Utilizing the Clients\Mine Needing Attention View in Provide® Enterprise

View Details

Palm Beach County has implemented a new view that is available for Medical and Non-Medical Case Managers in order to help improve efficiency and efficacy.

*NOTE: The columns related to CD4 and Viral Load data come from hidden fields in the Client Profile that are set by the nightly job. If you enter data related to one of these fields, it will not change on your screen until the nightly job has processed it. (Typically, you would see the change the following day).

In order to be included in this view, all of the following conditions must be met:

1. **Ryan White Status:** The "Ryan White Status" field on the "Profile" tab of the Client Profile must be set to "Active".
2. **Client Service Profile:** The client must have a Client Service Profile that is in "Open" status for your Agency. (Client Profile – Relationships Tab)
3. **Client Service Category Profile:** The client must have a Client Service Category Profile that is in "Open" status for either Medical Case Management or Non-Medical Case Management. You must be assigned as the "Assigned Provider". (Client Profile – Relationships Tab).

Additionally, this view will show you only clients assigned to you that need attention based on one of the following five factors:

1. **Action Plan Due:** This column will be set to "Yes" if the client meets any of the following conditions:
    - **No Action Plan**: There is not an action plan at all in the client file.
    - **Closed/Open Action Plan:** There is an action plan in the client file, but it is in a status of "Closed" (therefore inactive) or "Open" (meaning that it was never flagged as having been completed with the client.)
    - **Review out of Date:** There is an action plan in the client file, however, the "Last Review Date" in the Action Plan is great than 180 days (6 months).
2. **VL Due*:** This column will be set to "Yes" if the client meets any of the following conditions:
    - **No Viral Load Test Result**: There is not a test result record at all with the test name of "HIV 1 Viral Load".
    - **Viral Load out of Date**: There is a Test Result record in the client file with the test name of "HIV 1 Viral Load", but that result is outdated.

        - For clients that are virally suppressed (last viral load result is less than 200), this is defined as the Test Completed Date being greater than 6 months in the past.
        - For clients that are not viral suppressed (last viral load result is greater than 200), this defined as a Test Result record with the “Test Completed Date” being greater than 3 months in the past.
3. **CD4 Due*:** This column will be set to “Yes” if the client meets any of the following conditions:
    - **No CD4 Test Result**: There is not a test result record at all with the test name of “CD4 Count”.
    - **CD4 Test Result out of Date**: There is a Test Result record in the client file with the test name of “CD4 Count”, but that result is outdated.
        - For clients that are on HAART (Client Profile – Health Tab – “Antiretroviral Therapy” = “HAART”), this is defined as the Test Completed Date being greater 3 months in the past.
        - For all other clients, this is defined as a Test Result record with the “Test Completed Date” being greater than 6 months in the past.
4. **Eligibility Due:** This column will be set to “Yes” if the client meets any of the following conditions:
    - **No Eligibility:** The client has never had eligibility completed.
    - **Eligibility Has Expired:** The client’s eligibility has expired prior to the current date.
    - **Eligibility Expiring within 45 Days:** The client’s eligibility will expire within the next 45 days.
5. **HOPWA Rent Responsibility Due:** This column will be set to “Yes” if the client meets any of the following conditions if the client is currently “Admitted” to HOPWA at any of the HOPWA funded agencies.
    - **No Rent Responsibility:** The client has never had a HOPWA Rent Responsibility completed, but is “Admitted” to HOPWA within a Program Enrollment Housing record.
    - **Rent Responsibility Due:** It has been 5 months since the last HOPWA Rent Responsibility record has been completed.

NOTE: If the client is admitted to a HOPWA program, you will see a “Yes” in the “HOPWA Enrolled” column that is just to the left of the HOPWA Rent Responsibility Due column. If the client is not enrolled in HOPWA, the “HOPWA Rent Responsibility Due” column will be set to N/A (Not Applicable).

Additional columns are included in the view for your convenience. These are outlined below:

- **Action Plan Status:** Shows the status of the clients most recent action plan.

