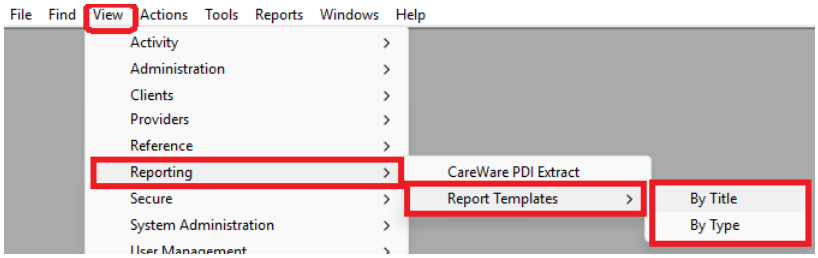
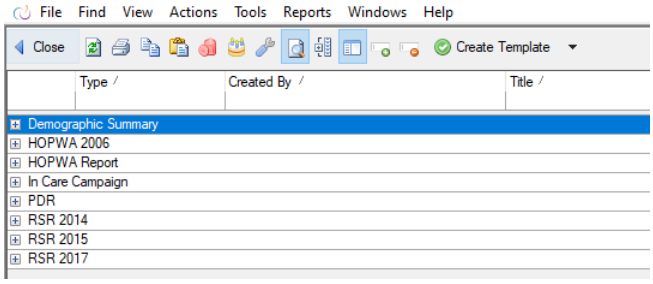
Creating a New RSR 2025 Template

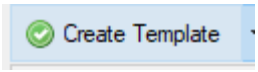
To create a new RSR 2025 Template, follow the steps below:

- From within Provide® Enterprise open one of the Reporting Views, using the navigation from the Windows Toolbar (*View – Reporting – Report Template…)*, similar to that seen in the figure below:

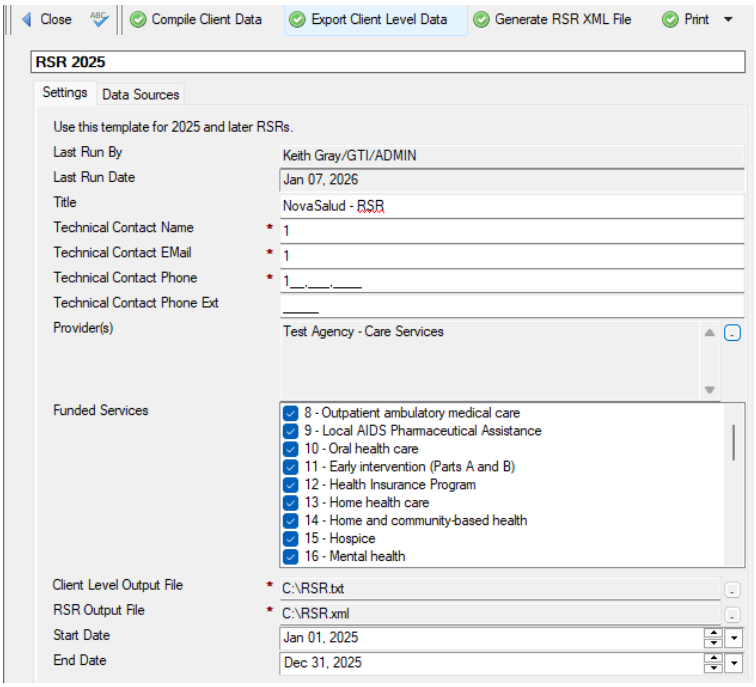


- A view, similar to that seen below, will open on your screen:



- Click on the portion of the 

button. The button will expand to show you the available Report Templates that can be created. Single click on "RSR 2025" and the report object will open on your screen, similar to that in the figure below:

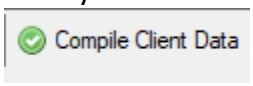


- Fill out the fields as appropriate:
    - **Title**. Enter a descriptive title to make finding your stored template easier.
    - **Technical Contact Name/Email/Phone/Phone Ext:** HRSA requires that a technical contact person be listed in your RSR submission, including the email and phone number. These details are entered here.
    - **Provider(s)**. Click the button to the right of this field to select the provider agency/program(s) you wish to include in your reporting.
    - **Funded Services:** Select the service categories that you receive Ryan White funding to provide. Make sure to only select the service categories that you are funded for and that are defined for you in the HRSA EHB.
    - **Client Level Export File**. Enter the location that you wish to save a client level export file. This will be a tab delimited text file that you can open in Excel to evaluate client and data elements included in your extract.
    - **RSR Output File.** Set this field to a file path where the RSR report should be placed. This is the file that you will actually upload to HRSA.
    - **Start and End Date.** Enter the start and end dates for your reporting period.

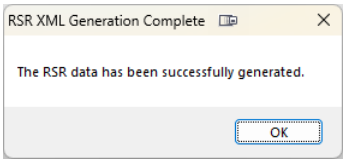
Data Sources Tab

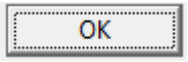
- Enter the SQL Views that your RDR/RSR/PDI will use. NOTE: All of the fields on this tab default to the view names recommended by GTI. Do note change these unless instructed to by GTI or your grants management staff.

Running the RSR 2025 Report Template

- After you have edited all of the appropriate information, click the 

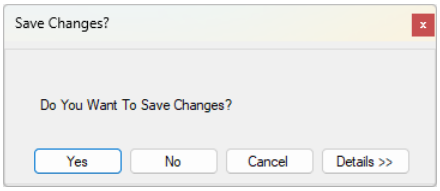
button to compile the client data that will be used throughout the remainder of the reporting process. After the data has been compiled, you will receive a message similar to that in the figure below.

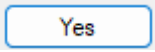


- Simply click the 

button to continue working with the template.
- NOTE: Once you have compiled the data, you can use the other buttons in the template, without having to re-compile the data each time. If you close out of the report template or make updates to data contained in the report, you will, however, need to compile the client data again.
- Once you have compiled the data, you can run other reports based on your RSR client level data. These are discussed in the section below entitled "Running Ryan White Reports from the RSR Template".
- After you are done working with this report template, simply click on the

button. A message similar to the one below will open.



- Click on the 

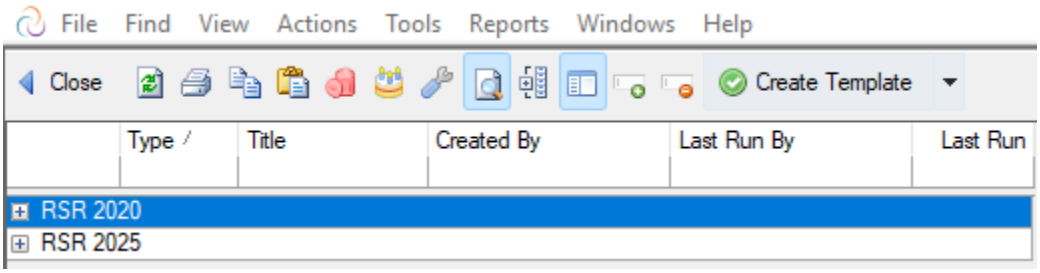
button if you wish to save the template. Saving the template will ensure that you can re-run the export at a later date, making only the necessary changes in the date range of the report, without having to setup a new template.

