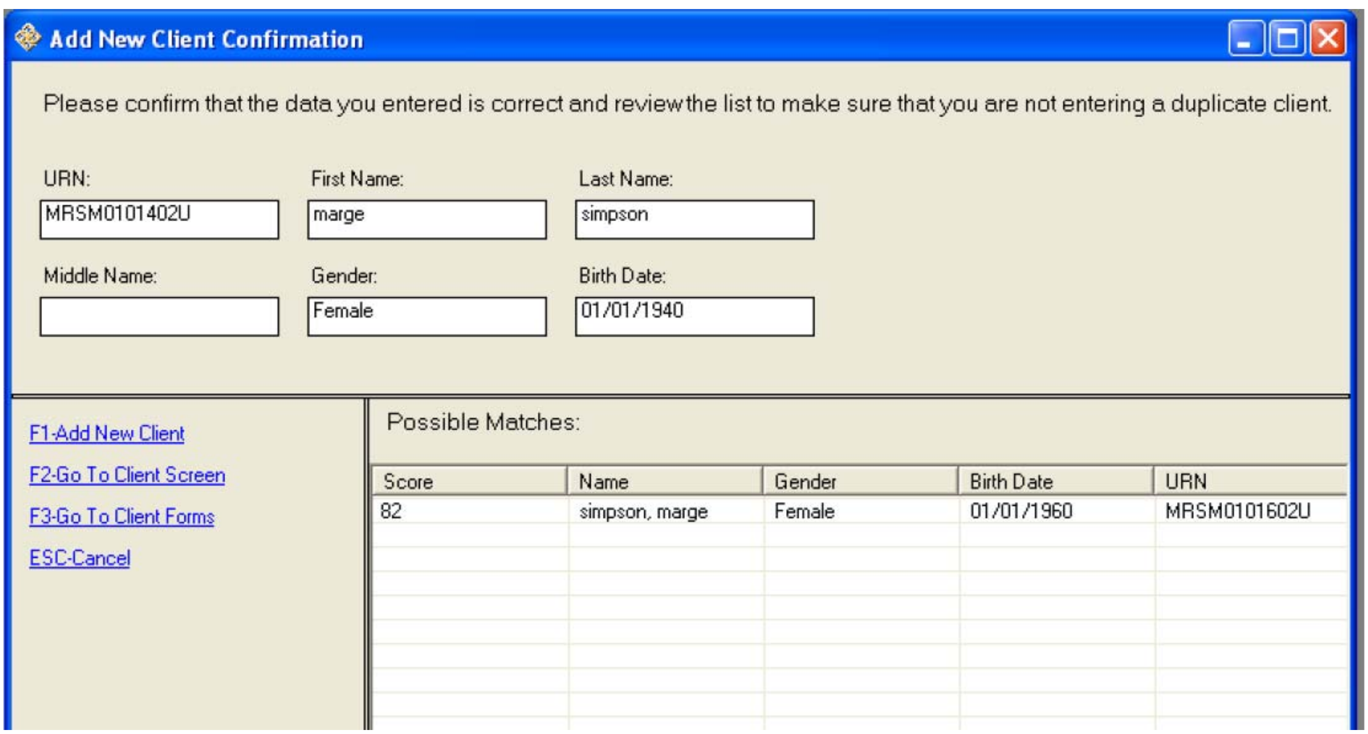
CW will create a *Generated URN* based on the 1st and 3rd letters of the first name, the 1st and 3rd letters of the last name, the date of birth and a code for gender. If you enter a nickname rather than the full legal name, the URN will change. CW uses the URN to determine if the client is already in the database and to generate an unduplicated client count for many reports. Therefore, it is very important that all *Add Client* entries are accurate. Note the difference between the URN's in the two screens below for Dearest Headlights and Deer Headlights.



Resolving Possible Duplicates When Adding Clients

When you enter a client in CAREWare who has previously been entered by someone else, one of two things will happen:

If the client was previously entered *by your agency* then you will see this screen:



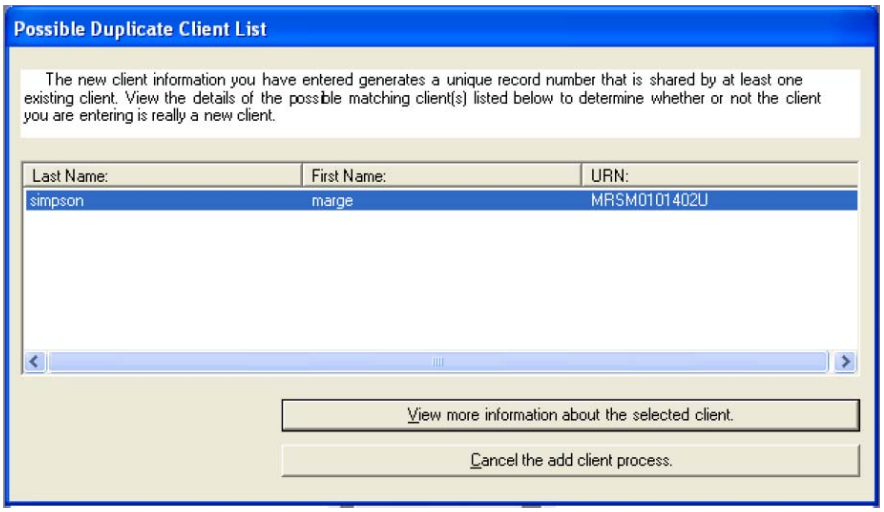
On this screen, you have the information for the client you are attempting to add at the top and a possible match in the Possible Match section. These clients are similar because they have very close URN components; only the birth year does not match.

In this case, you may click on the Possible Match client row and then click Go To Client Screen (F2) to view the record and determine whether this is the same client.