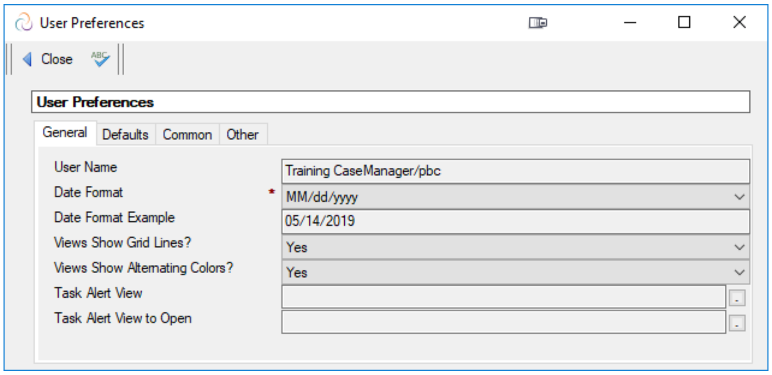
- **Date Last Action Plan Update:** This column shows the date the most recent update was made to the action plan. Updated would include any of the following:
    - **Date Opened:** This date is automatically set to the creation date of the Action Plan and cannot be changed.
    - **Date Completed:** If you click the "Plan Development Completed" button, the plan will be flagged with the "Date Completed" based on the date you enter at that time.
    - **Last Review Date:** This date is set when the plan is marked as "Reviewed".
- **Date of Last VL*:** Shows the Date of the Last Viral Load Test Result record.
- **Last VL Result*:** Shows the numeric value of the most recent Viral Load Test Result record.
- **Suppressed?*:** This column is computed based on the last viral load. IF the result is less than 200, the column should be set to "Yes". If above 200, the column should be set to "No".
- **Date of Last CD4*:** Shows the Date of the Last CD4 Test Result record.
- **Last CD4 Result*:** Shows the numeric value of the Last Viral Load Test Result record.
- **Date Started ART:** This field comes directly from the Client Profile – Health Tab and shows only if the client's Antiretroviral Therapy is set to "HAART". The field in the Profile is "Date Antiretroviral Therapy Started".
- **Date Eligibility Effective:** This shows the date that the current eligibility became effective. This comes directly from the Client Profile – RWA Eligibility Tab.
- **Date Eligibility Expires:** This column displays the date that the current eligibility will expire. This comes directly from the Client Profile – RWA Eligibility Tab.
- **HOPWA Agency:** The column will reflect the name of the agency that the client has a Program Enrollment Housing in the status of "Admitted".
- **HOPWA Program:** This column displays the HOPWA program type that the client is admitted to.
- **Last HOPWA Rent Responsibility:** In this column, the "Certification Date" of the most recent HOPWA Rent Responsibility record is shown.
- **HOPWA Admission Date:** This column shows the date of the client's admission to the HOPWA program that they are currently enrolled in.

Refer to the Palm Beach County PE User guide for instructions on how to update or create the action plan and/or enter Test Results.

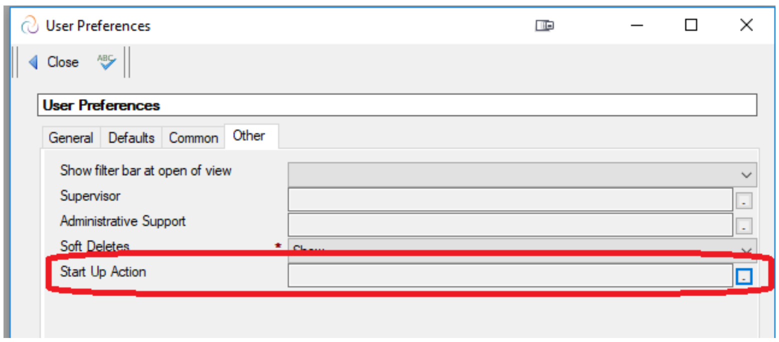
Changing Your Default Startup Action

Provide Enterprise includes the ability for you to set the "Startup Action" for what will happen when you log into the database. It is recommended that Medical and Non-Medical Case Managers set their "Default Startup Action" to be this new view. This can be done by following the steps below.

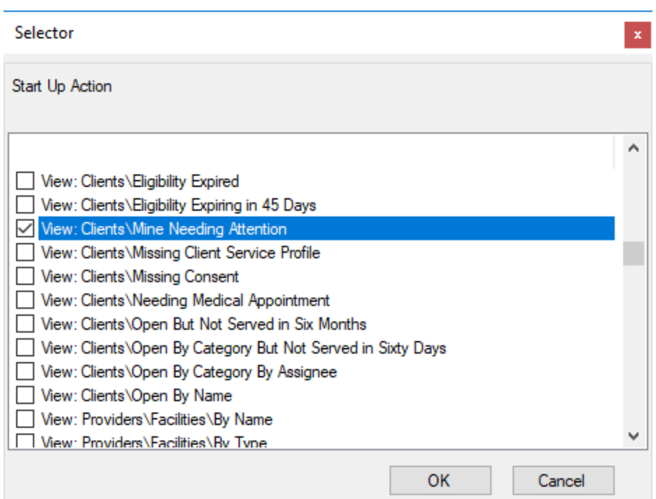
- When logged into Provide® Enterprise, select “Tools” at the top of the screen and then select “User Preferences”.   A box similar to that in the figure below will open:

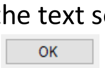


- Click the **Other** tab.

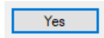


- On the “Start Up Action” field, click the  to the right of the field. This will open another screen and will look similar to that in the figure below:



- Scroll Down until you see “View: Clients\Mine Needing Attention” and click on the box just in front of the text so that a check mark appears. (Similar to that in the figure above).
- Click the  button to continue. You should see the Start Up Action field populate with your selection.

- Next click the 

button. You will get a prompt (similar to that below) asking whether you want to save your changes. Click 

to save your changes and continue.

This change will become effective the next time you log into Provide® Enterprise.