Provide Enterprise
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# Administrative Activities

## Provide Enterprise User Guide

## Virginia Department of Health

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Last Updated December 2024

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# Chapter One:  Introduction & Background

This guide will walk you through several activities that are specifically performed by the VDH Administrative Team.  The guide assumes the user is familiar with Basic Navigation, Eligibility Assessments, Client Registrations and Working with the Client Profile.

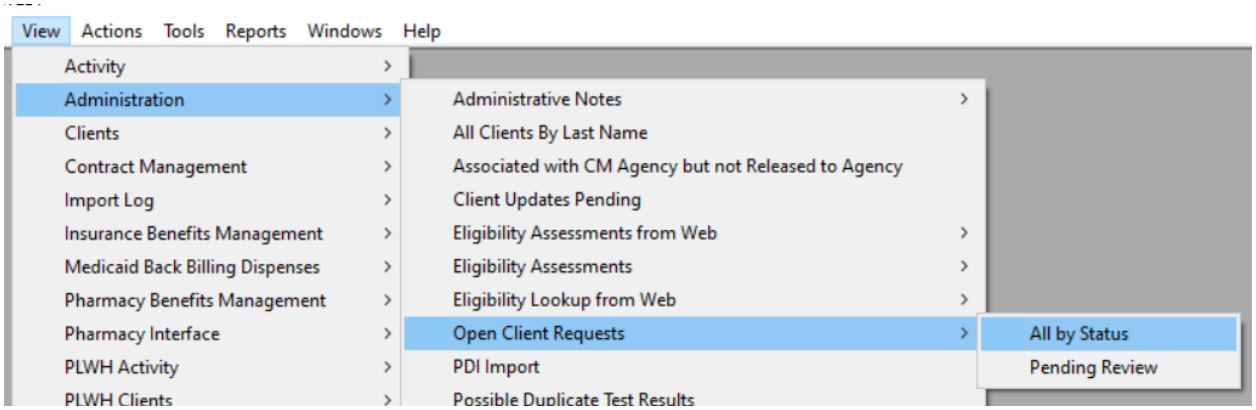
# Chapter Two:  Open Client Requests and Informed Consents

**Open Client Requests**

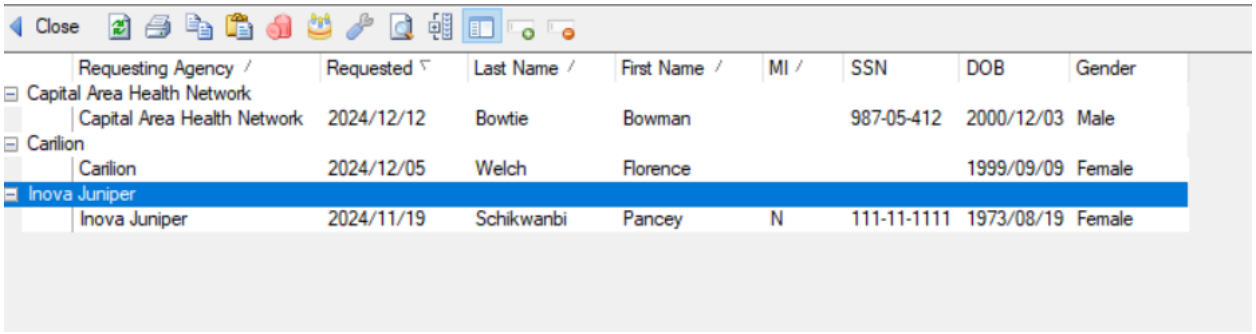
When an agency registers a new client, Provide Enterprise will check to see if the client already exists, and if so presents potential matching clients for the user to select.

Sometimes, a user may register a new client, however the client already receives services at another agency in your network.  When this happens, the user is presented with a message that an Open Client Request has been sent to the Virginia Department of Health for review.

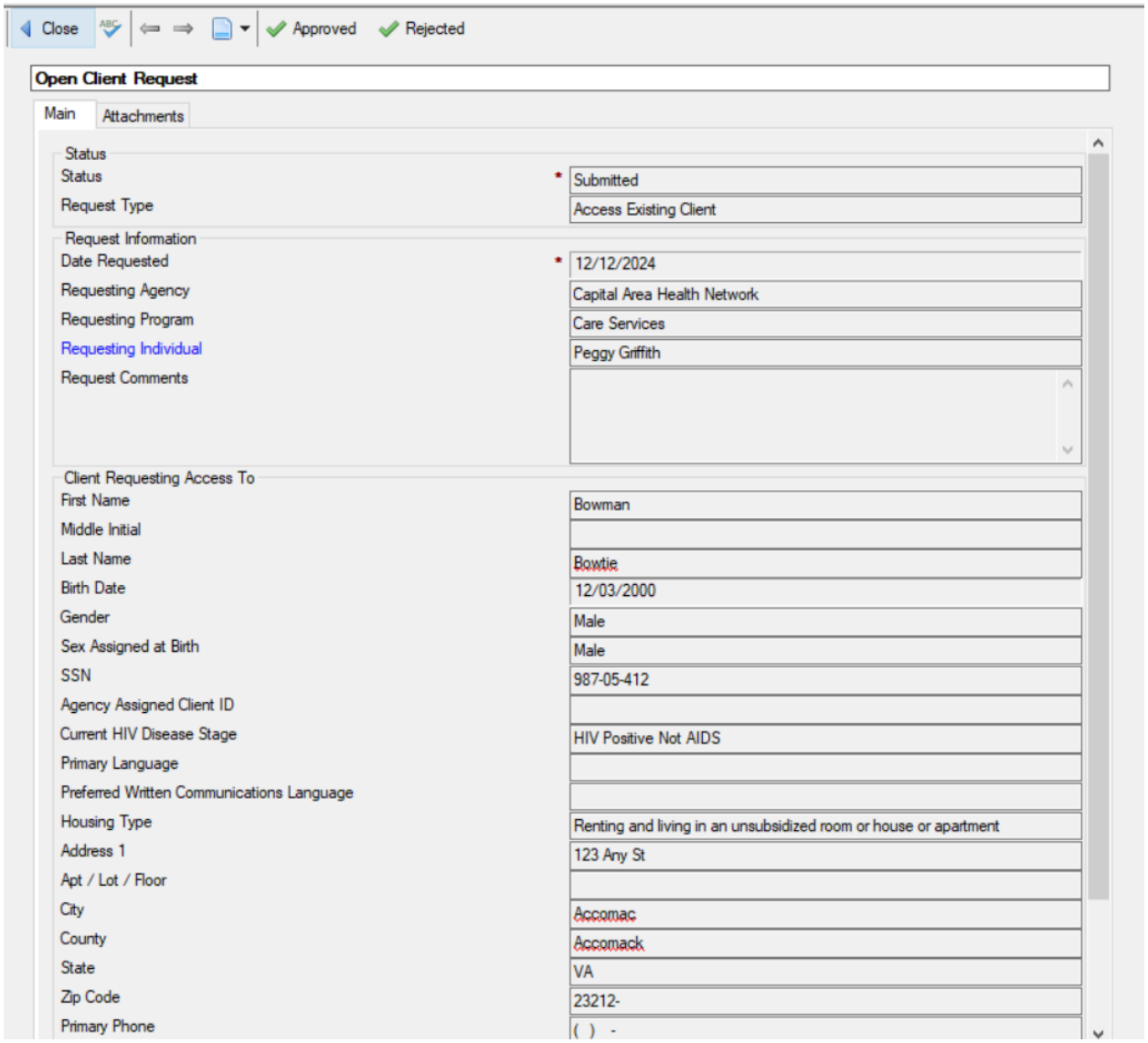
Go to View > Administration > Open Client Requests.



