

***Improving Data Entry
and Reporting
for
the HOPWA Program***

May 2012

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Welcome!

- The State Office of AIDS (OA) is continuing to work with providers to improve the quality of data that is collected and entered into ARIES.
- Today's webinar will focus on the Housing Opportunities for persons with AIDS (HOPWA) program.

Objectives

- Review the basic steps for completing the HOPWA Program information in ARIES;
- Demonstrate how to run the APR/CAPER Report;
- Demonstrate the Fix-It: HOPWA Report;
- Explain the Fix-It Report error messages;
- Identify the necessary steps to correct HOPWA data;
- Questions and Answers.

Importance of HOPWA Data

- Meets HUD requirements:
 - Income determination: Each provider must determine the composition of the household and verify the income of all the household members.
 - HIV status determination: Each provider must document and record the HIV/AIDS status of the applicant.
- Agencies who receive funding through the State Office of AIDS (OA) are required to enter their HOPWA data into ARIES.

Importance of HOPWA Data (cont.)

- For the next report period, annual HOPWA reports (APR/CAPER) can be generated out of ARIES if the data are entered correctly.
- Agencies can run their own reports to analyze client demographics and services throughout the year.
- Data will be used to monitor progress for OA site visits.

A close-up photograph of a silver chess king piece, showing its spherical top and tiered base. The piece is positioned on the left side of the frame. The background is a soft, out-of-focus light green with bokeh effects. A semi-transparent horizontal band is overlaid across the middle of the image, containing the main title text.

Basic Steps: Eligibility Process

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Basic Steps: Eligibility Process

The Eligibility Process:

Determine if the client is eligible

1. Create the Housing & Income Assessment;
2. Add Household Members; and
3. Complete the Rent Worksheet (if applicable).

Basic Steps: Eligibility

HOPWA Activities~Eligibility

Housing Information Services:

- 1) Anyone with HIV/AIDS and their family members; and
- 2) No income restrictions.

Housing Assistance and Supportive Services:

- 1) One family member must have HIV/AIDS; and
- 2) Must have qualifying income.

Completing the HOPWA Assessment

- We're going to briefly review the basic steps for completing a HOPWA assessment for an existing client.

Begin by finding the client record.

Back Home Find New Reports Shortcuts Help Logout
DEMO DEMO DEMO DEMO DEMO DEMO

Client Search

To find a client, or to check if a client is new to your agency, enter in some or all of the following information. You may use the wildcard *.

Last Name

First Name

Middle Initial


Client ID

SSN

Date of Birth

Display results

Search Related/Affected Individuals



Next, click on the Program Major Tab.

Back Home Find New Reports Shortcuts Help Logout

DEMO DEMO DEMO DEMO DEMO DEMO DEMO

DEMO-GRAPHICS ELIGIBILITY **PROGRAMS** MEDICAL MEDICATIONS RISK & ASSESSMENTS CARE PLAN CASE NOTES SERVICES CUSTOM DATA

PROGRAM SUMMARY EIP/BRIDGE/POS CHANGES **Program Summary** TMP CMP/MCWP CARE/HIPP MEDICARE PART D HOPWA PROGRAM SUMMARY **ARIES**

Janet C Hopwa

Program Summary

Program	Status	Date	Agency	Client ID	Staff	Reason
HOPWA	Enroll	11/1/2010	CA Sample	10036	CaseManager CaseManager1	

Staff Assignment **Edit**

[CaseManager CaseManager1](#)

Then click on the HOPWA Subtab.

Back Home Find New Reports Shortcuts Help Logout
DEMO DEMO DEMO DEMO DEMO DEMO DEMO

DEMO-GRAPHICS ELIGIBILITY PROGRAMS MEDICAL MEDICATIONS RISK & ASSESSMENTS CARE PLAN CASE NOTE SERVICES CUSTOM DATA

PROGRAM SUMMARY EIP/BRIDGE/POS CHANGES TMP CMP/MCWP CARE/HIPP MEDICARE PART D HOPWA HOPWA ARIES

Janet C Hopwa

HOPWA

Program	Status	Date	Agency	Client ID	Staff	Reason
HOPWA	Enroll	11/1/2010	CA Sample	10036	CaseManager CaseManager1	Change Status

Housing and Income Assessment

Date	Staff	Applying for	Outcome	
6/21/2011	Agency Management		Eligible	Edit
2/16/2011	Agency Management		Eligible	Edit
1/13/2011	Agency Management		Eligible	Edit
11/1/2010	Agency Management	STRMU	Eligible	Edit New

Household Status

Date	Staff	Disenrolled	
6/21/2011	Agency Management	No	Edit
6/20/2011	Agency Management	No	Edit New

There are three sections on the HOPWA Read Only screen.

