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Quality Management Gets a Makeover!

INSIDE THIS ISSUE

The ARIES HIV/AIDS Bureau (HAB) Quality Management (QM) Indicators Report was designed with the user in mind. This revised, robust report provides users with the ability to easily access and utilize their data for quality management activities. This report can be used for both systems- and client- levels interventions. Values for a given measure can be generated to identify problems with clinical care, service delivery, or data entry; once you have started a quality improvement plan (using tools such as the PDCA [plan, do, check, act] cycle) to address the problem, the values can be used to monitor or adjust the process. At the client level, these reports can be used to identify clients who did not meet a given measure and who may need follow up or additional support.

HAB revised their Performance Measure Portfolio in November 2013. They added new QM measures, revised some old measures, and "archived" others (such as Viral Load Monitoring, CD4 Monitoring, and PCP Prophylaxis). The new portfolio consisted of 46 measures.

The California Office of AIDS's (OA) Quality Management Committee selected 16 measures to program into ARIES. The report interface in ARIES has also been reconfigured to allow users to customize their QM reports. For example, users will be able to run the measures for their entire agency caseload or narrow measures to focus on a particular demographic group or service category.

Quality Management (continued on page 2)

What is "Eligible Scope" Reporting for the 2015 RSR?

- Starting with the 2015 calendar year data collection period, providers will report data on all clients eligible to receive Ryan White HIV/AIDS Program (RWHAP)-funded services, regardless of the actual funding source used to pay for those services.

How do I know if I should report a client?

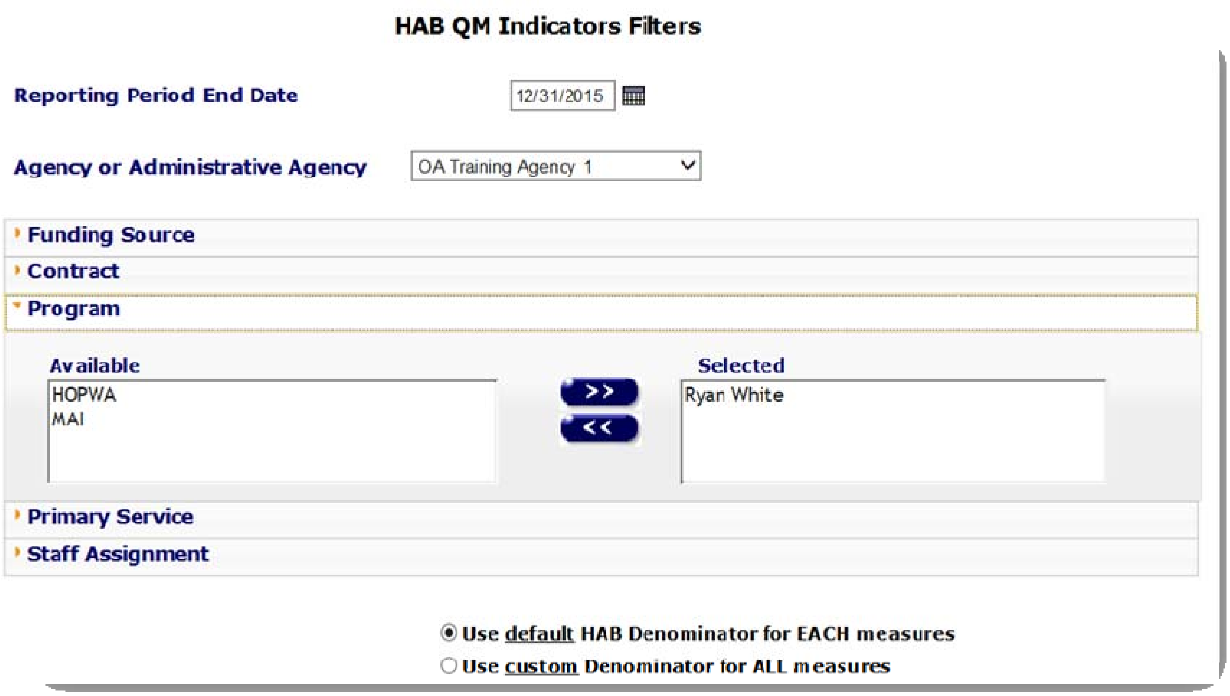
- You should report a client if (1) the client is RWHAP eligible and (2) the client received a service that your agency was funded by RWHAP to deliver in 2015, regardless of the actual funding source.

See page 7 for more details on eligible scope reporting and its impact on ARIES.

Quality Management (continued from page 1)

Accessing the Report

To access the report, select Compliance under the Reports menu. Click on the HAB QM Indicators - Summary Report link. You'll notice a redesigned screen. The first part of the screen looks like this:



Selecting Filters

The report interface has a numerous changes, including:

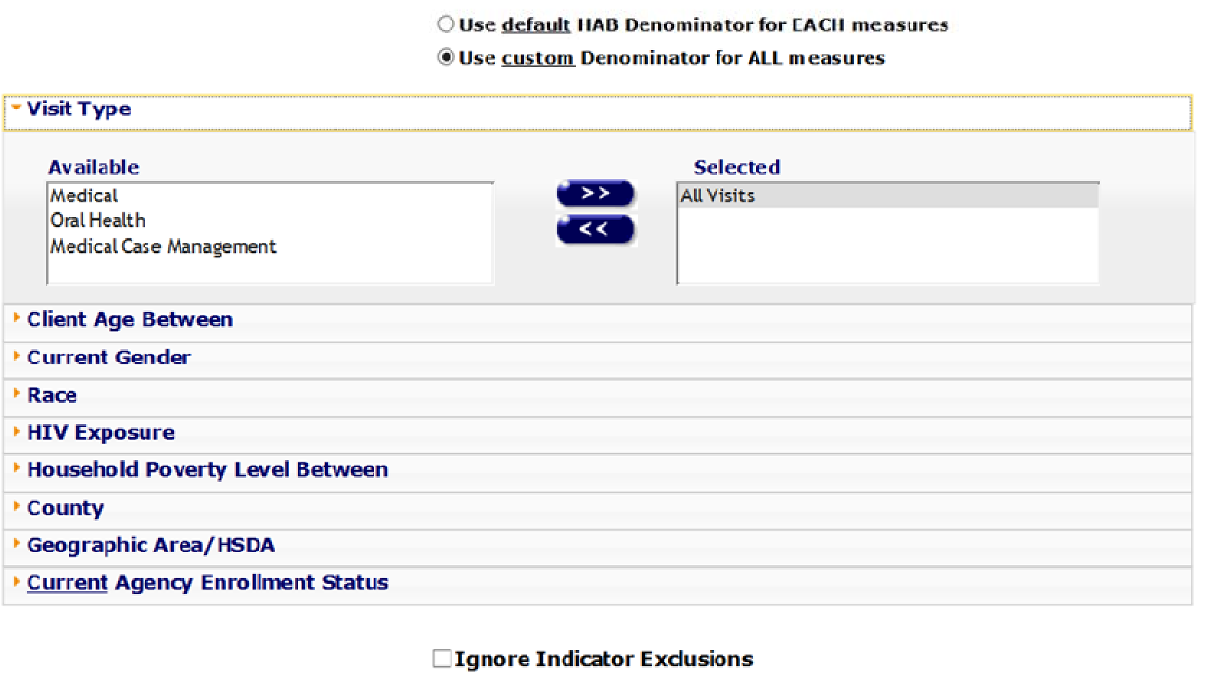
Reporting Period: HAB's indicators are measured in either one- or two-year periods. The Start Date field has been removed because users often ran reports for periods that were inconsistent with the measure, causing unexpected results (i.e., running a one-year report for a three month period). Now users simply specify the End Date for their report and ARIES calculates the Start Date(s). For example, if you want a report for calendar year 2014, enter 12/30/2014 in this field.

Filters: In the past, users could filter on Program and Funding Source. Now you can also filter by Contract, Primary Service, and Staff Assignment. To apply a filter, click on the orange triangle (▸) next to the name. The list of values will open. To move a value into the Selected box, either double-click on the value or click on the value and use the double arrows to move it to the Selected box.

Defining Denominators: The next step is to decide whether you want to use HAB denominators or create your own. You have two choices:

- Use default HAB denominator: Each measure was designed to mirror the HAB denominator definitions as closely as possible with the following exception: HAB requires that clients have “medical visit with a provider with prescribing privileges” in order to be considered in most measures. In the past, ARIES only counted certain outpatient/ambulatory medical care services as meeting this requirement. With this release, ARIES now also considers a CD4 or viral load test as evidence of a medical visit. (For other exceptions, please see *Calculations for HAB QM Indicators Report in ARIES*.)

- Use custom denominator for all measures: Perhaps the HAB denominator doesn’t work for you. If you click this radio button, ARIES will allow you to customize the denominators. For example, you can run a report that includes all your clients, not just those with a medical visit. Or maybe you want to run a report for a subset of your clients – like all Latino clients between 13 and 24 years old. Any changes will be applied to all measures.



More filtering fun! When you select the Use Custom Denominator radio button, additional filters will become active. Use these filters to expand or narrow your report. For example:

- You can expand the report to include all your clients regardless of whether they had a medical visit. Select the All Visits value from the Visit Type filter. ARIES will generate a report that includes clients who received at least one service of any kind and/or a CD4 or viral load test during the reporting period and otherwise meet the denominator criteria.

- Or you can narrow your report to include only clients of color for your Minority AIDS Initiative (MAI) outreach worker. Select all the appropriate values from the Race filter. ARIES will generate a report that includes only clients of color who otherwise meet the denominator criteria.

The report that you generate will calculate data based on the filter selections you make. Note that many HAB measures have different denominator definitions. When you use a custom denominator, it will apply to ALL of the measures you run in that work session. If you want to use different custom denominators for each measure, run each measure separately with its own custom denominator.

Exclusions: HAB excludes certain clients from their measures. For example, deceased clients are excluded from the Gap in Medical Visits measure. ARIES attempts to mirror HAB's exclusions as documented in *Calculations for HAB QM Indicators Report in ARIES*. However, users can check the Ignore Indicator Exclusion box to simply ignore the all the exclusions.

Selecting Measures

The final step to running your report is selecting the measures you want included in it. The interface has not changed, but the format has. The Measure Description and Report Period are now displayed on the screen so you know what each measure entails.

HAB QM Indicators - Measures

Core Measures(Select All)

Performance Measures	Measure Description	Period
☑ Gap in Medical Visits	Percentage of HIV-positive clients who had a medical visit in the first and last half of the year	One Year
☑ Medical Visits Frequency	Percentage of HIV-positive clients who had at least one medical visit at least 60 days apart in each 6-month period	Two Years
☑ Viral Load Suppression	Percentage of HIV-positive clients whose most recent viral load is less than 200 copies/ml	One Year
☑ Prescribed Antiretroviral Therapy	Percentage of HIV-positive clients who were prescribed antiretroviral therapy	One Year

All Ages Measures(Select All)

Performance Measures	Measure Description	Period
☐ TB Screening	Percentage of HIV-positive clients who were screened for tuberculosis at least once since diagnosis	One Year

Once you have selected all your filters, parameters and measures, click the yellow report button at the bottom of the screen. The Summary Report below shows the results. For each measure, both the numerator and the denominator are shown, as well as the percentage. A perfect score would be 100%. Anything less is, well, not perfect!