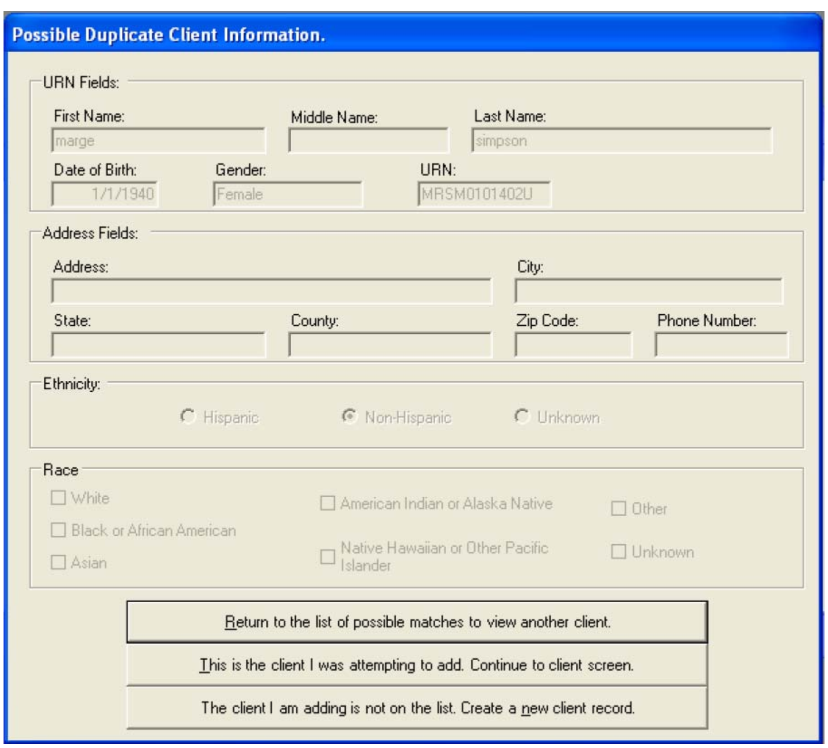
If this is the same client: Proceed with navigating the client record and entering information.

If this is NOT the same client: Click CLOSE on the open client record (shown above). Click ADD CLIENT again and then click the "Add New Client" (F1) link on the "Add New Client Confirmation" screen.

If the client was previously entered *by another agency and is new to your agency* then you will see this screen:



This screen tells you that there is another client record with a similar URN to the record you want to add. CAREWare will let you see *limited* information about the potential match so that you can determine whether this is the same client.



Select the record and click “View More Information About The Selected Client:”

If this is the same client: Click “this is the client I was attempting to add…” to confirm the client is a match and proceed with entering/updating information..

If this is NOT the same client: If there were multiple potential matches on the previous screen, click “return to the list of possible matches…” and repeat the check for the next possible client match. If this was the only potential match, click “the client I am adding is not on the list…” to create a new client record.

IF YOU HAVE ANY QUESTIONS ABOUT ADDING CLIENTS OR NEED HELP DETERMINING IF A CLIENT IS ALREADY IN CAREWARE, CONTACT Megan Wright at 504-568-7526 for assistance. ***Do not add a new client record if you have reason to believe the client has been enrolled in NOLA PrEPP or EC3 already.***

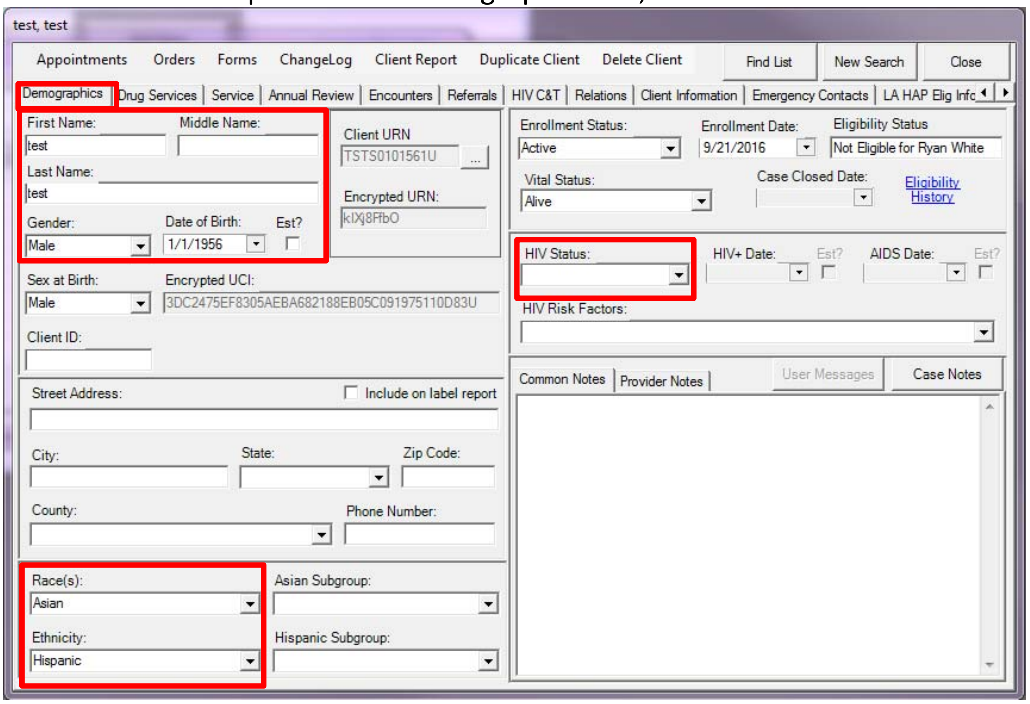
C. Peer Navigation Checklist Form Entry

Data for this form are entered in three places in the client's CAREWare record:

1. Demographics Tab
2. Services Tab
3. Referrals Tab

A. Find your client and open their record

The client record opens to the Demographics tab, which looks like this:



The fields you need to complete on the Demographics tab:

First name (legal)
Last name (legal)
Date of Birth
Race(s)
Ethnicity
HIV Status

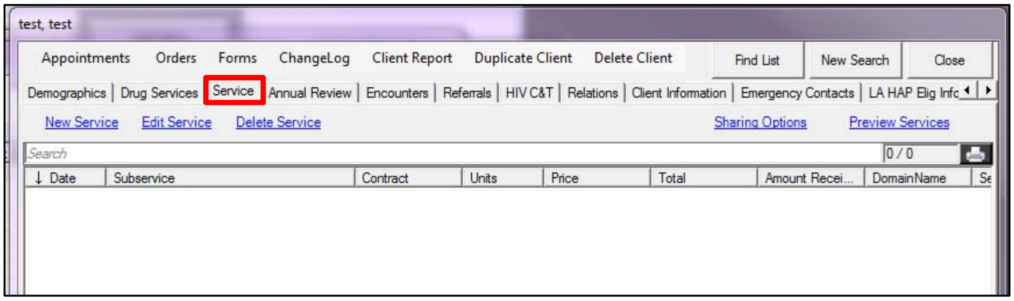
For Race and Ethnicity, if you select certain races or "Hispanic" then additional fields will appear for you to enter "subgroups" in. This is not required for this project, so you do *not* need to complete them. In the above screenshot example, you can see there is a Hispanic Subgroup field and an Asian Subgroup field. *You can leave these blank.*

If your client has been entered in CW or served by Ryan White/ADAP in the past, then they may have an existing record with previous information. Update any information that is inaccurate. CW in the past has been only used for HIV+ clients, so if you come across someone who is listed as HIV+ in CW but has presented as Negative, please let your main SHP contact know.

The rest of the information from the Peer Navigation Checklist form will be entered on the **Service** and **Referrals** tabs.

B. In your client's record, go to the Service Tab

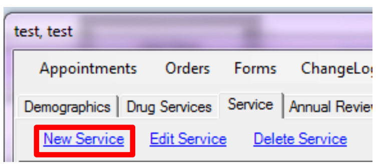
The Service Tab looks like this:



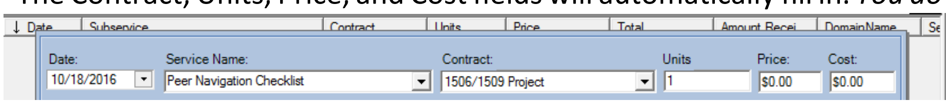
Any services the client has previously received will be listed in the white space. As you complete form entry, this will include their NOLA PrEPP & EC3 forms.

To enter the Peer Navigation Checklist form:

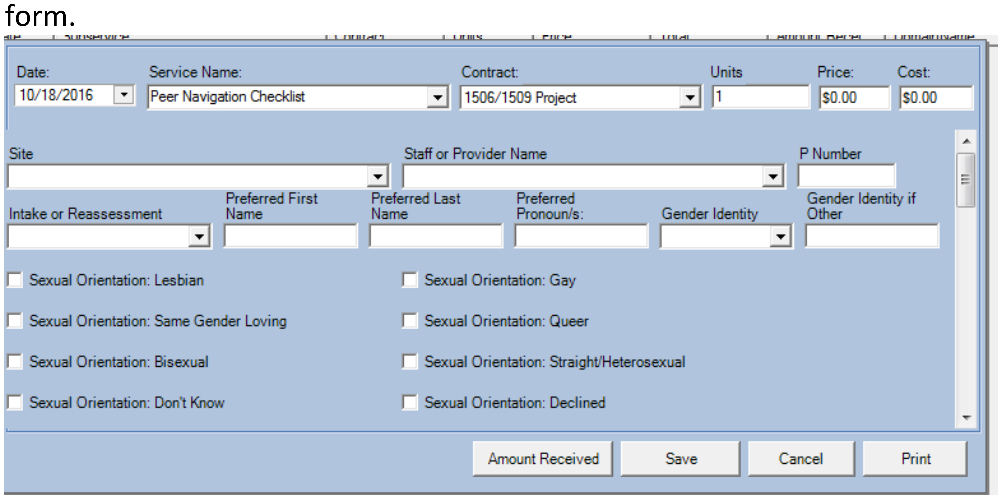
1. Click **New Service**



2. In the new blue window that appears, enter the **Date of the form** in the Date field. Then from the Service Name dropdown box, choose **Peer Navigation Checklist.**
   The Contract, Units, Price, and Cost fields will automatically fill in. *You do not need to change these.*



3. The new fields below the line above may take a few moments to show up. Be patient. Once they do, they should closely match the fields you've completed on the Peer Navigation Checklist paper form.



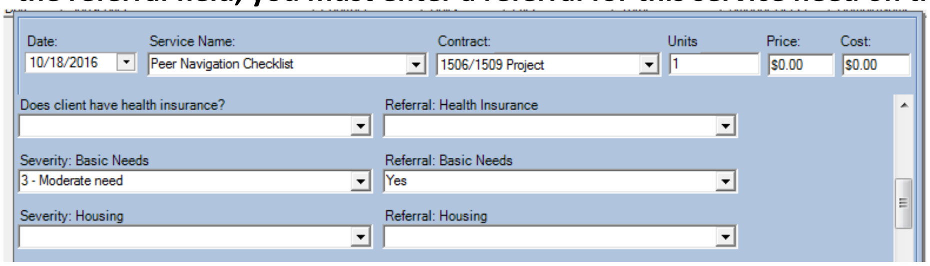
4. Select **your** agency from the **Site** field and **your** name from the **Staff or Provider Name** field. Enter the **P Number** from the form in the P Number field.

