

# Completing the RSR Provider Report

Ryan White HIV/AIDS Program (RWHAP) Services Report (RSR)

HIV/AIDS Bureau

January 31, 2024



Welcome to today's Webinar. Thank you so much for joining us today!

My name is Ellie Coombs. I'm a member of the DISQ Team, one of several groups engaged by HAB to provide training and technical assistance to recipients and providers for the RSR.

## Today's Webinar is Presented by:



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Today's Webinar is presented by Denise Absher from RWHAP Data Support. Denise will be walking you through the steps of completing the RSR Provider Report. This is intended for both Recipient-Providers and Providers who are doing the RSR for the first time as well as a refresher for those who have done it before.

Throughout the presentation, we will reference some resources that we think are important. To help you keep track of these and make sure you have access to them immediately, my colleague Isia is going to chat out the link to a document right now that includes the locations of all the resources mentioned in today's webinar.

At any time during the presentation, you'll be able to send us questions using the "Q&A" function on the settings bar on the bottom of the screen. All questions will be addressed at the end of the webinar in our live Q&A portion. During that time, you will also be able to ask questions live if you'd like to unmute yourself and chat with us directly.

Before we start, I'm going to answer one of the most commonly asked questions about the slides. The recording of today's webinar will be available on the TargetHIV website within one week of the webinar; the slides and written question and answer are usually available within two weeks. We will also send an email to everyone registered for this webinar when the recording, slides, and Q&A document are posted.

## Disclaimer

Today's webinar is supported by the following organizations and the contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement by, the Health Resources and Services Administration (HRSA), the U.S. Department of Health and Human Services (HHS), or the U.S. government.

The DISQ Team is composed of CAI, Abt Associates, and Mission Analytics and is supported by HRSA of HHS as part of a cooperative agreement totaling over \$4 Million.

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Now I'd like to turn the webinar over to Denise.

## Overview

Background

Accessing the Provider Report

Completing the Provider Report

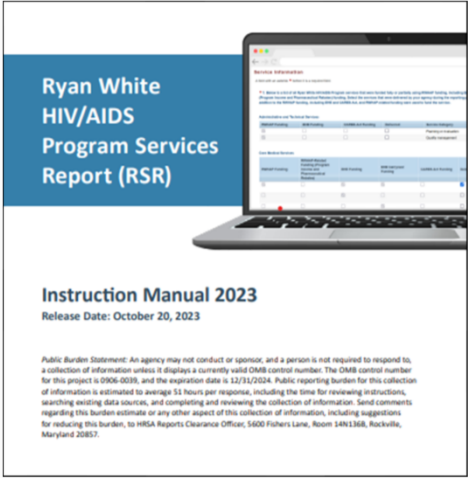
Submission Timeline

Upcoming Webinars and TA Resources

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Thank you, Ellie. As Ellie stated, today we're going to be going over the 2023 RSR Provider Report and the steps to complete it.

We'll start off by reviewing a little background information on the Provider Report and the RSR in general. After that, we'll walk through how to access the Provider Report followed by step-by-step instructions for completing it. This section will cover a couple of recent system enhancements. And then we'll close out our presentation with a look at the submission timeline as well as the upcoming webinars and technical assistance resources available to assist you.



# 2023 RSR Manual

Available on the [TARGETHIV WEBSITE](#)

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Before we start, I wanted to let you know that the 2023 RSR Instruction Manual is available on the TargetHIV website. The manual is an invaluable resource to utilize while completing your RSR and contains the instructions that we’re going to go over here today. There are a few very recent changes that were made to the Provider Report. I’m going to go over those changes today. We are updating the manual to reflect these changes. We’ll post the updated manual to the TargetHIV website as soon as possible.

If you have not done so already, I highly recommend that you sign up for the DISQ email updates to stay on top of all things RSR. The link will be provided at the end of the presentation, so stay tuned!



Let's jump into a quick poll question to see how experienced you are at completing the RSR Provider Report. Isia, can you please launch that poll for us?

How many times have you previously completed the RSR Provider Report?

- a. This will be my first time.
- b. I have completed it one or two years before.
- c. I have completed it three or more years previously.
- d. Somebody else at my agency completes the RSR Provider Report.

## New Provider Report Changes

Section	Change
General Information	Providers can now update this section directly in their Provider Report and any changes will be reflected in their organization profile in the HRSA EHBs
Clients by ZIP Code	Functionality of section has been updated with additional feedback on uploaded files that are improperly formatted

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Before we start, I want to briefly mention the recent updates to the Provider Report that were not covered in a previous presentation on RSR Updates and Best Practices. Don't worry if this slide doesn't make sense now. We'll be going over both of these changes in depth as we walk through the Provider Report later in this presentation.

First, the General Information section of the Provider Report was restructured for how it populates. As of the 2023 RSR, changes to the Provider Report will now populate to the organization profile. I'll go into more details when we discuss this section.

And then second, the Clients by ZIP Code section has been redesigned. With these updates, there are additional options for updating your ZIP code data within the report. I'll also go into more details when we discuss this section later in the presentation.



## What is the RSR?

- Annual data report completed by RWHAP and Ending the HIV Epidemic (EHE) recipients and providers\*
- Providers report client-level data on the clients served throughout the year
- Consists of two components:

**RSR Recipient Report**  
Completed by recipients and recipient-providers

**RSR Provider Report**  
Completed by all providers

\*The 2023 RSR is for the reporting period of January 1, 2023 – December 31, 2023.

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Let's start off by taking a look at some background information. What is the RSR?

The RSR is an annual data report (for the previous calendar year) completed by RWHAP and Ending the HIV Epidemic (EHE) recipients and providers where providers submit client-level data on the clients they served throughout that calendar year.

The RSR as a whole has two parts to it: the Recipient Report and the Provider Report. The Recipient Report is completed by recipients and recipient-providers. Recipients are organizations that receive a RWHAP or EHE initiative award directly from HRSA HAB. Recipient-providers are organizations that also receive RWHAP funds directly from HRSA HAB but they also provide direct client services.

The other part, the Provider Report, is what we're going to be talking about today and is completed by all providers, agencies that utilize RWHAP, RWHAP-related, and/or EHE initiative funding to provide services.

Now, recipients are currently working on their RSR Recipient Report. The RSR Provider Report system will open on February 5, 2024. At that point, you will be able to access the system to work on your report.

## Who Completes the Provider Report?

- All agencies that receive one or more of the following funding sources to provide services **must** complete an RSR Provider Report:
  - RWHAP funding including RWHAP Parts A, B, B Supplemental, C, and D
  - RWHAP-related funding including program income and pharmaceutical rebates
  - EHE initiative funding
- Providers are expected to complete their own report unless they have received an exemption from **all** funding recipients ([2023 RSR Instruction Manual](#)).



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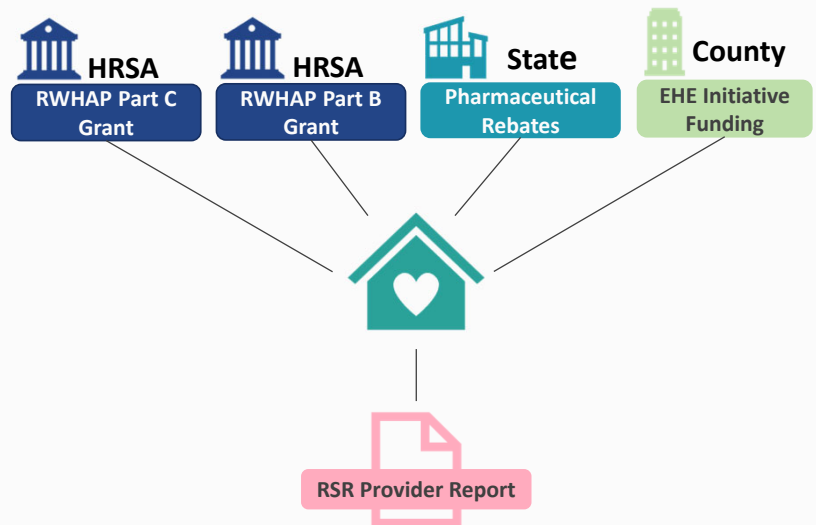
### Who Completes the Provider Report?

All agencies that receive any one of these funding sources needs to complete the Provider Report. That includes RWHAP funding, RWHAP-related funding, and EHE initiative funding. So, if you receive any one of those funding types to provide services, then you must complete an RSR Provider Report.

Providers are expected to complete their own reports since they're closest to their own data, the exception to that being if the provider qualifies for and has received an exemption from ALL funding recipients. We're not going to get into exemptions today but if you have questions, please see the 2023 RSR Instruction Manual or reach out to us at Data Support.

## Each Provider Completes a Single Report

- Providers submit a single RSR Provider Report that must include data on all RWHAP, RWHAP-related, and/or EHE initiative funding sources



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Providers can receive funding from many different sources. But no matter the amount of funding streams, they still complete just a single Provider Report. That single report should include data from all of the funding sources that they receive.

So, for example, we have our provider. This provider is also a recipient and receives a Part C grant directly from HRSA HAB. They also receive a Part B grant from the state and rebate dollars from the state and EHE initiative funding from the county health department.

This agency will take their data from all these funding sources and report on all of them in a single Provider Report.

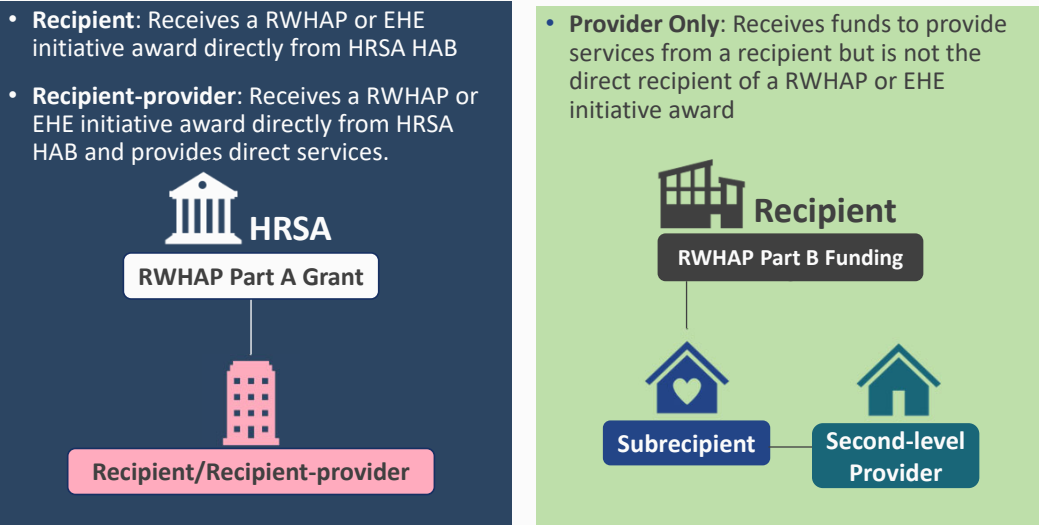
# Accessing the Provider Report

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Now that we have a better general understanding of the RSR, let's move on to how you can access the Provider Report.

