Provide Enterprise
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SC Outreach Module

Provide Enterprise User Guide

South Carolina

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Last Updated May 28, 2024,
Revised August 22, 2025

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Chapter One: Introduction & Background

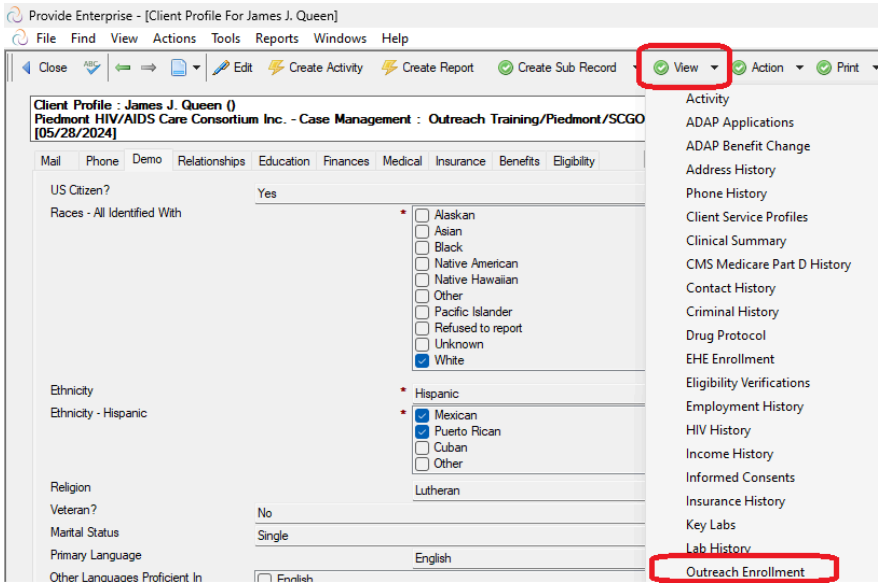
The purpose of the Outreach Enrollment is to provide a way for Outreach Specialists to enroll the clients they are trying to locate and record activities associated with that outreach. If the client is located, the goal is to transition them to specialized case management and eventually to traditional case management.

The Outreach Contacts made are reportable on the RSR.

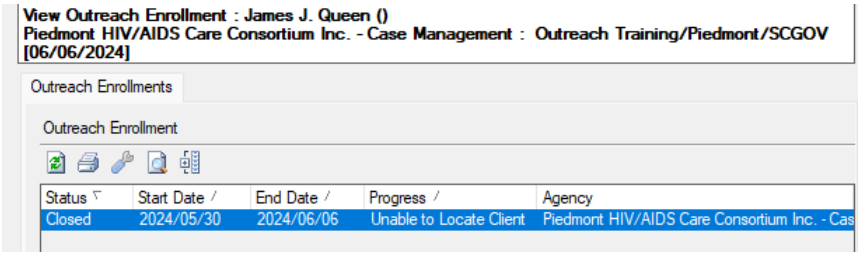
Chapter Two: Viewing Outreach Enrollments

Outreach Enrollment information can be viewed from within the individual client file or from a series of views built into the Provide Database.

To view the outreach enrollments from within the client file, first navigate into the client file that you wish to access the enrollment for. Once in the file, select the “View” button and then click on “Outreach Enrollment”



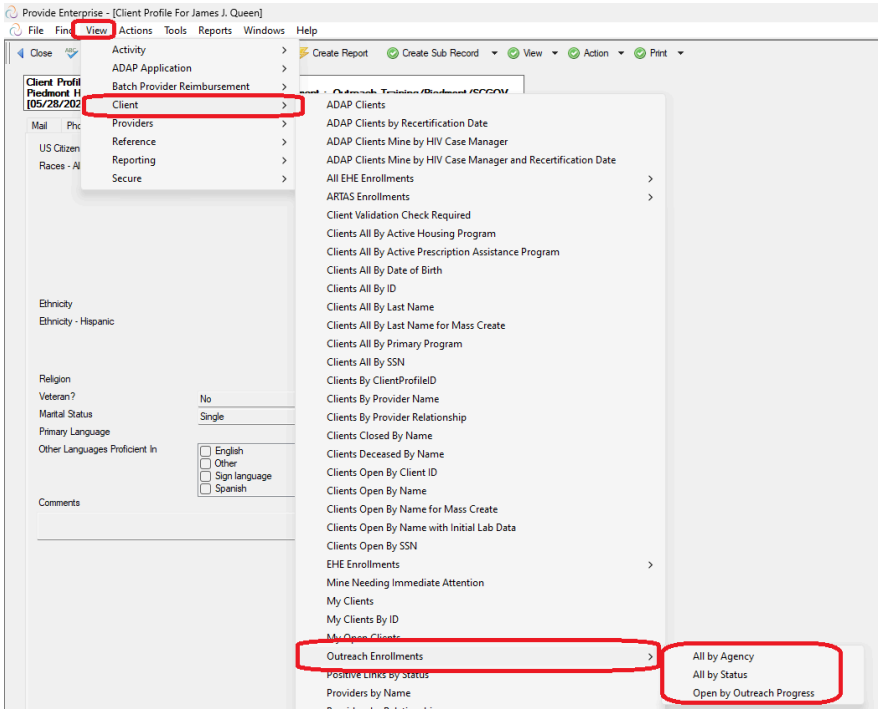
This will open the enrollment view, seen in the figure below:



A Series of “Client views, also exist in Provide Enterprise.

