Ryan White Program MAVEN User Guide

August 2019

North Dakota Department of Health
HIV·STD·TB
VIRAL HEPATITIS PROGRAM

NORTH Dakota | Health
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1. About MAVEN

MAVEN is the North Dakota's electronic disease surveillance system. It is web-based, client-centric surveillance system that allows tracking disease diagnosis and other information for a single person across different reportable conditions and surveillance models within the system.

Ryan White (RW) case management agencies will use MAVEN to enter Ryan White Part B client eligibility information, client demographics, co-morbidities screening information, and reengagement to care information. This information is used to complete different reports and monitor program performance and outcomes, as well as two HRSA's annual reports: the Ryan White HIV/AIDS Services Report (RSR) and the AIDS Drug Report (ADR); By accessing lab information in MAVEN, case managers are also able to monitor client's medical outcomes and treatment adherence.

In addition to reporting requirements, MAVEN access has benefits for the case managers by allowing them access to HIV Surveillance data such as lab work. All HIV labs (including HIV Ab testing, CD4 counts, HIV viral loads, HIV genotypes) are reportable to the NDDoH and are electronically imported into MAVEN. This allows case managers to have access to medical outcomes for clients and monitor retention in care and treatment adherence.

MAVEN Login:
MAVEN website: https://apps.nd.gov/maven/login.do.
Enter assigned username and password.
To reset password, please contact Alicia Torfin, NDEDSS Coordinator, at 701.328.2385 or via email at atorfin@nd.gov.

To obtain access to MAVEN, please contact the Ryan White coordinator. Each MAVEN user and agency will be required to sign annually the MAVEN User Agreement and MAVEN Site Agreement, respectively, and each user must sign the HIV.STD.TB.Viral Hepatitis Security & Confidentiality Oath.

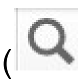
Each active Ryan White client will be assigned to their RW case manager. A client can only be assigned to one case manager at a time. If a client is case managed by multiple case managers, case will need to be reassigned between case managers. Case managers can only see those clients that are assigned to them. Once a client is closed by the case manager, and no additional information needs to be entered, case manager can reassign the case to the program coordinator.

Each HIV case contains also HIV Surveillance information not pertinent to the Ryan White program. To prevent confusion, all required information for reporting and program purposes will be linked to the RW Case Managers wizard.