Back Home Find New Reports Shortcuts Help Logout

DEMO DEMO DEMO DEMO DEMO DEMO DEMO

DEMO-GRAPHICS ELIGIBILITY PROGRAMS MEDICAL MEDICATIONS RISK & ASSESSMENTS CARE PLAN CASE NOTES SERVICES CUSTOM DATA

PROGRAM SUMMARY EIP/BRIDGE/POS CHANGES TMP CMP/MCWP CARE/HIPP MEDICARE PART D HOPWA HOPWA ARIES

Janet C Hopwa

HOPWA

Program	Status	Date	Agency	Client ID	Staff	Reason
HOPWA	Enroll	11/1/2010	CA Sample	10036	CaseManager CaseManager1	Change Status

Housing and Income Assessment

Date	Staff	Applying for	Outcome
6/21/2011	Agency Management		Eligible Edit
2/16/2011	Agency Management		Eligible Edit
1/13/2011	Agency Management		Eligible Edit
11/1/2010	Agency Management	STRMU	Eligible Edit New

Household Status

Date	Staff	Disenrolled
6/21/2011	Agency Management	No Edit
6/20/2011	Agency Management	No Edit New

1

2

3

Begin by creating a new Housing and Income Assessment.

Back Home Find New Reports Shortcuts Help Logout

DEMO DEMO DEMO DEMO DEMO DEMO DEMO

DEMO-GRAPHICS ELIGIBILITY PROGRAMS MEDICAL MEDICATIONS RISK & ASSESSMENTS CARE PLAN CASE NOTES SERVICES CUSTOM DATA

PROGRAM SUMMARY EIP/BRIDGE/POS CHANGES TMP CMP/MCWP CARE/HIPP MEDICARE PART D HOPWA HOPWA ARIES

Janet C Hopwa

HOPWA

Program	Status	Date	Agency	Client ID	Staff	Reason
HOPWA	Enroll	11/1/2010	CA Sample	10036	CaseManager CaseManager1	Change Status

Housing and Income Assessment

Date	Staff	Applying for	Outcome
6/21/2011	Agency Management		Eligible Edit
2/16/2011	Agency Management		Eligible Edit
1/13/2011	Agency Management		Eligible Edit
11/1/2010	Agency Management	STRMU	Eligible Edit
			New

Household Status

Date	Staff	Disenrolled
6/21/2011	Agency Management	No Edit
6/20/2011	Agency Management	No Edit
		New

Basic Steps: Housing and Income Assessment

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HOPWA Housing and Income Assessment Part 1 for Janet C Hopwa

Assessment/Application Date: 1/5/2011 Staff: Management Agency

Is the applicant chronically homeless as defined by HUD?

Is the applicant a survivor of domestic violence?

Living situation at time of enrollment:

If Other, Specify:

Application Type: Individual Family Applying for:

Do you have a roommate or live in a shared living situation?

Are you a home owner? Are you a renter?

If you rent or own, do you have a signed lease, title or tax receipt?

If yes, amount of mortgage or rent per month? How long at this residence: Years Months

Name on mortgage:

Terms of lease/rental agreement:

Name on lease/rental agreement:

Landlord / management co. / mortgage holder (payee):

Address:

City: State: ZIP:

Phone:

[Save & Next >](#)

HOPWA Housing and Income Assessment Part 2 for Janet C Hopwa

Do you currently receive housing rental assistance?

If yes, what type? Date first received:

If no, willing to apply? If not willing to apply, why?

Current housing description:

What utilities do you pay for in addition to rent?

Gas Hot Water
 Electric None
 Heating Fuel Other:

Who pays the utilities in the household?