These include:

- View\Client\Outreach Enrollments\All by Agency
- View\Client\Outreach Enrollments\All By Status
- View\Client\Outreach Enrollments\Open by Outreach Progress



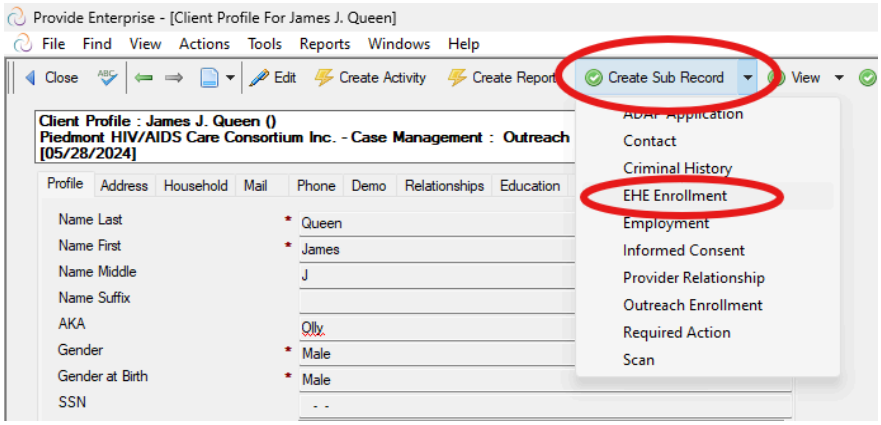
Chapter Three: Outreach Enrollment Record

The Outreach Enrollment and associated records are Client Subrecords (in the current release they are activity records) so that anyone can see the Client Profile has access to view the Outreach Enrollment. The Outreach enrollment has the following rules:

- Only 1 Enrollment can be Open at a time.
- Only the Aorg/Apgm that created the enrollment can edit it.
- There will be no limit on the number of enrollments created in a calendar year

Creating an Outreach Enrollment

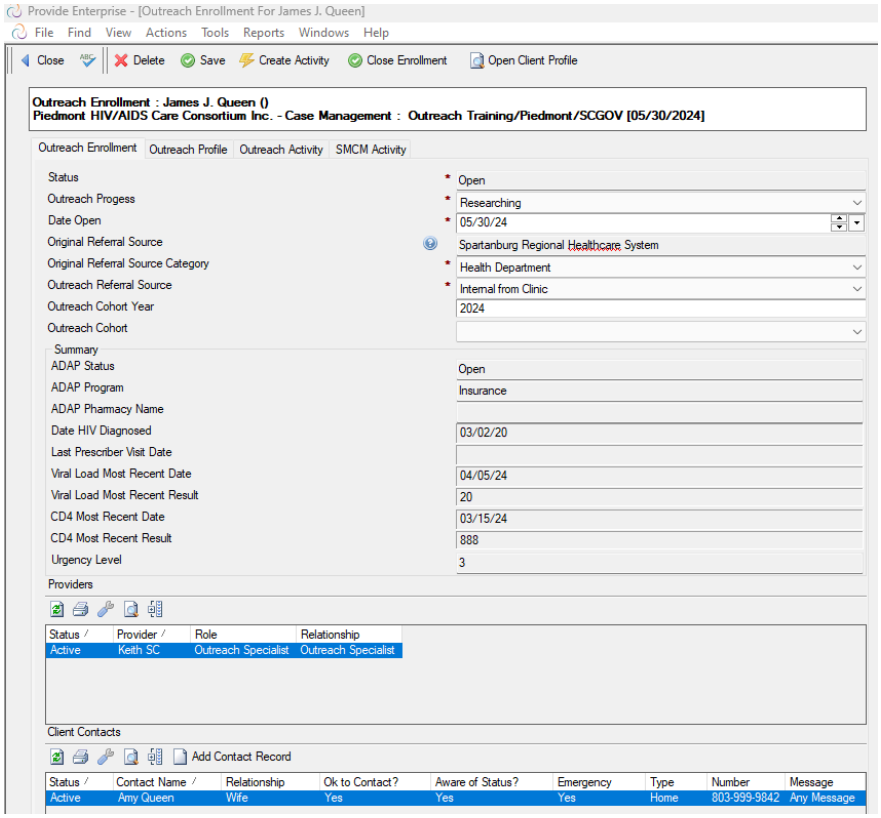
From the Client Profile click Create Subrecord - Outreach Enrollment.



- If there is not an existing open Outreach Enrollment, a new one will be created
- If there is an existing Open Enrollment and the AORG/APGM of the Current User matches the AORG/APGM of the Enrollment, the existing Outreach Enrollment will open
- If there is an existing Open Enrollment and the AORG/APGM of the Current User does not match the AORG/APGM of the Enrollment, the user will get the message “An Open Outreach Enrollment already exists for another Agency another Enrollment cannot be created”.

For demonstration purposes, we will work on a client that is being newly enrolled in the Outreach Program.

When the new enrollment is created, the system will automatically complete some of the fields that have been already completed in the Client Profile and/or Client Service Profile.



Outreach Enrollment Tab

- **Status:** An Outreach Enrollment can be either Open or Closed.
- **Date Open:** This field will default to the current date, but can be modified if necessary.
- **Outreach Progress:** This indicates the progress of the current outreach with the client. Values include:
    - In-Queue
    - Researching
    - Located Client
    - Unable to Locate Client
    - NOTE: The values of Located Client and Unable locate client will drive what needs to be filled out prior to closing the enrollment.
- **Original Referral Source:** Please note that this field comes from the Client Service Profile - Referral Tab.
- **Original Referral Category:** Select the Category of the original referral source.
- **Outreach Referral Source:** Select the original referral source.

- **Outreach Cohort Year:** Enter the year (YYYY) of the cohort. Only values from 1970 to 2040 will be accepted in this field.

Summary Section

The Summary section will be automatically populated from data elsewhere in the client's file including HIV History, ADAP Enrollment, and Test Results.

Providers Embedded View

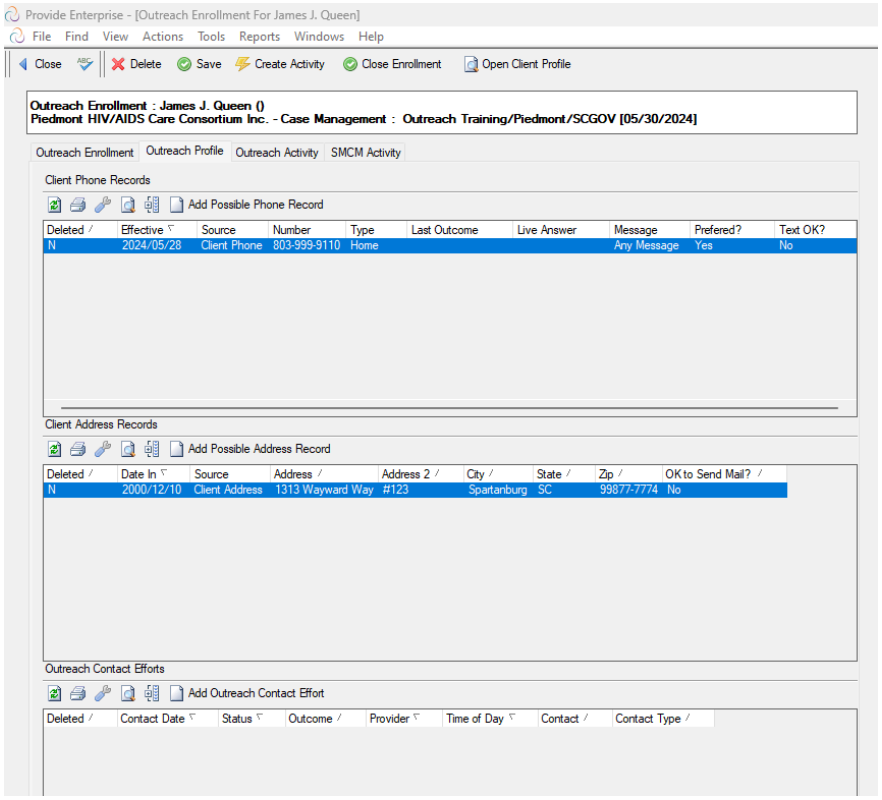
The Embedded view of Providers will show any Outreach associated providers entered in the Client Profile.