## Access Based on Organization Type



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How you access the Provider Report is based on your agency. All organizations access the RSR through the HRSA Electronic Handbooks or EHBs but there are multiple login portals within the EHBs and it's really important that you pick the right one. If you have the wrong account type, then you won't be able to access your agency's RSR.

Let's review the types of organizations that correlate to the different EHBs account types. First, we have recipients and recipient-providers. As I mentioned before, recipients are organizations that receive a RWHAP or an EHE initiative award directly from HRSA HAB. We also have recipient-providers who also receive a RWHAP or EHE initiative award directly from HRSA HAB, but they ALSO provide direct services. For example, HRSA gives a Part A grant directly to this organization making them a recipient. If they provide direct services, they are a recipient-provider. Recipients and recipient-providers use the Applicant/Grantee EHBs portal, and I'll show how this looks on the next few slides.

The other type of organization is a provider only. These organizations receive funds to provide services, but they are not the direct recipient of any RWHAP or EHE initiative award. So, for example, a recipient gives Part B funding to a provider which makes them a subrecipient. Or alternatively it could be a provider that receives funding from

a recipient through a subrecipient making them a second-level provider. If your agency is only a subrecipient and/or a second-level provider for all funding sources, then you fall under this provider only category. Provider only organizations will use the Service Provider EHBs login portal.

If you are at all unsure about how you should be accessing the RSR for your agency, please reach out to us at Data Support.

## New Users

- If you are a new user, you must create an account to access the RSR Provider Report
- Only proceed to creating an account when you are certain what type of account you need to create
  - Applicant/Grantee
  - Service Provider
- New service provider accounts will need their organization's GUID code to register their account

Contact [RWHAP Data Support](#) if you are unsure what type of account you must create or if you need your agency's GUID code

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If you are a new user, then you'll have to create an account in order to access the Provider Report. But you should only create an account when you are certain what type of account you should create. If you have questions about the type of account you should create and you are a recipient, then the EHBs Customer Support Center would be your best TA resource. If you're a service provider, a subrecipient or a second-level provider, then Data Support would be your best TA resource.

Additionally, if you are creating a new Service Provider account, you'll need what's called a GUID code. This is a long 32-digit alphanumeric code unique to each organization in the system and is used to tie your user account to your agency. Contact us at Data Support and we can provide you with that code for your agency.

## Login Process for Recipients and Recipient-providers

1

Go to [Grants.hrsa.gov](https://grants.hrsa.gov) and select Applicant/Grantee Role



### Applicant/Grantee

Use this link if you are applying for, or have been awarded a HRSA grant and you need to access the HRSA Electronic Handbooks (EHBs). Using this link, you can also access the FTCA or FOHC system.

2

Log into LOGIN.GOV

Applicant/Grantee

**LOGIN.GOV**

The EHBs uses Login.gov and two-factor authentication to enhance security. Use your existing Login.gov account, with the same email used for the EHBs, or create a new Login.gov account.

Create Login.gov Account

Login

3

Enter credentials and two factor authentication

XMS Production is using Login.gov to allow you to sign in to your account safely and securely.

Sign in Create an account

Sign in for existing users

Email address

Password

Show password

Sign in

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Now, let's first go through the login process for recipients and recipient-providers.

1. First, you'll go to [grants.hrsa.gov](https://grants.hrsa.gov) and select the Applicant/Grantee box at the top of the Select a Role page. This will move you to the Applicant/Grantee login portal. For all of you that already have an EHBs account and have completed the RSR before, you'll just continue to use your same account.

2. Once you have selected your role on the EHBs Select Role Page (and created an account if necessary), you will be directed to [login.gov](https://login.gov). This is a change for this year's EHBs login process that recipients, recipient-providers, and providers will have to go through to access the EHBs. To access the EHBs, you will need to click on the login button.

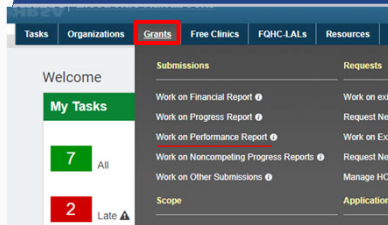
3. Next, you will enter your [login.gov](https://login.gov) credentials and select "Sign in". You will also be prompted to put in your two-factor authentication on the following page. Once you have done so, this will then take you to the EHBs home page.



## Login Process for Recipients and Recipient-providers (cont.)

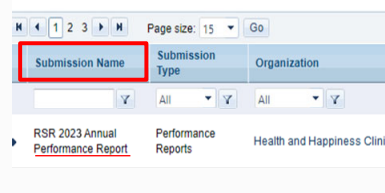
4

Hover over the Grants tab and select Work on Performance Reports



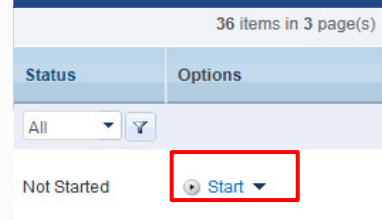
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On the Submissions-All page, scroll to the list of Submission Names and locate the 2023 report



6

Select start/edit under the Options header in the row that corresponds to your 2023 report



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4. Next, hover over the “Grants” tab at the top of the page and then select “Work on Performance Report” from the drop-down menu.

5. On the next page, Submissions-All, scroll down to find a table with a list of submissions for your agency. You will see a list of this year’s performance reports, as well as previous years.

On the bottom of the “Submissions All” page, under “Submission Name” locate your 2023 Performance Report in this list. If your organization is the recipient of more than one grant, then you’ll see multiple 2023 report submissions in this list. Make sure you select the appropriate one for the Provider Report you’re trying to access. Let’s say that this agency has a Part C grant. If we access the Part C report, we’ll be able to see all Provider Reports associated with the Part C grant.

6. Once you’ve located the recipient report you wish to work on, select the “Start” button listed under the “Options” header. If you’ve already begun working on your RSR, this link will instead say “Edit”.

## Login Process for Recipients and Recipient-providers (cont.)

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On the RSR Recipient Report Inbox page, select Provider Report

NAVIGATION << RSR Recipient Report Inbox Your session will expire in: 28:53

Inbox

- Recipient Report
- Provider Report**
- Check your XML

Manage Contracts

- Search Contracts

Search

- Recipient Reports
- Provider Reports

Report ID	Fund Source	Grant Number	Recipient Name	Reporting Period	Modified Date	Status	Action	Action History
	Part C	H76HA00000	Health and Happiness Clinic	RSR 2023 Annual		Not Started	Create	History

Page Size: 25

1 items in 1 pages

For help with EHBs contact the HRSA Help Desk by phone at 1-877-Go4-HRSA (1-877-464-4772) Monday through Friday, 8:00 a.m. to 8:00 p.m. Eastern Time. Or use the HRSA Electronic Handbooks Contact Center help request form to submit your question online. For questions regarding data content and/or reporting requirements, please contact Data Support at 1-888-640-9356 or email to RyanWhiteDataSupport@wrma.com

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7. You'll now be in the RSR Recipient Report Inbox. Depending on your browser's settings, this page may load in a new window.

The RSR Recipient Report will be in the center of the page. To get to the RSR Provider Report, you'll look in the Navigation panel on the left side of the screen and select the "Provider Report" link under the Inbox header.

## Login Process for Recipients and Recipient-providers (cont.)

8

On the RSR Provider Report Inbox page, locate the report you want to work on and select create under the Action header

The screenshot displays the HRSA Electronic Handbooks interface. The main content area is titled "RSR Provider Report Inbox". It features a table with the following data:

Report ID	Provider Name	Reg Code	Reporting Period	Modified Date	Status	Action	Clients
	Health and Happiness Clinic	11111	RSR 2023 Annual		Not Started	Create	
	Feeding People Food Bank	88888	RSR 2023 Annual		Not Started	Create	
	Hillwood Mental Health	55555	RSR 2023 Annual		Not Started	Create	

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8. In the Provider Report Inbox, you'll see all reports associated with the grant you used to access the RSR system. To open a report, select the envelope icon in the "Action" column that corresponds to the report you want to work on.

## Login Process for Providers

1

Go to [Grants.hrsa.gov](https://grants.hrsa.gov) and select Service Provider Role



### Service Provider

Use this link if you are a HAB provider and you need to access the HRSA Electronic Handbooks (EHBs).

2

Log into LOGIN.GOV

A screenshot of the LOGIN.GOV website. At the top, it says "Applicant/Grantee". Below that is the "LOGIN.GOV" logo. A message states: "The EHBs uses Login.gov and two-factor authentication to enhance security. Use your existing Login.gov account, with the same email used for the EHBs, or create a new Login.gov account." There is a "Create Login.gov Account" link and a "Login" button, both highlighted with a red box.

3

Enter credentials and two factor authentication

A screenshot of the LOGIN.GOV sign-in page. At the top, there are "Sign in" and "Create an account" buttons. Below that is the heading "Sign in for existing users". There are input fields for "Email address" and "Password". A "Show password" checkbox is visible. At the bottom, there is a "Sign in" button highlighted with a red box.


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Now we're going to go through the login process for providers.

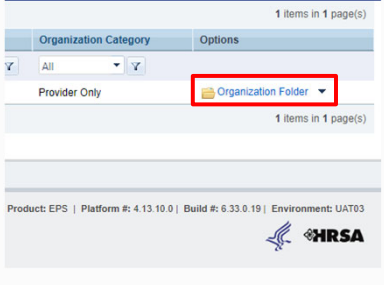
1. Agencies that are providers will go to [grants.hrsa.gov](https://grants.hrsa.gov) (same as recipients) except you will click on the Service Provider box at the bottom of the page. Again, for all of you that already have an EHBs account and have completed the RSR before, you'll just continue to use your same account.
2. Once you have selected your role on the EHBs Select Role Page (and created an account if necessary), you will be directed to [login.gov](https://login.gov). To access the EHBs, you will need to click on the login button.
3. Next, you will enter your [login.gov](https://login.gov) credentials and select "Sign in". You will also be prompted to put in your two-factor authentication on the following page. Once you have done so, this will then take you to the EHBs home page.

## Login Process for Providers (cont.)


**4** Select the Organization tab at the top of the page



**5** On the next page, scroll to the list of Organization Names and select the Organization Folder for your registered account



**6** On the Organization Home page, select the Access RSR link



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4. On the EHBs home page, select the “Organization” tab at the top of the screen.

5. The next page will show you the organizations your account is registered to. Locate your organization and then select the “Organization Folder” under the “Options” column on the right side of the table.