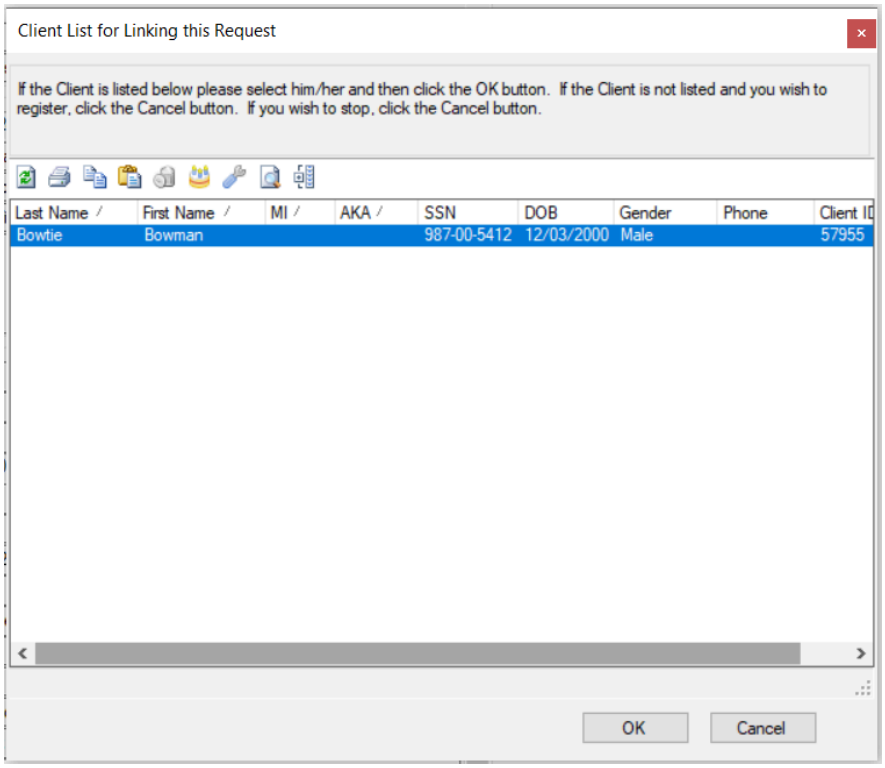

All by Status shows all Open Client Requests that have been received and processed.  The “Pending Review” view displays all Open Client Requests that have not been reviewed.




To review an Open Client Request, double click the record to open it.



After reviewing the request, click Approved to approve the request, or Rejected to reject the request. If you approve the request, a dialog box will appear to select the client record to release. Select the appropriate record, and click OK.

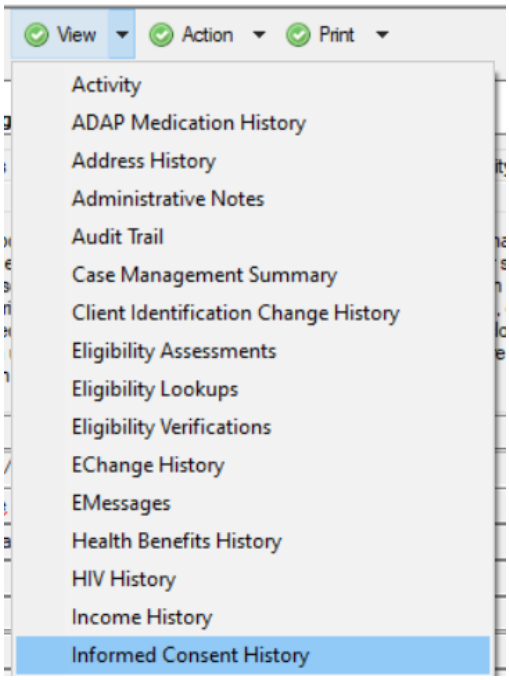



The Informed Consent will be created, and the agency will be able to see the Client Profile immediately, however sub-records such as address, income, health benefit, or eligibility assessments will be visible after an hourly agent runs and releases the associated histories.

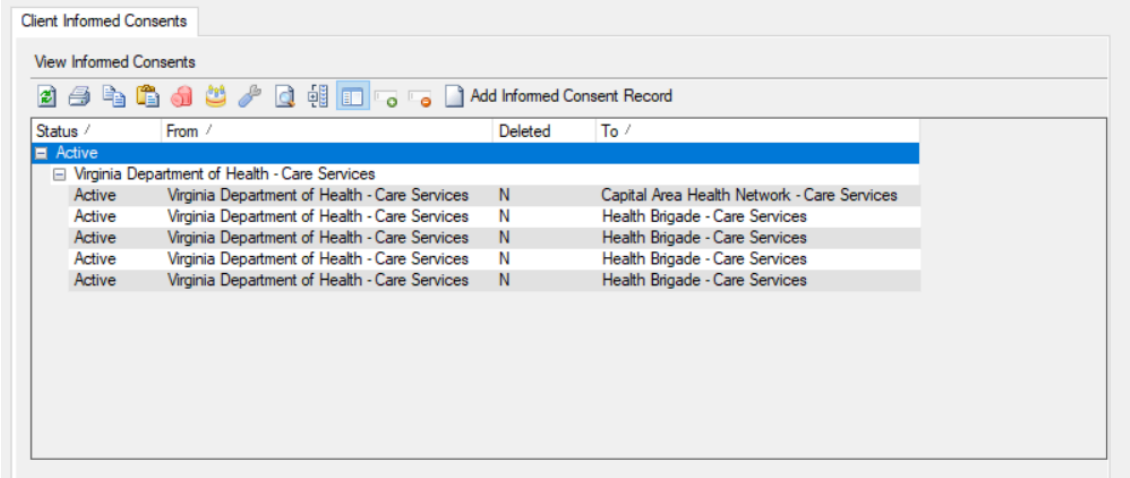
**Informed Consent**

Informed Consents allow you to release a Client Profile to another organization and program for any reason as necessary.

From the Client Profile, go to View > Informed Consent History.

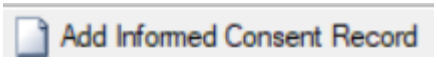



This will present an embedded view of all Active and Inactive Informed Consents.




## Adding Informed Consent

A user with appropriate permissions may add informed consents as needed to coordinate care for a client.

Click 

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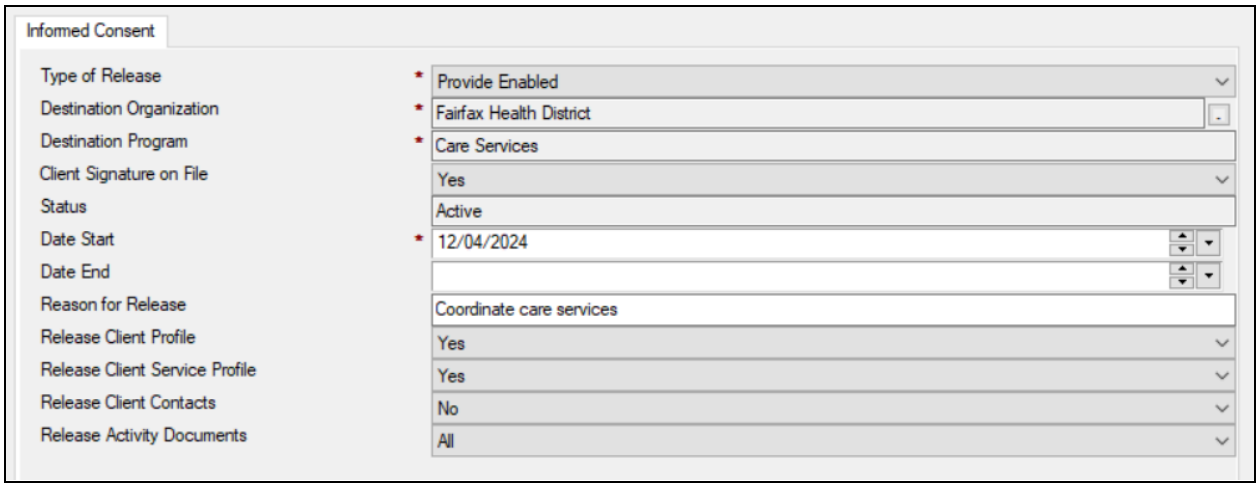
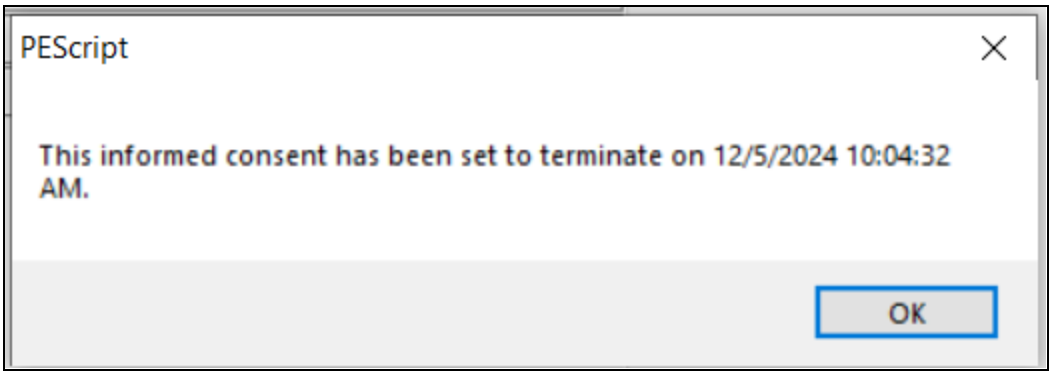



