HIV Prevention, Care and Treatment Resource Inventory Compiler

Introduction, Instructions, Tips, and Best Practices

INTRODUCTION

The *Integrated HIV Prevention and Care Guidance, including the Statewide Coordinated Statement of Need, CY 2022-2026* (Integrated Plan Guidance) requires an HIV Prevention, Care, and Treatment Resource Inventory. The purpose of this tool is to support the collection and analysis of information about all HIV resources in the jurisdiction.

The tool supports three key actions:

- **Data Collection:** The tool captures information for developing the HIV resources inventory. It can be shared with multiple users to input data for the HIV funding sources they receive, and then combined into one file.
- **Resource Inventory Table Creation:** Once all of the information is collected and combined into one file, the tool generates a formatted table, which can be downloaded as a PDF.
- **Funding Analysis Dashboard:** The tool includes a dashboard with six pre-programmed options for analyzing the collected data.

The tool was developed for the purpose of responding to the Integrated Plan Guidance; however it may be useful for other efforts to document, track, and analyze HIV prevention, care, and treatment resources, such as the priority setting and resource allocation processes.

It is important to review the Integrated Plan Guidance to confirm compliance with legislative and programmatic planning requirements. The HIV Prevention, Care, and Treatment Resource Inventory is a component of Section III of the Guidance (see excerpt below).

HIV Prevention, Care and Treatment Resource Inventory: Integrated Plan Guidance Requirement Detail

Create an HIV Prevention, Care, and Treatment Resource Inventory. The Inventory may include a table and/or narrative but must address all of the following information in order to be responsive:

- Organizations and agencies providing HIV care and prevention services in the jurisdiction.
- HRSA (must include all RWHAP parts) and CDC funding sources.
- Leveraged public and private funding sources, such as those through HRSA's Community Health Center Program, HUD's HOPWA program, Indian Health Service (IHS) HIV/AIDS Program, Substance Abuse and Mental Health Services Administration programs, and foundation funding.
- Describe the jurisdiction's strategy for coordinating the provision of substance use prevention and treatment services (including programs that provide these services) with HIV prevention and care services.
- Services and activities provided by these organizations in the jurisdiction and if applicable, which priority population the agency serves.
- Describe how services will maximize the quality of health and support services available to people at-risk for or with HIV.

INSTRUCTIONS

Data entry should be completed for primary funding awards, defined as the award that goes directly from the funder to the recipient. The data entry form includes a section for capturing information about subrecipients.

Step 1: Download and open the tool. It cannot be used in Excel Online or Google Sheets. When prompted, select “Enable Editing” and “Enable Macros.” These may appear as pop-up boxes or highlighted warnings under the Menu bar.

Step 2: Complete the Contact Information tab. The Contact Information tab is helpful if sharing the tool with multiple users and managing multiple copies.

Step 3: Review the Data Inventory tab. This information will be available for selection during data entry. Users can edit and add to the pre-populated items. Instructions on how to do so are included on the Data Inventory tab.

Step 4: Complete data entry from the Data Entry tab. There are no required data fields; however, to generate a formatted resources inventory table, the starred items (*) should be completed. After completing data entry, navigate to the top of the page and click the "Click to Submit Data" button. Data will be saved in the database tabs, and the data entry form will be cleared for additional data entry.

Step 5: If copies of the tool were sent to multiple users for data entry, compile data into one file:

- Copy all data in the Funding Source Database tab from a submitted file. Only cells with entered data should be copied. Do not copy column headers. To copy data, press Ctrl+A (headers are not included when using this shortcut) and right click to select “Copy.” You may also select the data using your mouse/cursor, and then right click to select “Copy.”
- Paste the copied data into the Funding Source Database in the file being used for compilation by right clicking on the first available blank row in the database, and selecting “Paste Values.”
- Repeat the process for the Service Provider Database.