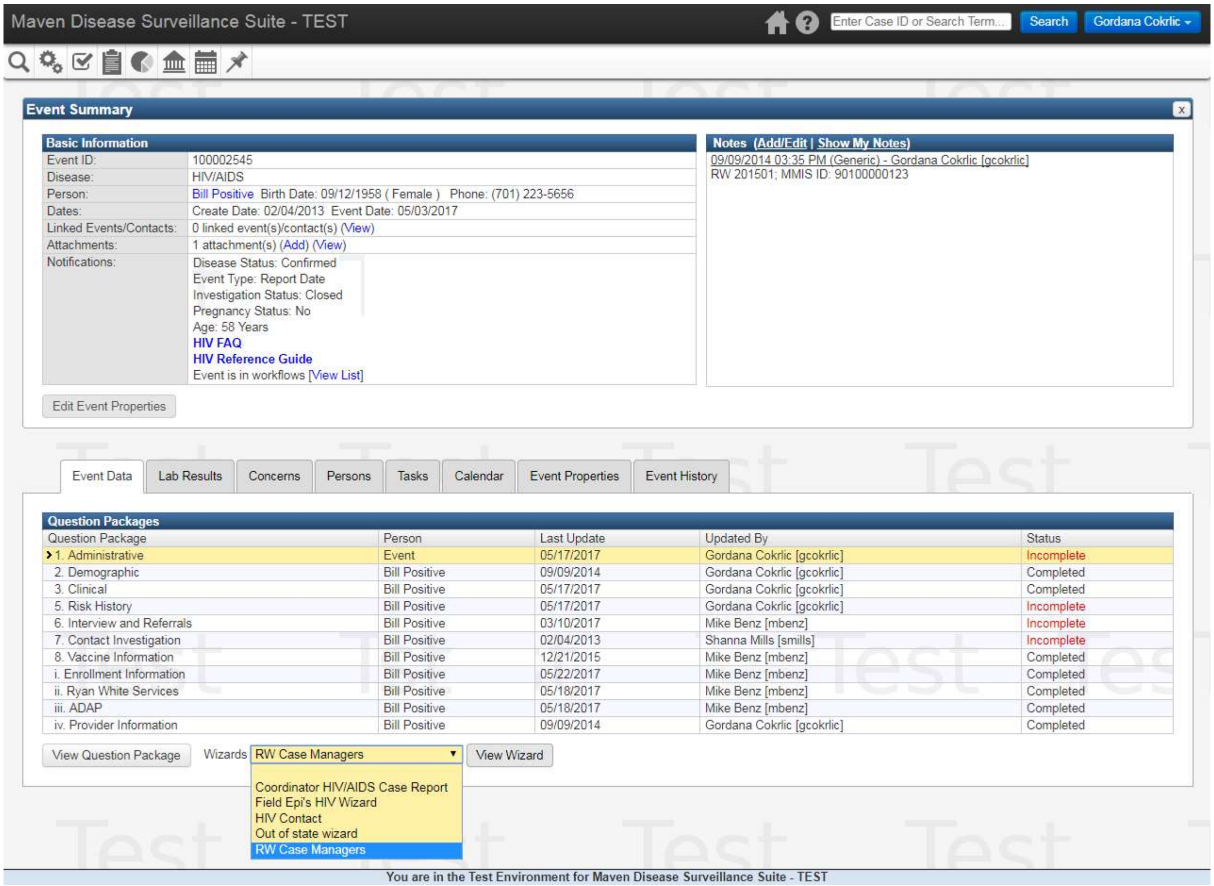
2. Client Search

Once logged in, you will see your name under Workflows. Clicking on user name leads to the full list of clients assigned to the case manager. To go to a specific client, click on the blue Click on the Event ID (displayed in blue). Click on the Export All link to export your cases into an Excel spreadsheet.

You can also see your workflow by clicking on the gear icon () in the upper left corner.

To search for a specific client, enter their name or their RW number in the Search Box in the upper right corner, or use the magnifying glass in the upper left corner ().

3. Client Dashboard



Once you are in the case, this is the main page, or dashboard. It has two sections. The upper section is Event Summary, and the lower section is Tabs.

Event summary has two sections: Basic Information and Notes. Basic information lists client demographics, and additional HIV surveillance information including the date and age of diagnosis. Notes section lists the notes between the HIV Surveillance Coordinator and the Field Epidemiologists. You may enter information here pertaining to the client's sexual contacts, pregnancy status, client relocating, etc. However, for noting any RW related information, please use the notes in the Enrollment package.

The bottom portion of the client dashboard lists different Tabs. Event Data Tab has question packages including three packages for RW clients: Enrollment Information, Ryan White Services, ADAP, and Linkage to Care.

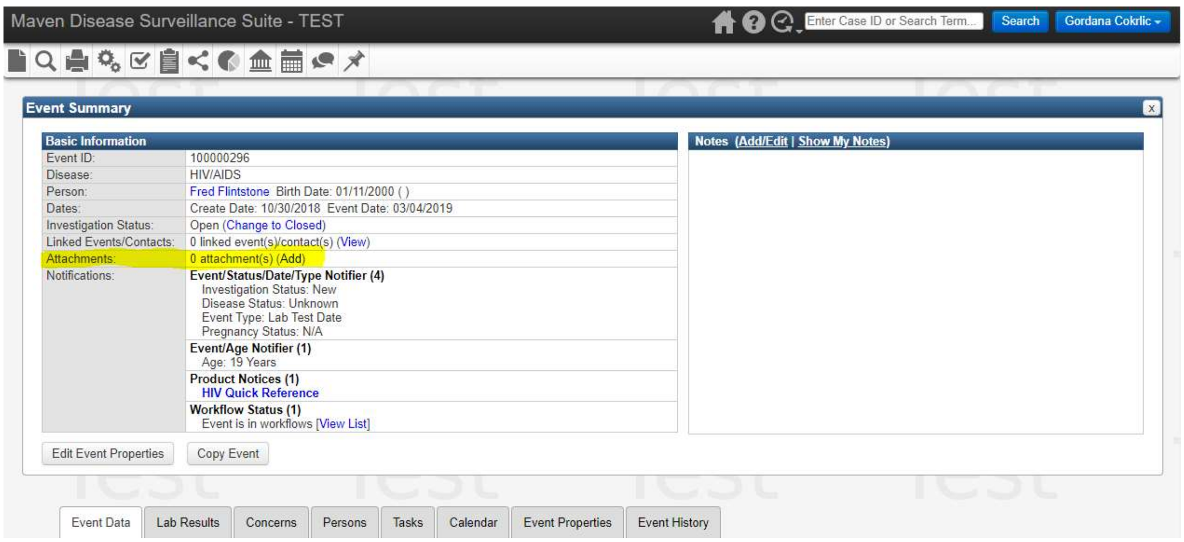
You may enter information by going to the package directly, or by going to the RW Case Managers wizard which will link all questions for RW case managers to populate.