- Destination Organization: Select the Agency/Program combination to release the client information.
- Client Signature on File: Ensure that the client has signed the appropriate consent form and select Yes.
- Date Start: Defaults to today's date
- Date End: You may enter an end date if this access is temporary. Otherwise, the field may remain blank if no end date is known or specified.
- Reason for Release: enter the reason for the release of information.
- Release Client Profile: Select Yes.
- Release Client Service Profile: This allows the destination org/program to see Client Service Profile information which shows which agencies may be serving a client.
- Release Client Contacts: This allows the destination org/program to see any contacts and/or household members related to the client.
- Release Activity Documents: This allows the destination org/program to see any sub-records and activity records that have taken place for the client. Choices are:
    - All - this releases all activity records to the destination organization/program, and is the most commonly made selection.
    - Selective - this allows you to specify only certain types of sub-records to the destination organization/program.
    - None - this would release the client profile only to the destination organization/program. No sub-records would be released.
- ***Note - an hourly script agent facilitates the release of all records to the destination organization/program. It may take up to one hour for all records to be released.*

## Terminating an Informed Consent

To terminate an Informed Consent, open the record, and click the Terminate button. A message will appear alerting you that the informed consent is set to be terminated. Click OK.

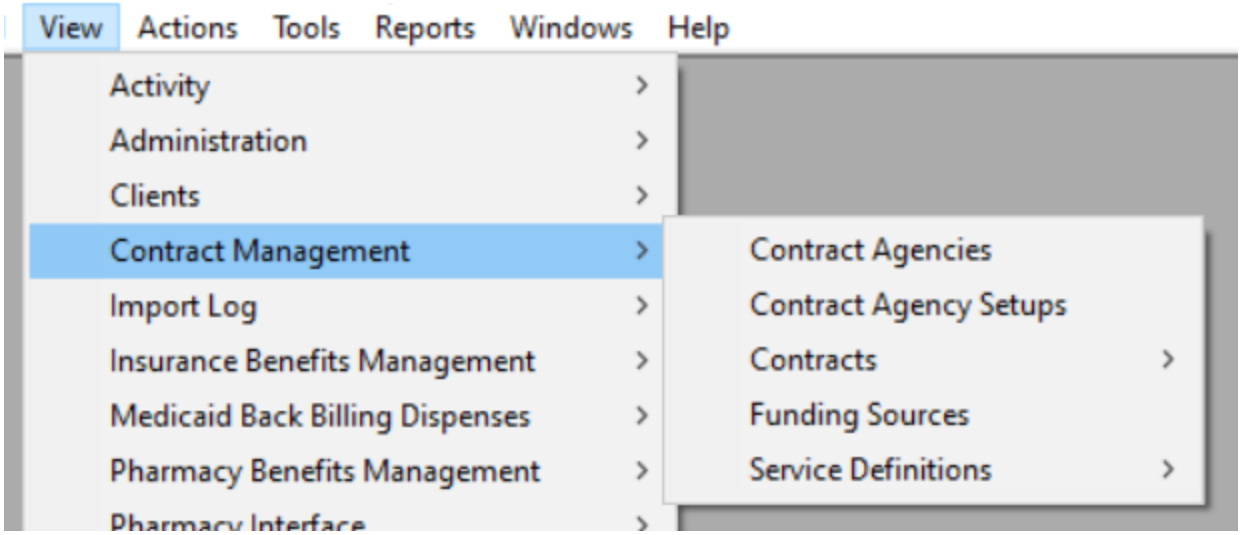
Once the consent is terminated, the destination org/program will still have a historic view of the client, but will be unable to serve the client or see any new updates, sub-records, or eligibility statuses regarding the client.



# Contract Management

The Contract Management section of Provide Enterprise is used to set up your subrecipient agencies and funding sources.