Applicant Roommate
 Spouse/Partner None
 Other:

Employed: Not employed

Public Assistance: Yes

[Save & Next >](#) [Cancel](#)

HOPWA Housing and Income Assessment Part 3 for Janet C Hopwa

Household Members

Name	ARIES Client	Relationship	Monthly Income	
Janet C Hopwa	Yes	Applicant	\$965.00	Edit
John C Hopwa	Yes	Son	\$0.00	Edit
Mary A Hopwa	Yes	Daughter	\$0.00	Edit
				New

Total Monthly Household Income: \$965.00
 Total Annual Household Income: \$11,580.00
 Household Size: 3
 Qualifying AMI Percentage for this Jurisdiction:

Income Threshold for this AMI Percentage and Household Size: [HUD Area Median Income Website](#)

Outcome: **Ineligible**

Adjusted Annual Household Income: \$0.00 [Rent Worksheet](#)

Monthly Resident Rent Payment: \$0.00
 Monthly Resident Rent and Utility Payment: \$0.00

Household on Waiting List: TBRA STRMU Facility Based

Prior to enrolling a client in HOPWA, a Housing Income and Assessment record must be completed to determine if the client is eligible for HOPWA. The assessment record consists of three screens. All three screens should be completed before saving the new record.



Basic Steps: Client Enrollment

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Basic Steps: Enroll the Client if the Outcome is Eligible

< Back Home Find New Reports Shortcuts Help Logout

DEMO DEMO DEMO DEMO DEMO DEMO DEMO

DEMO-GRAPHICS ELIGIBILITY **PROGRAMS** MEDICAL MEDICATIONS RISK & ASSESSMENTS CARE PLAN CASE NOTES SERVICES CUSTOM DATA

PROGRAM SUMMARY EIP/BRIDGE/POS CHANGES TMP CMP/MCWP CARE/HIPP MEDICARE PART D **HOPWA**

Janet C Hopwa

HOPWA **Enroll**

Program	Status	Date	Agency	Client ID	Staff	Reason
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Housing and Income Assessment

Date	Staff	Applying for	Outcome
7/19/2010	CaseManager_CaseManager1		Eligible

Edit

New

Household Status

Date	Staff	Disenrolled
------	-------	-------------

Once you have completed a Housing Income and Assessment record with an outcome of 'Eligible', you can enroll the client in HOPWA.

A close-up photograph of a silver pushpin is positioned on the left side of the frame. The pushpin's spherical head is in sharp focus, showing its metallic texture and a small shadow. The stem of the pushpin is also visible, tapering downwards. The background is a soft, out-of-focus green with bokeh light effects, suggesting an indoor setting with plants or a window. A semi-transparent white horizontal band is overlaid across the middle of the image, containing the main title text.

Basic Steps: Household Status

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Basic Steps: Household Status

- The HOPWA reports in ARIES require a client's household status to be reported at one of two time periods; either at disenrollment (i.e., if the client disenrolls before the end of the year) or at the end of the program year (i.e., if the client is continuing in the HOPWA program at the end of the year).
- It is suggested that users create the Household Status record when enrolling a client in HOPWA. This provides a visual reminder that agencies need to update the record if the client disenrolls from the program (or at the end of the program year).

Basic Steps: Household Status

DEMO DEMO DEMO DEMO DEMO DEMO DEMO

DEMO-GRAPHICS ELIGIBILITY **PROGRAMS** MEDICAL MEDICATIONS RISK & ASSESSMENTS CARE PLAN CASE NOTES SERVICES CUSTOM DATA

PROGRAM SUMMARY EIP/BRIDGE/POS CHANGES TMP CMP/MCWP CARE/HIPP MEDICARE PART D HOPWA

Janet C Hopwa

HOPWA

Program	Status	Date	Agency	Client ID	Staff	Reason
HOPWA	Enroll	11/1/2010	CA Sample	10036	CaseManager CaseManager1	

Housing and Income Assessment

Date	Staff	Applying for	Outcome	
1/13/2011	Agency Management		Eligible	Edit
1/5/2011	Agency Management		Ineligible	Edit
11/1/2010	Agency Management	STRMU	Eligible	Edit New

Household Status

Date	Staff	Disenrolled	
11/1/2010	Agency Management	No	Edit New

Click here to add a new record.

Basic Steps: Household Status

Navigation: Back Home Find New Reports Shortcuts Help Logout

DEMO DEMO DEMO DEMO DEMO DEMO

DEMO-GRAPHICS ELIGIBILITY PROGRAMS MEDICAL MEDICATIONS RISK & ASSESSMENTS CARE PLAN CASE NOTES SERVICES CUSTOM DATA

PROGRAM SUMMARY EIP/BRIDGE/POS CHANGES TMP CMP/MCWP CARE/HIPP MEDICARE PART D HOPWA HOPWA ARIES

Janet C Hopwa

HOPWA

Program	Status	Date	Agency	Client ID	Staff	Reason
HOPWA	Enroll	11/1/2010	CA Sample	10036	CaseManager CaseManager1	Change Status

Housing and Income Assessment

Date	Staff	Applying for	Outcome	
1/13/2011	Agency Management		Eligible	Edit
1/5/2011	Agency Management		Ineligible	Edit
11/1/2010	Agency Management	STRMU	Eligible	Edit New

Household Status

Date	Staff	Disenrolled
------	-------	-------------

To change the status of a client that is currently enrolled in HOPWA, click the 'Change Status' button in the HOPWA section of the HOPWA Read-Only screen.