4. Attaching Files

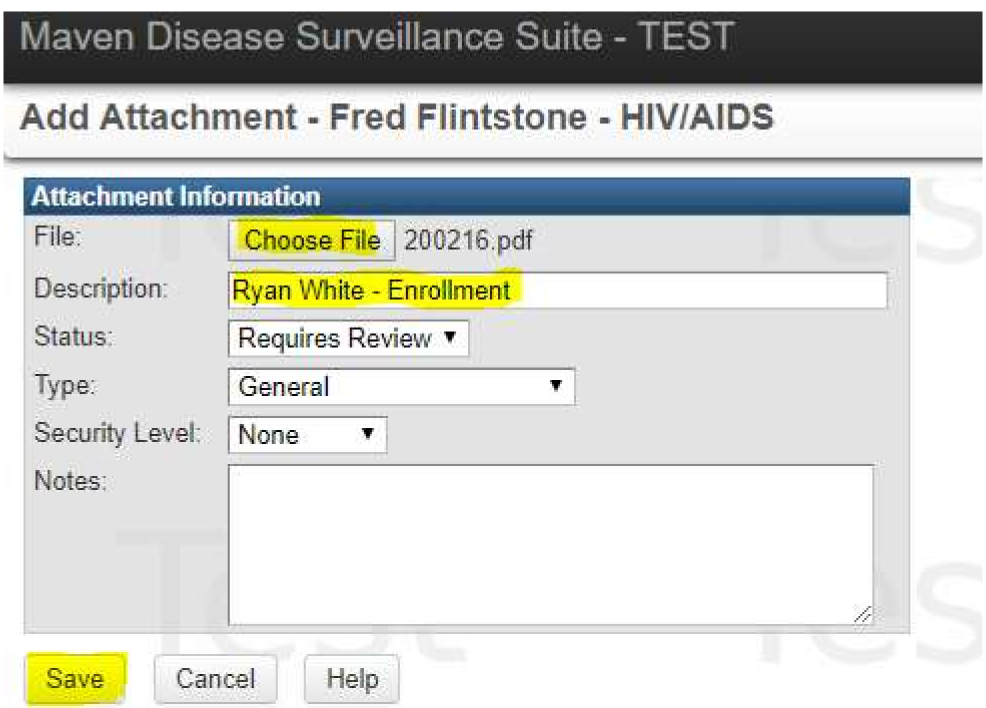
All Ryan White eligibility and additional documents can be upload to Maven. This will allow for a more confidential and effective way of storing and sharing documents than paper mailing, faxing, or paper storage.

To attach a document to the client's Maven case:

1. Click on Add.



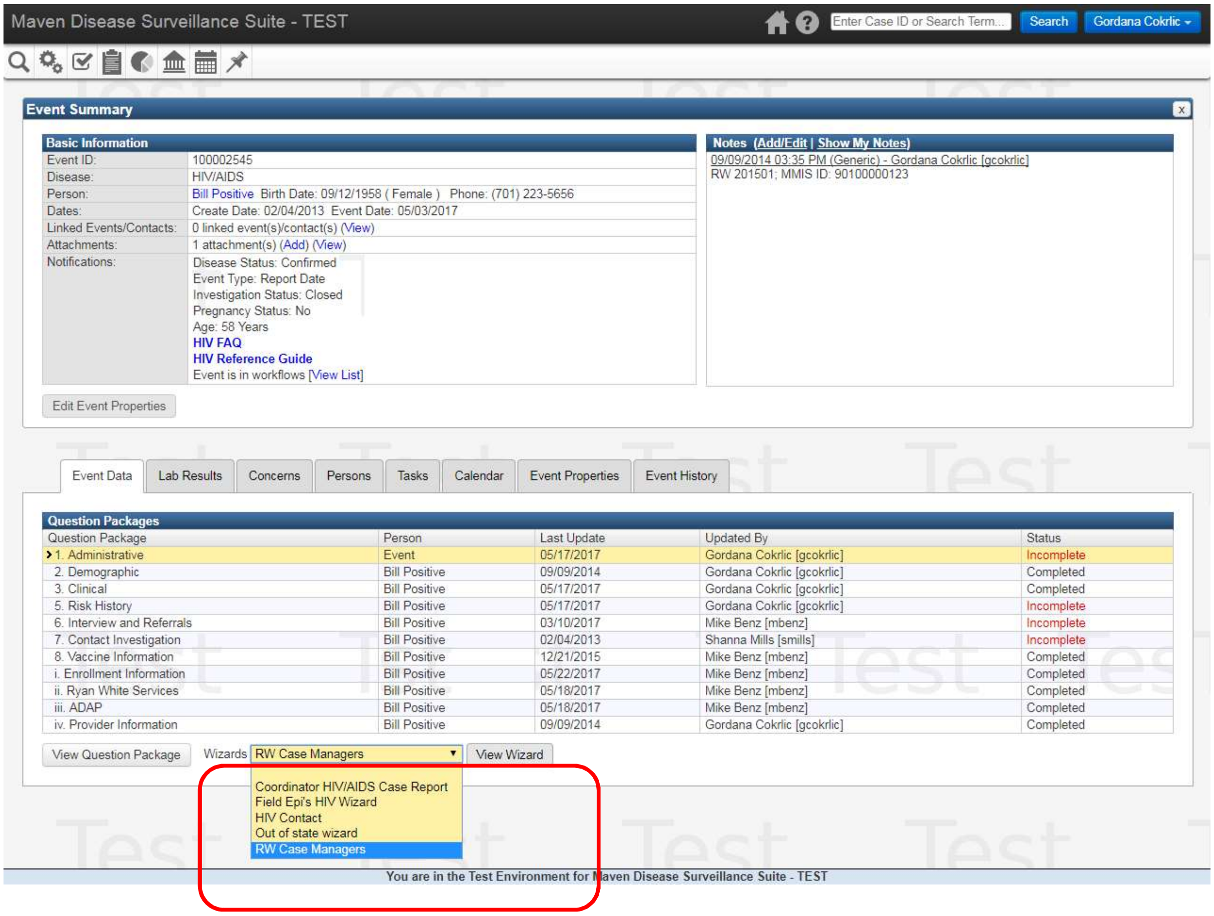
2. Click on Choose File and select the file that you would like to attach.



3. Name the file in the description box with prefix “Ryan White – “.
4. Save
    a. Status, type, and security level can be left as default.