These features require access to the Provide.ContractManagement.Editors.Admin

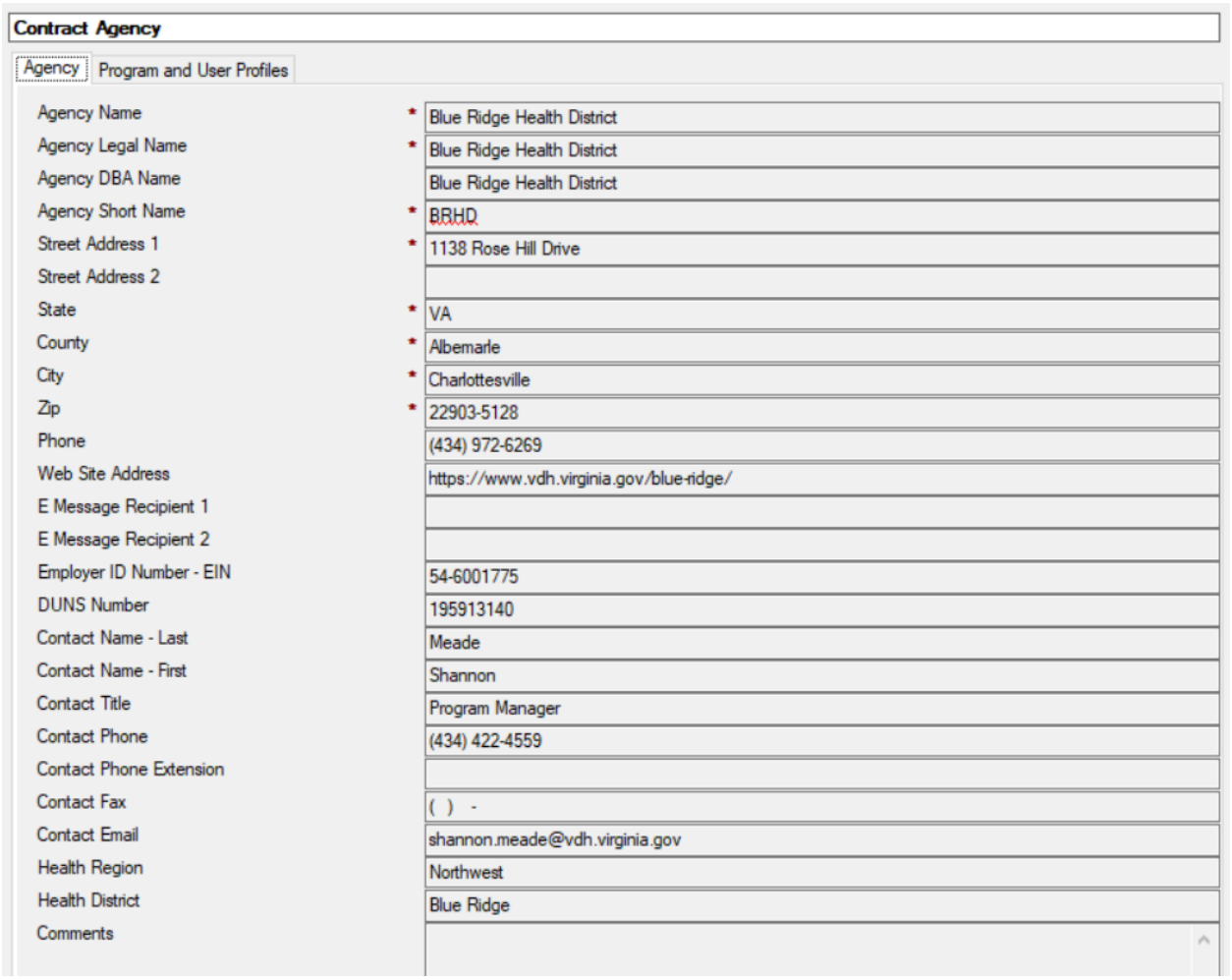



**Contract Agencies**

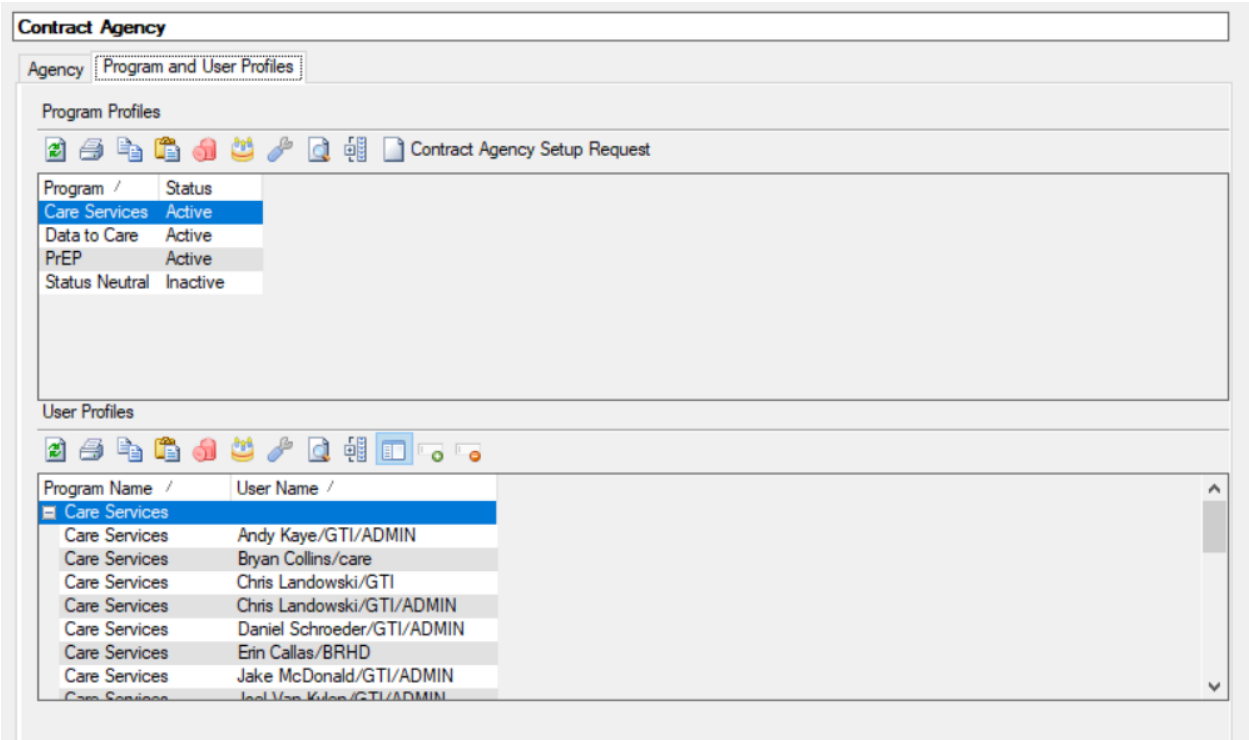
Every agency that is contracted within the PE system must have a Contract Agency record defined for it. Before you request the setup of a new Contract Agency or Program Profile associated with an existing Contract Agency, be sure you look to see if the Agency and Program Profile is already set up. Open the view of "Contract Management\Contract Agencies" as shown below:

| Name | Contact | EMessage Recipient 1 |
|---|---|---|
| Agency Tester | Jason Griffin | |
| AIDS Response Effort | Cathy Sencindiver | |
| Blue Ridge Health District | Shannon Meade | |
| Capital Area Health Network | Phyllis Mann | |
| Carilion | Jennifer McPherson | |
| Community Access Network | Spohnholz Kallyn | |
| Community In Development | Patricia | |
| Council of Community Services | Pam Meador | |

Scroll through to see if you can find the Agency already defined. If it is, open the Contract Agency record as shown below:



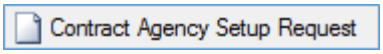
Go to the “Program and User Profiles” tab:



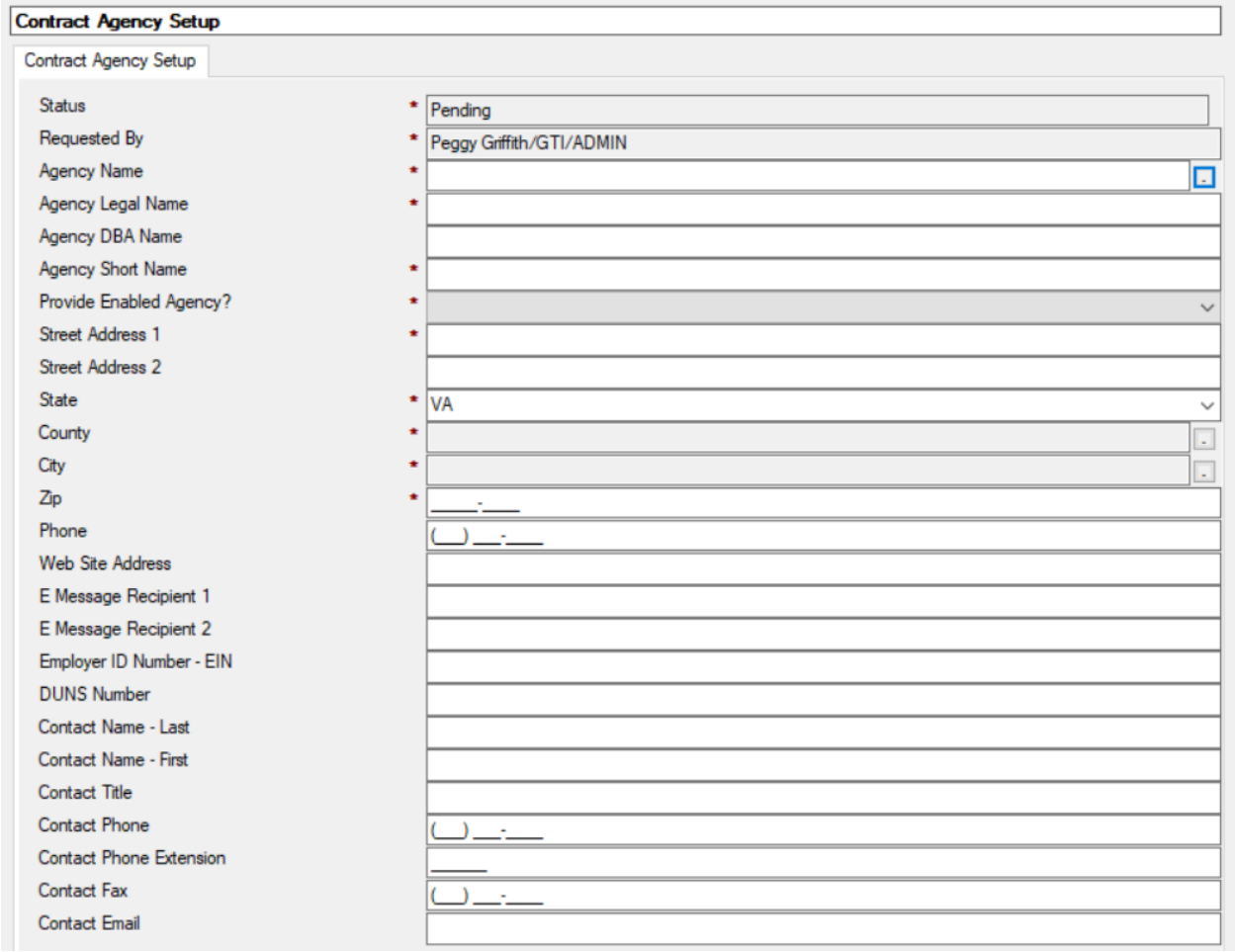

This tab will show you all of the Program Profiles associated with the agency, and user profiles associated with the agency.