HAB QM Indicators - Summary Report

QM Indicator	Numerator / Denominator	Percentage	
Gap in Medical Tests: Percentage of HIV-positive clients who had a medical visit in the first and last half of the year	4 / 54	7.4%	All Client Export, QM Client Follow-Up
Medical Visits Frequency: Percentage of HIV-positive clients who had at least one medical visit at least 60 days apart in each 6-month period	1 / 55	1.8%	All Client Export, QM Client Follow-Up
Viral Load Suppression: Percentage of HIV-positive clients whose most recent viral load less than 200 copies/mL	39 / 115	33.9%	All Client Export, QM Client Follow-Up
Prescribed Antiretroviral Therapy: Percentage of HIV-positive clients who were prescribed antiretroviral therapy	47 / 115	40.9%	All Client Export, QM Client Follow-Up

Criteria: Agency Name:'Shared Agency' End Date of the Report:'10/31/2015 12:00:00 AM' Date the Report was Generated:'11/4/2015 12:00:00 AM'

This report was based on data generated at 11/4/2015 6:02:21 PM.

Summary Report Cancel

There are several report and export options available from this screen. If you wish to export a file containing the Summary Report as it appears on the screen, click the Summary Report button at the bottom of the screen. For each individual measure, you have two report/export options:

QM Client Follow-Up: This report will list those clients who were in the denominator but not in the numerator. In other words, these are the clients who did not "pass" the test imposed by the QM measure. There could be several reasons for this:

- *Missing Data:* You may find that when you review the client's ARIES record, certain data may be missing. For example, the client's chart may indicate that the appropriate Viral Load tests exist but were never entered into ARIES.

- *Pending Data:* If you have just entered new data for the client, that data will not show up on the QM reports until the next day. The same is true for the RSR and the STAR reports. Performing all the calculations necessary for the QM report (or the RSR or the STAR) could take hours. To avoid such delays, ARIES runs the calculations overnight so that much of the data needed for these elaborate reports are precalculated. You can always tell the last time the calculations were run by looking at the line "This report was based on..." at the bottom of the screen.

- *Client needs intervention:* The data may indeed be completely accurate, indicating that further direct intervention is needed with the client. For example, if no Viral Load test exists, one should be scheduled as soon as convenient.

When viewing the QM Client Follow-Up report, you may also export the report by clicking the Export button at the bottom of that page. The export will be identical to the format of the All Client Export except that the file will contain only those clients who are in the denominator but not in the numerator.

All Client Export: This export will create a file listing each client in the denominator. Clients who did not meet a given measure are flagged as "0" in the "InNumerator" column of the export, while those clients who met the measure are flagged as "1." Selected demographic data (including ARIES ID) are included for each client. In addition, several measure-specific data elements will also be included. For example, for the Viral Load Suppression measure, the export includes the dates and results of the client's two most recent Viral Load tests.

Usability Tip: When you run more than one QM measure at a time, as shown in the screen above, clicking on any of the report/export buttons will navigate away from the screen, making it necessary to rerun the measures to return to the Summary screen. Instead, hold down the <CTRL> key when you click on one of the buttons, and this will open the output screen in a new tab, leaving the Summary report intact in its original tab. Similarly, you can hold down the <SHIFT> key when you click on one of the buttons to open the output screen in a new window.

Getting Help with QM

There are a number of resources to help users with the HAB QM Indicators report.

- The *Calculations for HAB QM Indicators Report in ARIES* is posted at www.projectaries.org. This document describes all the data elements and values that go into calculating a given measure, identifies where ARIES differs from HAB, and outlines all the client exclusions.
- The *ARIES User Manual* can be accessed by clicking Help on the black menu bar or hitting the F1 key while logged into the system. The manual will provide step-by-step instructions on how to generate a report.
- The ARIES Help Desk is also available to assist users. They can be contacted 866-411-ARIES (2743) or helpdesk@projectaries.org. As a reminder, do not include any client information in on their voice mail or in an e-mail.

The 2015 RSR

Some important changes are coming for the 2015 Ryan White Program Services Report (RSR). More detailed information will be published in the January 2016 newsletter, but please read the following for a preview of those changes. We expect the 2015 RSR to be available in early January. For now, you can run the old 2014 version of the RSR to get started on cleaning up your data, but you should not use the XML file from that report to submit to the Health Resources and Services Administration's (HRSA) HIV/AIDS Bureau (HAB).

Eligible Scope Reporting

For calendar year 2015, HAB has redefined the clients and services to be reported on the RSR. The change to "eligible scope" reporting was made to address the impact of the Affordable Care Act (ACA) as many more clients now have health insurance which may pay for some services that were previously covered by Ryan White HIV/AIDS Program. Prior to 2015, the RSR was a "funded scope" report that only included services paid for with Ryan White funds. For 2015, any service that could have been paid for with Ryan White funds should be included in the RSR.

What is the Impact on ARIES?

There will be no changes to the RSR-required data elements or response options for 2015. HAB released the new validations which are included in this release (R30). The enhancement allowing ARIES providers to generate an eligible scope RSR will be available early January 2016. Grantees and providers will use HAB's Electronic Handbook System (EHB) to submit their RSR.

What are HAB's Expectations?