Step 6: Once all data are combined into one file, users can:

- **Create a formatted table from the Resource Inventory Table tab.** Click the "Update Table" button to ensure that all entered data are included and sorted appropriately. Then select either the "PDF with HIV Care Continuum" button or the “PDF with EHE Strategies” button. PDFs can only be generated on a PC at this time. Data entry can be completed on a Mac, but the file must be opened on a PC to create the formatted table.
- **Review and analyze the Funding Dashboard.** Click the “Click to Refresh Dashboard” button to ensure that all entered data are included and sorted properly.
- Spelling differences can impact functionality. See Tips & Best Practices for using the Excel Tool in the next section for information on ensuring consistency in spelling.

TIPS & BEST PRACTICES

Tips for Using the Excel Tool

- Spelling differences can impact functionality. This is particularly important for the two tables on the Data Inventory tab and the spelling of sub recipient names in Section 3 of the Data Entry tab. To help ensure consistent spelling:
    - If sharing copies of the tool with multiple users, complete the Data Inventory tables prior to disseminating the tool to limit the number of potential additions from other users. Provide instructions about what users should do if they have edits or additions to the Data Inventory section, such as instruction to contact someone before making changes or to communicate changes when the file is returned.
    - When all data are compiled, review the database tabs to ensure consistency in spelling. Spelling corrections can be made directly in the database by double clicking in the cell.

- Null data fields are a placeholder for database functionality. Do not delete rows with null data from the tool. They will not be included in the formatted table or impact the dashboard items.

Best Practices for Developing and Analyzing a Comprehensive HIV Resources Inventory

- The tool is structured to capture HIV resources awarded through grant mechanisms, as opposed to reimbursable services, such as those provided through Medicaid and Medicare, or other public/private resources and insurance programs. Jurisdictions should consider strategies for obtaining and/or estimating such expenditures on HIV services, and determine whether or not to include estimates in this tool, or otherwise incorporate documentation and discussion of these resources in the narrative.
- The Integrated Plan Guidance requires jurisdictions to describe how resources and service provision are coordinated and leveraged to maximize the quality of health and support services available to people with or experiencing risk for HIV. This information is helpful for assessing and analyzing available resources to identify gaps and inform priorities. To support collection of additional detail about specific funding sources, Sections 2 and 3 on the Data Entry tab include Additional Details fields. In addition to being saved in the database tabs, this data is compiled at the bottom of the Funding Dashboard tab.
- The charts and graphs generated in the Funding Dashboard can be copied and pasted into other materials, such as the Integrated Plan submission or presentations to planning groups.
- The HIV Resources Inventory is a key source of information required to effectively assess strengths and gaps in the HIV service delivery system. It should be reviewed in combination with other data and assessments to determine where jurisdictions may need to build capacity to provide additional or expanded services, or where adjustments to resource planning may be needed, such as to funding allocations for specific services and funded agencies, in order to meet the evolving needs of people with HIV in the jurisdiction.
- For jurisdictions taking a syndemic approach to the integrated planning process, or those interested in including resources beyond those for HIV prevention, care, and treatment, the tool can accommodate this. In this case, ensure that the Data Inventory is updated to include funders for other service areas and that the Services Delivered table is updated accordingly. While users can only add up to 10 additional entries to the Services Delivered table, the pre-populated items can be edited by double clicking in the cell and typing over what is there. If a pre-populated HIV service is not provided in the jurisdiction, users can edit it to reflect an entirely different service.
- If using the tool to generate a formatted resources inventory table, the PDF document will include as the title "HIV Prevention, Care and Treatment Resources Inventory." To edit the title, users will need to use Adobe Acrobat or another PDF editor.

Need Assistance?

Contact us at ihaptac@jsi.com

Visit our website to access more resources.

Stay in touch! Sign up for our listserv to receive up-to-date information about new resources.

About the IHAP TAC: The HRSA-funded **Integrated HIV/AIDS Planning Technical Assistance Center** (IHAP TAC) supports Ryan White HIV/AIDS Program Parts A and B recipients, CDC DHP-funded recipients, and their respective HIV planning bodies with integrating planning, including the development, implementation, and monitoring of their Integrated HIV Prevention and Care Plans. We provide national and individualized training and technical assistance and facilitate peer-to-peer learning.