A close-up photograph of a silver pushpin is positioned on the left side of the frame. The pushpin's spherical head is in sharp focus, showing its metallic texture and a slight shadow. The background is a soft, out-of-focus green, suggesting an indoor setting with plants. A semi-transparent horizontal band is overlaid across the middle of the image, containing the main title text.

Basic Steps: Enter Services

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Basic Steps: Enter Services

DEMO DEMO DEMO DEMO DEMO DEMO DEMO

DEMO-GRAPHICS ELIGIBILITY PROGRAMS MEDICAL MEDICATIONS RISK & ASSESSMENTS CARE PLAN CASE NOTES **SERVICES** DATA

SERVICES **ARIES**

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Services **New**

Date and Staff

Program Primary **Search**

Date	Staff	Category	UOS	Total	Edit
11/1/2010	Agency Management	HOPWA > Housing Subsidy Assistance > Short Term Rent > Short Term Rent	30.00 Day @ \$33.00	\$990.00	Edit
11/1/2010	Agency Management	HOPWA > Supportive Services > Case Management, Client Advocacy, Access to Benefits/Services > Case Management, Client Advocacy, Access to Benefits/Services	2.00 15 Minutes @ \$45.00	\$90.00	Edit

In order to track the HOPWA services received by the agency's HOPWA clients, services must be entered for the client on the 'Services' major tab in ARIES.


Basic Steps: Enter Services

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Service

Client Name * Hopwa, Janet
Client Hopwa, Janet

Staff * Management, Agency **Site** Main

Date of Service * 1/13/2011  **Days to Next Service** date

Contract Name * HOPWA 10/11 CA/OA **Created Date**

Program * HOPWA

Primary Service * Housing Placement Assistance

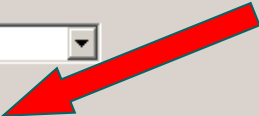
Secondary Service * Housing Information Services

Agency Subservice * Housing Information Services

Units of Service * 1 @ \$ 0.00 per 15 Minutes = \$ 0.00 **Total**

Client Payment CARE/HIPP Co-Payment * **Actual Minutes Spent**

Service Notes



Make sure the 'HOPWA' contract is displayed in the 'Contract Name' drop-down when entering HOPWA services.



Basic Steps: Create Reports

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Basic Steps: Reports

To access HOPWA reports, first click on 'Reports' and then on 'Compliance'.

Janet C Hopwa

Services [New](#)

Date: and Staff:

Program: Primary: [Search](#)

Date	Staff	Category	UOS	Total	Edit
11/1/2010	Agency Management	HOPWA > Housing Subsidy Assistance > Short Term Rent > Short Term Rent	30.00 Day @ \$33.00	\$990.00	Edit
11/1/2010	Agency Management	HOPWA > Supportive Services > Case Management, Client Advocacy, Access to Benefits/Services > Case Management, Client Advocacy, Access to Benefits/Services	2.00 15 Minutes @ \$45.00	\$90.00	Edit

Basic Steps: Reports

DEMO

DEMO

DEMO

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HOPWA Reports

[HOPWA Annual Progress Report](#)

Displays the HOPWA Annual Progress Report (APR), including optional IDIS extended calculations

[HOPWA Consolidated Annual Progress and Evaluation Report](#)

Displays the HOPWA Consolidated Annual Performance and Evaluation Report (CAPER)

[Missing HOPWA Data Report](#)

Shows clients with missing HOPWA data, by the staff who was responsible for completing the client's most recent assessment

MCWP Reports

[Last Date of MCWP Services Compliance Report](#)

Displays Last Date of MCWP Services Compliance Report

There are three HOPWA reports: the *HOPWA Annual Progress Report (APR)*, the *HOPWA Consolidated Annual Progress and Evaluation Report (CAPER)*, and the *Missing HOPWA Data Report*.