The ARIES Team realizes that grantees and providers may be concerned about this transition and are eager to begin working on their 2015 RSR. As a reminder:

> "HAB understands that there may be data completeness issues due to the changes in reporting requirements. As with all changes in the RSR, we ask that you do your best. There will be no penalties for missing data." -Systems That Create the RSR: Preparing for Eligible Scope webinar, May 26, 2015

How to prepare for the 2015 RSR?

Until the next issue of The ARIES Advisor is published, please continue to enter your Ryan White clients and services in ARIES and run the following reports:

The Summary Report

The Summary Report consists of a list of clients for each data element in the RSR. For example, the first table in the Summary Report lists your clients by Enrollment Status. There is *no change* to the Summary Report for 2015. All of the data elements for the 2015 RSR are the same as the 2014 RSR. The big difference, as explained above, is the selection of the clients and services to be included on the 2015 RSR.

The Validation Report

Previously, the RSR included a Missing Data Report. Over the years, this report has become a bit complicated since it included a mix of RSR upload validations and ARIES data validations. For 2015, the report will include only the RSR validations, hence the name change from Missing Data Report to Validation Report. A sample of the new report is shown below:

RSR Validation Report - by Client

ARIES ID	Client	Staff	Alerts	Warnings	Errors
			Verify the data before uploading, HAB will accept the data without an explanation	*If possible, correct the data before uploading, otherwise HAB will require an explanation*	*The data cannot be uploaded, and the client will be excluded from the XML upload file*
100017888	Balloon, Red A		Missing Race Missing HIV Risk Factors		
100048651	Bush, Rose X		Missing Sex at Birth Missing HIV/AIDS Status Missing HIV Year Missing HIV Risk Factors	Missing Housing Status Missing Medical Insurance	
100050004	Client, NonShare X		Hispanic Ethnicity without Subgroup Missing Race Missing Sex at Birth Missing HIV Risk Factors	Missing Poverty Level Missing Medical Insurance OAMC Services without Viral Load Test Dates OAMC Services without HAART Status	
100049998	Client, Share X		Hispanic Ethnicity without Subgroup Missing Race Missing Sex at Birth Missing HIV Risk Factors	Missing Poverty Level Missing Medical Insurance OAMC Services without Viral Load Test Dates OAMC Services without HAART Status	
100017136	Computer, Laptop X	Worker, Outreach	Missing Race Missing HIV Risk Factors	Missing Housing Status OAMC Services without Viral Load Test Dates OAMC Services without HAART Status	
100049220	Cup, Paper X	Worker, Outreach	Missing Race Missing Sex at Birth Missing HIV Year OAMC Services without TB Screening OAMC Services without Hepatitis B Screening OAMC Services without Hepatitis C Screening	Missing Poverty Level Missing Housing Status Missing Medical Insurance OAMC Services without HAART Status	

When you upload your XML file into HAB's EHB, the data passes through three levels of validation. Any data that does not meet HAB's expectations will generate an Alert, Warning, or Error message. The purpose of this report is to let you see, in advance, how the EHB will respond when you upload your XML file. ***Alerts*** mean that HAB wants you to check the data for accuracy, but no explanation is required, and the data will be accepted as-is even if you can't correct it. ***Warnings*** also mean that HAB wants you to check the data for accuracy, but in this case, if you cannot correct the data, HAB will require you to submit an explanation before the data is accepted. ***Errors*** mean that HAB will not accept your XML file until the data is corrected. You should never see any Error messages on your RSR. The data entry procedures in ARIES prevent you from entering data that would cause an Error message.

Completeness Report

The Completeness Report lists the data elements of the RSR along with a percentage indicating how many of your clients have a known value for that data element. In other words, the report tells you how complete your reporting is for each data element. While the content of the Completeness Report has not changed for 2015, the *function* has changed significantly. For each data element, you will be able to generate a list of those clients who do not have a known value. For example, if your report shows that 27 of your clients do not have a known value for Sex at Birth, you will be able to click on a link to generate a report telling you the names and ARIES IDs of those 27 clients. More information on this new feature will be available in the January newsletter.

Please contact the Help Desk at 866-411-ARIES (2743) or helpdesk@projectaries.org if you have any questions regarding the RSR changes in ARIES.

Importing by ARIES ID

As more agencies are using electronic medical record (EMR) systems, more agencies are now importing data into ARIES. Importing always means matching clients between two data systems, the local EMR and ARIES. In the past, ARIES imports have relied on the six client identifiers (first name, middle initial, last name, birthdate, gender, mother's maiden name). This works fine for creating new clients in ARIES because the client record in ARIES and the client record in the EMR system will always match. However, the six ARIES client identifiers can be edited in both ARIES and in the EMR, and once edited, there's no longer a match between the client record in ARIES and the client record in the EMR. As a result, the next time data are imported into ARIES from the EMR, a new client record would be created with the new identifiers, resulting in duplicate records in ARIES for that client.

A new feature of ARIES Import greatly decreases the chances of client duplication due to these types of edits. This new feature relies on ARIES ID as the identifier used to match clients between the two data systems. Since ARIES ID does not change (with a few exceptions), this link between the two systems is far more reliable. Here's a brief description of how the feature works:

1. A new client is imported from the EMR into ARIES.
2. When the new client record is created in ARIES, it is assigned a unique ARIES ID.
3. Following the import, a list of all clients and their ARIES IDs are exported from ARIES.
4. The list is imported into the EMR, which adds the ARIES ID to the client record in the EMR.
5. The next time data is exported from the EMR for that client, the ARIES ID is included in the export.
6. When that data is imported into ARIES, the matching is done based on ARIES ID instead of the six client identifiers.