Client Contacts Embedded View

Client Contacts can be viewed and entered from within this embedded view. The view only shows records where the Emergency Contact field is set to "Yes"or the OK To Contact field is set to "Yes" and phone numbers are listed in the record.

Outreach Profile Tab

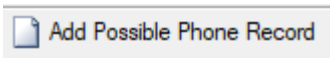
This tab consists of three embedded views which will be outlined below.



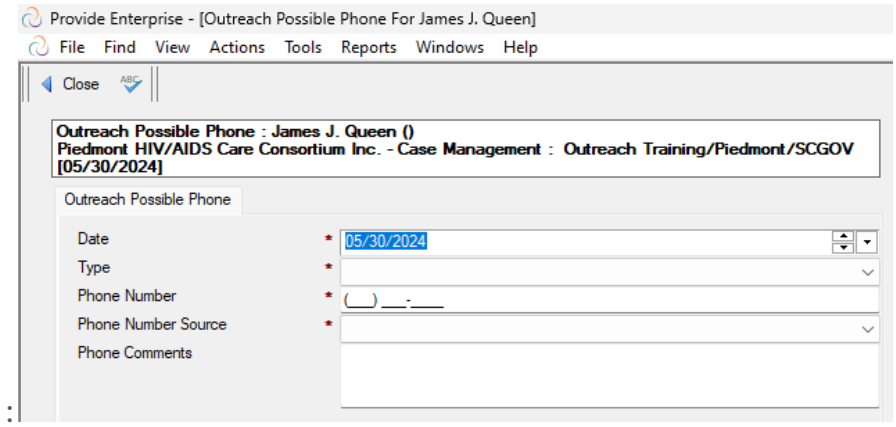
Client Phone Records Embedded View

This is a derived view that breaks out the phone numbers from the Client Profile to a line per phone type. Note that if the source is **Client Phone**, double clicking on the line does not open a record.

Adding a Possible Phone Record

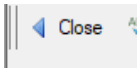
As users attempt to locate clients, this record is used to record new phone numbers that they have identified and where it was obtained. From this view, you can also add an Outreach Possible Phone record. To do so, simply click the 

button to activate the record similar to that in the figure below:



Fill out the fields as appropriate:

- **Date:** Enter the date the number was obtained (this will default to the current date).
- **Type:** Enter the type of phone number being entered (home, work, cell, other).
- **Phone number:** Enter the phone number.
- **Source**: Enter the source of the number (Database Search, Family Member/Friend etc.)
- **Comments:** Enter any comments related to the phone number.

After filling out the required fields, click the 

button and select "Yes" to the "Want to Save Your Changes?" prompt.

The Phone number Source will show in the phone record view and when clicked on opens the Outreach Possible Phone record.

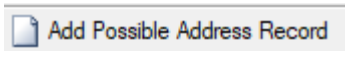
Client Address Records Embedded View

This is a derived view that breaks out the address from the Client Profile to a line per address. Note that if the source is **Client Address**, double clicking on the line does not open a record. From this view, you can also add an Outreach Possible Address record.

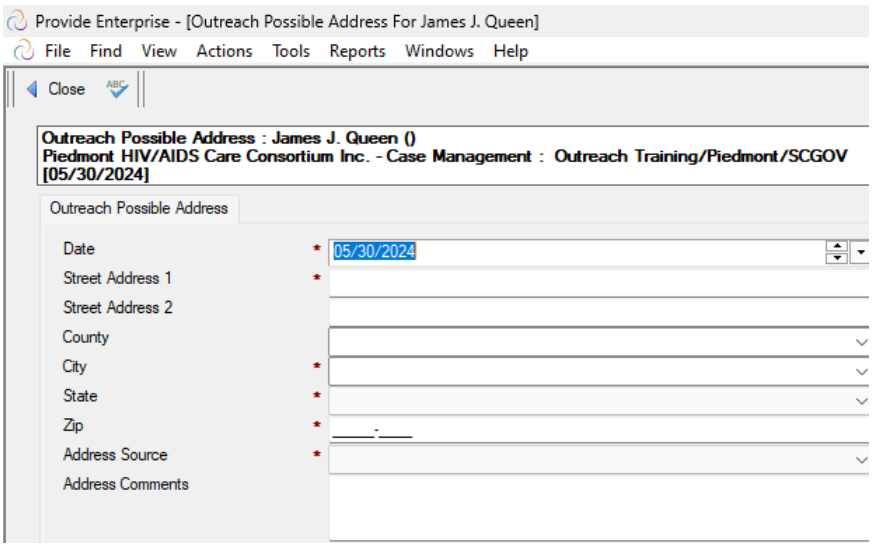
As you attempt to locate clients, this record is used to record new addresses that have been identified and how the address was obtained. The Address Source will show in the address record view and when clicked on opens the Outreach Possible Address record.

Adding a Possible Client Address Record

To add a possible client address record, follow these steps:

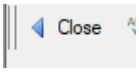
- Click on the 

button the Client Address Records embedded view to open the form seen below.



- Fill out the fields as appropriate:
    - **Date**: Enter the date the address information was obtained. The current date will default in the field.
    - **Street Address 1:** Enter the first line of the street address.
    - **Street Address 2:** Enter the second line of the street address, if applicable (i.e. unit, apartment number, etc.)