5. In the **Intake or Reassessment field**, select whether the checklist was completed as part of the client's initial intake or during a reassessment. If you aren't sure, ask your main SHP contact for this project.

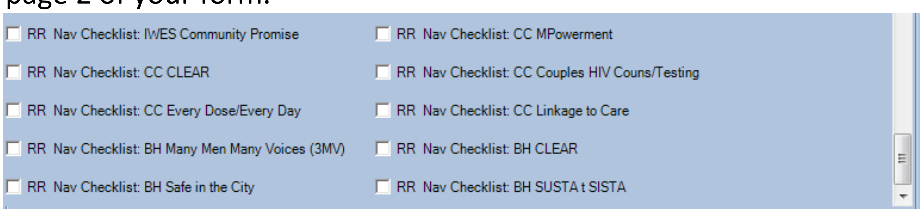
6. If your client uses a name other than the legal name shown on the Demographics tab, enter it in the preferred name fields. Complete the Preferred Pronouns and Gender Identity fields.

7. Mark any applicable Sexual Orientation checkboxes as reported by your client.

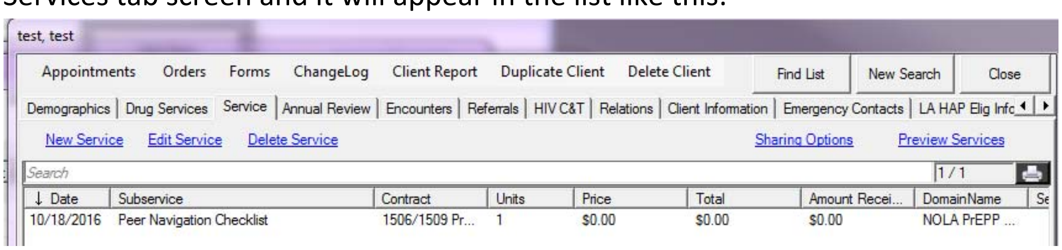
8. In the next fields, you will make a selection in the field on the left (their Severity score) and then indicate whether a referral was made in the corresponding field on the right. **If you mark YES in the referral field, you must enter a referral for this service need on the Referrals tab.**



9. After the Severity and Referral fields, complete the "RR Nav Checklist" checkboxes at the bottom of the screen. These correspond to the "Risk reduction Interventions and Navigation Checklist" on page 2 of your form.



10. When you are finished entering the Peer Navigation Checklist form items (except for referrals), click Save. **Important:** If pressing the Save button does not take you back to the Service screen, scroll up in the form and look for any fields with a red exclamation mark next to them. This means that the field is required to be completed and is blank.
Complete the field and save again. When the service is successfully saved, you will return to the Services tab screen and it will appear in the list like this:



Next, you will need to enter any referrals made as a result of peer navigation. See the last section in this packet for instructions.

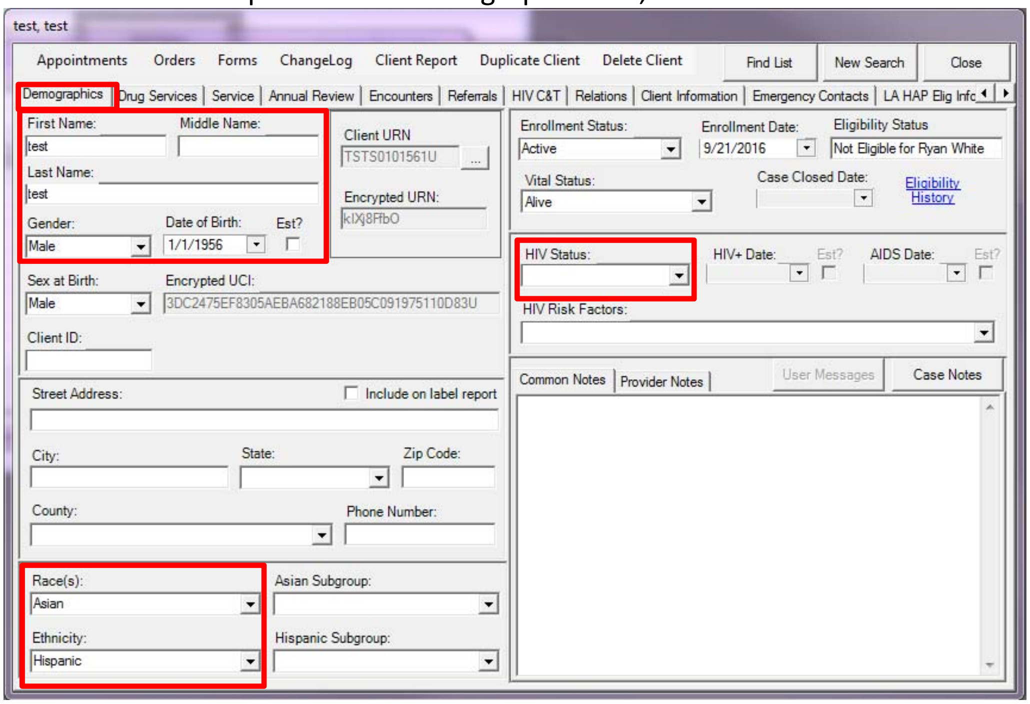
D. PEP & PrEP Navigation Checklist Form Entry

Data for this form are entered in three places in the client's CAREWare record:

1. Demographics Tab
2. Services Tab
3. Referrals Tab

A. Find your client and open their record

The client record opens to the Demographics tab, which looks like this:



The fields you need to complete on the Demographics tab:

First name (legal)
Last name (legal)
Date of Birth
Race(s)
Ethnicity
HIV Status

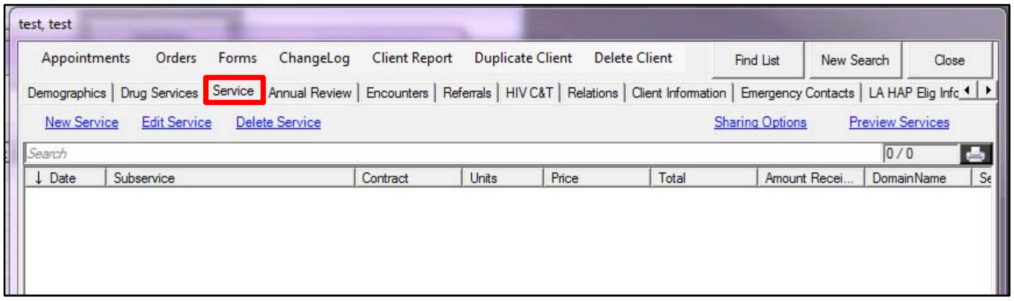
For Race and Ethnicity, if you select certain races or "Hispanic" then additional fields will appear for you to enter "subgroups" in. This is not required for this project, so you do *not* need to complete them. In the above screenshot example, you can see there is a Hispanic Subgroup field and an Asian Subgroup field. *You can leave these blank.*

If your client has been entered in CW or served by Ryan White/ADAP in the past, then they may have an existing record with previous information. Update any information that is inaccurate. CW in the past has been only used for HIV+ clients, so if you come across someone who is listed as HIV+ in CW but has presented as Negative, please let your main SHP contact know.

The rest of the information from the PEP & PrEP Navigation Checklist form will be entered on the **Service** and **Referrals** tabs.

B. <u>In your client's record, go to the Service Tab</u>

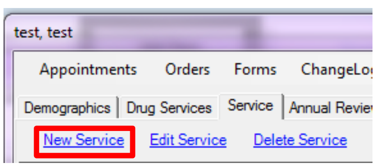
The Service Tab looks like this:



Any services the client has previously received will be listed in the white space. As you complete form entry, this will include their NOLA PrEPP & EC3 forms.

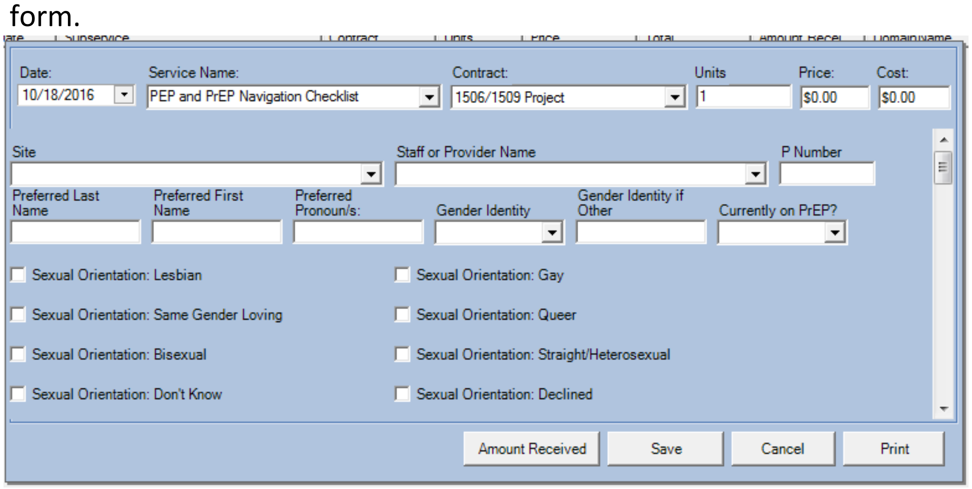
To enter the PEP & PrEP Navigation Checklist form:

1. Click **New Service**



2. In the new blue window that appears, enter the **Date of the form** in the Date field. Then from the Service Name dropdown box, choose **PEP and PrEP Navigation Checklist.**
   The Contract, Units, Price, and Cost fields will automatically fill in. *You do not need to change these.*

3. The new fields below the line above may take a few moments to show up. Be patient. Once they do, they should closely match the fields you've completed on the Peer Navigation Checklist paper form.

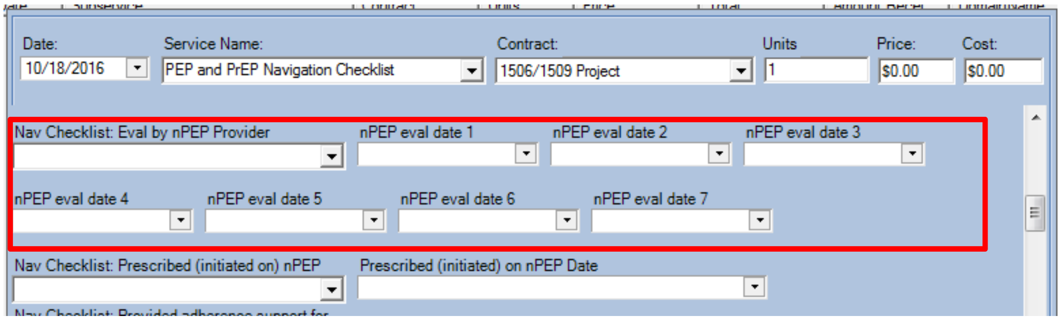


4. Select **your** agency from the **Site** field and **your** name from the **Staff or Provider Name** field. Enter the **P Number** from the form in the P Number field.

5. If your client uses a name other than the legal name shown on the Demographics tab, enter it in the preferred name fields. Complete the Preferred Pronouns and Gender Identity fields.