Using this new feature requires some specialized skills and extra work on the part of your IT staff, so not all agencies may use this feature. If your agency currently imports data into ARIES and you would like to use the Import by ARIES ID feature, please e-mail Karl Halfman at the state Office of AIDS for more information. If your agency is not currently importing data into ARIES but would like to, please see ARIES Policy Notice G3.

Changes to ARIES ReportExport

ARIES ReportExport is an application used to generate ad hoc reports. Some end users have access to ReportExport, as does the Help Desk. In Release 29, several enhancements were made to ReportExport:

- New Navigation Options: When creating a new report, if you choose to export your results, the previous version of ARIES required you to then run the report and display it on-screen before you could decide to save, edit, or delete it. For very large reports, this was a problem, and sometimes caused a browser lockup. In the new version of ARIES, after you export data for a new unsaved report, you will see the Save, Edit, and Cancel buttons. Save allows you to save the report for future use, Edit allows you to return to the design pages and make changes to the report, and Cancel allows you to exit without saving the report, essentially deleting it.

- New Staff Association Tables: When adding the Staff Table to a report in previous versions of ARIES, if you started with the Client Table, the name was always the Primary Staff Person for each client (from the Program Summary tab), and if you started with the Service Line Item Table, the name was the Staff Person associated with the service record. However, many other tables – especially longitudinal tables – also have a staff name associated with them, and until now, it was impossible to include that information in an ad hoc report. The new version of ARIES includes many new Additional Tables that can be added to a report. For example, to get the name of staff person associated with a Substance Abuse and Mental Illness Symptoms Screener (SAMISS) assessment, add the table "SAMISS Assessment Staff Table" to the report. As before, if you start with the Service Line Item Table add the Staff Table, you will continue to get the Staff Person associated with the client, but with this new version of ARIES, you may also add special Staff tables to get not only the Primary Staff Person for each client, but also the other staff assignments for each client (1, 2, 3 or 4). The new staff association tables are:

Barriers To Care Staff Table	EIP Functional Staff Table	Program Staff 3 Table
Care Plan Staff Table	HOPWA Assessment Staff Table	Program Staff 4 Table
Case Plan Task Staff Table	HOPWA Status Staff Table	Referral Staff Table
Case Note Staff Table	Program Staff 1 Table	Referral To Staff Table
EIP Behavioral Staff Table	Program Staff 2 Table	SAMISS Assessment Staff Table

- New Additional Tables: When starting with the Service Line Item table, two new tables are now available as Additional Tables: Client Latest Data Table and Client Latest Data Periodic Table. These special and powerful tables require advanced report design skills. For more information, see the training webinar at www.projectaries.org.

- More New Additional Tables: Case Notes consist of a "parent" record in the Care Note Table and one or more "child" records in the Case Note Paragraph Table. Previously, only the parent table was available in ReportExport, but the child table has now been added. Please note that the actual text of a case note is not available for security reasons, but you may now access the Category of each paragraph as well as the Share flag. Similarly, Care Plans consist of a parent record and one or more child records representing each Task of the Care plan. The Task table was previously not available, but may now be included in reports.

- Exporting Data: Many users are unaware of this, but ReportExport is a two-sided coin - one side is for creating ad hoc reports, and the flip side is for exporting mass quantities of data - a "data dump" option (see screen below). Because the export task can literally export all data for your entire agency, a new permission has been added to control access to that task. If you previously used that task and have a legitimate need to do so again, please contact the ARIES Help Desk to request permission. The Help Desk is at 866-411-ARIES (2743) or helpdesk@projectaries.org. Please note that this new permission is not required to export the results of an ad hoc report or any other ARIES report, only for the mass data export available in ReportExport.

New MAI Report

Minority AIDS Initiative (MAI) outreach workers can now use the MAI Provider Report to summarize their efforts to link and re-engage clients of color in HIV care. This report combines data from the Outreach Services Module and full ARIES.

To run the report, select Outreach from the Reports menu and click on the report name. Enter the contract name (such as MAI 15/16 CA/OA) and click run. A table will appear with separate rows for each racial/ethnic group served. If you provided multiple types of services to your MAI clients, there will be a separate group of racial/ethnic group rows for each Primary Service. For each group, the report shows:

- The number of service records entered (i.e., a Client Phone Contact and Appointment Assistance under Outreach Services are counted as 2 services).
- The number of visits (i.e., the previous example would count as 1 visit if the services were provided on the same day, and 2 visits if provided on different days).
- The number of clients served.

- The number of clients Linked to ANY Care (i.e., the client's Referral has an Outcome of "Confirmed to Care" or "Referred to Care" and an Outcome Date).
- The number of clients Linked to ARIES Care (i.e., ACE clients who have been enrolled in care at your own agency and have had their ACE record linked to their ARIES record).

MAI Provider Report

Contract	Primary Service	Race	Services	Visits	Clients	Linked to Any Care	Linked to ARIES Care
MAI 15/16 CA/OA	Outreach Services	Asian	8	8	2	0	2
MAI 15/16 CA/OA	Outreach Services	Hispanic or Latino(a)	28	26	6	2	2

In addition to summarizing outreach efforts, this report can be used as a quality assurance tool. If the services/visits are low, make sure staff know how to enter services (for instructions, see the ARIES Advisor [June 2015], page 5). If there are "White (not Hispanic)" clients on this report, make sure staff understand that MAI is for people of color. If there are no clients Linked to ANY care or ARIES care, make sure staff know how to complete these outcomes (see pages 7 and 8, respectively).