All Ryan White documents can be attached to Maven, however, documents with social security numbers listed on them such as tax returns and Social Security Income statements need to have SSNs removed before uploading the document into Maven or SSNs from those documents will be redacted by the RW Coordinator.

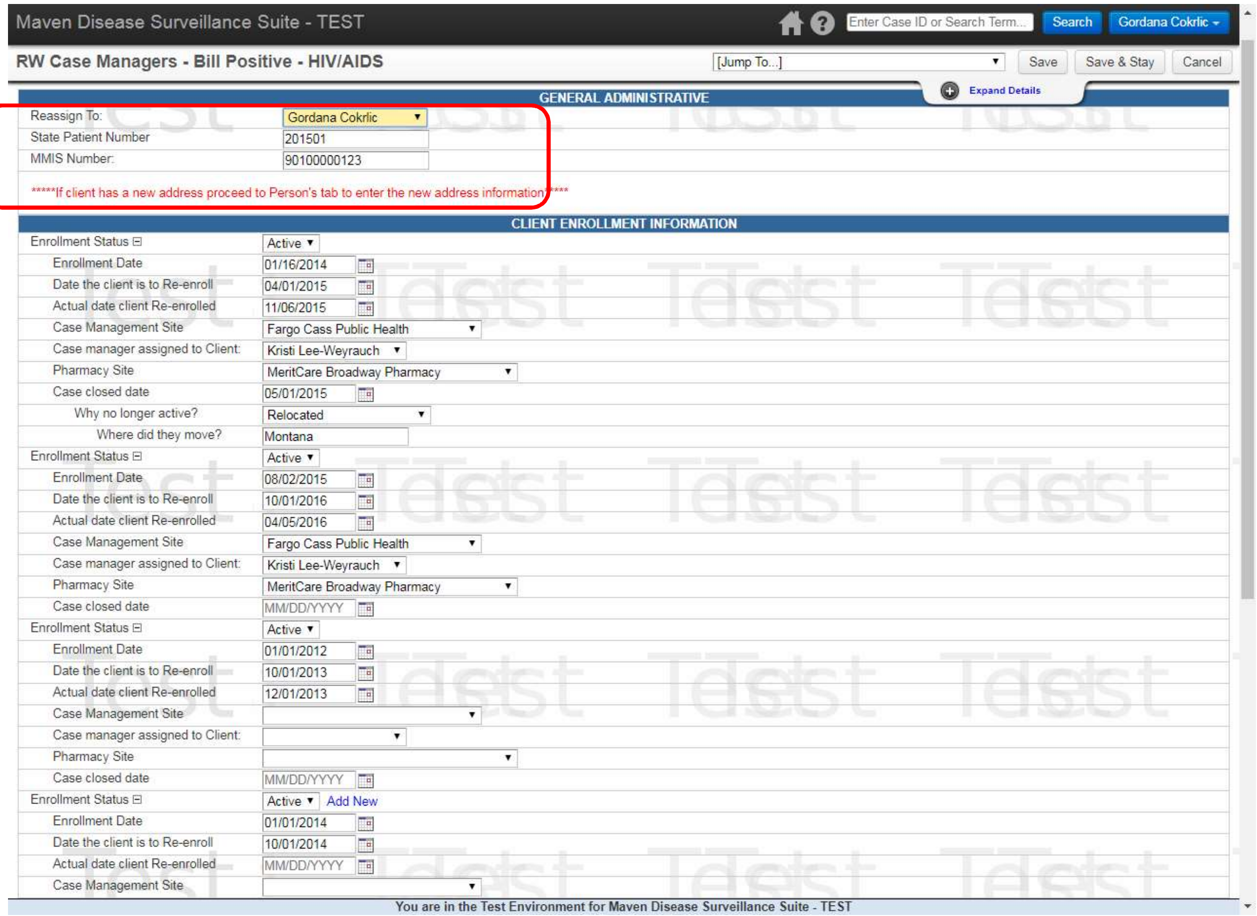
5. RW Case Managers Wizard



Select the RW Case Managers wizard from the drop-down list, and click on View wizard.

To advance though the fields in the wizard, press Tab button.