6. On the “Organization Home” page, select the “Access RSR” link which will be in the center of the page.

## Login Process for Providers (cont.)

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On the RSR Provider Report Inbox page, select Provider Report

The screenshot displays the HRSA Electronic Handbooks interface. The top navigation bar includes 'Organization' and 'Dashboards'. The main content area is titled 'RSR Provider Report Inbox'. A table lists the following report:

Report ID	Provider Name	Reg Code	Reporting Period	Modified Date	Status	Action	Clients	Action History
	Feeding People Food Bank	88888	RSR 2023 Annual		Not Started	Create		History

The 'Create' button in the Action column is highlighted with a red box. The page also shows a 'Page Size' dropdown set to 25 and '1 Items in 1 pages' at the bottom right of the table.

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7. That will take you straight to the RSR Provider Report inbox. To open your Provider Report, select the envelope icon in the Action column.

# Completing the Provider Report

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Now that we've figured out how to get to the report, let's go over instructions for completing it.

## Navigation Panel

- Use the Navigation panel on the left side of the page to access all report sections and actions

The screenshot shows a navigation menu with the following sections and callouts:

- Inbox**: Callout: "Navigate back to Provider Report Inbox or Check Your XML system"
- Provider Report Navigation**: Callout: "Access Provider Report sections"
- Provider Report Actions**:
  - Validate, Submit, Un-Submit, Print: Callout: "Validate, submit, and print the Provider Report"
  - Clear Clients: Callout: "Remove an uploaded XML file from the report"
  - Release Lock: No callout
- Provider Report - Reports**:
  - Upload Completeness Report: Callout: "Access and export the Upload Completeness Report"
  - Action History: Callout: "View Provider Report Action History"

First, I want to highlight one of the most important parts of the system when completing your report, the Navigation panel. The Navigation panel is always there on the left side of the page and is how you access the various report sections and complete all report actions. So, let's take a quick look at it because we're going to be mentioning it a lot.

At the top you have links to the inboxes. So, if you want to get back to the Provider Report Inbox or want to access the Check Your XML test system, you can do that here. Next, we have the various sections of the RSR Provider Report. Use the links here to get to each section. You must complete each of these six sections before you can submit your report. After that we have some important report actions including validating, submitting, un-submitting, and printing your report.

And in that same section you also have the Clear Clients action which you can use to remove a data file that was previously uploaded to your report. And then lastly, we have the Upload Completeness Report (UCR), an extremely helpful tool to check your data quality, and the Action History which lists all of the submission steps taken on the report and has some helpful information. During today's presentation, we're going to go over all of these a bit more.



# General Information Page

**RSR Provider Report** Your session will expire in: 29:56

**Hillwood Mental Health**

Report ID: 12345      Status: Working      Due Date: 3/25/2024 6:00:00 PM  
Report Period: RSR 2023 Annual      Last Modified Date: 2/7/2024 1:09:28 PM      Last Modified By: mgeller@hillwoodhealth.org  
Access Mode: Read/Write      Client Count (unique combination of provider and eUCI):      Locked By: mgeller@hillwoodhealth.org

### General Information

The organization data updated within the RSR Provider Report must also be updated in the Provider Organization Profile to ensure these changes are reflected in the future reports.

**Organization Details** [Update](#)

EIN: 123456789  
UEI: 12ABC345DEF6  
Mailing Address: 888 5th St NE  
Washington, DC 20002-4322

**Organization Contacts**

Name	Title	Phone Number	Email	FAX	Is Primary POC	Actions
Phoebe Buffay	Program Director	(123) 456-7890	pbuffay@hillwoodhealth.org		Yes	Edit Delete

[Add Contact](#)

**Provider Profile Information** [Update](#)

Provider Type: Publicly funded community mental health center  
Section 330 Funding Received: No  
Type of ownership: Public/Local  
Faith-based Organization: No  
Part of a real time electronic data network: No

**Service Delivery Sites**

Let's now just jump into the report starting with the first section, General Information. Opening the report will bring you straight here but you can also select "General Information" in the Navigation panel to get here at any point. General Information, as the title suggests, contains a few general fields about your organization divided into four different parts: Organization Details, Organization Contacts, Provider Profile Information, and Service Delivery Sites.

## General Information Section Update

NEW

- Previously provider updates were made in the Organization Profile and synchronized to the Provider Report:
  - Organization Details
  - Organization Contacts
  - Provider Profile Information
- Changes made by recipients and providers now made directly in the Provider Report ~ automatically updated in their Organization Profile



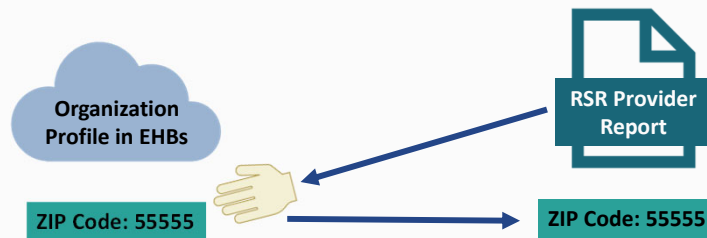
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As I mentioned earlier, there were some recent updates to the Provider Report. One of those updates was in the General Information section.

Previously providers were instructed to make any updates to the Organization Details, the Organization Contacts and the Provider Profile Information in their Organization Profile and then synchronize them to their Provider Report.

Recipients and providers can now make changes directly in the Provider Report which will update their Organization Profile automatically.

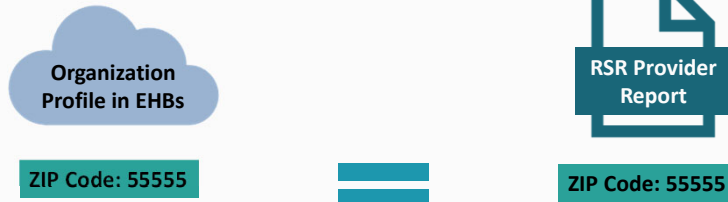
## General Information Example



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I'll show you what I mean by that. We'll use address as an example, specifically the ZIP Code field, but this applies for any of those sections I mentioned on the previous slide. When the Provider Report is first created, it's going to automatically grab the address from the Organization Profile in the EHBs.

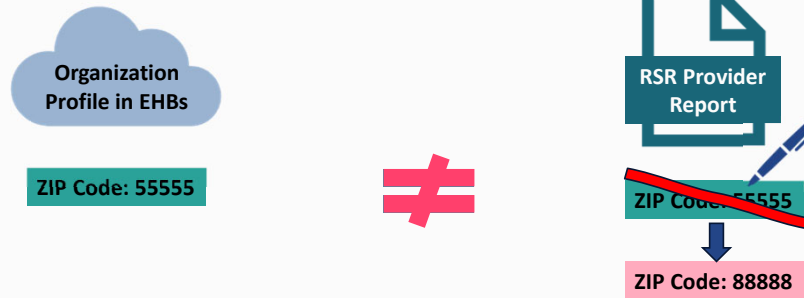
## General Information Example



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The addresses in both the Organization Profile in the EHBs and the Provider Report now match.

## General Information Example



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If the provider then edits the address directly within the Provider Report, we'll see it doesn't match the profile.

## General Information Example



ZIP Code: 55555



ZIP Code: 88888

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As illustrated in this slide, the address in the Organization Profile no longer matches the address in the Provider Report. Here's where the process is different this year.

## General Information Example



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Instead of having to deal with the previous synchronization process, the system will take the address that the provider put in the Provider Report and overwrite the Organization Profile so that they match again.

## General Information Example



ZIP Code: 88888



ZIP Code: 88888

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The address in the Organization Profile again matches the address in the Provider Report.



# Updating General Information

The screenshot displays the 'RSR Provider Report' for 'Hillwood Mental Health'. The interface includes a navigation sidebar on the left and a main content area. The main content area is divided into several sections:

- General Information:** Contains report metadata such as Report ID (12345), Status (Working), Due Date (3/25/2024 6:00:00 PM), Report Period (RSR 2023 Annual), Last Modified Date (2/7/2024 1:09:28 PM), Access Mode (ReadWrite), Client Count, and Locked By (mgeller@hillwoodhealth.org).
- Organization Details:** Includes fields for EIN (123456789), UEE (12ABC345DEF6), and Mailing Address (888 5th St NE, Washington, DC 20002-4322). An 'Update' button is highlighted with a red box.
- Organization Contacts:** A table listing contacts with columns for Name, Title, Phone Number, Email, FAX, Is Primary POC, and Actions. One contact, Phoebe Buffay, is listed as Program Director. An 'Add Contact' button is highlighted with a red box.
- Provider Profile Information:** Includes fields for Provider Type (Publicly funded community mental health center), Section 330 Funding Received (No), Type of ownership (Public/Local), Faith-based Organization (No), and Part of a real time electronic data network (No). An 'Update' button is highlighted with a red box.

The page number '31' is visible in the bottom right corner of the interface.

We are now back to the General Information page that we looked at just a few slides ago. As previously mentioned, there are several different sections on this page.

To update the information for the Organization Details section or the Provider Profile Information section, simply click the 'update' link. To add a contact to the Organization Contacts section, simply click on the 'Add Contact' link.

## Service Delivery Sites

Provider Report - Reports

- Upload Completeness Report
- Action History

Search

- Provider Reports

Administration

- Print Requests

Comments

- Add Comments
- View Comments

References

- Merge Rules
- Validation Rules

Performance Measures

- HIVQM Inbox

Emerging Initiatives

- CDR Inbox
- EHE Triannual Inbox

[Add Contact](#)

---

**Provider Profile Information** [Update](#)

Provider Type: Publicly funded community mental health center

Section 330 Funding Received: No

Type of ownership: PublicLocal

Faith-based Organization: No

Part of a real time electronic data network: No

---

**Service Delivery Sites**

Note: You can use organization address for a service delivery site if this address is used to deliver client services. If not, select the Add a Site button to add a service delivery site.

Name	Address Type	Address	Address Line 2	City	State	Zip	Country	Postal Code	Phone Number	Actions
Hillwood Health	Domestic	123 Sesame Street		Washington	DC	12345	N/A	N/A	(123) 456-7890	<a href="#">Edit</a> <a href="#">Delete</a>

Website URL: [www.hillwoodhealth.org](http://www.hillwoodhealth.org)

Hours of Operation: By Appointment

Services provided at this site: Mental Health Services, Psychosocial Support Services, Medical Case Management, including Treatment Adherence Services, Non-Medical Case Management Services

[Add Organization Address as a Site](#) [Add a Site](#)

For help with EHBs contact the HRSA Help Desk by phone at 1-877-Go4-HRSA (1-877-464-4772) Monday through Friday, 8:00 a.m. to 8:00 p.m. Eastern Time. Or use the HRSA Electronic Handbooks Contact Center help request form to submit your question online. For questions regarding data content and/or reporting requirements, please contact Data Support at 1-888-640-9356 or email to [RyanWhiteDataSupport@wrma.com](mailto:RyanWhiteDataSupport@wrma.com)

Let's move on to the bottom half of the General Information Section, to the Service Delivery Sites section.