To assist you with interpreting this report, a second report is available listing each individual client on the summary report. The detail report is called MAI Provider Report – Detail and is also on the Outreach Reports page. Be sure to use the same criteria for both reports. The detail report shows each client's ACE ID (if the client was an anonymous client at some point), ARIES ID (if the client was enrolled in ARIES at your agency for care), Race/Ethnicity, and a breakdown by Primary Service. EIS stands for Early Intervention Services, OS stands for Outreach Services, and TE stands for Treatment Education. If a client was Linked to Any Care, then the date of the Referral Outcome will be shown. Similarly, if a client was Linked to ARIES Care, then the linkage date will be shown.

MAI Provider Report – Detail

ACE ID	ARIES ID	Race	EIS Services	EIS Visits	OS Services	OS Visits	TE Services	TE Visits	Linked to Any Care	Linked to ARIES Care
A111S1	999999999	Hispanic or Latino(a)	0	0	9	9	0	0		10/17/2015
A222T2		Hispanic or Latino(a)	0	0	6	4	0	0	8/11/2015	
A333U3	888888888	Hispanic or Latino(a)	0	0	5	5	0	0	5/21/2015	10/21/2015
A444V4		Hispanic or Latino(a)	0	0	3	3	0	0		
A555W5	777777777	Asian	0	0	4	4	0	0		10/17/2015
A666Y6	666666666	Asian	0	0	4	4	0	0		10/21/2015
A777X7		Hispanic or Latino(a)	0	0	4	4	0	0		
A666Z6		Hispanic or Latino(a)	0	0	1	1	0	0		

Note that both of these reports may be filtered by ACE Client Table Source. To run a report including ALL clients, leave this filter blank. To limit the report to only those clients who are ARIES clients, use a Table Source filter of Equals ARIES. To limit the report to only anonymous clients, use a Table Source filter of Equals ACE. Note that clients who were originally ACE clients but eventually linked to an ARIES client have a source of ARIES.

Update Highlights

- Date Fields Required: Longitudinal tables are tables used to capture historical data where a client can have more than one record. Examples of such tables are CD4 or Viral Load. While all longitudinal tables have a date field, some did not previously require a value in that date field. This release imposes a requirement to complete the date field. In most tables, that date cannot be after today's date, but where appropriate, future dates are now allowed, such as the Start/End Dates for Other Medications records.

- Languages: The Primary and Secondary Languages dropdown lists have been expanded to include the top 15 languages spoken in California, plus all of the Medi-Cal Threshold Languages. Users can now select from 18 linguistic options on the Demographic Detail screen.

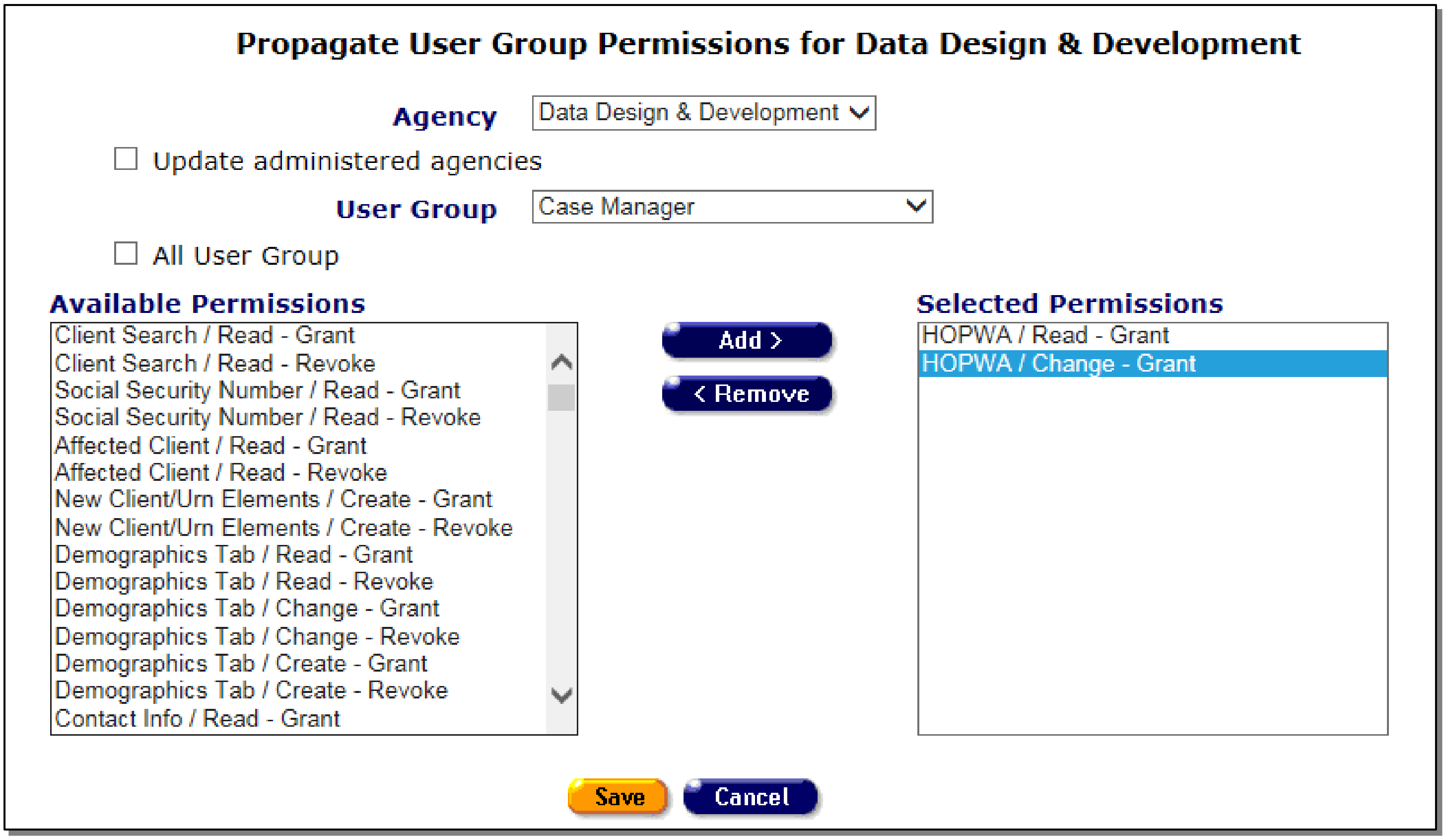
- Referral Outcomes: The rules for the Referral Edit screen have been modified. Now, if you enter an Outcome, you must enter an Outcome Date, and vice versa. Additionally, the Outcome Date no longer defaults to any value.