- **County:** Enter the County that this address is found in.
- **City:** Enter the City.
- **State:** Enter the State.
- **Zip:** Enter the corresponding Zip Code.
- **Address Source:** Enter the source of where the address was obtained from (Database Search, Family Member/Friend, etc.)
- **Comments:** Enter any applicable comments here.

After filling out the required fields, click the 

button and select "Yes" to the "Want to Save Your Changes?" prompt.

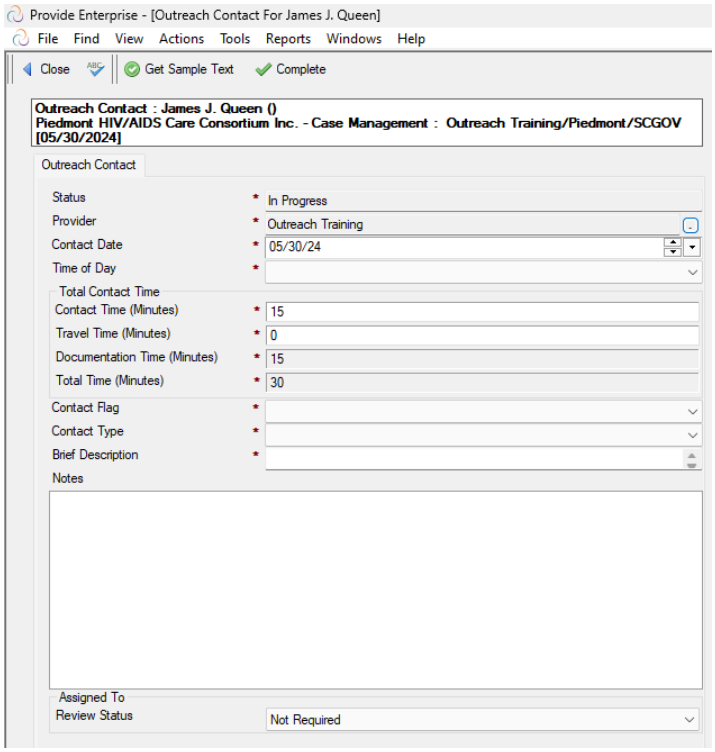
Outreach Contact Effort Embedded View

This is an embedded view of Outreach Contact Records. This is the record used to record attempts to contact the client and is included in the RSR.

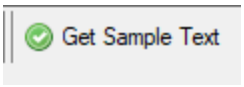
Adding a Contact Effort Record

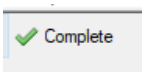
To add a contact effort record, simply click on the

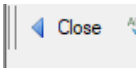
button to open the form, seen in the figure below:



- Fill out the fields as appropriate:
    - **Status:** The status will default to “In Progress''. When you are done documenting the note, make sure that you click the “**Complete**” button at the top to ensure that the Outreach Contact Record becomes reportable. Once Complete, you will not be able to edit the Outreach Contact record.
    - **Provider:** This will default to the person creating the Outreach Contact record, but can be changed if someone else is doing the documentation.
    - **Contact Date:** This should reflect the date of the actual outreach encounter. It will default to the current date, but can be changed as needed.
    - **Time of Day:** Select the time of day when the encounter occurred (Morning, Afternoon, Evening).
    - **Contact Time:** This will default to 15, but can be changed to reflect the actual length of contact with or on behalf of the client.
    - **Travel Time:** This will default to 0, but can be updated to reflect any travel time needed to support this encounter.
    - **Documentation Time:** This value cannot be changed and will default to 15 minutes.
    - **Total Time**: This field will compute based on the Contact, Travel and Documentation Times entered above.
    - **Contact Flag:** This field should be set to reflect the outcome of the encounter (Made, Attempted, Documentation Only).
    - **Contact Type:** Select the type of encounter that was completed with or on behalf of the client.
        - If the Contact type is Telephone, Letter,Text message, Home visit, Client contact home visit, Emergency/Ok to Contact telephone, the user must select from the Phone numbers or Address values that show in the Client Phone and Address Records views.
        - For Phone and Text type contacts, there is an outcome field that is selected based on what happened with the contact (such as Disconnected/Not working, Live Answer, No Answer, voicemail, etc.)
    - **Brief Description:** Enter a very brief description of the encounter.
    - **Notes:** Enter the full text description of this encounter.

        - Sample Text is available for notes that allows users to select predefined text for the Outreach Contact simply by clicking on the 

button at the top of the Outreach Contact.
    - **Review Status:** This field can be used to document the status of review of the Outreach contact along with review person and review date. It will always default to "Not Required". Once the Outreach Contact is completed, a button will appear at the top of the Outreach Contact that can be used to make updates to the review status.
- Once you have filled out all applicable fields, you should Complete the Contact by clicking the 

button at the top. The **Status** will be set to Complete and the record will close, returning you to the Outreach Enrollment. NOTE: Once you do this, you will no longer be able to edit the encounter.
- If you wish to save the encounter without completing it, you can click the 

button and select "Yes" to the "Want to Save Your Changes?" prompt. Keep in mind that Outreach Encounters that are not in a **Complete** status will not be included in reports.

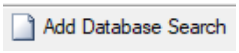
Outreach Activity Tab

The Outreach Activity Tab is where details regarding database searches and returned U.S. mail can be tracked.