Editing and Running a Saved RSR Report Template

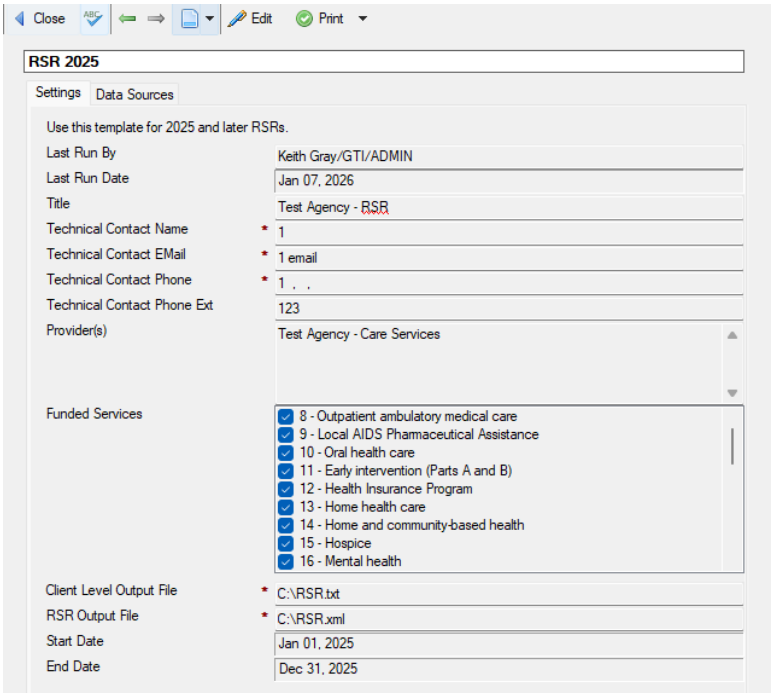
Once you have saved a Report Template, it is easy to access it at a later date so that you can re-run it for the same date period or for a new date period without having to set up a new report template.

- From within Provide® Enterprise open one of the Reporting Views, using the navigation from the Windows Toolbar (*View – Reporting – Report Template…)*, similar to that seen in the figure below:

- A view, similar to that seen below, will open on your screen:

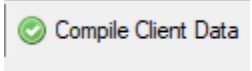


- Find the RSR template that you want to run and double click on the template. It will open up on your screen and will look similar to that in the figure below.



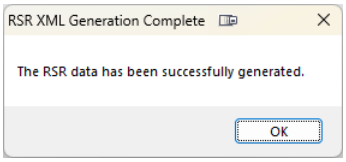
- Click on the

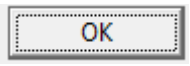
button to edit the report template. Change any necessary fields, such as the Start and End Dates.

- After you have edited all of the appropriate information, click the 

button to compile the client data that will be used

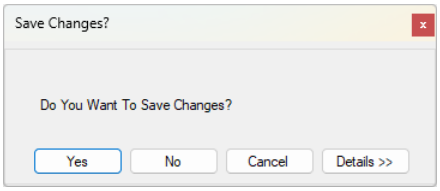
throughout the remainder of the reporting process. After the data has been compiled, you will receive a message similar to that in the figure below.

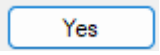


- Simply click the 

button to continue working with the template.
  - NOTE: Once you have compiled the data, you can use the other buttons in the template, without having to re-compile the data each time. If you close out of the report template or make updates to data contained in the report, you will, however, need to compile the client data again.
- Once you have compiled the data, you can run other reports based on your RSR client level data. These are discussed in the section below entitled "Running Ryan White Reports from the RSR Template".
- After you are done working with this report template, simply click on the

button. A message similar to the one below will open.

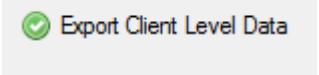


- Click on the 

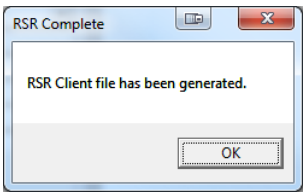
button if you wish to save the template. Saving the template will ensure that you can re-run the export at a later date, making only the necessary changes in the date range of the report, without having to setup a new template.

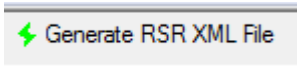
Running Ryan White Reports from the RSR Template

Once you have created and/or edited a saved RSR Report Template and Compiled the RSR Data, you can generate either a Client Level Data file (in a tab delimited text format that can be used in Microsoft Excel) and/or the Client XML file that you will upload directly to the HRSA web site.