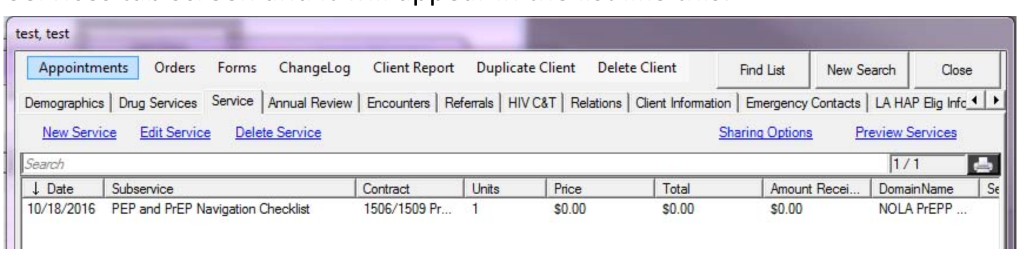
6. Mark any applicable Sexual Orientation and Self-Reported Risk checkboxes.

7. In the next fields, which correspond to the nPEP & PrEP Navigation Checklist section, you will need to look carefully to make sure you are entering the data in the correct items. Each navigation item starts on a new line with a field that has "Nav Checklist" at the beginning. This field is followed by several date fields and/or other items to complete for the navigation item.



In each "Nav Checklist" item, you will need to select from Yes, No, and NA. If there are **dates** to accompany the item, fill them in as applicable. For example, if a client is evaluated by a nPEP provider, the first evaluation date should be entered in "nPEP eval date 1." The second evaluation would go in "nPEP eval date 2" and so on. *If you need more date fields than are provided for any item, contact Megan Wright at megan.wright@la.gov.*

8. When you are finished entering the PEP & PrEP Navigation Checklist form items (except for referrals), click Save. **Important:** If pressing the Save button does not take you back to the Service screen, scroll up in the form and look for any fields with a red exclamation mark next to them. This means that the field is required to be completed and is blank. Complete the field and save again. When the service is successfully saved, you will return to the Services tab screen and it will appear in the list like this:



9. **Updating the form:** The PEP & PrEP Navigation Checklist form is expected to be updated with additional information over time. <u>Do not make a new entry for each update – you will edit the existing entry to include new information.</u> To update your existing entry:
   a. Browse to the Services tab in the same client's record
   b. Select the PEP & PrEP Navigation Checklist entry you already saved from the list of services (as shown above)

c. Click **Edit Service.** Once the form loads, you can update it with new dates or information.
d. Click **Save** to save the updated information.

Next, you will need to enter any referrals made as a result of peer navigation. See the last section in this packet for instructions.

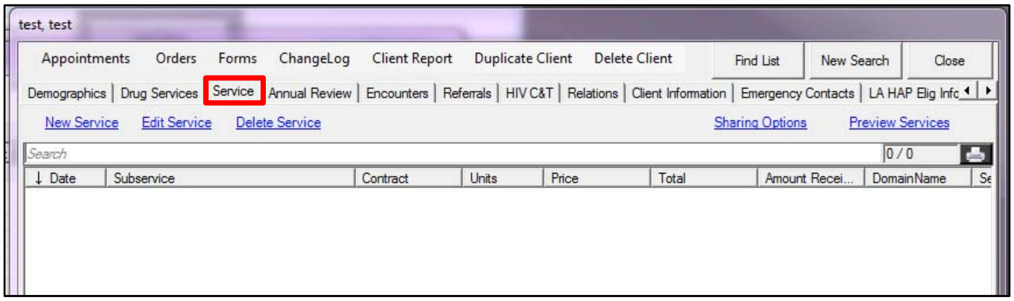
E. Navigation Activity Log Form Entry

Data for this form are entered in two places in the client's CAREWare record:

1. Services Tab
2. Referrals Tab

A. <u>In your client's record, go to the Service Tab</u>

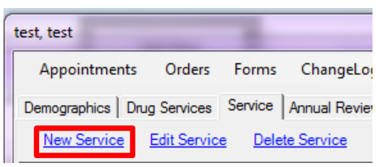
The Service Tab looks like this:



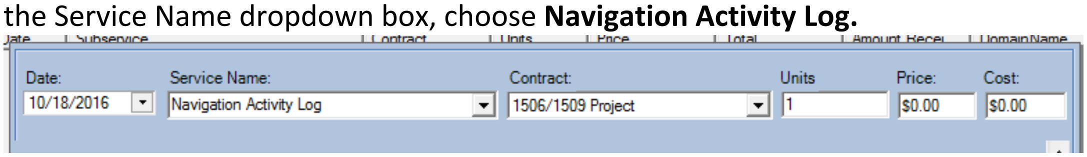
Any services the client has previously received will be listed in the white space. As you complete form entry, this will include their NOLA PrEPP & EC3 forms.

To enter an item from your Navigation Activity Log:

1. Click **New Service**



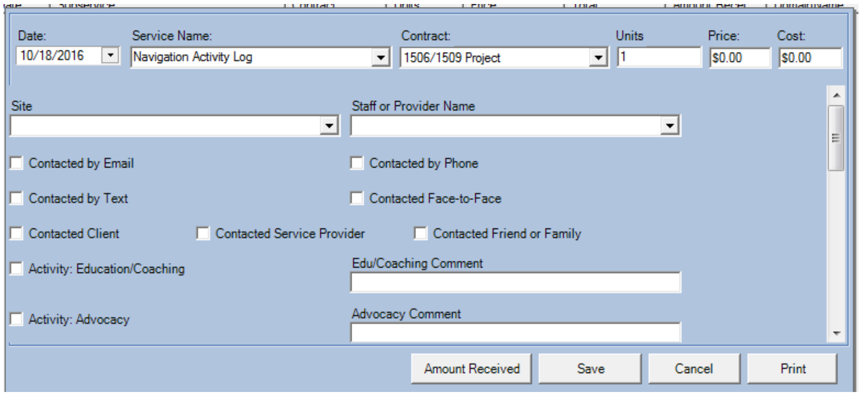
2. In the new blue window that appears, enter the **Date of the activity** in the Date field. Then from the Service Name dropdown box, choose **Navigation Activity Log.**



The Contract, Units, Price, and Cost fields will automatically fill in.
You will need to update the **Units** field with the time spent on the activity. This is measured in 15 minute increments.
1 unit = 15 minutes
<u>For example:</u> If the activity you are entering took 30 minutes, enter a 2 in the Units field.