4.1 General Administrative Section

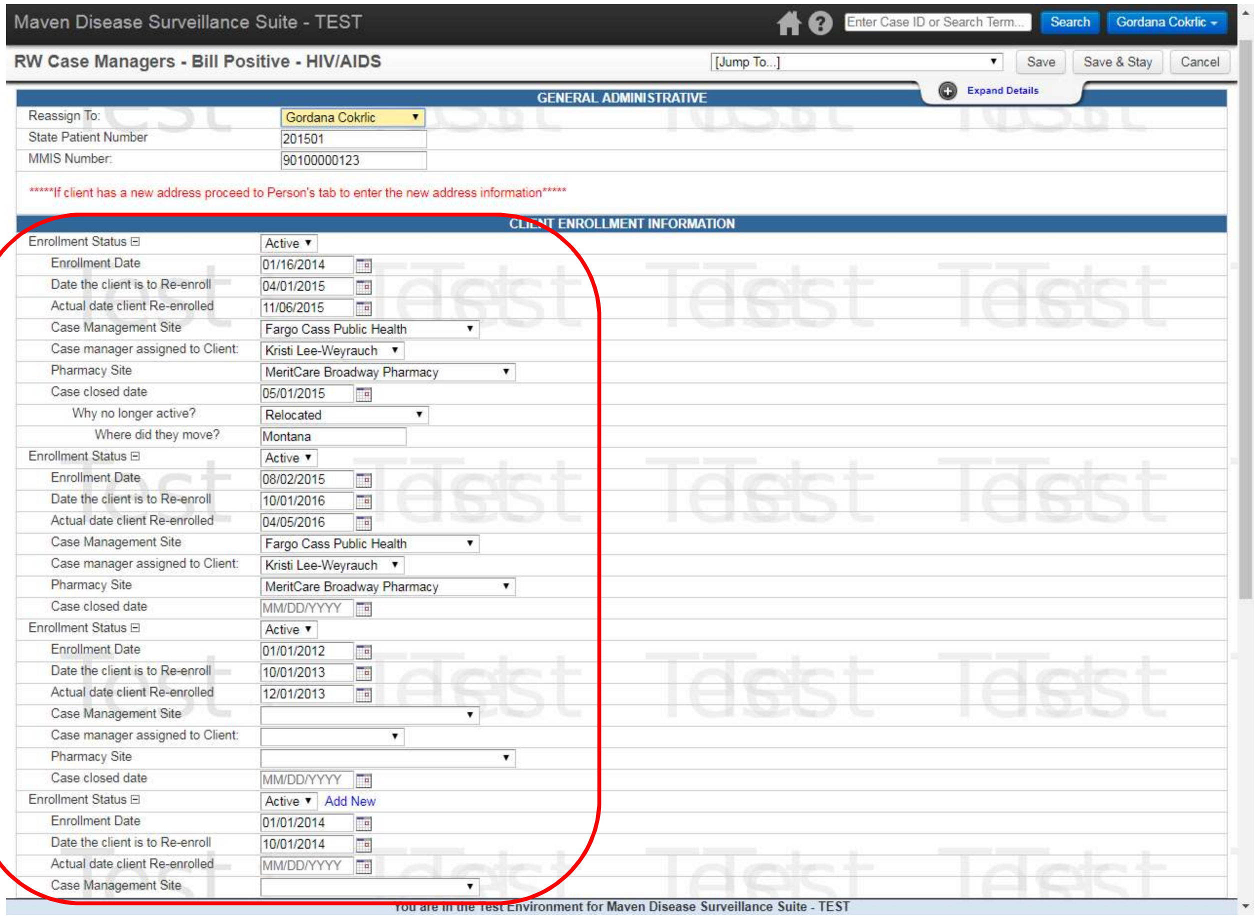


Reassign To box lists the case manager that the client is assigned to. Case managers can reassign the case to another case manager when transferring the client, or to RW Coordinator if closing the client. Once the case is reassigned, the case manager will not be able to see that client after they exit the case.

State Patient Number (or RW number) is the number assigned by the HIV Surveillance program and is used for RW services reimbursement.

MMIS Number (or ADAP number) is assigned to RW clients by MMIS and is used for ADAP medication billing. Patients must provide this number to the pharmacy in order to get their medications reimbursed through ADAP.

4.2 Client Enrollment Information



Client Enrollment Information lists the enrollment spans and the case management agency information for the client.

To enter enrollment information, please fill out the following. To advance to the next field, press Tab.

<u>Enrollment Status</u>

- Select Active

<u>Enrollment Date</u>

- Enter the date when you signed the application

<u>Date Client is to Re-enroll</u>

- Enter the date of the next recertification cycle
  - Re-enrollment cycle starts on April 1st. Recertification cycle starts on October 1st.

<u>Actual Date Client Re-enrolled</u>

- Leave blank for newly enrolled clients.

- For existing clients, this will be the date of the last reenrollment/recertification.

<u>Case Management Site</u>

- Select your agency.

<u>Case Manager Assigned to the Client</u>

- Select your name.