The Service Delivery Sites section lists all sites where clients can access services. You can use the expand icon to show the additional fields included.

Also listed here is the site name, address, phone number, website, hours of operation, and the services provided. Review the information here and make sure it's accurate and up-to-date. I do want to make a note about the website URL. There is a validation in the system that will trigger for any Service Delivery Site missing a website URL so be sure to fill that out whenever possible.

If you need to edit an existing site, you can do so using the Edit link over here in the Actions column. You can remove a site, if necessary, here as well by selecting the "Delete" link.

And if you need to add a brand-new site, you can do so using the Add a Site buttons here. If you click on the Add Organization Address as a Site button, you will also be taken to the add a service delivery site page. However, the address will be

automatically populated with the agency's address that is listed in the Organization Details section.

In the interest of time, we're not going to demonstrate adding a site, but if you have any questions as you work through this section, please call Data Support.

## Program Information Section

The screenshot displays the 'RSR Provider Report' interface for 'Hillwood Mental Health'. The 'Program Information' section is highlighted with a red box. It contains the following fields and options:

**Program Information**  
A field with an asterisk \* before it is a required field.

1. Contact information of person responsible for this submission:

- a. Name:
- b. Title:
- c. Phone:   
Extension:
- d. Fax:
- e. Email:

2. Select the status of your agency's clinical quality management program.

- Clinical quality management program initiated this reporting period
- Previously established clinical quality management program
- Previously established program with new quality standards added this reporting period
- Do not have a clinical quality management program

The navigation sidebar on the left includes: Inboxes, Provider Report, Navigation, General Information, Program Information (highlighted), Service Information, HC&T Information, Clients by ZIP Code, Import Client-Level Data, Provider Report Actions (Validate, Submit, Un-Submit, Print, Clear Clients, Release Lock), Provider Report - Reports (Upload Completeness Report, Action History), Search, Provider Reports, and Administration.

Report ID: 12345 | Status: Working | Due Date: 3/25/2024 6:00:00 PM  
Report Period: RSR 2023 Annual | Last Modified Date: 2/7/2024 1:09:28 PM | Last Modified By: mgeller@hillwoodhealth.org  
Access Mode: ReadWrite | Client Count (unique combination of provider and eUCI): | Locked By: mgeller@hillwoodhealth.org

Your session will expire in: 26:58

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Let's move on to the Program Information Section. You can navigate to this section by clicking on the "Program Information" link in the navigation column. First off in Program Information, is the contact information of the person responsible for the report. Fill out all required fields. This is the person we'll reach out to if we have any questions about this submission.

Next, select the status of your agency's clinical quality management program from the choices provided.

## Program Information Section (cont.)

**3. Funding Source Certification:**

This item lists all of your agency's sources of Ryan White HIV/AIDS Program (RWHAP) funding, including EHE and CARES Act, and RWHAP-related (Program Income and Pharmaceutical Rebates) funding. Please verify that this list is accurate. If a funding source is missing, contact your recipient and ask them to add your agency to their list of contractors. If a recipient that did not fund your organization is listed, contact Ryan White HIV/AIDS Program Data Support for assistance.

Funding Source	Recipient Name	Funded Through	Grant Number	Exempt
Part C	Health and Happiness Clinic		H76HA00000	No
Part B	State Health Department		X07HA00000	No

I have reviewed my agency's list of Ryan White HIV/AIDS Program funding sources and certify that the list is accurate.

\* 4. Within your organization/agency, identify the number of physicians, nurse practitioners, or physician assistants who obtained a Drug Addiction Treatment Act of 2000 (DATA) waiver to treat opioid use disorder with medications (medication assisted treatment [MAT], e.g. buprenorphine, naltrexone) specifically approved by the U.S. Food and Drug Administration (FDA):

\* 5. How many of the above physicians, nurse practitioners, or physician assistants prescribed MAT (e.g. buprenorphine, naltrexone) for opioid use disorders in the reporting period?

\* 6. How many RWHAP eligible clients were treated with MAT during the reporting period?

Cancel Save

Question 3 is the funding source certification. This table lists all sources of funding your agency received based on what has been entered into the system by your recipients. Make sure all of your RWHAP, RWHAP-related, and EHE initiative funding sources are included in this table. If a funding source is missing, contact your recipient. You also want to review the list of funded services. Select the expand icon on the left to see the list of services. This list again comes from information entered into the system by your recipients. If there are any discrepancies, again reach out to your recipient. If you are a recipient or a recipient-provider and you need help clearing the discrepancies, please contact Data Support. Also, make sure you select the checkbox below the table to confirm the data are accurate and complete.

Questions 4, 5, and 6 all relate to your agency's usage of medication assisted treatment (or MAT) for opioid use disorder. These do all require a response so if there is nobody to report for one or more of these questions, then enter a zero. We're not going to go too in depth on describing each and every field of the report today in the interest of time but a great place to look for clarification on these MAT questions is the RSR Manual on pages 43-44.

Once you have entered a response for all required fields, select "Save" at the bottom

right of the page.

## Service Information Section

- General Information
- Program Information
- Service Information
- HC&T Information
- Clients by ZIP Code
- Import Client-level Data

**Provider Report Actions**

- Validate
- Submit
- Un-Submit
- Print
- Clear Clients
- Release Lock

**Provider Report - Reports**

- Upload Completeness Report
- Action History

**Search**

- Provider Reports

**Administration**

- Print Requests

**Comments**

- Add Comments
- View Comments

### Service Information

A field with an asterisk \* before it is a required field.

\* 7. Below is a list of all Ryan White HIV/AIDS Program services that were funded fully or partially using RWHAP funding, including EHE and CARES Act, and RWHAP-related (Program Income and Pharmaceutical Rebates) funding. Select the services that were delivered by your agency during the reporting period even if other funding streams in addition to the RWHAP funding, including EHE and CARES Act, and RWHAP-related funding were used to fund the service. In the table at the bottom of the form, select any additional services that your organization delivered through your organization's generated Program Income or Pharmaceutical Rebates.

**Administrative and Technical Services**

RWHAP Funding	EHE Funding	CARES Act Funding	Delivered	Service Category
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Technical assistance

**Core Medical Services**

RWHAP Funding	RWHAP-Related Funding (Program Income and Pharmaceutical Rebates)	EHE Funding	CARES Act Funding	Delivered	Service Category
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Medical Case Management, including Treatment Adherence Services
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Mental Health Services

**Support Services**

RWHAP Funding	RWHAP-Related Funding (Program Income and Pharmaceutical Rebates)	EHE Funding	CARES Act Funding	Delivered	Service Category
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Non-Medical Case Management Services
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Psychosocial Support Services

**EHE Initiative Services**

EHE Funding	Delivered	Service Category
<input type="checkbox"/>	<input type="checkbox"/>	

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Let's move onto the next section of the report, Service Information, by selecting it in the Navigation here on the left.

The Service Information Section lists all of the services that your organization was funded to provide during the reporting period as entered by your recipients. Providers must review the funded services to make sure they are accurate and complete. Again, just like we saw in the last section, if there is something wrong with your funded services, either a missing one or an erroneous one added, contact your recipient so that they can make the necessary corrections.

The services here are split into their respective categories: administrative and technical services, core medical services, support services, and EHE initiative services. For each service that you delivered, select the checkbox in the Delivered column over here to the right. For example, the table lists, under Core Medical Services, that my agency used RWHAP Funding to provide Medical Case Management and Mental Health Services. To confirm that these services were indeed delivered, check the corresponding check box for each of the services that were delivered.

## Service Information Section (cont.)

- Merge Rules
- Validation Rules
- Performance Measures
- HIVQM Inbox
- Emerging Initiatives
- CDR Inbox
- EHE Triannual Inbox

**Additional Services Delivered Through Your Organization's Generated Program Income and/or Pharmaceutical Rebates**

Delivered	Service Category
<input type="checkbox"/>	AIDS Pharmaceutical Assistance
<input type="checkbox"/>	Child Care Services
<input type="checkbox"/>	Early Intervention Services (EIS)
<input type="checkbox"/>	Emergency Financial Assistance
<input type="checkbox"/>	Food Bank/Home Delivered Meals
<input type="checkbox"/>	Health Education/Risk Reduction
<input type="checkbox"/>	Health Insurance Premium and Cost Sharing Assistance for Low-Income Individuals
<input type="checkbox"/>	Home and Community-Based Health Services
<input type="checkbox"/>	Home Health Care
<input type="checkbox"/>	Hospice
<input type="checkbox"/>	Housing
<input type="checkbox"/>	Linguistic Services
<input type="checkbox"/>	Medical Nutrition Therapy
<input type="checkbox"/>	Medical Transportation
<input type="checkbox"/>	Oral Health Care
<input type="checkbox"/>	Other Professional Services
<input type="checkbox"/>	Outpatient/Ambulatory Health Services
<input type="checkbox"/>	Outreach Services
<input type="checkbox"/>	Referral for Health Care and Support Services
<input type="checkbox"/>	Rehabilitation Services
<input type="checkbox"/>	Respite Care
<input type="checkbox"/>	Substance Abuse Outpatient Care
<input type="checkbox"/>	Substance Abuse Services (residential)

Only select services that were funded and delivered with RWHAP-related program income.

Cancel
Save

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Now there is one more table at the bottom of the Service Information Section, the Additional Services table. This table contains all of the services that weren't listed as funded by any of your recipients. Now we've seen a lot of providers use this table incorrectly. This table is only for services that you as the provider are funding and providing utilizing your organization's own RWHAP-related funding. So, if your organization generates program income and/or pharmaceutical rebates and uses that RWHAP-related funding to provide a service, you can select that service here. If you check one of the services in this table, that service should be included in your client-level data file. If you do not fund a service with your own RWHAP-related program income, you should not select it here. For example, if you get pharmaceutical rebates for a 340B and you use that to fund services, you will check those funded services in this table.

Once you have finished on the page, make sure to select the "Save" button at the bottom right.

Please don't forget, that you should only select services in this table that were funded and delivered with RWHAP-related program income.