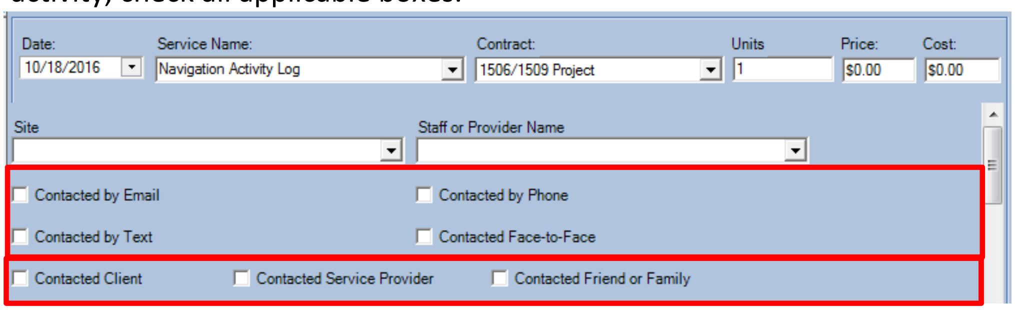
You should not change the Contract, Price, or Cost fields.

3. The new fields below the line above may take a few moments to show up. Be patient. Once they do, they should closely match the fields you've completed on the Navigation Activity Log paper form.



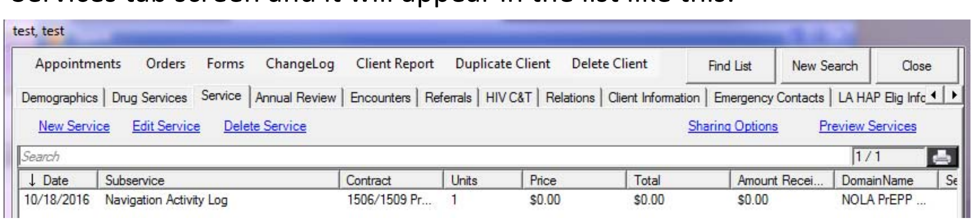
4. Select **your** agency from the **Site** field and **your** name from the **Staff or Provider Name** field.

5. In the next fields, which correspond to the "Type of Follow-Up & With Whom" section, check off the method of contact and who was contacted. If there were multiple methods or contacts for the activity, check all applicable boxes.



6. To enter the activities, scroll to the next section. Along the left side there are checkboxes for each activity type. Along the right side there are comment fields for each activity type. Mark only the activities performed for this log entry.

7. When you are finished with each Navigation Activity Log entry (except for referrals), click Save. **Important:** If pressing the Save button does not take you back to the Service screen, scroll up in the form and look for any fields with a red exclamation mark next to them. This means that the field is required to be completed and is blank.
Complete the field and save again. When the service is successfully saved, you will return to the Services tab screen and it will appear in the list like this:



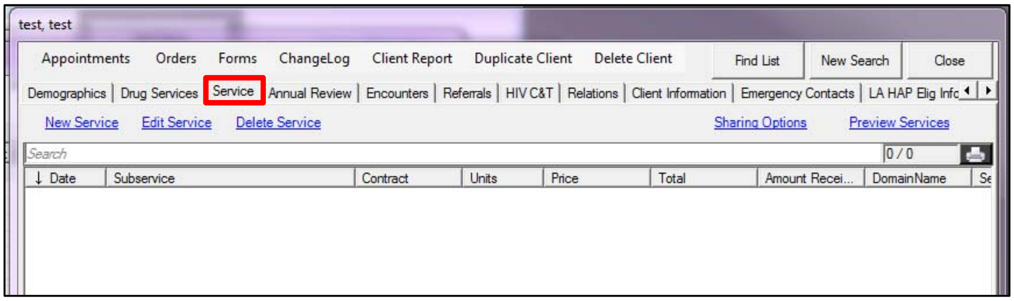
Next, you will need to enter any referrals made as a result of peer navigation. See the last section in this packet for instructions.

F. Client Discharge (closure) Entry

When a client leaves your intervention, use the below Service entry to indicate they have left.

B. In your client's record, go to the Service Tab

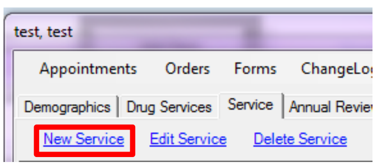
The Service Tab looks like this:



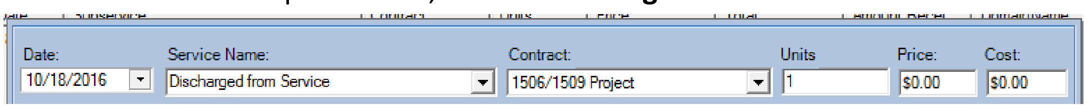
Any services the client has previously received will be listed in the white space. As you complete form entry, this will include their NOLA PrEPP & EC3 forms.