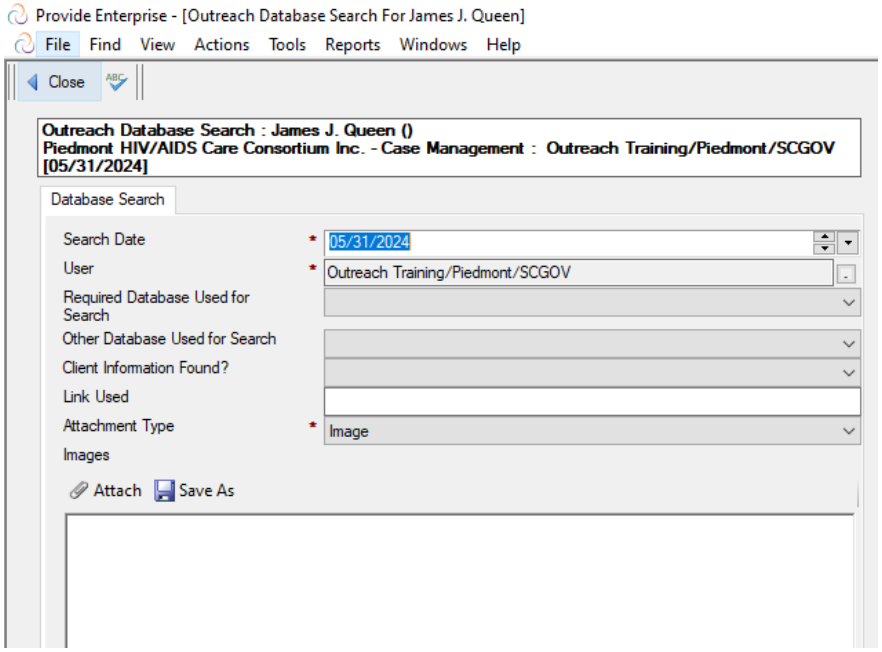
Database Search Embedded View

This embedded view shows Outreach Database Search records. This allows users to record and database searches they may have used (Spokeo, 411.com, etc.).

Adding a Database Search Record

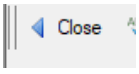
To add a database search record, simply click on the 

button to open the form, seen in the figure below:



Fill out the fields as applicable:

- **Search Date:** This will default to the current date but can be changed when needed.
- **User:** This will default to your user name, but can be changed if you are documenting this for another outreach worker.
- **Required Database Used for Search:** Select the database that was used to perform the search from the dropdown.
- **Other Database Used for Search:** Select any other database used to search for the client.
- **Client information Found:** Select whether or not any client information was found from the search.
- **Link Used:** Enter the link used for the search.
- **Attachment:** Attach an image or file showing screenshots of the search or other applicable results files.

After filling out the required fields, click the 

button and select "Yes" to the "Want to Save Your Changes?" prompt.

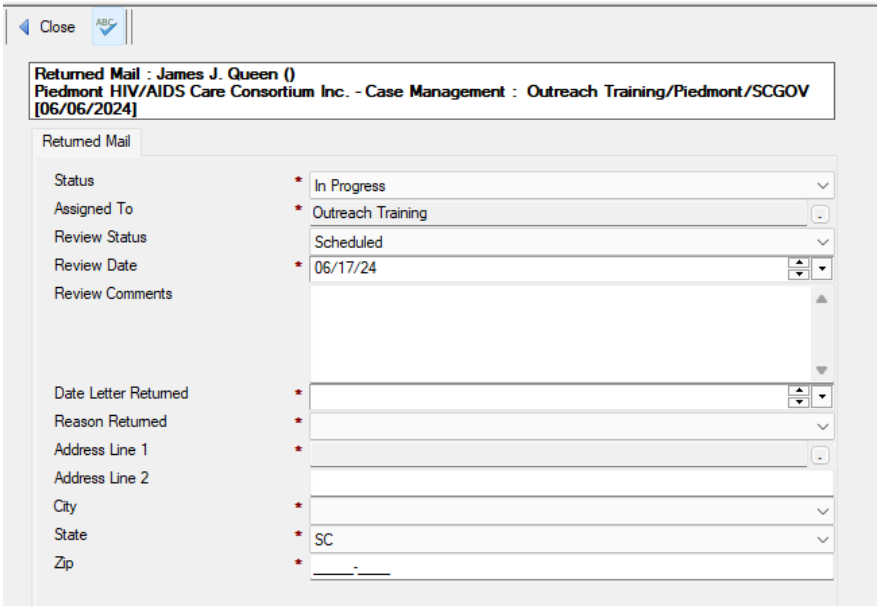
Client Returned Mail Embedded View

This embedded view shows Returned mail records. These are used to record information from any mail returned to the sender.

Adding a Client Returned Mail Record

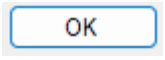
To add a Client Returned Mail Record, simply click the

button to open the form seen below:

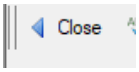


Fill out the fields as appropriate:

- **Status:** This will default to "In Progress", but should be changed to "Complete" when you are ready to finalize this returned mail document.
- **Assigned To:** This will default to your user name, but can be modified if needed to reflect another Provide Outreach user.
- **Review Date:** This field will default to 11 days in the future to be used as a reminder to review the document if needed.
- **Review Comments:** Enter any comments related to this piece of returned mail.
- **Date Letter Returned:** Enter the date the letter was returned.
- **Reason Returned:** Select the reason the letter was returned from the dropdown.
- **Address Line 1/Address Line 2/City/State/Zip:** Select the Address of this returned mail by clicking the button to the right of the field. Select the address from the

window that opens and then click the 

button. This will populate the remaining fields.

After filling out the required fields, click the 

button and select "Yes" to the "Want to Save Your Changes?" prompt.

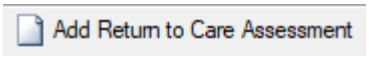
Outreach Assessment Tab

This tab can only be seen if the "Outreach Progress" on the Outreach Enrollment tab is set to "Located Client". It consists of only an embedded view of Outreach Assessments.

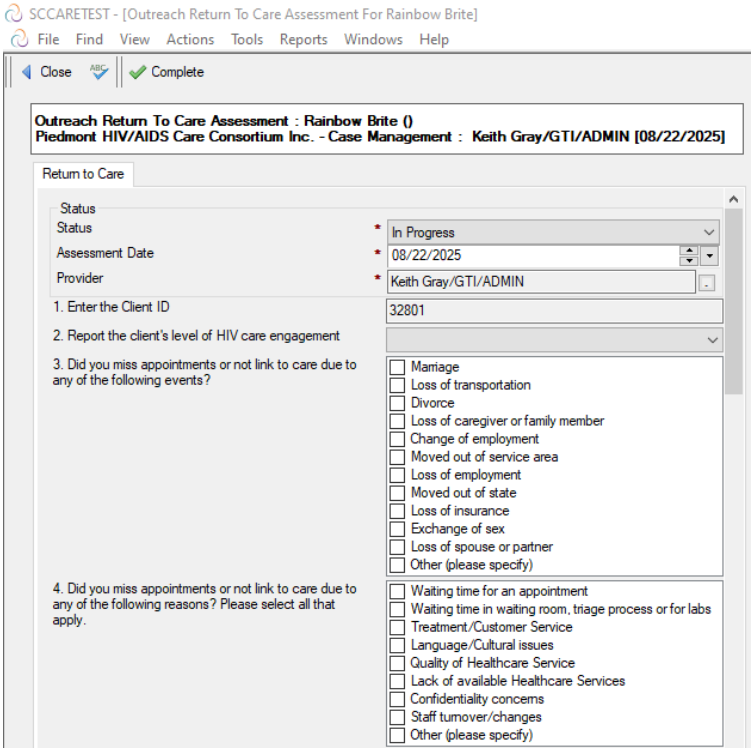
Assessments Embedded View

This embedded view shows Outreach Assessments and will show existing assessments and allow users to create new assessments as needed.