Basic Steps: Reports~APR

➤ The first report is the “HOPWA Annual Progress Report.” This report displays the HOPWA Annual Progress Report (APR), which includes the optional Integrated Disbursement and Information System (IDIS) extended calculations. Typically, areas who receive HOPWA Competitive Grant awards from HUD may use the APR without extended IDIS calculations. Agencies that contract with the State OA HOPWA Program will use the APR with extended IDIS calculations.

Basic Steps: Reports~CAPER

➤ The second report is called the “HOPWA Consolidated Annual Progress and Evaluation Report.” By clicking on this report link, you can run the “HOPWA Consolidated Annual Progress and Evaluation Report (CAPER).” Only those agencies that are HOPWA formula Grantees (receive a grant from HUD through the national formula allocation) will use the CAPER.

Basic Steps: Reports~ Missing HOPWA Data Report

- The third report is the, “Missing HOPWA Data Report.” This report shows which clients have missing HOPWA data. It also displays the staff person who was responsible for completing the clients’ most recent assessment.

Basic Steps: Reports

➤ It is important to note that if agencies want to generate these three reports from ARIES, they need to enroll clients using the 'HOPWA' subtab under the 'Program' major tab in ARIES. They also need to track HOPWA client services on the 'Services' Major tab in ARIES. In other words, you need to complete and use both of these tabs ('HOPWA' and 'Services') in ARIES in order to successfully generate your APR, CAPER and Missing HOPWA Data Reports.

A close-up photograph of a cracked walnut shell, showing the dark brown, textured interior. The shell is split open, revealing the inner surface. The text is overlaid on the shell in white, with the title underlined.

Summary of Basic HOPWA Steps

1. Complete the Housing and Income Assessment (determine if the client is eligible).
2. If determined to be eligible, enroll the client.
3. Enter/update household status.
4. Enter services on the service line-item screen.
5. Generate Reports.

HOPWA Reminder

- For those funded through the HIV Care Program, HOPWA requirements are different from the Ryan White HIV/AIDS Program Services Report (RSR).
- The HOPWA program requires that you determine eligibility, enroll a client, and enter services.
- HOPWA clients should be reassessed at least annually.

A close-up photograph of a silver pushpin is positioned on the left side of the frame. The pushpin's spherical head is at the top, and its cylindrical shaft tapers down to a flat base. The background is a soft, out-of-focus green, suggesting an indoor setting with plants. A semi-transparent horizontal band is overlaid across the middle of the image, containing the main title text.

HOPWA Fix-It Report

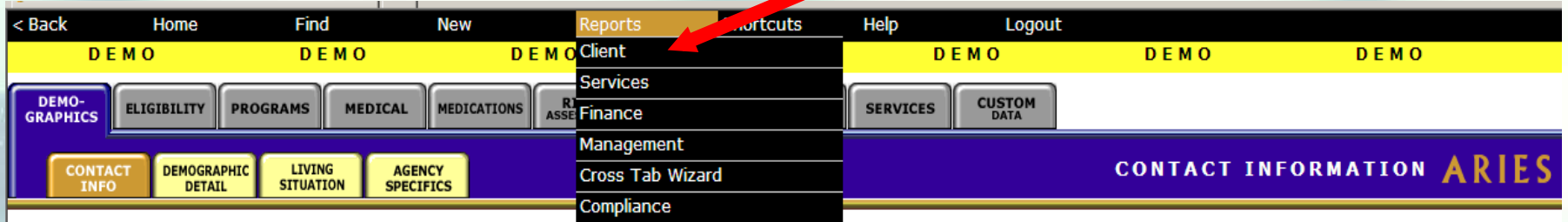
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Running the *Fix-It Report*

- Some of your records need attention. We have designed a report that will help you find records in your agency that need HOPWA information corrected and/or updated.

To locate the *Fix-It: HOPWA* report, go to *Reports* and select the *Client* menu.



The screenshot shows a web application interface with a navigation bar. The 'Reports' menu is open, and a red arrow points to the 'Client' option. Other options in the 'Reports' menu include 'Services', 'Finance', 'Management', 'Cross Tab Wizard', and 'Compliance'. The navigation bar also includes 'Back', 'Home', 'Find', 'New', 'Shortcuts', 'Help', and 'Logout'. Below the navigation bar, there are several buttons for 'CONTACT INFO', 'DEMOGRAPHIC DETAIL', 'LIVING SITUATION', and 'AGENCY SPECIFICS'. On the right side, there are buttons for 'SERVICES' and 'CUSTOM DATA'. The page title is 'CONTACT INFORMATION ARIES'.