### Contract Agency Setup

If the agency is not already defined, you will need to set up a new agency.

A 

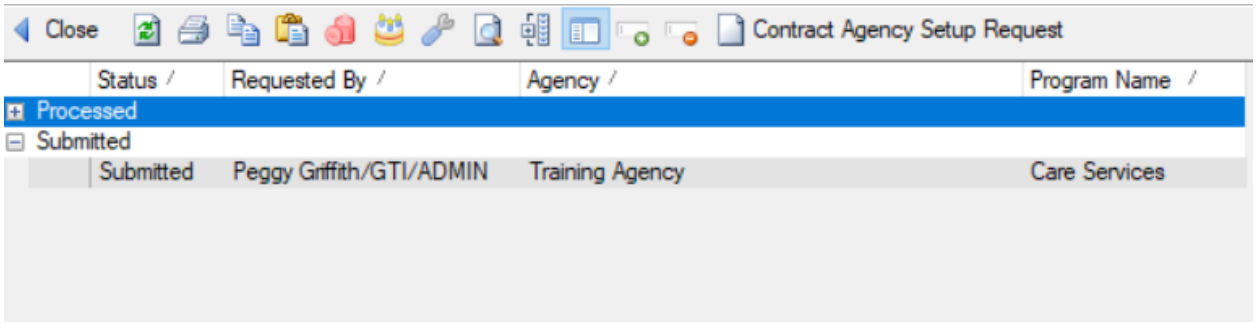
record can be created from the View “Contract Management\Contract Agencies” or “Contract Management\Setup Requests\Agency Program” or from the button on the “Program and User Profiles” tab of the Contract Agency record. It opens as shown below:




Fill in the fields as follows:

- Agency Name. Use the UI button to select the Agency name or manually enter the name if a new Agency to the PE system.
- Provide Enabled Agency? This Yes/No field indicates if the Agency will have staff that will use the PE system to document clients and services or to have their Contract set up and reimbursements processed through the system.
- Program Name. This field appears if "Provide Enabled Agency?" is set to "Yes" and is used to indicate the type of program.

Once all filled in, click the "Submit" button on the Contract Agency Setup form. If the setup request passes all edit checks it is placed in a queue for Contract Administrators to review and Approve if appropriate. Open the view "Contract Management\Setup Requests\Agency Program" as shown below:



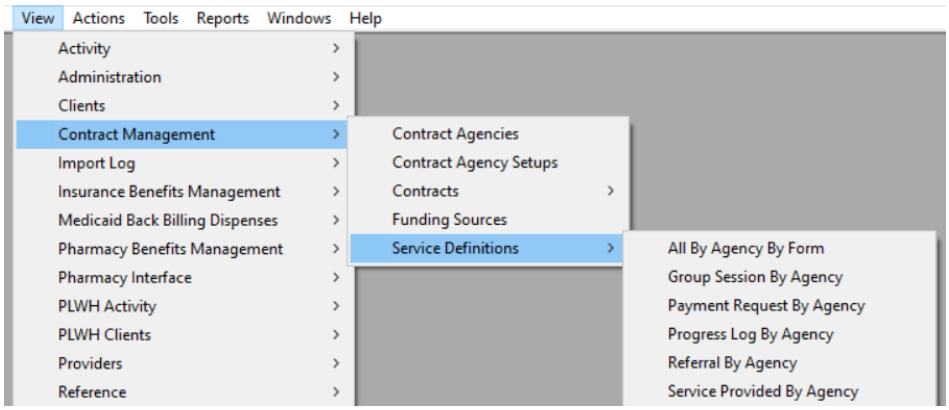

Open the submitted record and click ether the Approve or Reject. Once approved, they will go into a Queue for the PE Administrators (GTI staff) to "Process".

### Contracts and Funding Sources

At this time, Contracts and Funding Source features are not used by the Virginia Department of Health. For more information about implementation of these features, contact the Help Desk.

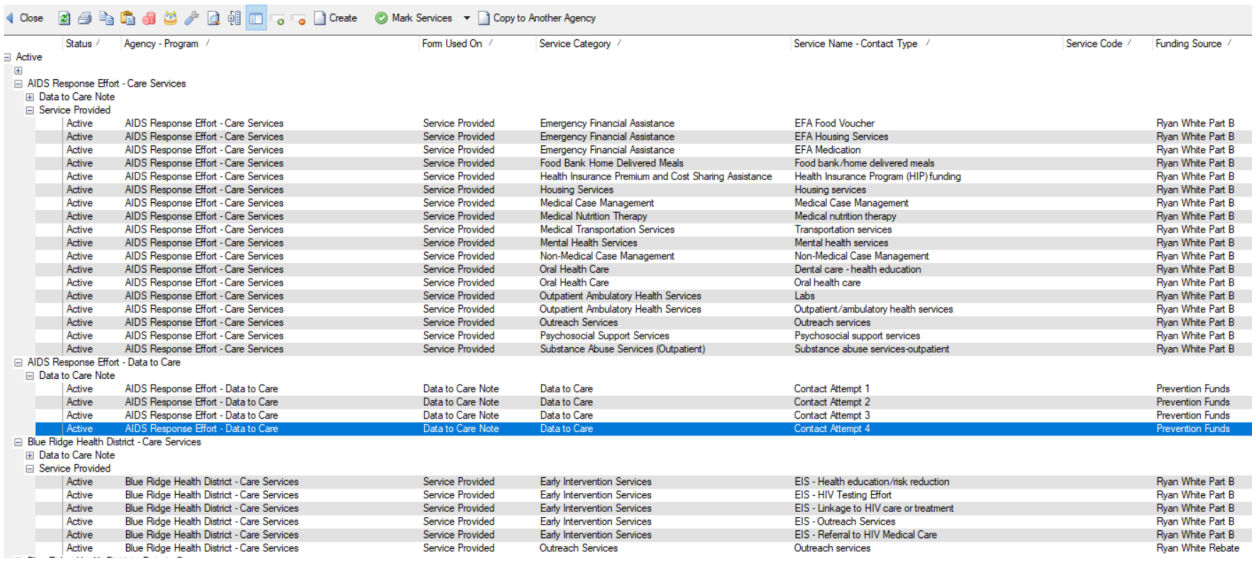
### Service Definitions

Service Definitions are used to describe the services that each agency is allowed to perform. There are several views to help you search and analyze the service definitions. For the Virginia Department of Health, the applicable views are listed below.
**Warning**: Once a Service has been defined to the Provide® Enterprise system and used by an agency you should never change the name or delete the document. Instead, if the Service is to no longer be used simply de-select both "Forms where used" check boxes. This way you will not be able to continue to enter the Service but when you run Searches or Reports you can still select the previously used Service names.

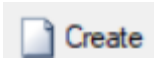



## All By Agency By Form

This view is the most comprehensive display of all active and inactive service definitions used on all forms throughout the Provide System.

