



## HOPWA Training Now Available Online

A new California Office of AIDS ARIES WebEx online training module is now available for the Housing Opportunities for Persons with AIDS program (HOPWA). The course, which runs about 45 minutes in length, will teach HOPWA staff how to enter HOPWA data and how to generate HOPWA reports from ARIES.

The course covers:

1. Completing the Housing and Income Assessment to determine eligibility.
2. Enrolling eligible clients in HOPWA and changing a client's HOPWA status
3. Completing the Household Status information section.
4. Entering HOPWA services.
5. Generating the HOPWA Annual Progress Report (APR), the HOPWA Consolidated Annual Progress and Evaluation Report (CAPER), and the Missing HOPWA Data Report.

To access the Office of AIDS ARIES WebEx trainings, please do the following:

1. Go to this website: <https://cdph-ooa.webex.com/mw03051/mywebex/default.do?siteurl=cdph-ooa&service=7>
2. Click on "**Recorded Sessions**" on the left-hand side of the screen (under the "Attend a Session" menu). You will then be brought to the "Recorded Sessions" screen.

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3. Click on the "**Topic**" heading to view the trainings in order by course number.
4. Click on "ARIES Training - Course 13" to take the HOPWA training. You will be brought into the course's "Recording Information" screen.
5. Click "**View**" to take the course.
6. Finally, you will be required to provide some basic information on the registration pop-up screen before you can begin.

Please note that the trainings are narrated, so be sure you have sound enabled on your computer.

As a reminder, all new ARIES users should complete ARIES Training - Courses 1 and 3. These courses cover system security, client share options, navigation, and other basic concepts.

## Microsoft Internet Explorer 6 No Longer Supported

ARIES no longer supports Microsoft Internet Explorer 6 (IE6). Attempting to log in to ARIES with IE6 will generate an error message and access will be denied. Users must log in to ARIES with Microsoft Internet Explorer 7 or 8. In addition, Microsoft Internet Explorer 9 is now supported for ARIES use without Compatibility Mode. To determine your version, open your browser, go to the browser's Help menu and select the "About" option. If you are still using IE6, contact your agency's technical support source for assistance. Please note that because of the security issues involved, the ARIES Help Desk cannot assist you with upgrading your browser version.

## Missing RSR Data Report

The Missing RSR Data Report now runs concurrently with the RSR Export. Results are geared to the data requirements of the RSR and display beneath the RSR Summary Report on the Results screen. The report identifies clients with missing RSR data who are being reported as "Unknown" for certain questions in the RSR. Each client's primary staff member is also included in the report.

To enter missing data, link to the individual client's records via the client's name in the report. Keep in mind that HAB expects providers to collect all required data. If you leave a data element blank, it will be counted as an "Unknown." Depending on your percentage of "Unknown" responses, HAB may ask you to collect the missing data and re-submit your RSR.

To access the RSR Report:

- On the Reports menu, click **Compliance Reports**.



- On the Compliance Reports menu, click the Ryan White HIV/AIDS Services (RSR) Export link, which takes you to the RSR Export/Missing RSR Data Report screen.

**Clear View Mission**

**RSR Export**

**Agency or Administrative Agency**

**Reporting Period**

**Missing RSR Data Report**

**Include Medical Data**

**Sort By**

**Data Elements**

## Missing RSR Data Report *continued from page 2*

Once you have selected the Agency and reporting period, you can now select the information to display on the Missing RSR Data Report. When the Aggregate Data checkbox is selected (only available for Administrative Agencies and Partners), the Missing RSR Data Report will not be generated.

**Include Medical Data** - Use the dropdown to select whether or not you wish to include medical data. Selecting "No" is helpful for agencies that do not provide or pay for medical services as those elements will not show as missing on the report.

**Sort by** - Use the dropdown to select whether you want to sort by Client or Data Element. Sorting by client will list all the missing data elements by client. Sorting by Data Element will list all clients missing that particular data element. Selecting "Client" may be helpful for those agencies that have one staff person enter

all data for a client, while selecting "Data Element" may be helpful for those agencies that assign a particular staff person to enter specific data elements such as lab tests, demographic data, etc. for all clients.