Adding an Outreach Assessment

To add an Outreach Assessment, simply click on the 

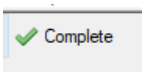
button to open the form, seen in the figure below:

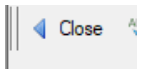


The OOC Events Tab contains questions related to the reason for the client falling out of care or needing to get into care.
Fill out the fields as appropriate:

- **Status:** This will default to In Progress until marked Complete.
- **Assessment Date:** Enter the date the assessment was completed. This will default to the current date.
- **Provider:** This will default to the provider entering the assessment, but can be modified if needed.
- **1. Enter the Client ID**: This field will be populated with the client's ADAP ID.
- **2. Report the client's level of HIV care engagement**: Select the client's level of HIV Care Engagement from the dropdown.
- **3. Did you miss appointments or not link to care due to any of the following events? Please select all that apply:** Select all applicable values from the picklist.
    - **..Specify**: This field will show if "Other (please specify)" is selected above.
- **4. Did you miss appointments or not link to care due to any of the following reasons?** Select all applicable values from the picklist.
    - **..Specify**: This field will show if "Other (please specify)" is selected above.
- **5. Did you miss appointments or not link to care when entering or exiting one of the following facilities: Please select all that apply:** Select all applicable values in the picklist.
    - **..Specify**: This field will show if "Other (please specify)" is selected above.
- **6. Did you miss appointments or not link to care for any of the following societal reasons? Please select all that apply:.** Select all applicable societal reasons that may have impacted linkage or retention in care.
    - **....Specify:** This field will show if "Other (please specify)" is selected above.
- **7. Did you miss appointments or not link to care for any of the following cultural reasons? Please select all that apply:** Select all applicable cultural reasons that may have impacted linkage or retention in care.
    - **....Specify:** This field will show if "Other (please specify)" is selected above.
- **8. Did you experience any of the following personal reasons that caused you to miss appointments or not link to care? Please select all that apply:** Select all applicable personal reasons that may have impacted linkage or retention in care.
    - **....Specify:** This field will show if "Other (please specify)" is selected above.

- **9. Which service experience is most important to keeping you in care"? Please select all that apply.** Select all applicable service experiences that are most important to maintain care..
    - **....Specify:** This field will show if "Other (please specify)" is selected above.
- **10. What core and support services do you need to stay in medical care and keep your medical appointments? Please select all that apply:** Select all applicable service categories.
    - **...Specify:** This field will show if "Other (please specify)" is selected above.

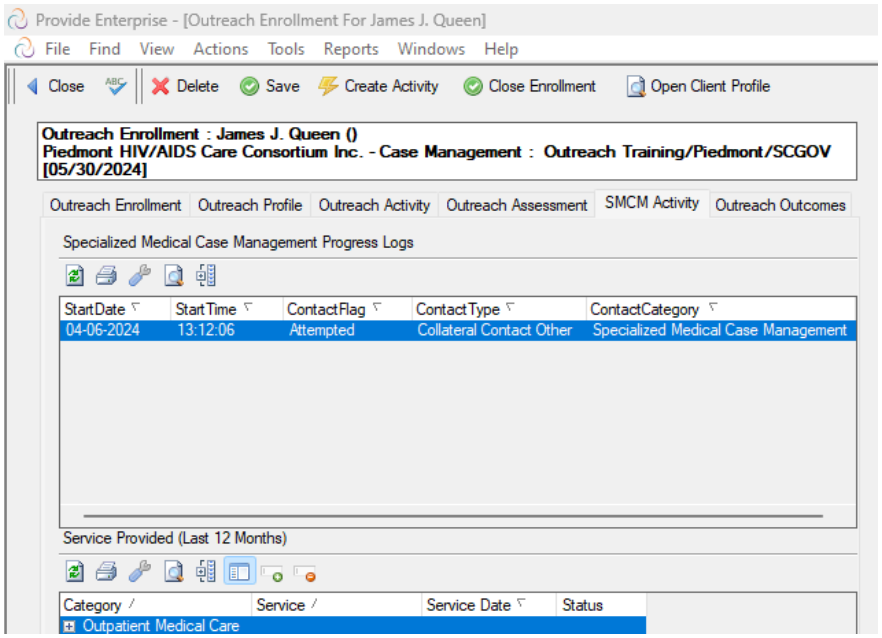
- Once you have filled out all applicable fields, you should Complete the Outreach RTC Assessment by clicking the 

button at the top. The **Status** will be set to Complete and the record will close, returning you to the Outreach Enrollment. NOTE: Once you do this, you will no longer be able to edit the assessment.
- If you wish to save the assessment without completing it, you can click the 

button and select "Yes" to the "Want to Save Your Changes?" prompt.

SMCM Activity Tab

This tab consists of two embedded views and are informational for the Outreach worker.



Specialized Medical Case Management Progress Logs Embedded View

This embedded view will show Progress Logs with the Contact Category of Specialized Medical Case Management as a reference for the Outreach worker.