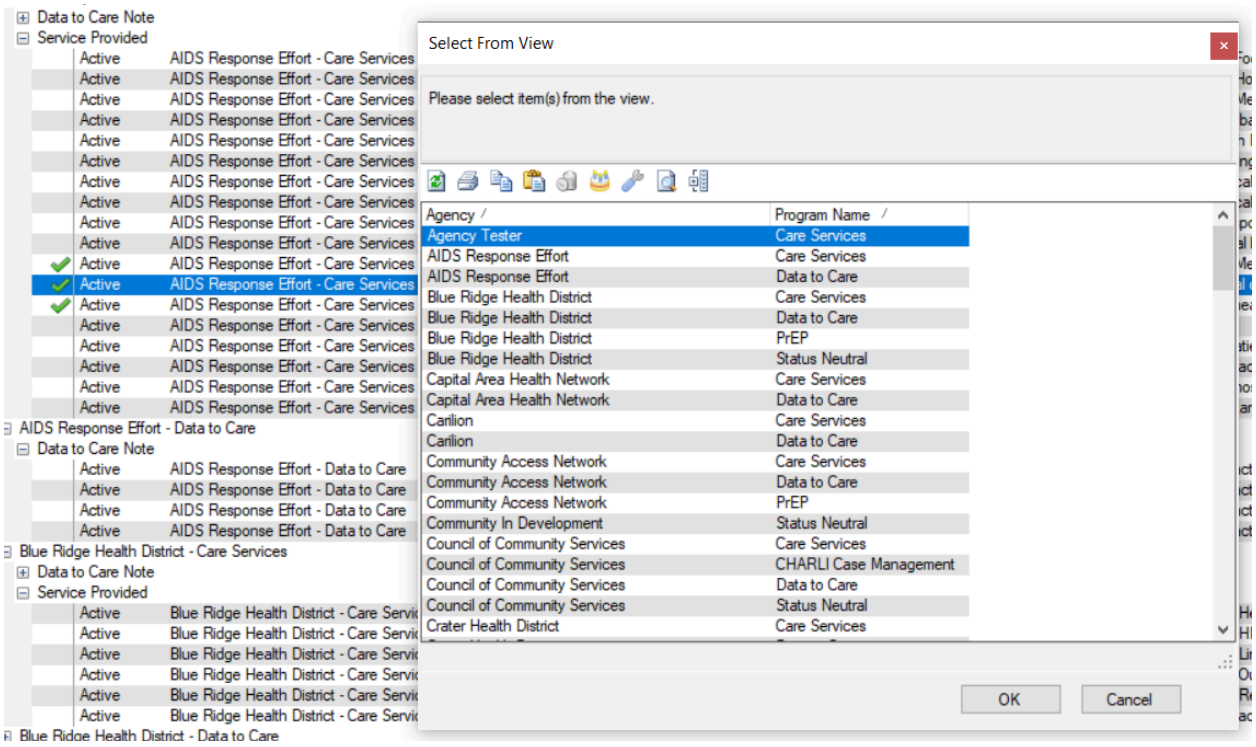



| Status | Agency - Program | Form Used On | Service Category | Service Name - Contact Type | Service Code | Funding Source |
|---|---|---|---|---|---|---|
| Active | | | | | | |
| AIDS Response Effort - Care Services | | | | | | |
| Data to Care Note | | | | | | |
| Service Provided | | | | | | |
| Active | AIDS Response Effort - Care Services | Service Provided | Emergency Financial Assistance | EFA Food Voucher | | Ryan White Part B |
| Active | AIDS Response Effort - Care Services | Service Provided | Emergency Financial Assistance | EFA Housing Services | | Ryan White Part B |
| Active | AIDS Response Effort - Care Services | Service Provided | Emergency Financial Assistance | EFA Medication | | Ryan White Part B |
| Active | AIDS Response Effort - Care Services | Service Provided | Food Bank Home Delivered Meals | Food bank/home delivered meals | | Ryan White Part B |
| Active | AIDS Response Effort - Care Services | Service Provided | Health Insurance Premium and Cost Sharing Assistance | Health Insurance Program (HIP) funding | | Ryan White Part B |
| Active | AIDS Response Effort - Care Services | Service Provided | Housing Services | Housing services | | Ryan White Part B |
| Active | AIDS Response Effort - Care Services | Service Provided | Medical Case Management | Medical Case Management | | Ryan White Part B |
| Active | AIDS Response Effort - Care Services | Service Provided | Medical Nutrition Therapy | Medical nutrition therapy | | Ryan White Part B |
| Active | AIDS Response Effort - Care Services | Service Provided | Medical Transportation Services | Transportation services | | Ryan White Part B |
| Active | AIDS Response Effort - Care Services | Service Provided | Mental Health Services | Mental health services | | Ryan White Part B |
| Active | AIDS Response Effort - Care Services | Service Provided | Non-Medical Case Management | Non-Medical Case Management | | Ryan White Part B |
| Active | AIDS Response Effort - Care Services | Service Provided | Oral Health Care | Dental care - health education | | Ryan White Part B |
| Active | AIDS Response Effort - Care Services | Service Provided | Oral Health Care | Oral health care | | Ryan White Part B |
| Active | AIDS Response Effort - Care Services | Service Provided | Outpatient Ambulatory Health Services | Labs | | Ryan White Part B |
| Active | AIDS Response Effort - Care Services | Service Provided | Outpatient Ambulatory Health Services | Outpatient/ambulatory health services | | Ryan White Part B |
| Active | AIDS Response Effort - Care Services | Service Provided | Outreach Services | Outreach services | | Ryan White Part B |
| Active | AIDS Response Effort - Care Services | Service Provided | Psychosocial Support Services | Psychosocial support services | | Ryan White Part B |
| Active | AIDS Response Effort - Care Services | Service Provided | Substance Abuse Services (Outpatient) | Substance abuse services-outpatient | | Ryan White Part B |
| AIDS Response Effort - Data to Care | | | | | | |
| Data to Care Note | | | | | | |
| Active | AIDS Response Effort - Data to Care | Data to Care Note | Data to Care | Contact Attempt 1 | | Prevention Funds |
| Active | AIDS Response Effort - Data to Care | Data to Care Note | Data to Care | Contact Attempt 2 | | Prevention Funds |
| Active | AIDS Response Effort - Data to Care | Data to Care Note | Data to Care | Contact Attempt 3 | | Prevention Funds |
| Active | AIDS Response Effort - Data to Care | Data to Care Note | Data to Care | Contact Attempt 4 | | Prevention Funds |
| Blue Ridge Health District - Care Services | | | | | | |
| Data to Care Note | | | | | | |
| Service Provided | | | | | | |
| Active | Blue Ridge Health District - Care Services | Service Provided | Early Intervention Services | EIS - Health education/risk reduction | | Ryan White Part B |
| Active | Blue Ridge Health District - Care Services | Service Provided | Early Intervention Services | EIS - HIV Testing Effort | | Ryan White Part B |
| Active | Blue Ridge Health District - Care Services | Service Provided | Early Intervention Services | EIS - Linkage to HIV care or treatment | | Ryan White Part B |
| Active | Blue Ridge Health District - Care Services | Service Provided | Early Intervention Services | EIS - Outreach Services | | Ryan White Part B |
| Active | Blue Ridge Health District - Care Services | Service Provided | Early Intervention Services | EIS - Referral to HIV Medical Care | | Ryan White Part B |
| Active | Blue Ridge Health District - Care Services | Service Provided | Outreach Services | Outreach services | | Ryan White Rebate |

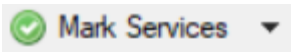
The 

button allows you to create a new Service Definition from scratch, however, the

allows you to select several service definitions and copy all characteristics to another agency/program, and saves time. Simply place a green check mark next to the definitions you would like to copy and select the “Copy to Another Agency” button.



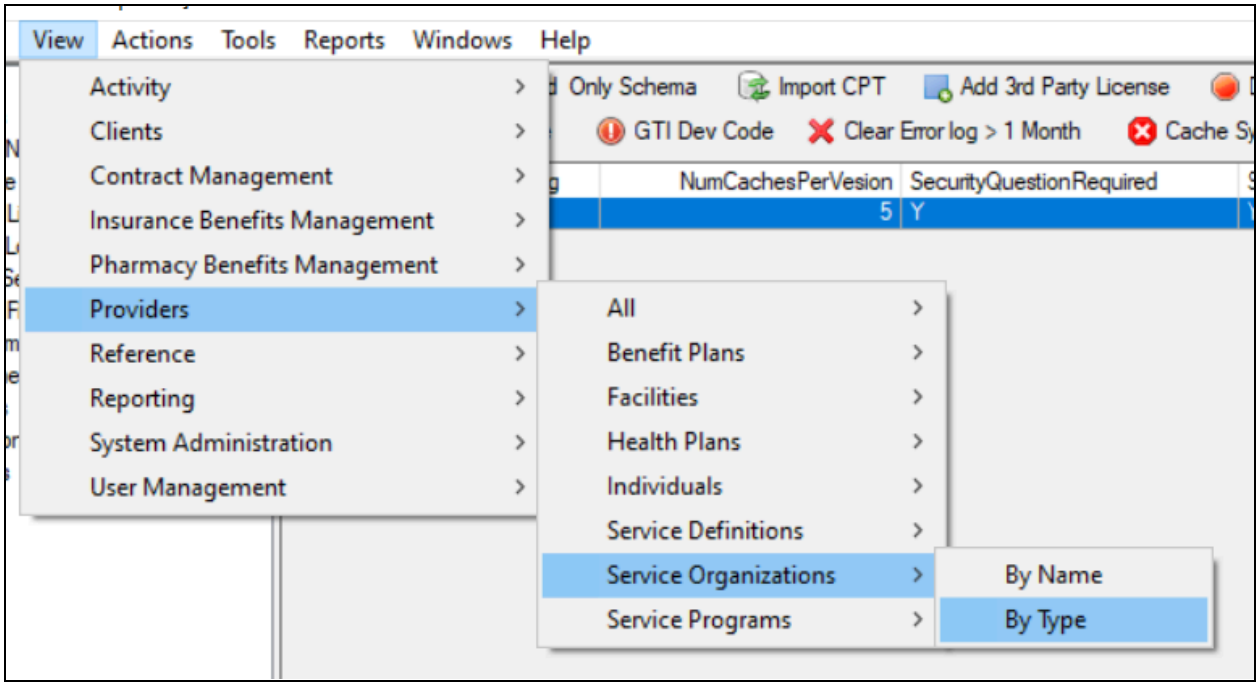

Select the agency you want to copy the service to, and click OK.