**Data Elements** - Use the dropdown to limit the report to one data element or to run the report for all data elements. The default is "All Elements."

After completing the fields in the RSR Export and Missing RSR Data Report sections you can run the reports.

### Reviewing the Missing Data Report

The screenshots that follow show an example of Missing Data Report by Client and Missing Data Report by Data Element. The clients in these screenshots are fictitious.

### Missing Data Report - by Client

Client	Staff	Missing RSR Data
<a href="#">Walker, Clint</a>	Trainee Staff	Enrollment Status; Poverty Level; Living Situation; Insurance; Risk Screening; CD4 Test; Viral Load; HAART; TB Screening; Mental Health Screening; Prenatal Care;
<a href="#">Wallace, Frank</a>	Trainee3 Staff	Enrollment Status; Living Situation; Insurance; Risk Screening; CD4 Test; Viral Load; HAART; Substance Abuse Screened; Prenatal Care;

**Number of clients: 2**

Criteria: Reporting Period Between 2011-01-01 and 2011-06-30 (Year - 2011, Period - 1, Agency - Clear View Mission, Data Elements - All Elements)

### Missing Data Report - by Data Element

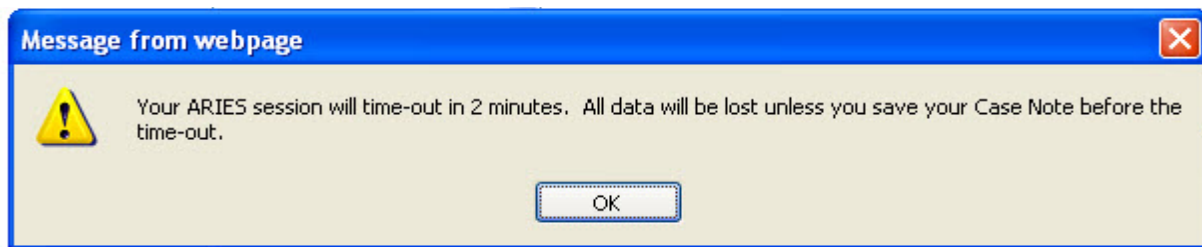
Client	Staff	Missing RSR Data
<a href="#">Walker, Clint</a>	Trainee Staff	Enrollment Status;
<a href="#">Wallace, Frank</a>	Trainee3 Staff	Enrollment Status;
<a href="#">Walker, Clint</a>	Trainee Staff	Poverty Level; Living Situation;
<a href="#">Wallace, Frank</a>	Trainee3 Staff	Living Situation;
<a href="#">Walker, Clint</a>	Trainee Staff	Insurance;
<a href="#">Wallace, Frank</a>	Trainee3 Staff	Insurance;
<a href="#">Walker, Clint</a>	Trainee Staff	Risk Screening;
<a href="#">Wallace, Frank</a>	Trainee3 Staff	Risk Screening;
<a href="#">Walker, Clint</a>	Trainee Staff	CD4 Test;
<a href="#">Wallace, Frank</a>	Trainee3 Staff	CD4 Test;
<a href="#">Walker, Clint</a>	Trainee Staff	Viral Load;

## Version 3.0.6.0 Highlights

### ARIES Time-Out Feature

For security reasons, a 30 minute time-out feature is built into ARIES. If no activity has occurred within 30 minutes, the user's ARIES session is terminated. This means if a user has not moved from one screen to another or clicked the edit/save buttons within 30 minutes, they will be logged out of the application. In most areas of ARIES, this time-out feature is not a problem. However, users who write long and complex Case Notes may find that the time-out will occur before they finish writing the note -- which means that the entire content of the note will be lost. To help prevent that from occurring, a 2-minute pop-up warning has been built into the Case Note screen (see sample below). Please note that this warning only appears if ARIES is the active window 2 minutes prior to the time-out. If the user has switched to another window or another tab within the same browser window, the 2-minute warning will not occur until you return to the ARIES tab/window, and the time-out may occur without warning.