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## HIV Counseling and Testing Section

**NAVIGATION**

- Inbox
- Provider Report
- Check your XML
- Provider Report
- Navigation
- General Information
- Program Information
- Service Information
- HC&T Information**
- Clients by ZIP Code
- Import Client-level Data
- Provider Report Actions
- Validate
- Submit
- Un-Submit
- Print
- Clear Clients
- Release Lock
- Provider Report - Reports
- Upload Completeness Report
- Action History
- Search

**RSR HIV Counseling and Testing Service Information**

Your session will expire in: 29:56

---

Hillwood Mental Health

Report ID: 12345	Status: Working	Due Date: 3/25/2024 6:00:00 PM
Report Period: RSR 2023 Annual	Last Modified Date: 2/7/2024 1:09:28 PM	Last Modified By: mgeller@hillwoodhealth.org
Access Mode: Read/Write	Client Count (unique combination of provider and eUCI):	Locked By: mgeller@hillwoodhealth.org

---

HIV Counseling and Testing Service Information

Report the number of individuals who received counseling and testing during the reporting period. A field with an asterisk \* before it is a required field.

\* 8. Did your organization use Ryan White HIV/AIDS Program funds to provide HIV Counseling and Testing services during the reporting period?  Yes  No

9. Number of individuals tested for HIV:

10. Of those tested (#9 above), number who tested NEGATIVE:

11. Of those tested (#9 above), number who tested POSITIVE:

12. Of those who tested POSITIVE (#11 above), number referred to HIV medical care:

Cancel
Save

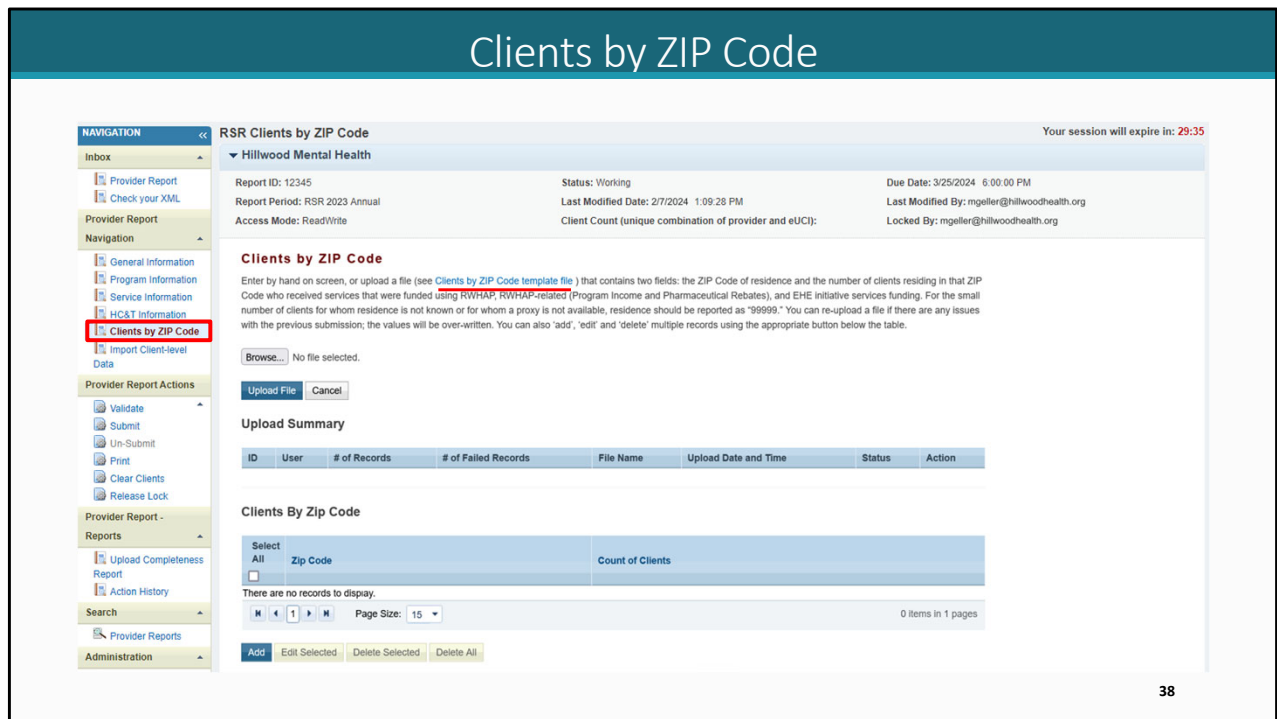
37

We'll move on now to the next section by selecting the HC&T Information link in the Navigation panel.

This section is where you will provide data on your agency's HIV counseling and testing activities. Start by answering question 8, yes or no, on whether your agency utilized funding to provide HIV counseling and testing activities. If your answer is no, just select that and save and you're done for this section.

If your answer is yes, then you must complete the rest of the fields on this page. In these fields, enter your agency's data on the number of clients tested for HIV, including the number who tested negative, the number who tested positive, and the number who tested positive and were referred to HIV medical care. If you do not have any individuals to add for one of the questions, enter a zero. The data you enter here should be indicative of your agency overall and not just those tests provided utilizing RWHAP funding. For example, if you receive CDC Prevention funds for HIV testing, you would include those clients here.

Once you have answered all questions, make sure to select "Save" at the bottom right.



We'll keep moving forward by selecting Clients by ZIP Code in the Navigation panel.

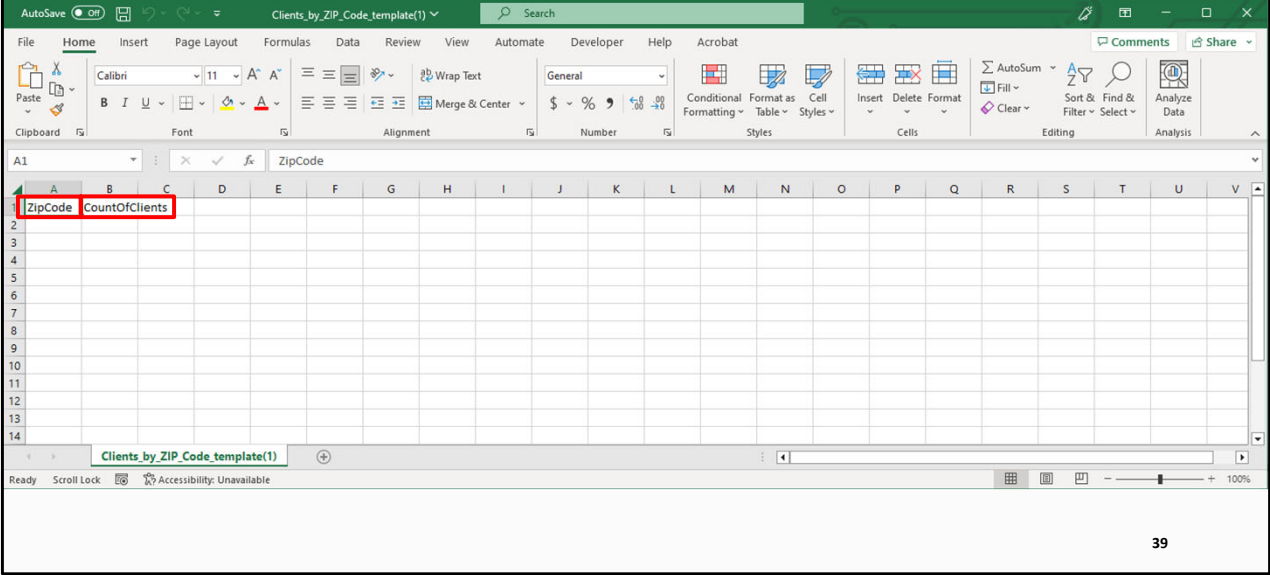
In this section you will enter aggregate data on the number of clients served based on their ZIP Code of residence. The clients included here are the same as those that you should include in your client-level data: eligible clients who received at least one service that your agency was funded to provide with any of those RWHAP funding sources we've reviewed previously in the presentation.

You have two options for providing your ZIP Code data: either entering it manually into the system or uploading a file.

Uploading a file containing your ZIP Code data directly to the system can be simpler for many organizations such as CAREWare users. CAREWare can export a properly formatted ZIP Code data file for you. The template file for the ZIP Code upload can be found in the description here at the top.

The template file is simply a .csv file which opens in Microsoft Excel. If you click on the link, the template file will be displayed in a new window.

# Clients by ZIP Code Template File



This is what the template file looks like. The template file has two columns: one for your ZIP Codes and another for the number of clients that reside in that ZIP Code. You can import the data into the template file, and then save the file on your computer.

# Clients by ZIP Code - Import

**NAVIGATION** << RSR Clients by ZIP Code Your session will expire in: 29:35

**Hillwood Mental Health**

Report ID: 12345 Status: Working Due Date: 3/25/2024 6:00:00 PM  
Report Period: RSR 2023 Annual Last Modified Date: 2/7/2024 1:09:28 PM Last Modified By: mgeller@hillwoodhealth.org  
Access Mode: ReadWrite Client Count (unique combination of provider and eUCI): Locked By: mgeller@hillwoodhealth.org

### Clients by ZIP Code

Enter by hand on screen, or upload a file (see [Clients by ZIP Code template file](#)) that contains two fields: the ZIP Code of residence and the number of clients residing in that ZIP Code who received services that were funded using RWHAP, RWHAP-related (Program Income and Pharmaceutical Rebates), and EHE initiative services funding. For the small number of clients for whom residence is not known or for whom a proxy is not available, residence should be reported as "99999." You can re-upload a file if there are any issues with the previous submission; the values will be over-written. You can also 'add', 'edit' and 'delete' multiple records using the appropriate button below the table.

**Browse...** to file selected.

**Upload File** Cancel

#### Upload Summary

ID	User	# of Records	# of Failed Records	File Name	Upload Date and Time	Status	Action
----	------	--------------	---------------------	-----------	----------------------	--------	--------

#### Clients By Zip Code

Select	Zip Code	Count of Clients
All		

There are no records to display.

Page Size: 15 0 items in 1 pages

Add Edit Selected Delete Selected Delete All

When you're ready to upload your file, select the "Browse" button, locate and select your file saved on your computer, and then select the "Upload File" button.

## Clients by ZIP Code Updates

NEW

- System generated validation messages for any ZIP code files it is unable to read
- Redesigned page
- Maximum number of records is 15,000
- No template file changes or ZIP code data reporting changes



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As I mentioned earlier, there were some recent updates to the ZIP Code Section of the report.

The system will now generate validation messages on the page for any ZIP code files it is unable to read.

The page has been redesigned for ease of use.

Also, the maximum number of records has been raised to 15,000.

There are no changes to the template file or how ZIP code data are reported.

## Clients by ZIP Code Upload Status

**Error: Your form has errors and cannot be submitted.**

- The column name 'ZipCode' is missing from the data file.
- Repeated columns found for 'CountOfClients'. Please remove extra columns.

Browse... No file selected.