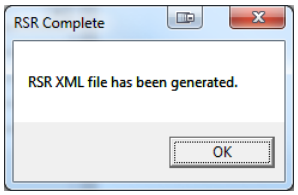
- To create the Tab Delimited Client Level Data File, click on the 

button. The file will be created and saved to the location that you specified in your report template for the "Client Level Output File". After the file is generated, you will get a message similar to that in the figure below:



- To create the actual RSR Client file that you will upload to HRSA, click the 

button. The XML file will be created and saved to the location that you specified in your report template for the "RSR Output File".



- NOTE: The "Compile Client Data" must be run prior to attempting to generate the client level data file or the XML file.
- When the report has finished, the Ryan White Client Level Report (RSR) will be placed in the file you specified in your template.
- Currently there are six different print outs that you can generate from within the RSR Template. These include:
    - Print\Completion Report: This will generate a report very similar to the completion report summary that HRSA's web site provides after your Client XML file has been uploaded.
    - Print \Completion Detail Report: This report provides the detailed client level information related to the Completion Report. (For example, if your completion reports lists clients missing Enrollment Status, the Completion Detail Report will list out these clients).
    - Print\Validation Report: This report performs the validation checks for errors, warnings, and alerts recommended by HRSA to ensure accuracy in your RSR submission.
    - Print\Client Summary Report: This report provides a summary of all clients and services contained in your RSR.
    - Print\Clinical Summary Report: This report contains a summary of all clinical data in your RSR.
    - Print\Total Clients Served by Zip Code: This report gives you the details of the number of clients served broken down by zip code. It can be used to enter the required information in the Provider Report on the HRSA website.

Fixing the Most Common RSR Errors

Missing Housing Status or Geographic Unit Code

The RSR looks at the most recent Address History with a "Date Effective" prior to or during the reporting period. If the address information for the clients was changed after the end of the reporting period, that address history record will not be included in the RSR.

If the client's most recent Address History record does not have a Housing Status or Zip Code (both RSR data elements), you will need to first do an "Update" from the Client Profile - Address Tab to make changes to the appropriate data point.

After that (or if no changes to the housing status or zip code need to be made), you can go into the most recent Address History record for these clients (View\Address History) and use then click the “Edit” button to back date the effective date to be during the reporting period (but after the last Address History record that has invalid data).

Missing or Unknown HIV Status, HIV/AIDS Diagnosis Year, HIV Risk Factor or ART

The RSR looks at the most recent HIV History with a "Date Information Effective" prior to or during the reporting period. If the HIV information for the clients was changed after the end of the reporting period, that HIV history record will not be included in the RSR.

To fix this, simply navigate to the most recent HIV History record for these clients (View\HIV History) and use the "Change Effective Date" button and back date the effective date to be during the reporting period (but after the last HIV History record that has invalid data.)

If the client does not have and HIV History record with the correct information in it, you will need to first update the HIV information in the Client Profile and then save the Client Profile. After that, you can navigate into the most recent HIV History record for these clients (View\HIV History) and use the "Change Effective Date" button and back date the effective date to be during the reporting period (but after the last HIV History record that has invalid data).

Missing Enrollment Status

As with the Address and HIV information, the RSR looks at the most recent enrollment status that is prior to or during the reporting period to determine what to report on the client level RSR report. In Provide, this comes from the Client Service Profile History records.

To fix this issue, you will want to navigate to the Client Service Profile. This is done by clicking the “View” button in the Client Profile and selecting “Client Service Profile”.
Double click on the “Client Service Profile” for your agency and then select the “History” tab. Double click on the most recent Client Service Profile History record for the “CSPStatus” (especially if it has a date after the end of the reporting period. Click the “Backdate History” button and select a date that falls prior to or during the reporting period, but after the most recent history record.

If the client does not have a history record that reflects the current status, you would need to first change the status. Once that is done, you should be able to then double click on the most recent Client Service

Profile History record for the “CSPStatus”. Click the “Backdate History” button and select a date that falls prior to or during the reporting period, but after the most recent history record.