If you are actively writing a Case Note, then you will see the pop-up warning (see below). However, if you have been called away from the PC, you may miss the warning. For security reasons, any time you leave your PC for any reason, you should save your work and log out of ARIES. Doing so will ensure that the ARIES time-out feature will never cause your Case Note to be lost.



### New Service Filters Added

The read-only screen for Service Line Items has been modified to include filters for Secondary Service and Subservice. Previously the only filters were on Date, Staff, Program, and Primary Service. Having this functionality allows agencies to drill down more specifically when viewing a client's services.



### Ad Hoc Report Enhancements

Several new features have been added to ARIES ReportExport. When creating an aggregate Ad Hoc Report, the Row or Aggregates screen expanded from eight (8) to twelve (12) rows. These additional "Group By" rows allow more data elements to be included on the report.

For data elements that use a dropdown in ARIES Client, all the values of that dropdown are now available as filters in ReportExport. In addition, for those data elements with dropdowns that allow manually entered data in an "Other" field, the manually entered values are also now available as filters in ReportExport. An adjustment was made to reports that use the Staff Display Order data element. This data element identifies the order of the staff assignments on the Program Summary tab in ARIES Client. Reports now include all clients even if they have no staff persons assigned. In addition to the client's Residence Address, the Mailing Address is now also available in ReportExport. See the article on [page 7](#).

## Grouping Clients by HRSA URN

There are two Unique Record Numbers (URNs) in ARIES. The first is the ARIES Extended URN, which is based on first name, last name, middle initial, date of birth, gender and mother's maiden name (MMN). The second is the HRSA URN, which is based on only four of these data elements: first name, last name, date of birth, and gender. Sometimes, a client is accidentally enrolled multiple times with different middle initials or MMNs. This can sometimes occur within a single agency, but is more common when a client is enrolled in multiple agencies. When a different middle initial or MMN is used, the client will have different Extended URNs for each enrollment, but the same HRSA URN.

In the past, all ARIES reports were based on identifying clients based on unique Extended URNs. However, if a client was enrolled with different middle initials or MMNs, that client would have multiple Extended URNs, and would therefore be counted multiple times. Starting with this new version of ARIES, two reports have been modified to use the HRSA URN, the intent being to get a more accurate count of unique clients. The two reports with this new feature are Crosstab Reports and the HAB QM Indicators. By default, the reports will still be based on the Extended URN. To base the report on the HRSA URN, click the radio button next to "HRSA URN" as shown in Figures 1 and 2.

Individual agencies running a report by HRSA URN will, in most cases, see no difference in the data displayed. However, Administrative Agencies or ARIES Partners are more likely to see a difference since it is more common for clients registered across multiple agencies to have been enrolled with different middle initials or MMNs.

Cross Tab Report - Located on the Reports - Cross Tab Report menu

Figure 1

The screenshot shows the 'Crosstab Report' configuration interface. It includes the following fields and options:

- Data to Summarize \***: A dropdown menu set to 'Count Clients Served'.
- Service Start Date**: A date input field with '9/1/2011' and a calendar icon.
- Service End Date**: A date input field with '9/26/2011' and a calendar icon.
- Row \***: A dropdown menu set to 'Adherence - ART'.
- Column \***: A dropdown menu set to 'Adherence - ART'.
- Table**: A dropdown menu.
- Unique Client Identifier**: Two radio buttons, 'Extended URN' (selected) and 'HRSA URN'.
- Display print format**
- Report >** (yellow button) and **Export** (blue button)



HAB QM Indicators Report - Located on the Reports - Compliance Report menu

Figure 2

**HAB QM Indicators Filters**

Report Period Between 1/1/2010 and 12/31/2010

Agency or Administrative Agency Clear View Mission

Aggregate data for Administrative Agency

Funding Source

Program

Age

Race

Gender

Unique Client Identifier  Extended URN  HRSA URN

### URN Q&A

**Question:** What do I do if I find a client who has been enrolled twice with different identifiers?

**Answer:** Contact your Administrative Agency (county) or the ARIES Help Desk. They can merge the two client records into a single client record.