<u>Pharmacy Site</u>

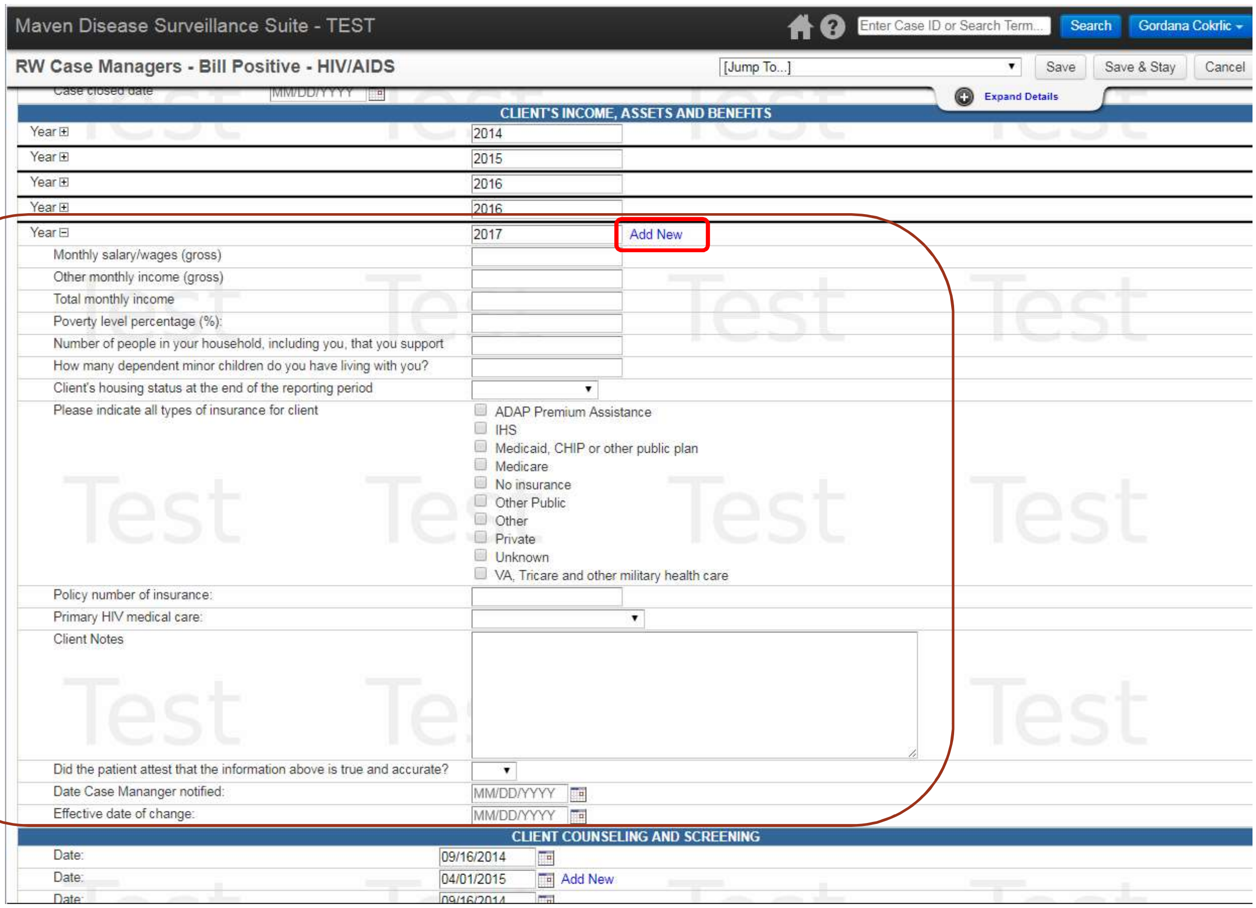
- Select the pharmacy where client will fill their prescription if receiving ADAP assistance.

<u>Case Closed Date</u>

Case Closed Date will be blank for active clients. If closing a client, enter the case closed date and select a reason for closure.

Each time a client enrolls, a new eligibility period must be started by selecting Add New. Please **<u>do not</u>** overwrite the new enrollment information over a past enrollment span.

4.3 RW Wizard: Client's Income, Assets, and Benefits



Clients Income, Assets, and Benefits section collects income and insurance information. This information will be entered with each enrollment, re-enrollment, and recertification.

Each year, a client will have at least two iterations (the orange outline marks one iteration) under Client's Income, Assets and Benefits for that year. One set will be for re-enrollment, and one for recertification (client in the image above has 2 iterations for 2016).

For reporting purposes, the last income in the calendar year is reported. Changes in income off-cycle do not need to be entered in MAVEN, as they will be entered with re-enrollment or recertification. However, all types of insurance a client has during the year have to be reported. Therefore, anytime the client's insurance status changes, this information must be entered in MAVEN with the dates the coverage started/ended. The rest of the information does not need to be verified (e.g. income, dependents, housing status), and can be copied from the previous iteration. Do not leave this information blank, as this will cause the reporting information to be incomplete.

To add income/housing status/insurance information, click on Add New. Press Tab to advance through the fields.

Add New

Year

- Enter the current year and press Tab

Citizenship Status

Monthly Salary/Wages (Gross)

- Enter income rounded to the nearest whole number. Do not enter decimal places

Other Monthly Income

- Enter any other income that clients or household members receive.
- Enter 0 if no other income.

Total Income

- Press Tab and total income field will self-populate

Poverty Level Percentage (%)

- Household income/guideline x 100 = % household poverty level
- Current poverty guidelines can be found at: https://aspe.hhs.gov/poverty-guidelines.
- Online FPL calculator: www.safetyweb.org/fpl.php.

Please indicate all types of insurance for the client (select all that apply)

- ADAP Premium Assistance
    - Select if the client's premium is paid by the case manager or the RW Coordinator using ADAP funds.
- Indian Health Services (IHS)
- Medicaid, CHIP, or other public plan
    - If a client has Medicaid, select whether it is Traditional or Medicaid Expansion.
    - If a client is enrolled in another state's Medicaid, select uninsured as their Medicaid will not cover their medical care in ND.
- Medicare
    - Select all the parts that client is enrolled in.
- No Insurance
    - Select if client is uninsured.
    - Please provide a brief explanation in the notes section why the client is uninsured.
- Other
    - Select if insurance does not fit in another category

- Private
    - Employer (Group)
    - Individual (health plan purchased through the Marketplace, COBRA, or directly from insurance company)

Policy Number
- Enter the policy number for the private insurance, Medicaid, or Medicare Part D.