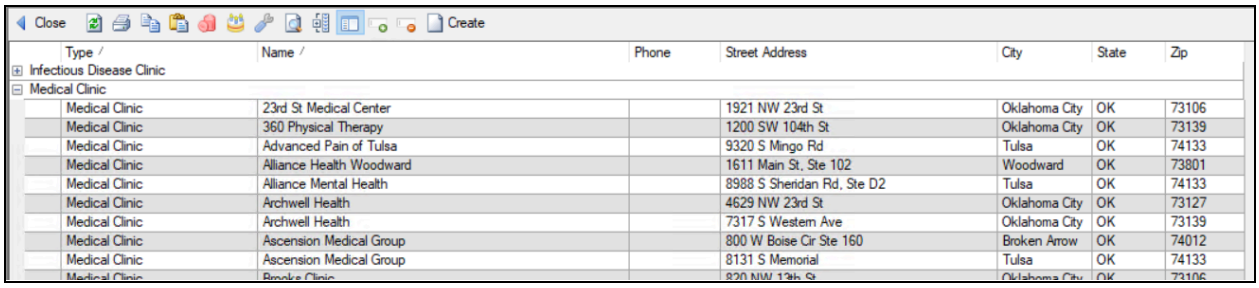
You can also use the  to make a service definition active or inactive.

# Adding/Updating Medical Provider Records

### Service Organizations

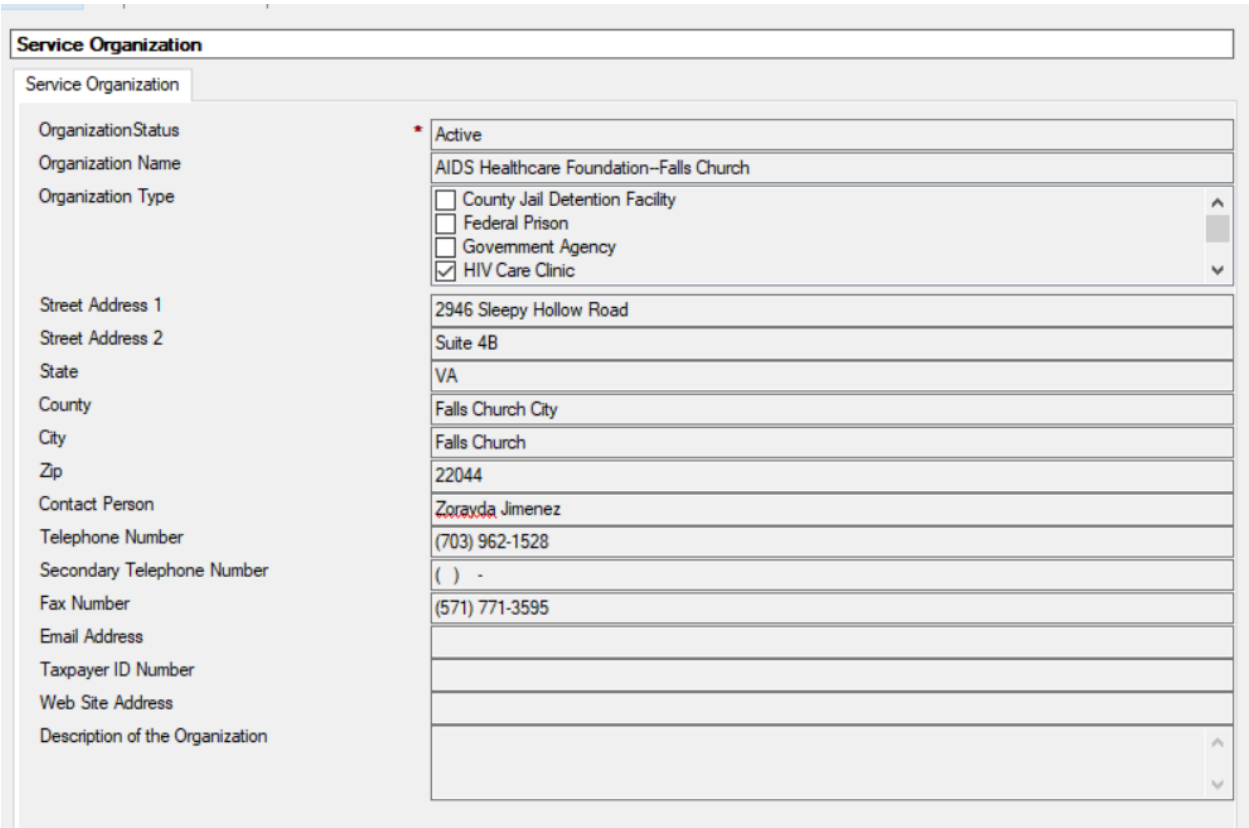
The reference list for Service Organizations is found at View > Providers > Service Organizations. You may view by Name or by Type. By Type will present a categorized list of providers, and may be easier to sort through.




## Creating a New Service Organization

To add a new Service Organization, click the Create button.




Complete the fields.

- Organization Status - defaults to Active
- Organization Name - Enter the name of the new organization
- Organization Type - select all that apply. However, in order for the service organization to appear in the Pick List for HIV Medical Care providers, the option of “Medical Clinic” must be selected.
- Address fields - enter the address of the service organization
- Contact fields - if you know the contact person at the agency and phone, fax, email, etc. you may enter it here.
- Description - if you have any additional information to include about the clinic, you may enter it in the description field.

When you are finished entering information, click Close and Yes to save the record. The record will be selectable for the agency immediately.