## Agency Emulation Mode

A new ARIES feature called "Agency Emulation Mode" allows Administrative Agencies (AA's) and Partners to log in as themselves, but work interactively within ARIES Client as if they were logged in as a user at one of the agencies they manage. Working in Agency Emulation Mode, an AA or Partner can add or edit client data and run reports specifically for that agency. It is no longer necessary for AA's to have many different logins and certificates in order to review the data of the provider agencies they manage. The Agency Emulation functionality does not require additional user permissions

For access to this functionality, the user need only be a staff member of an Administrative

Agency or the Partner Agency. To work in Agency Emulation Mode, log in to ARIES Client as usual, select "Agency Emulation" from the Shortcuts menu, and select the name of the agency you wish to emulate. While in this mode, a warning message will appear at the top of all screens. To cancel Agency Emulation Mode, return to the same screen and select your AA agency name or the Partner agency name. Agency Emulation Mode automatically terminates when you log out of ARIES Client.

Agency Emulation Mode does not apply to ARIES ReportExport. However, you can create and save an Ad Hoc Report in ReportExport using your AA or Partner login, then log into ARIES Client and use Agency Emulation Mode to run the report for one particular agency.

## Client Mailing Address Available in ARIES Report Export

ARIES Ad Hoc Reports created in ARIES Report Export have always provided access to a client's residence address. Now, the client's mailing address can also be included in Ad Hoc Reports. This new capability will allow agencies to export mailing address data for use with mail merge capabilities in other software (ARIES itself cannot generate mailing labels). In the table below notice there are two address tables, one for residence and one for mailing address.

**Additional Table**

**New Report**

**Please check the tables with data you would like to include in the report.**

<input checked="" type="checkbox"/> Address Table	<input type="checkbox"/> Contact Info Table	<input type="checkbox"/> Hopwa Worksheet Table	<input type="checkbox"/> Referral Table
<input checked="" type="checkbox"/> Address Mailing Table	<input type="checkbox"/> Custom Data Entry Group Table	<input type="checkbox"/> Housing Assistance Table	<input type="checkbox"/> Client Related Affected Table
<input type="checkbox"/> Agency Table	<input type="checkbox"/> Demographic Table	<input type="checkbox"/> Immunization Table	<input type="checkbox"/> Risk Factor Table
<input type="checkbox"/> Agency Specifics Table	<input type="checkbox"/> EIP Functional Table	<input type="checkbox"/> Income History Table	<input type="checkbox"/> Staff Table
<input type="checkbox"/> Acuity Table	<input type="checkbox"/> EIP Behavioral Table	<input type="checkbox"/> Insurance Table	<input type="checkbox"/> SAMISS Assessment Table

A sample mailing list Ad Hoc Report is displayed below. Please note that some clients prefer not to receive mailings. That preference is stored in the Contact Info table. If you include that table in your Ad Hoc Report, you can limit the report to only those clients who are willing to receive mail.

**Report Result**

**Mailing List**

Client First Last Name	Address Mailing Street 1	Address Mailing Street 2	Address City	Address State	Address Mailing ZIP	Contact By Mail	Mail Confidential
Zzz T Zzz	968 35th St		Los Angeles	CA	95817	false	true
Teresa D Zen	582 West Mall Blvd	#103	Austin	TX	78712	true	true
Shawna U Zen	10057 E Date Pl	#156	Oakland	CA	92404	true	true
Deb E Young	640 S. 2nd Street		Dubois	WY	82513	true	true
Deb A Young	1234 AnyStreet		Van Nuys	CA	91405	false	true
Saul P Yimamfri	PO Box 699		Sacramento	CA		false	true
Mario L Yang	418 Eagle Rd	#231	Oakland	CA	94501	false	false

The Mailing Labels canned report, available on the Service Reports page in ARIES, has also been revised to display the client's mailing address. This canned report also contains the client's mailing preference flags.