To enter discharge information:

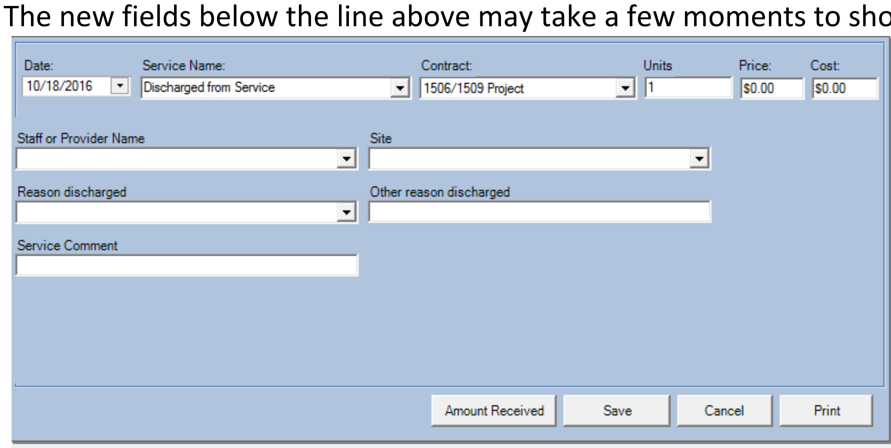
1. Click **New Service**



2. In the new blue window that appears, enter the **Date of the discharge** in the Date field. Then from the Service Name dropdown box, choose **Discharged from Service.**



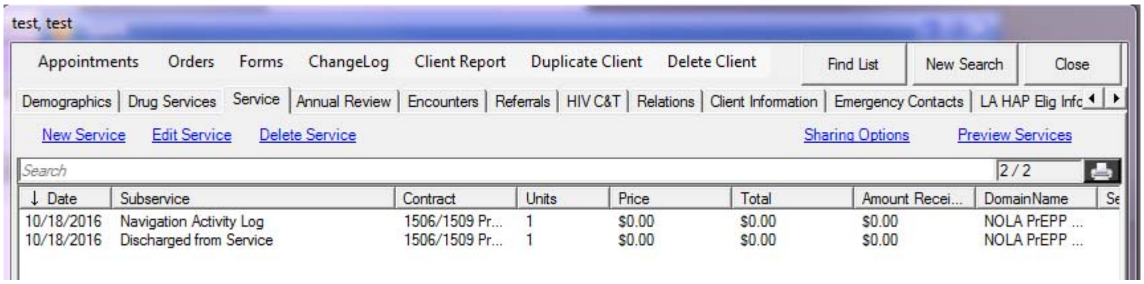
3. The new fields below the line above may take a few moments to show up. Be patient.



4. Select **your** agency from the **Site** field and **your** name from the **Staff or Provider Name** field.

5. In the next fields, select the reason the client was discharged from the program and add any applicable comments.

6. When you are finished with the entry click Save. **Important:** If pressing the Save button does not take you back to the Service screen, scroll up in the form and look for any fields with a red exclamation mark next to them. This means that the field is required to  be completed and is blank.
Complete the field and save again. When the service is successfully saved, you will return to the Services tab screen and it will appear in the list like this:



G. Entering and Tracking Referrals

Each client's referrals are entered in their CAREWare record. The referral entry is updated each time a follow-up activity is completed.

Any referrals made as a result of this project should be entered. For example, if you indicate YES in a referral field on the Peer

Open the client record and click on the *Referrals Tab.*

To Add a NEW Referral:

- Click the "Add Referral" link

- Enter the date you *made* the referral in the Referral Date field

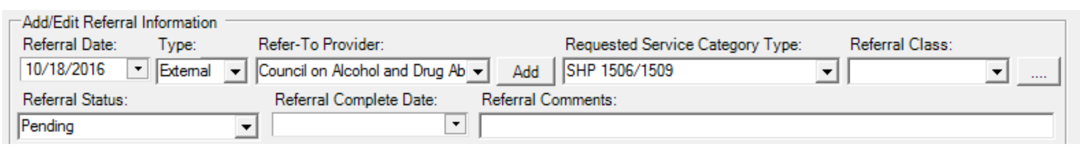
- In the *Type* field, select <u>**EXTERNAL**</u> (*do not use Internal)*

4. Select the provider you are referring the client to in the *Refer-To Provider* list (if you do not see your provider, refer to the instructions in this manual for adding them)

5. Select <u>**SHP 1506/1509**</u> in the *Requested Service Category* field. Do not use any other choices.

6. Leave the *Referral Class* field blank.

7. Leave *Referral Status* as pending unless you already have a final outcome for the referral.



8. In the lower portion of the referral entry, complete the following fields when making the initial referral entry:
   - Select *your* name in the "Staff or Provider Name" field and *your* agency in the "Site" field.
   - If the referral is related to the "Peer Navigation Checklist" or "PEP and PrEP Navigation Checklist" form, enter the date from that form in the **Date on 1506/1509 Form** field.
   - If the referral is related to the "Peer Navigation Checklist" or "PEP and PrEP Navigation Checklist" form, enter the P Number from that form in the **P Number** field.
   - Enter the type of service they are being referred for in the **Service Need Area** field. If the referral corresponds to one indicated on the Peer Navigation Checklist form, then be sure to select the same item. E.g. if you indicated that a client received a Housing referral on the Peer Navigation Checklist, choose Housing for the housing referral.

All of the other fields will be completed during your referral follow-up and should <u>not</u> be completed now.

Click Save to exit the referral.

To Update a Referral with Follow-Up Data:

1. Open the client record and go to the *Referrals Tab*.

2. Select the referral you have follow-up information for and click *Edit Referral.*

3. The referral will open for editing.

4. If the client was linked successfully, mark Yes in the **Linked?** field. Enter the date of the linkage in the **Date Linked** field. If the client was *not* linked successfully, mark No in the **Linked?** field. Enter the reason for the failed linkage in the **Reason Not Linked** field.

5. Select a new status for the referral in the **Referral Status** box. If you will not be updating the referral again, select *Completed*.

6. Select the date you are completing the referral entry in the **Referral Complete Date** field.

7. When you are finished, click Save.