Upload File Cancel

### Upload Summary

ID	User	# of Records	# of Failed Records	File Name	Upload Date and Time	Status	Action
20063	mgeller@hillwoodhealth.org	17	16	<a href="#">HillwoodZipCodeData.csv</a>	2/7/2024 4:55:18 PM	Processed with errors	<a href="#">View Validation Report</a>

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The system is going to let you know in two different places if your file has issues. First is the banner at the top of the page right after you upload your file. If there is a big issue with your file, like the columns are misnamed or missing from the template, then you'll get an error here letting you know the file upload has failed. Simply correct the issues in your file based on the message and try to reupload.

The next place is in the upload summary table. If the system accepts your file, it'll be added to the upload summary table on the page. The page will automatically refresh until it has finished processing your file. If you see that the status has changed to processed with errors as we have here, you'll know there's something not quite right with the file that needs to be corrected. To view the issues preventing your file from being read, select the "View Validation Report" link in the Action column on the right side of this table.

## Clients by ZIP Code Upload Status (cont.)

Clients by Zip Code Validation Report		
Organization Name: Arch Solktors Inc.		Report ID: 131445
Row No.	Message	Level
12	ZIP Code is required.	Error
14	ZIP Code is required.	Error
16	ZIP Code is required.	Error
6	Count of Clients is required.	Error
14	Count of Clients is required.	Error
16	Count of Clients is required.	Error
2	Data in the file is invalid. ZIP Code must be 5 digits numeric value. 00000 is not allowed. Count of Clients must be an integer greater than zero. Please correct the data and reupload the file.	Error
4	Data in the file is invalid. ZIP Code must be 5 digits numeric value. 00000 is not allowed. Count of Clients must be an integer greater than zero. Please correct the data and reupload the file.	Error
7	Data in the file is invalid. ZIP Code must be 5 digits numeric value. 00000 is not allowed. Count of Clients must be an integer greater than zero. Please correct the data and reupload the file.	Error
8	Data in the file is invalid. ZIP Code must be 5 digits numeric value. 00000 is not allowed. Count of Clients must be an integer greater than zero. Please correct the data and reupload the file.	Error
9	Data in the file is invalid. ZIP Code must be 5 digits numeric value. 00000 is not allowed. Count of Clients must be an integer greater than zero. Please correct the data and reupload the file.	Error
10	Data in the file is invalid. ZIP Code must be 5 digits numeric value. 00000 is not allowed. Count of Clients must be an integer greater than zero. Please correct the data and reupload the file.	Error
11	Data in the file is invalid. ZIP Code must be 5 digits numeric value. 00000 is not allowed. Count of Clients must be an integer greater than zero. Please correct the data and reupload the file.	Error
13	Data in the file is invalid. ZIP Code must be 5 digits numeric value. 00000 is not allowed. Count of Clients must be an integer greater than zero. Please correct the data and reupload the file.	Error
15	Data in the file is invalid. ZIP Code must be 5 digits numeric value. 00000 is not allowed. Count of Clients must be an integer greater than zero. Please correct the data and reupload the file.	Error

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This is what the Clients by Zip Code Validation Report looks like.

## Editing ZIP Code Data

- Add: Add a new ZIP code to the data table
- Edit Selected: Adjust the number of clients for any ZIP code selected in the table above
- Delete Selected: Remove any selected ZIP codes from the table above
- Delete All: Remove all ZIP code data from the report

### Upload Summary

ID	User	# of Records	# of Failed Records	File Name	Upload Date and Time	Status	Action
20058	mgeller@hillwoodhealth.org	33	0	HillwoodZipCodeData.csv	2/7/2024 2:13:04 PM	Processed with no errors	View Validation Report

### Clients By Zip Code

Select All	Zip Code	Count of Clients
<input type="checkbox"/>	20000	12
<input type="checkbox"/>	20001	12
<input type="checkbox"/>	20002	12
<input type="checkbox"/>	20003	100
<input type="checkbox"/>	20004	10
<input type="checkbox"/>	20005	12
<input type="checkbox"/>	20006	10
<input type="checkbox"/>	20007	12
<input type="checkbox"/>	20008	10
<input type="checkbox"/>	20009	12
<input type="checkbox"/>	20010	1
<input type="checkbox"/>	20011	12
<input type="checkbox"/>	20038	12
<input type="checkbox"/>	20039	12
<input type="checkbox"/>	20040	12

Page Size: 15 33 items in 3 pages

Add Edit Selected Delete Selected Delete All

44

If there are no issues with your file, then your data will eventually move into the processed with no errors status and you'll see your data added to the table below as you can see here.

You can edit the count of clients for any ZIP code in this table by selecting the checkbox on the left and then selecting the Edit Selected button below.

You can remove any ZIP codes again by selecting the checkbox and then the Delete Selected button. And you can also add any additional ZIP codes by selecting the Add button. And then as expected, the Delete All button will remove all data from this table so only use that option if you're certain you need to remove all data.

As before, the system only accepts one file at a time so if you have uploaded data as we have here, uploading an additional file will overwrite everything already here in the system.

Now you don't have to upload a file to enter your ZIP code data. You can also still just add your data manually. To do that at any time, just select the "Add" button at the bottom of the page.



## Clients by ZIP Code Manual Entry (cont.)

**Add ZIP Code**

Note: Any changes made to this page must be saved.

Zip Code	Count of Clients
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

45

The “Add ZIP Code” window will appear.

Simply enter the ZIP code and the corresponding count of clients residing in that ZIP code for each row.

When you are finished, click on the “Add” button at the bottom of the screen. If you don’t want to save you data, click on the “Cancel” button.

# Import Client-level Data

RSR Provider Report

Your session will expire in: 29:57

NAVIGATION

Inbox

- Provider Report
- Check your XML

Provider Report

Navigation

- General Information
- Program Information
- Service Information
- HC&T Information
- Clients by ZIP Code
- Import Client-level Data

Provider Report Actions

- Validate
- Submit
- Un-Submit
- Print
- Clear Clients
- Release Lock

Provider Report - Reports

- Upload Completeness Report
- Action History

Search

Provider Reports

Report ID: 12345      Status: Working      Due Date: 3/25/2024 6:00:00 PM

Report Period: RSR 2023 Annual      Last Modified Date: 2/7/2024 1:09:28 PM      Last Modified By: mgeller@hillwoodhealth.org

Access Mode: ReadWrite      Client Count (unique combination of provider and eUCI):      Locked By: mgeller@hillwoodhealth.org

Client Level Data Upload

If your agency provided core medical or support services during the reporting period, upload client-level data to complete your Provider Report. When your XML file is successfully processed, you can view any alerts, warnings, or errors that are in the data. You can also view the Upload Completeness Report. Select the arrow to the left of the ID number to see the Validation Report and Upload Completeness Report for each individual file that was successfully processed. To see the Validation Report and Upload Completeness Report for the merged client-level data, select the links in the left navigation menu.

Please note:

- This feature only works with RSR client-level data XML files that conform to the RSR Client-Level Data XML Schema Definitions. The most recent RSR XML Schema Definitions are available on the [TargetHIV website](#).
- You will be unable to upload files larger than 29MB. If your client-level data XML file is larger than 29MB, please zip your file before upload. [Create Compressed Zip File](#)
- Changes to the file status in the Upload History Table are not automatically displayed. To view real-time updates to the Upload History Table, you must manually refresh this browser window.

Select the client records that you would like to upload. You will receive an email confirmation after your records are successfully processed.

Choose File

No file chosen

Upload File

Cancel

Upload History

ID	User	Description	Request Date	Processed Date	Clients in File	Status
No records to display.						

Page Size: 25      0 items in 1 pages

The last section of the report is Import Client-level Data.

Providers of core medical or support services must upload a properly formatted client-level data XML file to their Provider Report. There are many different data elements that can be reported for each client in the client-level data upload. The specific data elements that must be reported for each client (including demographic, client service, and clinical information) are determined based on the services that that client received. For more information, please see Appendix A in the 2023 RSR Instruction Manual.

To upload a file, select the “Choose File” button, locate and select your data file stored on your computer, and then select the “Upload File” button.

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## Import Client-level Data (cont.)

NAVIGATION << RSR Provider Report Your session will expire in: 29:57

Inbox

Provider Report

Navigation

General Information  
Program Information  
Service Information  
HC&T Information  
Clients by ZIP Code  
Import Client-level Data

Provider Report Actions

Validate  
Submit  
Un-Submit  
Print  
**Clear Clients**  
Release Lock

Provider Report -

Hillwood Mental Health

Report ID: 12345 Status: Working Due Date: 3/25/2024 6:00:00 PM  
Report Period: RSR 2023 Annual Last Modified Date: 2/7/2024 1:09:28 PM Last Modified By: mgeller@hillwoodhealth.org  
Access Mode: ReadWrite Client Count (unique combination of provider and eUCI): 72 Locked By: mgeller@hillwoodhealth.org

**Clear Client Records**

All client records that have been imported into this report can be cleared by selecting the checkboxes next to each file. Then select the "Clear Selected File(s)" button below to schedule the request.

Row Number	Select All	Request ID	User	Description	Organization	Clients in File	Status	Processed Date	Software System	Marked For Delete
1	<input type="checkbox"/>	12345	mgeller@hillwoodhealth.org	23RSR_Data.xml	Hilltop Mental Health	72	Processed	02/07/2024 9:15:50	CAREWare	

For help with EHBs contact the HRSA Help Desk by phone at 1-877-G04-HRSA (1-877-464-4772) Monday through Friday, 8:00 a.m. to 8:00 p.m. Eastern Time. Or use the HRSA Electronic Handbooks Contact Center help request form to submit your question online. For questions regarding data content and/or reporting requirements, please contact Data Support at 1-888-640-9356 or email to [RyanWhiteDataSupport@wrma.com](mailto:RyanWhiteDataSupport@wrma.com)

Logged in as: Provider  
The HAB Web Applications also require Adobe Acrobat Reader 5 or higher installed on your PC. To download Adobe Acrobat Reader, click

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I want to highlight how to remove a client-level data file since this is a question that we get asked quite a lot at Data Support. Say you made some corrections to your data and now you need to remove the file with the erroneous data.

To do that, select “Clear Clients” in the Navigation panel on the left side of the screen which will bring you to a page that looks just like this.

Select the checkbox for any file you want to remove and then the “Clear Selected File(s)” button. The system will process your request to remove the file and within a few minutes will delete it from your report.

If you have completed all sections of the report and you’ve uploaded your data, you’re ready to move on to the next step of validating.

## Client-level Data Submission

- Data must be uploaded to the Provider Report and not the Check Your XML test system
- You may upload more than one file and the system will merge them based on the [RSR Merge Rules](#)
- Review your data quality using the Upload Completeness Report (UCR)
- Attend the upcoming [Reviewing Your Data at Upload: Tools in the RSR Web System](#) webinar and the [RSR UCR Bootcamp](#) webinar
- Review the [Creating the RSR Client-level Data File webinar](#) for more detailed information

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I like to briefly go over some general information regarding the client-level data submission.