Services Provided Embedded View

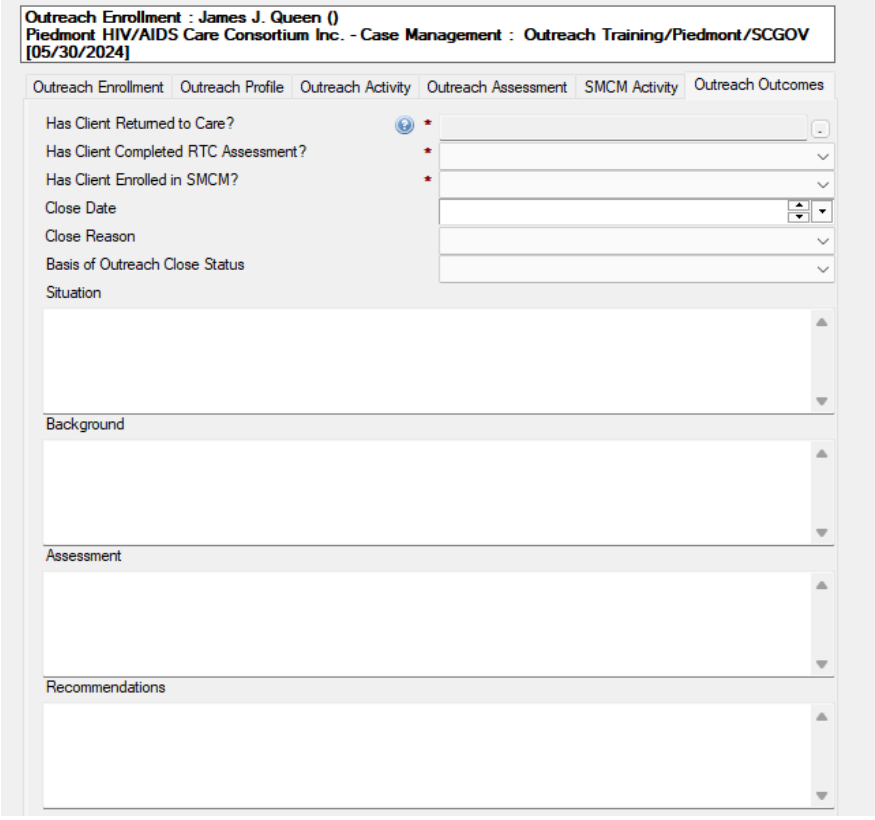
This embedded view will show Services Provided records entered for the client for all services for the past 12 months.

Outreach Outcomes Tab

The Outreach Outcomes Tab will only show if the “Outreach Progress” field on the “Outreach Enrollment” tab is set to “Located Client” or “Unable to Locate Client”. The fields that show on this tab depend on the “Outreach Progress” value.

Located Client Fields

If the “Outreach Status” is set to “Located Client”, the Outreach Outcomes Tab will look like that in the figure below:



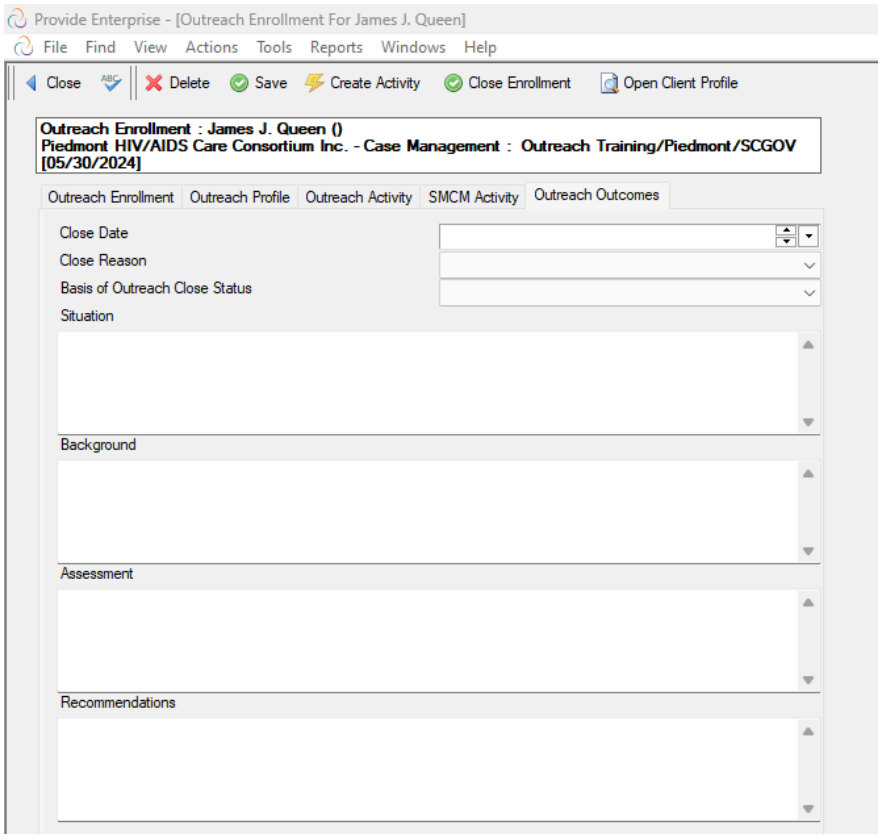
Fill out the fields as appropriate:

- **Has Client Returned to Care?** Click the next to the field to select whether the client has returned to care, has not returned to care, or where the returned to care status is pending.
    - **...Proof of visit?:** If "Yes" is selected for the "Has Client Returned to Care" question, this field will show for you to document the type of proof you have that the visit occurred.
    - **...Date of Prescriber Visit:** If "Yes" is selected, this field will show for you to document the date of the prescriber visit.prescriber.
    - **...Reason:** If "No" or "Pending" are selected under the "Has Client Returned to Care" question, the reason field will appear. SImply select the best answer from the list.
- **Has Client Completed RTC Assessment?** Select whether or not the client completed the RTC assessment.
    - **...Reason:** If you select "No" or "Pending" to the "Has Client Completed RTC Assessment?" question, you will be prompted to select a reason.
        - **.....Why did client refuse?** If you select "Client refuses" in the above field, you will be prompted to document why the client refused to complete the RTC Assessment.
- **Has Client Enrolled in SMCM?:** Select whether or not the client has enrolled in Specialized Medical Case Management.
    - **...Reason:** If you select "No" or "Pending" to the "Has Client Enrolled in SMCM?" question, you will be prompted to select a reason.
        - **.....Why did client refuse?** If you select "Client refuses" in the above field, you will be prompted to document why the client refused enrollment in the SMCM program.
- **Close Date:** When ready to close the enrollment, enter the date that it is being closed.
- **Close Reason** When ready to close the enrollment, enter the reason that it is being closed.
- **Basis of Outreach Close Status:** When ready to close the enrollment, select the basis of the outreach for this enrollment.
- **Situation:** At the time of closing the enrollment, you must have documented the client's situation.