Notes
- Enter any notes pertinent to the case such as insurance information, or efforts in obtaining coverage for the uninsured clients

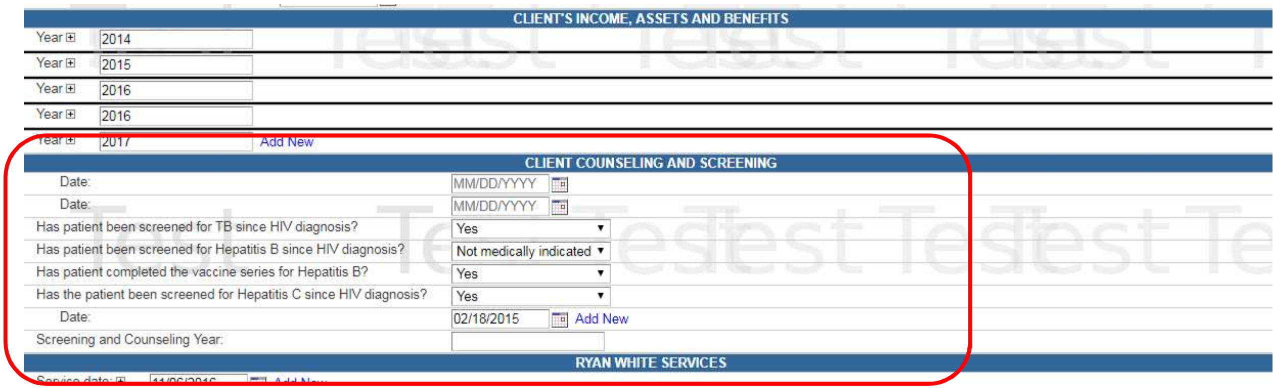
Date Case Manager Notified
- Enter date you signed the recertification form, or the date you were notified of any changes

Effective Date of Change
- Enter date of change for current insurance policy. If no change in policy, leave blank.

4.4 RW Case Management Acuity Assessment

Enter the date the acuity scale was completed, and the acuity score.

4.5 RW Wizard: Client Counseling and Screening



Screening and immunizations for Ryan White clients was implemented in grant year 2017. This question has been revised 1/1/2019. The old cases will have the questions formatted the old way where once in a lifetime screenings (Tuberculosis, hepatitis B and hepatitis C) are separated from the annual screenings (chlamydia/gonorrhea, and syphilis).

Old Question Format:

- Has patient been screened for TB since HIV diagnosis?
- Has patient been screened for Hepatitis B since HIV diagnosis?
- Has patient completed the vaccine series for hepatitis B?
  - If the patient has a history of disease, or has been vaccinated, select "Not medically indicated"
- Has the patient been screened for hepatitis C since HIV diagnosis?

- Screening and Counseling Year

Annual screening questions are completed at reenrollment. To enter the annual screenings and counseling information **enter the year** when the screenings were received, and **press Tab key**. Answer the following questions.

- Was client screened for syphilis in the past 12 months?
- Was client screened for chlamydia and gonorrhea in the past 12 months?
- Was client counseled about HIV transmission and risks in the past 12 months?
- Was client screened for mental health and substance abuse in the past 12 months?
- Was client counseled about HIV transmission and risks in the past 12 months?

If the client did not complete screening questions on their enrollment or reenrollment, and you do not have access to this medical information, please Add New year, and leave the questions blank.

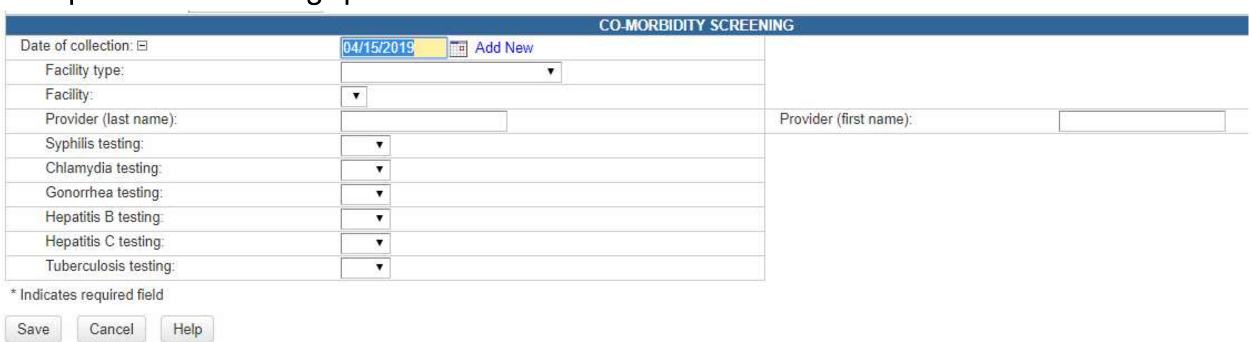
If the client indicated no mental health issues, substance abuse issues, or HIV transmission risks (risky sexual behavior, elevated viral load, diagnosed with an STD), select as not medically indicated.

New Question Format: Co-Morbidity Screening

Clients enrolled in 2019 will have a new co-morbidity screening format. All screenings will be added based on the date of the screening, and not the screening year.

Enter the date of collection, and press Tab. Enter all tests that client received on that date, including test results.

Complete the following questions.