As I mentioned at the beginning of the webinar, the RSR Provider Report system will be open on Monday, February 5th, so you should upload your data directly into your Provider Report. At that point, you no longer need to use the Check Your XML system to check your file schema.

While HRSA HAB prefers data to be merged locally, there are instances where providers may have multiple files to upload. In that instance, the system will merge them based on the RSR Merge Rules. Please use the link provided on this slide for more information.

Please be sure to check out your UCR which, again, is accessed through a link in the left-hand Navigation panel. Providers are strongly encouraged to review this report to check their data quality. The links to some additional UCR resources are provided on the slide.

Finally, please be sure to check out the Creating the RSR Client-level Data File webinar

for more detailed information on the information covered in this slide.

You can also contact the DISQ team for more information on these topics.

# Validation Process

The screenshot displays the 'RSR Provider Report' interface for 'Hillwood Mental Health'. The left sidebar contains a 'NAVIGATION' menu with options like 'Inbox', 'Provider Report', and 'Provider Report Actions'. The 'Validate' option under 'Provider Report Actions' is highlighted with a red box. The main content area shows report details: Report ID: 12345, Status: Working, Report Period: RSR 2023 Annual, Last Modified Date: 2/7/2024 1:09:28 PM, Due Date: 3/25/2024 6:00:00 PM, Last Modified By: mgeller@hillwoodhealth.org, Access Mode: ReadWrite, Client Count: 72, and Locked By: mgeller@hillwoodhealth.org. A message states: 'Your validation request has been scheduled. It may take several minutes to generate the report.' A note follows: 'NOTE: You must refresh this page to display your results.' At the bottom, it says 'Logged in as: Provider' and 'The HAB Web Applications also require Adobe Acrobat Reader 5 or higher installed on your PC. To download Adobe Acrobat Reader, click [icon]'.

To Validate your report, select “Validate” in the Navigation panel. The validation process looks for any issues in your report and your uploaded data before it is sent to HAB.

The system will let you know that request is processing. To view your results, select “Validate” again to refresh the page. If the validation has fully processed, you’ll see your validation results. Otherwise, continue to wait and refresh until the report has finished validating. You can also refresh your screen by pressing F5.

## Validation Categories

### Errors

- Must be corrected before submitting the report

### Warnings

- Should be corrected whenever possible but if not, you may submit by adding a comment to each warning received

### Alerts

- Should be corrected whenever possible but you may still submit with alerts

It is recommended that providers review the [2023 RSR Data Validations](#) on the TargetHIV website

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Validation messages are sorted into three different categories: errors, warnings, and alerts. Errors must be corrected before you submit your report. You cannot submit your report with an error. Warnings should be corrected whenever possible but if for some reason you are unable to correct a warning you can still submit your report by providing a comment explaining your agency's situation as it relates to the warning for each one that you receive. Alerts also should be corrected whenever possible. However, some alerts may not require a correction, so you will still submit your report with an alert.

Be sure to check out the full list of validation messages available on the TargetHIV website. There are a few updates which we are not going to review today but it's always helpful to familiarize yourself with the sort of validation messages that you could receive.

# Validation Results

Navigation

- General Information
- Program Information
- Service Information
- HC&T Information
- Clients by ZIP Code
- Import Client-Level Data

Provider Report Actions

- Validate
- Submit
- Un-Submit
- Print
- Clear Clients
- Release Lock

Provider Report - Reports

- Upload Completeness Report
- Action History

Search

Provider Reports

Administration

- Print Requests

Comments

### Validation Results

You must fix all errors in your report before you can submit your data. Please fix all warnings as appropriate. For the warnings that you cannot or should not fix, enter a warning comment before you submit your data. To enter warning comments for a specific check, select the Add Comment link located in the Action column of the validation results table(s). Contact the help desk if you have questions about any of the validation errors, warnings, or alerts.

For any validation that includes the number of clients, please click on the arrow to the left of the message to see a list of the client eUCIs.

**RSR Provider Report:**

Row No.	Check No.	Message	Level	Comment Count	Action
1	21	A response is required in QR2, clinical quality management status.	Error		
2	237	The Hillwood Mental Health Service Delivery Site is missing a website URL.	Alert		

**Client-Level Data**

[View Detailed CLD Validation Report](#)

Row No.	Check No.	Message	Level	Comment Count	Action
▶ 1	96	8 Clients missing Poverty Level.	Warning	0	<a href="#">Add Comment</a>
▶ 2	97	9 Clients missing Housing Status.	Warning	0	<a href="#">Add Comment</a>

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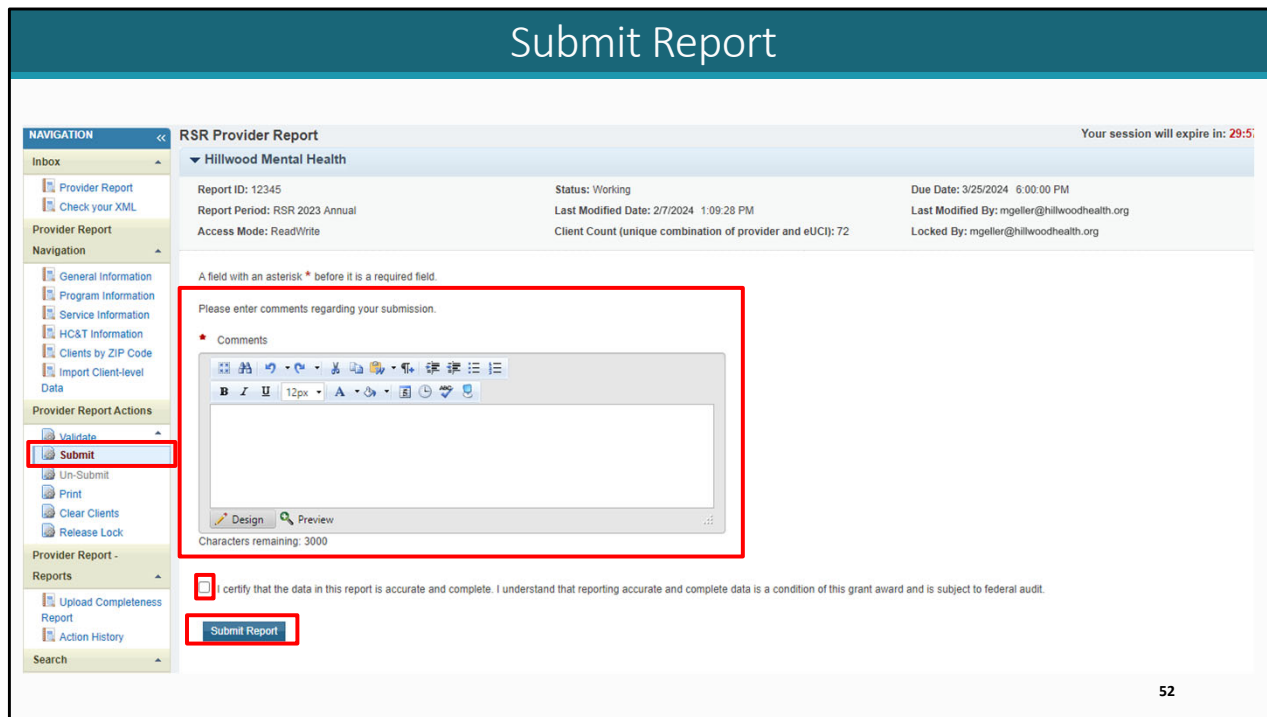
Logged in as: Provider  
The HAB Web Applications also require Adobe Acrobat Reader 5 or higher installed on your PC. To download Adobe Acrobat Reader, click [here](#).

This is a sample validation results page. The system will split any validation results into those resulting from your Provider Report up here at the top and those that are coming from your data uploaded to the report in this second table at the bottom. If you make any corrections to your report or your data due to your validation results, then you must revalidate your report using the same instructions we went over earlier.

If you need to add a comment to a warning, simply select the “Add Comment” link in the Action column. A text box will appear where you can type in and save your comment. Comments cannot be deleted or edited once saved so only enter a comment once you are certain of its contents. If for some reason, you have erroneous information entered for a comment, simply add another with the correct explanation mentioning that and that the previous comment should be disregarded.

Once you have taken care of any validation issues, the next step is to submit your report.





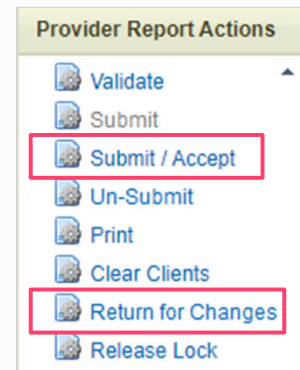
To submit your report, select “Submit” over in the Navigation panel.

In the comment box, enter a comment with any meaningful feedback you have about the RSR submission process.

Beneath that, select the checkbox confirming the report data are accurate and complete. And lastly, select the “Submit Report” button.

## Provider Report Status

- Provider Reports must be reviewed and accepted by all funding recipients
  - “Review” status: One or more funding recipients must review and accept the report
  - “Submitted” status: The report is complete and accepted by all recipients
- In the Action History, you can see which recipients have accepted a report, identified by the grant number



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Once you submit your report it will advance out of “Working” status. Provider Reports must be reviewed by all recipients that fund the provider. From there, they can either accept the report by selecting “Submit/Accept” or return it back to the provider for changes by selecting “Return for Changes,” both available in the Navigation panel once a recipient has accessed the report.

If your Provider Report is in “Review” status, it means that one or recipients must still review it. Once it is in “Submitted” status, that means all recipients have reviewed and accepted the report.

You will be able to see the grant number for each recipient that has accepted the report, making it much easier to figure out which recipient and which grant must still accept a Provider Report before it moves to “Submitted” status.

## Action History

RSR Provider Report

Your session will expire in: 29:57

**Hillwood Mental Health**

Report ID: 12345

Report Period: RSR 2023 Annual

Access Mode: ReadWrite

Status: Review

Last Modified Date: 2/7/2024 1:09:28 PM

Client Count (unique combination of provider and eUCI): 72

Due Date: 3/25/2024 6:00:00 PM

Last Modified By: mgeller@hillwoodhealth.org

Locked By: mgeller@hillwoodhealth.org

Action Type	Action Taken By	Action Taken On
<div style="display: flex; align-items: center;"> <span style="font-size: 1.2em; margin-right: 5px;">-</span> <span>Accept PR</span> </div> <p style="font-size: 0.8em; margin-top: 5px;">Description: Recipient Accepts Provider Report, stay in Review Status since not all Recipients accepted Out of 2 funding sources, H76HA00000 has accepted. <u>Comment: Accepting report</u></p>	cbing@recipientoffice.gov	2/7/2024 10:27:30 AM
<div style="display: flex; align-items: center;"> <span style="font-size: 1.2em; margin-right: 5px;">+</span> <span>Submit PR</span> </div>	mgeller@hillwoodhealth.org	2/7/2024 7:38:20 AM
<div style="display: flex; align-items: center;"> <span style="font-size: 1.2em; margin-right: 5px;">+</span> <span>Client Level Data Upload (id = 12345)</span> </div>	mgeller@hillwoodhealth.org	2/7/2024 7:21:55 AM
<div style="display: flex; align-items: center;"> <span style="font-size: 1.2em; margin-right: 5px;">+</span> <span>Start PR</span> </div>	mgeller@hillwoodhealth.org	2/6/2024 9:59:10 PM

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Logged in as: Provider  
The HAB Web Applications also require Adobe Acrobat Reader 5 or higher installed on your PC. To download Adobe Acrobat Reader, click [here](#).