- **Background:** At the time of closing the enrollment, you must have documented the background of the outreach situation.
- **Assessment:** At the time of closing the enrollment, you must have documented your assessment of the outreach situation.
- **Recommendations:** At the time of closing the enrollment, you must have documented your recommendation regarding the client's outreach.

Unable to Locate Client Fields

If the "Outreach Status" is set to "Unable to Locate Client", the Outreach Outcomes Tab will look like that in the figure below:



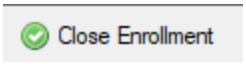
Fill out the fields as appropriate:

- **Close Date:** When ready to close the enrollment, enter the date that it is being closed.
- **Close Reason** When ready to close the enrollment, enter the reason that it is being closed.
- **Basis of Outreach Close Status:** When ready to close the enrollment, select the basis of the outreach for this enrollment.

- **Situation:** At the time of closing the enrollment, you must have documented the client's situation.
- **Background:** At the time of closing the enrollment, you must have documented the background of the outreach situation.
- **Assessment:** At the time of closing the enrollment, you must have documented your assessment of the outreach situation.
- **Recommendations:** At the time of closing the enrollment, you must have documented your recommendation regarding the client's outreach.

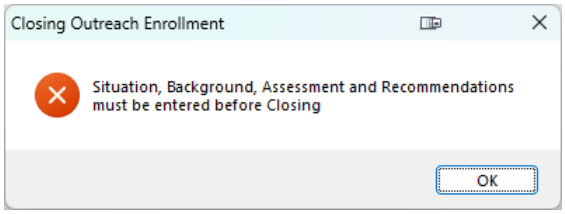
Closing the Outreach Enrollment

When you are ready to close the Outreach Enrollment, you can simply click the



button at the top.

- If you have not yet documented the SItuation, Background Assessment, or Recommendations, you will get a pop-up similar to that in the figure below.



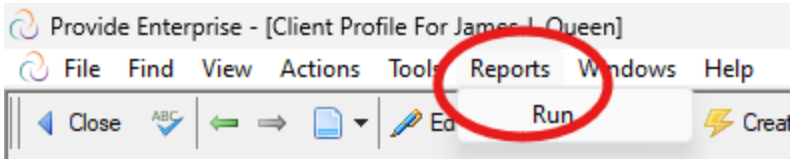
- If all required data points have been completed, the status will be changed to "Closed" and the Outreach Enrollment will be closed.

Chapter 4: Outreach Enrollment Report

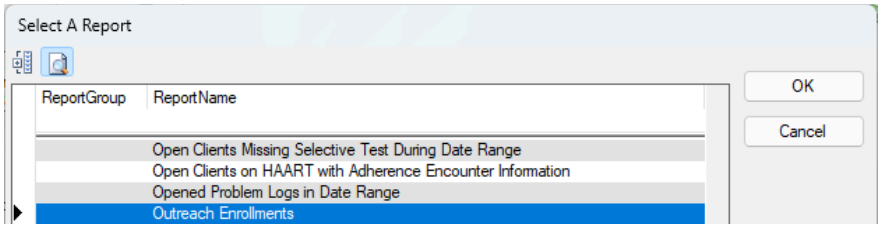
An Outreach Enrollment report has been created to help support the efforts of the Outreach Program.

To generate this report, simply follow the steps below:

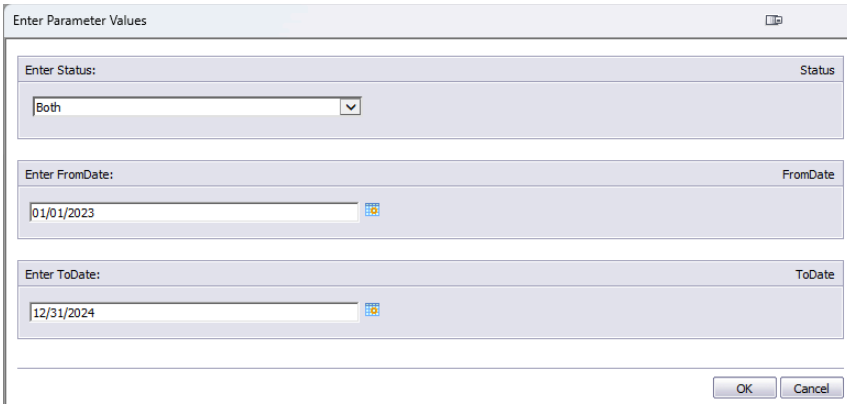
- Select Reports from the Menu Bar at the top of your screen and select "Run".



- Select "Outreach Enrollments".

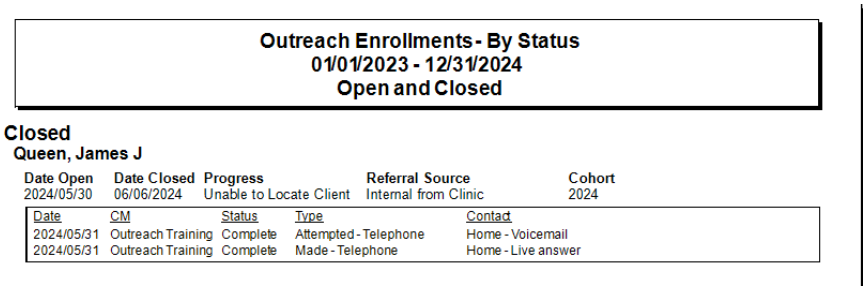


- The report will start to generate and the parameter fields will appear, similar to those in the figure below:



- Enter the parameters:
  - **Status:** Select whether you want to include Open Enrollments, Closed Enrollments, or Both.
  - **From Date:** Enter the start date of your reporting period.

    - **To Date:** Enter the end date of your reporting period.
- Click the OK button to generate the report.
- After the report finishes compiling, it will open on your screen similar to that in the figure below:



Outreach Enrollments - By Status
01/01/2023 - 12/31/2024
Open and Closed

Closed
Queen, James J

Date Open	Date Closed	Progress	Referral Source	Cohort
2024/05/30	06/06/2024	Unable to Locate Client	Internal from Clinic	2024

Date	CM	Status	Type	Contact
2024/05/31	Outreach Training	Complete	Attempted - Telephone	Home - Voicemail
2024/05/31	Outreach Training	Complete	Made - Telephone	Home - Live answer