Janet C Hopwa

Contact Information [Edit](#)

Phones:

555-555-1112 (Mobile) -- be confidential; no messages

Residence:

as of 1/1/2009
123 Potato Chip Drive
Bakersfield, CA

County: Kern

Geog Area/HSDA:

Previous Address:

County:

Geog Area/HSDA:

Contact by mail: No

Be confidential

Mailing Address:

County:

Geog Area/HSDA:

Emergency:

Jane Smith
123 Third Street
Bakersfield, CA

Phone 1: 555-555-1111

Phone 2:

be confidential; no messages



The *Fix-It: HOPWA* report is located toward the bottom of the *Client Report* page.

DEMO DEMO DEMO DEMO DEMO DEMO DEMO

[Client Name and Primary Staff](#)

Lists clients in alphabetical order with the client's primary staff person. For Display Order filter, select "=" from the dropdown, then enter "1" in the first criteria field.

[Fix-It: CD4](#)

Lists clients served within a date range and any problems with CD4 tests

[Fix-It: Viral Load](#)

Lists clients served within a date range and any problems with Viral Load tests

[Fix-It: HOPWA](#)

Lists clients served within a date range and any problems with HOPWA data



Once you click on the report link, the *Report Filter Value* page will be displayed.

< Back Home Find New Reports Shortcuts Help Logout

DEMO DEMO DEMO DEMO DEMO DEMO

Report Filter Values

Fix-It: HOPWA

Service Line Item Service Date Between 4/1/2011 & 3/31/2012

Service Line Item Program Equals HOPWA &

Display 9999 results Display print format

Report > **Export**

- 1 Type in the date range.
- 2 Make sure to indicate that program equals HOPWA.
- 3 Click Report.

Running the *Fix-It Report*

- What will appear is a report showing all records for clients served by your agency during the specified date range.
- Error messages will indicate which records need attention and why.
- The report will look something like this...

Sample *Fix-It* HOPWA report

< Back	Home	Find	New	Reports	Shortcuts	Help	Logout
DEMO	DEMO	DEMO	DEMO	DEMO	DEMO	DEMO	DEMO
Fix-It: HOPWA							
ARIES ID	Client	Info Only	Errors				
100008457	Angelo, San	No	No Eligible Assessment,				
100040971	Johnson, Trina H	No	No Eligible Assessment,				
100044296	Lane, Sarah E	Yes	No Eligible Assessment,				
100045277	Osmond, Marie	Yes	Expired Eligible Assessment,				
100044825	Ramos, Lindsay M	No	Expired Eligible Assessment,				
100044668	Stackhouse, Jason J	Yes	Expired Eligible Assessment, SLIs after Ineligible Assessment,				
100037316	Abcdr, Jklm	Yes	Expired Eligible Assessment, SLIs after Ineligible Assessment,				
100007889	Ama, Mic T	No	SLIs after Ineligible Assessment,				
100001981	Cane, Elizabeth Q	No					
100046010	Caper, Mia S	Yes					
100043371	Hopwa, Janet C	No					
11 records, generated 4/10/2012 12:59:09 PM							
<i>Criteria: Service Line Item Service Date BETWEEN '4/1/2011' AND '3/31/2012' AND Service Line Item Program = 'HOPWA'</i>							
Export							

Running the *Fix-It Report*

No Eligible Assessment	A client has had a HOPWA service at your agency, but no "Eligible" assessment has ever been entered at your agency.
Expired Eligible Assessment	A client has had a HOPWA service at your agency, but the date of the most recent "Eligible" assessment at your agency is more than 365 days prior to <u>the date of the most recent HOPWA service</u> .
SLIs after Ineligible Assessment	A client has had a HOPWA service at your agency, and the most recent assessment at your agency had an "Ineligible" outcome, but there are HOPWA services after the date of that assessment.

Running the Fix-It Report

- Please look up the clients with error messages using their ARIES ID.
- Resolve the error by looking in client's charts and/or assessments for the missing or inaccurate information.
- Then update ARIES accordingly.

Questions & Answers

■ Questions?



Resources

■ Additional Resources:

- This presentation is posted in the *Training* section of www.projectaries.org.
- The instructions and link for accessing the WebEx HOPWA *Training* are also on the ARIES web site (under *Training*).
- The **ARIES User Manual** can be accessed by pressing the F1 button while in ARIES.
- The ARIES Help Desk can be reached at **866-411-ARIES (2743)**.

Thank you!

- Thank for participating! We hope that this has been a productive use of your time.
- Together we can improve ARIES data quality!