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To show you what I mean, here we have the Action History of a Provider Report.

You can see in this sample report that there is a separate line item for the different report actions such as when it was started and when it was submitted.

This report also contains information on if and when your recipient(s) have accepted your report. In this example, we see that one recipient has accepted this report and the description indicates that this recipient is one of two that must accept it and includes their grant number.

# Submission Timeline

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Hang in there! We're almost at the end of the webinar. Let's briefly go over the submission timeline.

## RSR Submission Timeline

Date	Recipients	Providers
Thursday, October 26, 2023	Check Your XML	
Monday, December 4, 2023	Recipient Report Start Date	--
Monday, February 5, 2024	Recipient Report Due Date	Provider Report Start Date
Monday, March 4, 2024	--	Provider Report Target Date
Monday, March 18, 2024	Return for Changes Deadline	--
Monday, March 25, 2024	All RSRs must be in "Submi@ed" status by 6pm ET	

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We have gone over a whole lot of instructions for today's presentation and we want to get to the Q&A as quickly as possible but first I have just a couple additional helpful resources to share with you all starting with the submission timeline.

February 5th is both the due for the Recipient Report and the start date for the Provider Report. The target deadline for the Provider Report is on Monday, March 4th. March 18th is the return for changes deadline, the last day that a recipient can return a Provider Report to a provider for changes without having to go through us at Data Support. And then finally, the RSR submission deadline is on Monday, March 25th at 6 pm ET. All RSRs must be in "Submitted" status by that time. No extensions will be granted.

## Upcoming Webinars and TA Resources

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Finally, I'd like to go over some of the upcoming webinars and technical assistance resources.

## RSR Webinar Series



Date	Webinar
February 7, 2024	<a href="#">Reviewing Your Data at Upload: Tools in the RSR Web System</a>
February 21, 2024	<a href="#">RSR UCR Bootcamp</a>
May 15, 2024	<a href="#">RSR Town Hall</a>

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Our RSR webinar series is coming to a close, but we do have a few more really great webinars that you should attend.

These webinars are on Wednesdays and take place from 2:00pm-3:00pm EST. The registration links to sign up for these webinars are provided on this slide.

## TA Contact Information

### RWHAP Technical Assistance Resources

- The [RWHAP TA Resources Brochure](#) features information on each RWHAP technical assistance provider, including:
  - RWHAP reports they support
  - Questions they frequently respond to
  - Contact information

**Ryan White HIV/AIDS Program TA Resources**

<p><b>RWHAP Data Support</b></p> <p>Reports: RSR, ACR, ACTC, EHE, HIVCAL, PFI/Infectious Report, Expenditure Report, GCMS, and GDR.</p> <p>The Ryan White Data Support team provides support for questions related to data report content and submission site navigation, and interpretation of the infectious reports and HRSA HIV reporting requirements. They can address such issues as:</p>	<ul style="list-style-type: none"> <li>• I don't understand something in the infectious report.</li> <li>• I don't understand a reporting requirement.</li> <li>• What is the allowable response for a given data element?</li> <li>• I received a validation message (alert, warning, error) and I don't know how to fix it.</li> <li>• What is my organization's relationship with our reporting/submitter/provider?</li> <li>• How do I manage contacts in the GCMS?</li> <li>• What is my provider's registration code?</li> <li>• How do I change my report's submission value?</li> <li>• I need the report returned to me for changes.</li> <li>• I don't understand a certain RWHAP service category and what activities are included in that category.</li> </ul>	<p><b>RWHAP DATA SUPPORT</b></p> <p>1-888-640-9356 Hours: 10am-6:30pm ET, M-F RyanWhiteDataSupport@hrsa.gov TargetHIV_DataSupport</p>
<p><b>Data Integration, Systems and Quality (DISQ) Team</b></p> <p>Reports: RSR, ACR, ACTC, EHE, HIVCAL.</p> <p>The DISQ team aims to enhance the completeness, accuracy and consistency of RWHAP client-level data through capacity building, training and technical assistance (TA) for recipients and providers. They can address such issues as:</p>	<ul style="list-style-type: none"> <li>• I'm a new user and I don't know where to start.</li> <li>• I need help with my client-level data.</li> <li>• What is the data reporting schedule and how do I use it to trap my source data?</li> <li>• How do I create an XML file?</li> <li>• How do I use TRAST?</li> <li>• How do I integrate data from multiple sources?</li> <li>• How do I use the current completeness report?</li> <li>• I need help addressing a data issue identified in my system-generated report.</li> <li>• How do I check the quality of our data?</li> <li>• I would like to improve my organization's process for managing/entering/uploading our data.</li> <li>• Is there another organization that uses the same data system that I can talk to?</li> </ul>	<p><b>DISQ</b></p> <p>Data Integration, Systems &amp; Quality TECHNICAL ASSISTANCE Data.TA@usphhsa.org TargetHIV_DISQ</p>
<p><b>EHBs Customer Support Center</b></p> <p>Reports: RSR, ACR, ACTC, EHE, HIVCAL, PFI/Infectious Report, Expenditure Report, GCMS.</p> <p>The EHBs Customer Support Center assists with registering, accessing, and uploading the EHBs. They can address such issues as:</p>	<ul style="list-style-type: none"> <li>• I can't log into the EHBs.</li> <li>• I need help registering in the EHBs.</li> <li>• I need to add/change who is allowed to upload the report.</li> <li>• I need help finding my report in the EHBs.</li> <li>• I have a web system error.</li> </ul>	<p><b>HRSA Electronic Handbooks</b></p> <p>1-888-664-4772 Hours: 10am-6pm ET, M-F EHBs_TA@hrsa.gov</p>
<p><b>CAREWare Help Desk</b></p> <p>Reports: RSR, ACR, EHE, HIVCAL.</p> <p>The CAREWare help desk can assist with generating XML files from CAREWare. They can address such issues as:</p>	<ul style="list-style-type: none"> <li>• I need help with CAREWare.</li> <li>• How do I generate an uploadable XML file using CAREWare?</li> <li>• How do I create a system report in CAREWare?</li> <li>• How do I import data from another system into CAREWare?</li> </ul>	<p><b>jjProg</b></p> <p>1-877-294-3871 Hours: 12-5pm ET (Mon-Fri) and 10:30-6:30pm ET (Tue-Thu) cshhs@jjprog.com</p>
<p><b>Contact Your Project Officer</b></p> <p>They can address such issues as:</p>	<ul style="list-style-type: none"> <li>• I have questions about my organization's RWHAP program.</li> <li>• I need help with my program report.</li> <li>• I have a question about my grant funding.</li> <li>• I can't meet the report deadline?</li> <li>• My organization is a recipient, and my provider is not submitting their data on time.</li> <li>• My organization did not collect all the required data. What do I do?</li> </ul>	<p><b>HRSA</b></p> <p>100% Reauthorized Division of HIV/AIDS HIV/AIDS Division</p>

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There are several technical assistance resources available to help you, the RWHAP TA Resources brochure outlines information about each technical assistance provider, including the reports they support, frequently asked questions they respond to, and their best contact information. You can find this resource on the TargetHIV website.

Most importantly, please don't forget that there is no wrong door for TA – if we can't assist you, we're happy to refer you to someone who can!



## Additional TA Resources



### [TargetHIV Website](#)

[2023 RSR Instruction Manual](#)  
[RSR Data Dictionary and XML Schema Implementation Guide](#)  
[DISQ ListServ](#)



### [HRSA HAB Website](#)

Policy notices, instructions, and HAB information  
[PCN #16-02](#)

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The TargetHIV website is the best place to find all of our TA materials such as the 2023 RSR Instruction Manual and the RSR data dictionary.


As I mentioned at the beginning of the presentation, you can also join the DISQ listserv to be informed about all things RSR.

Also, the HRSA HAB website is the place to go for policy notices and HAB information. PCN#16-02 can be found on that website which is the list of definitions for all core medical and support services.

## Connect with HRSA

To learn more about our agency,  
visit

[www.HRSA.gov](http://www.HRSA.gov)

 Sign up for the HRSA eNews

FOLLOW US:    



Finally, to connect with and find out more about HRSA, check out HRSA.gov.

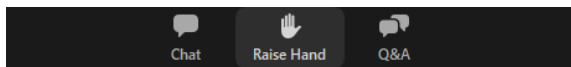
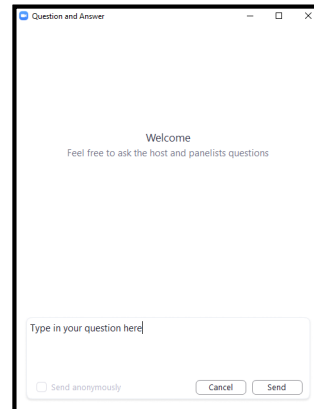
I'd like to take a moment to thank everyone for joining us on today's presentation. I will now turn it back over to Ellie for the Q&A portion of the webinar.

## Let's Hear From You!

- Please use the “raise hand” function to speak. We will unmute you in the order that you appear.

**OR**

- Type your question in the question box by clicking the Q&A icon on the bottom toolbar.



And now to your questions – but first, I would like to remind you that a brief evaluation will appear on your screen as you exit, to help us understand how we did and what other information you would have liked included on this webinar. We really appreciate your feedback and use this information to plan future webinars. My colleague Isia is going to put a link out in the chat feature if you would prefer to access the evaluation right now. We’ll also send a final reminder via email shortly after the webinar.

As a reminder, you can send us questions using the “Q&A” button on your control panel on the bottom of your screen. You can also ask questions directly “live.” You can do this by clicking the “raise hand” button, which is also on your control panel. If you raise your hand, we’ll be able to allow you to unmute and ask your question. We hope you consider asking questions “live” because we really like hearing voices other than our own.

We do want to get all of your questions answered, and we do not usually run over an hour. If you have submitted your question in the question box and we cannot respond to your question today, we will contact you via email to follow up. Sometimes we need to do some follow-up before providing you with a final answer, so stay tuned for

the written Q&A as well for answers to all of your questions.