- More Uses for ARIES ID: ARIES ID is a unique number assigned to every ARIES client. You may see the number on the Client Demographics read-only screen. Searching for clients by ARIES ID has been a part of ARIES for some time, and ARIES ID appears on the Client Search Results screen. With this new release, you may now also use ARIES ID to identify a client on the Batch Entry screens for CD4 or Viral Load Tests. In addition, if you use the Service Line Item screen or the Document Upload screen to enter data for multiple clients in the same work session, you may now identify those clients using ARIES ID.

- Import Documentation: Agencies that import data into ARIES rely on extensive technical documentation in the form of XML Schema files and Sample Data files. These files typically change with each new ARIES release, and now contain a version stamp to identify the ARIES version to which the documentation applies. These files are available for download from the ARIES Import application.

Selective Propagation of User Permissions

User permissions determine what a user can do once they log into ARIES. Users are typically assigned to a User Group which establishes their default set of permissions, but sometimes the default permissions for a User Group do not meet the needs of a particular Agency or Administrative Agency (AA). In the past, agencies would need to edit each user individually, but with a new Agency Utility, agencies can manage user permissions for a group of users in one step, or even update the permissions of all staff in one step.



The screen above shows the features of the User Permission Propagation utility. First, select the agency to which the changes should be applied. When run at the Provider Agency level, only your agency will appear in the dropdown. When run at the AA level, all of the managed agencies will be listed. Administrative Agencies can also apply the changes to all the agencies they manage by checking the "Update administered agencies" box.

Next, select the User Group to which the changes should be applied. All of the standard ARIES user groups will appear in this dropdown. If you wish to apply the changes to all users, check the "All User Group" box.

The list box on the left includes all of the individual permissions within the user permission matrix. Each permission represents one of the active checkboxes on the standard user permission edit screen. For each permission, both a "Grant" and a "Revoke" option are shown – Grant means to check the box and add the permission, Revoke means to uncheck the box and remove the permission. To change a permission, select the appropriate item in the left box, then click Add, or alternately you can double-click on any of the available permissions. This will cause the permission to move from the Available list box to the Selected list box. To remove a permission from the Selected list box, select it and click Remove, or just double-click on the item. This will remove it from the Selected list box and return it to the Available list box.

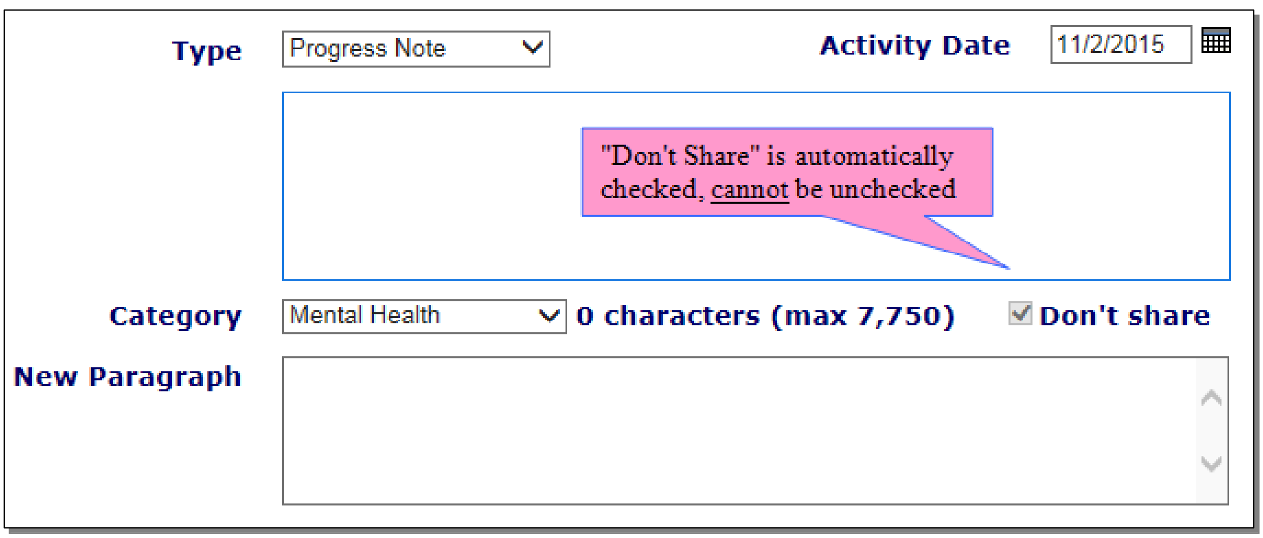
In the example shown above, all of the Case Managers at the Data Design & Development agency are going to be given both Read and Change permissions for the HOPWA screens. When your selections are correct, click the Save button. ARIES will ask for confirmation before performing the update. Make sure that you have correctly identified the agency, user group, and permissions you want to modify because the changes will overwrite all existing permissions and cannot be undone.