## Client Rosters by Staff

The Active Client Roster by Staff has been revised and users can now filter by Staff Name and by Staff Assignment (Staff 1, 2, 3 and 4 from the Program tab). The Active Client Roster by Staff report is located on the Client Reports page in ARIES.

**Report Filter Values**

**Active Client Roster by Staff**

**Staff Last Name**  &

**Staff Assignment Levels**

**Display**  **results**  Display print format

The example below illustrates filtering the report for just one staff person "Cooper" who is assigned to Staff field #1. The data shown is from the ARIES Demo site and is fictitious.

<b>Active Client Roster by Staff</b>		
Staff	Client Name	Client Contact Info
<a href="#">Joe Cooper</a>	<a href="#">Wendy Berry</a>	Do not contact
<a href="#">Joe Cooper</a>	<a href="#">Franklin Daniels</a>	409-505-1455 No messages.
<a href="#">Joe Cooper</a>	<a href="#">Xanadu Davies</a>	936-793-5926 Messages OK.
<a href="#">Joe Cooper</a>	<a href="#">Ynez Davies</a>	415-838-2360 Be confidential. Messages OK.
<a href="#">Joe Cooper</a>	<a href="#">Moana Davis</a>	Do not contact
<a href="#">Joe Cooper</a>	<a href="#">John Doe</a>	Do not contact
<a href="#">Joe Cooper</a>	<a href="#">Kes Edmond</a>	415-564-4040 Messages OK.
<a href="#">Joe Cooper</a>	<a href="#">Catherine Ellis</a>	Do not contact
<a href="#">Joe Cooper</a>	<a href="#">Ynez Felton</a>	512-457-9911 No messages.
<a href="#">Joe Cooper</a>	<a href="#">June Fortner</a>	415-207-2645 Messages OK.

Note that when using this report, clients who do not have a staff assignment will not be included in the report. To identify clients without a staff assignment, users with access to ARIES ReportExport can create an Ad Hoc Report. Users without access to ReportExport can request a report from the ARIES Help Desk.



### Creating a Staff Assigned Report in ARIES ReportExport

Using the Staff Display Order in ARIESReportExport is similar to using the Staff Assignment filter on the Active Client Roster by Staff report in ARIESClient, but there are important differences. The ReportExport example below uses the same filter as the Client Roster example above ( Staff #1 for active clients), but the output of this report will display all active clients, including those with no Staff #1 assignment. The unassigned clients are those with no data in the Staff Name column.

**Filter Values**

**Active Client Roster By Staff Using Display Order**

**Agency Specifics Client Status**  or  &

**Staff Display Order** =  &

**Report Result**

**Active Client Roster By Staff Using Display Order**

ARIES ID	Client Last First Name	Staff Name
100000017	Edmond, Deanna U	
100000025	Porter, Mack M	
100000041	Biggs, Jennifer V	
100012913	Thompson, Ruth R	Rhetta,Alexander
100012327	Smith, Aaron F	Rhetta,Alexander
100008887	Young, Deb E	Rhetta,Alexander
100007145	Average, Joe Q	Amy,Applebaum

## Low Income Health Program

"LIHP," which stands for the Low Income Health Program, has been added to the Type drop-down on the Insurance screen. For Ryan White clients who are enrolled in LIHP, it is important that providers update their insurance records in ARIES.

- To add a LIHP insurance record, the provider must create new insurance record, select "Public 1" as the Source, select "LIHP" as the Type, and enter the Start Date.
- If the client has an existing "No Insurance" record, the provider must edit that record by adding an End Date (i.e., the day before LIHP coverage begins).

## Agency Contact Info in ARIES

Agency Administrators are asked to review the information on the Agency and/or Agency Site screens in ARIES. Each agency's address, primary contact person, telephone or fax numbers, or e-mail addresses should be updated whenever there are changes. The State Office of AIDS uses this information to communicate with agencies about ARIES.

**ARIES Help Desk**  
866-411-ARIES (2743)