## Updating a Service Organization

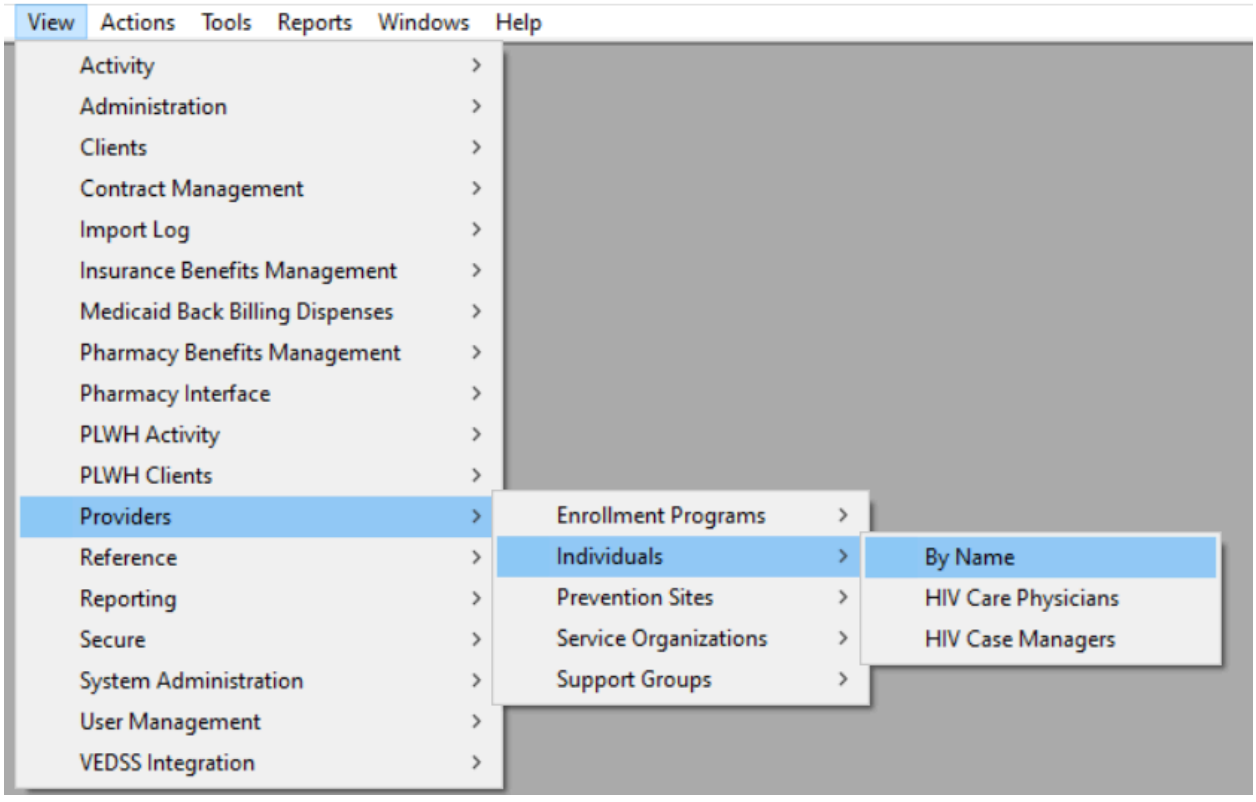
To update a Service Organization, double-click on any service organization record. Click the Edit. From here you may make any edits that are necessary, including making the Status "Inactive," which will make the service organization unselectable going forward.

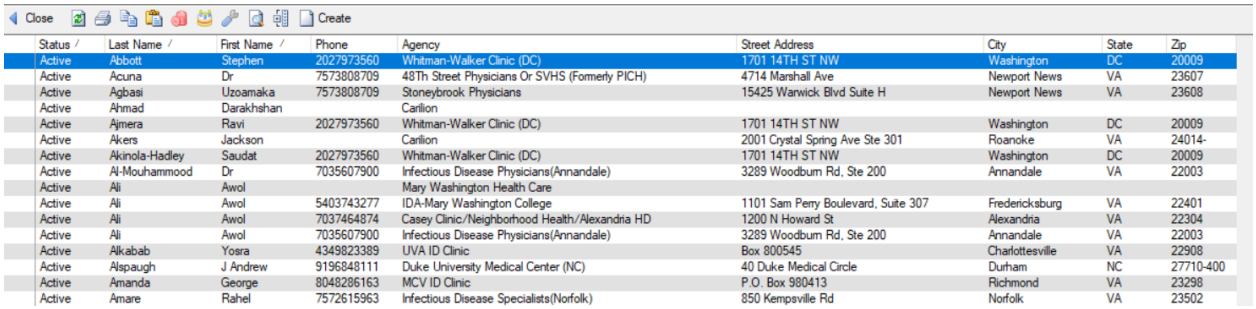
When you are finished entering information, click Close and Yes to save the record. The record will be selectable for the agency immediately.

### Individual Providers

Individual Providers are located at View > Providers > Individual. You may view all by name or categorized by Role.

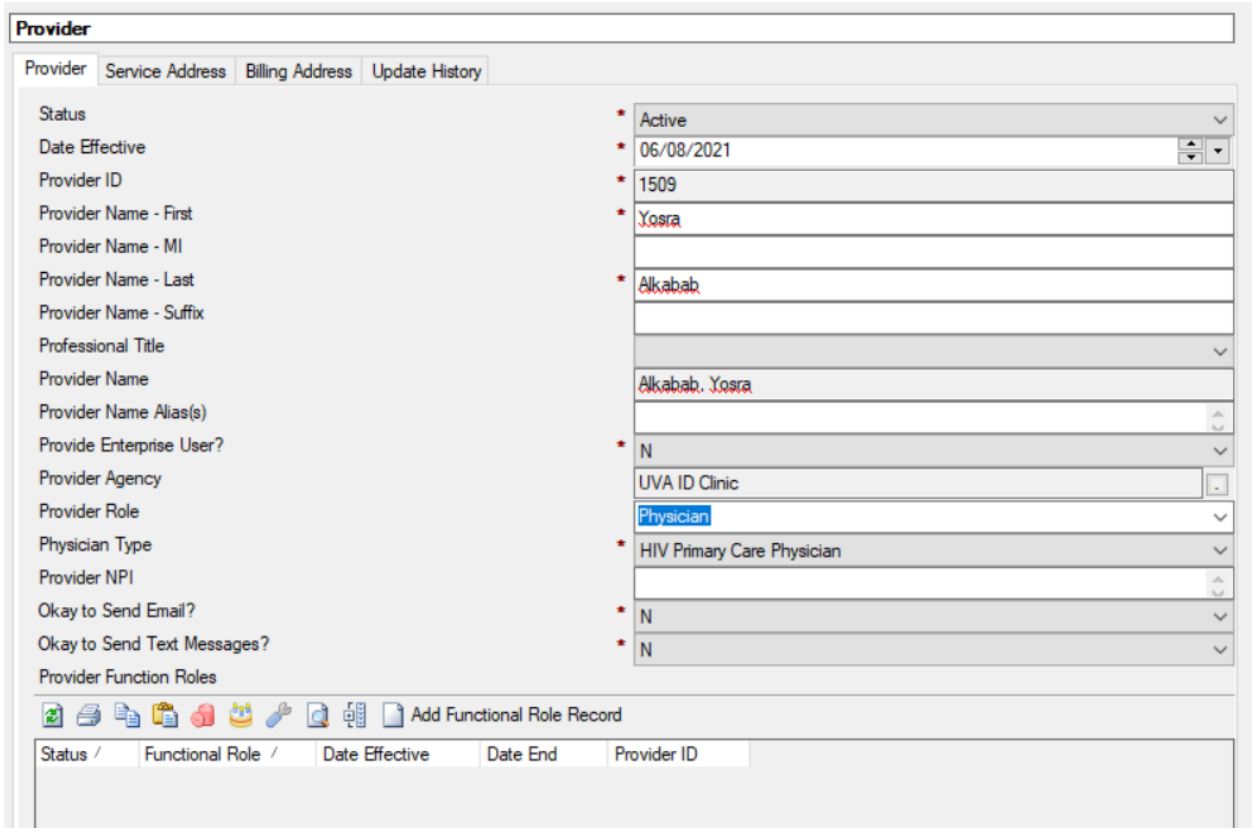
Also note, that if an individual provider serves at multiple service organizations, then the provider will have a unique provider record for each organization.






## Create a New Provider

To create a new Provider, click the Create button.




Complete the fields:

- Status - defaults to Active.
- Provider Name fields - First and Last Name are required.
- Provide User? - Defaults to N (No). This means that this provider is not a licensed user of Provide Enterprise.

- Provider Agency - Select the agency from the list.  Please note that if the agency is not found, then you will need to create it using the instructions provided in the Service Organizations section of this chapter.
- Provider Role - Select the appropriate role for the provider. This helps to classify the provider as an HIV Case Manager or HIV Care Physician.
- OK to send Text Messages - defaults to No.
    - **Note at this time Virginia Department of Health does not use email messaging to prevent potential security issues.

Service Address tab - The address tab is optional, but you can use it if you have additional contact information about the provider.

Billing Address tab - The address tab is optional, but you can use it if you have additional contact information about the provider.

Update History - displays historical records when the provider record was previously updated.

When you are finished entering information, click Close and Yes to save the record.  The record will be selectable for the Medical Provider immediately.

### Updating an Individual Provider

To update an Individual Provider, double-click on any service organization record.  Click the

. From here you may make any edits that are necessary, including making the Status “Inactive,” which will make the service organization unselectable going forward.

When you are finished entering information, click Close and Yes to save the record.  The record will be selectable for the Medical Provider immediately.