To use this new User Permission Propagation utility, you must have access to the Agency Utilities tab on the Agency Screen, and you must have a permission specific to this task. Currently, no users have that permission because of the powerful nature of this utility. If you wish to have access to this utility, contact the ARIES Help Desk at 866-411-ARIES (2743) or helpdesk@projectaries.org. Only Agency/AA Administrators or Managers who have demonstrated advanced knowledge of ARIES permissions will be granted permission to use this utility. Each request will be considered individually, and it may take several days before permission is activated. Administrators and Managers are encouraged to use this utility carefully, making only one or two changes in a single pass to avoid errors.

Sharing Case Notes

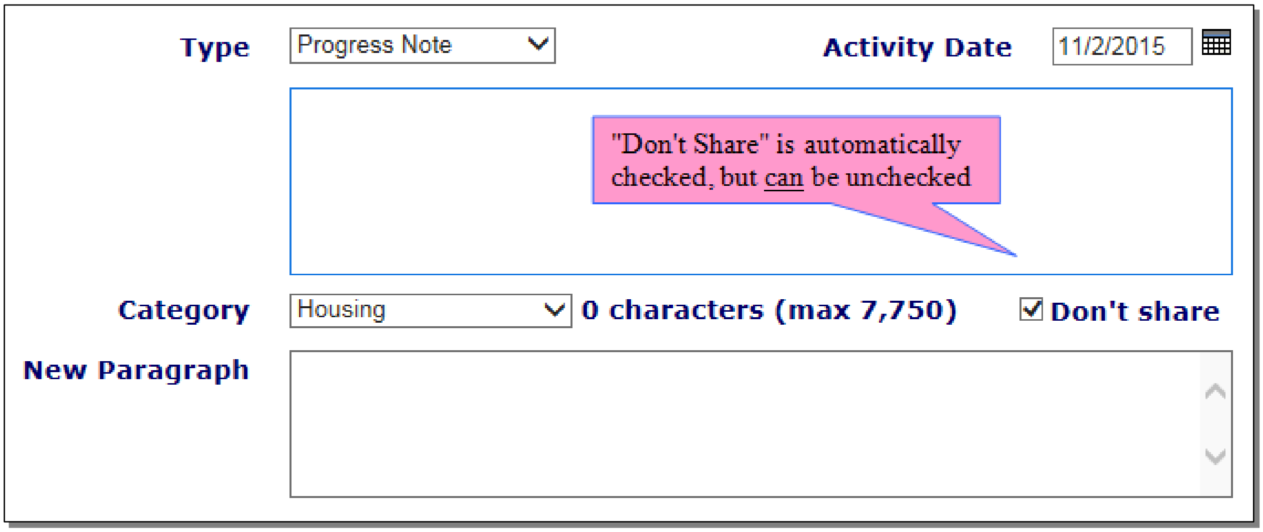
You may have noticed that an active action is now required to share a case note. By default, case notes are now marked as “Don’t share” and users must uncheck the box to enable sharing. This change was implemented after the Help Desk learned that some users were entering information about mental health and substance use in general case notes, but failing to mark these notes as non-share. Though this change does create an extra step for general case notes, it will help ensure that sensitive client information is not inappropriately or illegally shared.

Case notes categorized as (1) Incident Report, (2) Legal, (3) Mental Health, or (4) Substance Use will continue to be treated as non-shared regardless of clients’ share status.



Case notes marked with any other category will also be treated as non-share by default. However, users can share these other categories of notes by simply unchecking the “Don’t share” box on the Case Notes screen. When the user saves the note, a pop-up message will ask for confirmation: "You are about to share this note. Select Cancel if it includes any mental health, substance use, or other sensitive information. Select OK to Save."

This is to prevent providers from mistakenly sharing sensitive information in the notes (e.g., writing a Housing note that discusses the client's drug use).



Users will continue to have to sign and seal a shared case note before it can be made visible to a share client's other providers in ARIES. For more information, please see ARIES Policy Notice E5.

Revisions to the HOPWA Progress Report

The Housing Opportunities for Persons with AIDS (HOPWA) Progress Report has been revised. Several critical changes have been made to the way ARIES calculates data in many of the tables throughout the report. For example:

- The table Homeless Individual Summary now correctly calculates the Number of Chronically Homeless. Chronically Homeless is now only based on 'Yes' responses to the following question found in the HOPWA Assessment (page 1): Is the applicant chronically homeless as defined by HUD?
- In the table Prior Living Situation, the old issue of defining continuing clients has been fixed. ARIES now calculates this field based on clients who have received a HOPWA service in the 12-month period prior to the start date of the reporting period. Previously, ARIES had counted any type of HOPWA service when looking for continuing clients and did not limit the date range of that service.
- Also, there were several places in the report where clients who met certain criteria were reported on different rows or different columns depending on whether the agency provided Housing Subsidy Assistance. These calculations have been corrected as well.

HOPWA providers should continue to enter their HOPWA data in the Programs Tab. You can now use the updated HOPWA Progress Report (located on the Compliance Report Page under the HOPWA heading) to submit your annual report in July 2016. Don't forget to keep your data updated throughout the year! If you have any specific questions on the changes made to the report, please contact the ARIES Help Desk at 866-411-ARIES (2743) or helpdesk@projectaries.org.