6. Entering Eligibility Information

5.1 Client Enrollment

When enrolling a client, go to RW Case Managers wizard, and complete the:

- Enrollment Information,
- Client's Income, Assets and Benefits, and
- Client Counseling and Screening sections in the wizard.

If the client has been previously enrolled, select Add New to add a new eligibility period, and enter the new enrollment date, agency and case manager. **Do not** overwrite over the past enrollment span dates.

5.2 Client Reenrollment

When re-enrolling a client, go to the RW Case Managers wizard, and complete the following.

- Date the Client is to Re-Enroll: enter the date of the start of the next 6-month cycle (e.g., 10/01/2019).
- Actual Date Client Re-Enrolled: enter the date case manager received and signed the completed Reenrollment form.
- Client's Income, Assets, and Benefits:
  - Year: add a new year to the Client's Income, Assets and Benefits section, press Tab, and complete the questions.
- Case Management Acuity Assessment:
  - Enter date completed and acuity score.
- Client Counseling and Screening
- Check if client's address in the Person tab is current.

5.3 Client Recertification

Complete the following in the RW Case Managers wizard:

- Date the Client is to Re-Enroll: enter the date of the start of the next 6-month cycle (e.g., 04/01/2020).
- Actual Date Client Re-Enrolled: enter the date on the recertification form.
- Client's Income, Assets, and Benefits:
  - Year: add a new year to the Client's Income, Assets and Benefits section, press Tab, and complete the questions.
  - Since you are not reassessing income information for most clients, copy this information from reenrollment iteration.
- Case Management Acuity Assessment:
  - Enter date completed and acuity score.
- Client Counseling and Screening: update with new screenings.

- Check if client's address in the Person tab is current.

5.4 Entering a Change in Insurance Status

- Any change in insurance (e.g., client loses insurance, client switches to another type of insurance) must be entered in MAVEN.
- To do so, Add New Year in the Client's Income, Assets, and Benefits section. All questions should be populated, so copy income information from the previous iteration, and select new insurance information.
- Enter effective date of change when client lost coverage or gained new coverage.
- Notify the RW coordinator to make the same change in MMIS.

7. Closing Clients

When closing a client, enter the closing date and select one of the following reasons why the client is no longer active.

- Did not recertify eligibility (clients that do not complete the re-enrollment by April 30th, or recertification by October 31st)
- Non-compliance
- Ineligible, income too high (income above 400% FPL)
- Incarcerated (long-term incarcerated persons are not eligible for RW)
- Relocated
    - Enter where the client moved
- Deceased
- Unknown

Notify the RW Coordinator to close the case in MMIS and reassign the case out of your workflow.

Update the address in the Person Tab, if you know where the client moved.

8. Reassigning a Client to Another Case Manager

Clients moving to another part of the state should be reassigned to the case manager covering that area. Reassign the case to the new case manager in the RW Case Managers wizard.

Please provide the new case manager with the latest re-enrollment documentation and notify the RW Coordinator of the change.

The new case manager will need to update the address and their agency in MAVEN.

9. Ryan White Services Package

At the bottom of the wizard, you will be able to see the services provided to the client. You may also see the services by going to the Ryan White Services package on the Dashboard.

Currently, RW services are manually entered from the monthly Requests for Reimbursement submitted through the Payment Reporting System (PRS). Case managers do not need to enter services into MAVEN. You may use this information for reference.

10. ADAP Package

ADAP reimbursed meds are listed in the ADAP question package. Reimbursed medications are imported from MMIS (Medicaid Managed Information System). There is usually a 2-month delay before the medications are imported. If you are having questions about client's medication adherence, please call the RW Coordinator, or the pharmacy to check if the client is filling meds.

11. Lab Results Tab

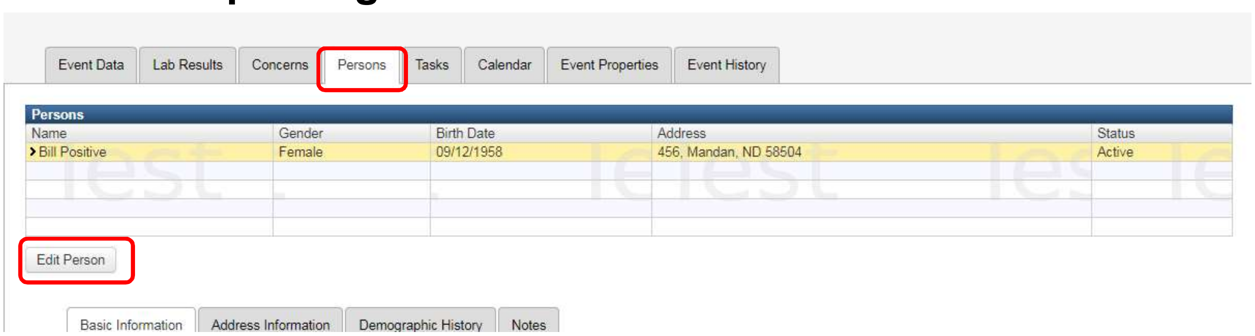
You can access labs by clicking on the Lab Results Tab. Single click will list the results in the Details under the Tabs. Double clicking on the lab will display the full lab result.

Any patient that has not had labs within the past 12 months, or has a detectable viral load should be contacted to assess their needs and reengage them into medical care and treatment. See section 16 on documenting reengagement into care.

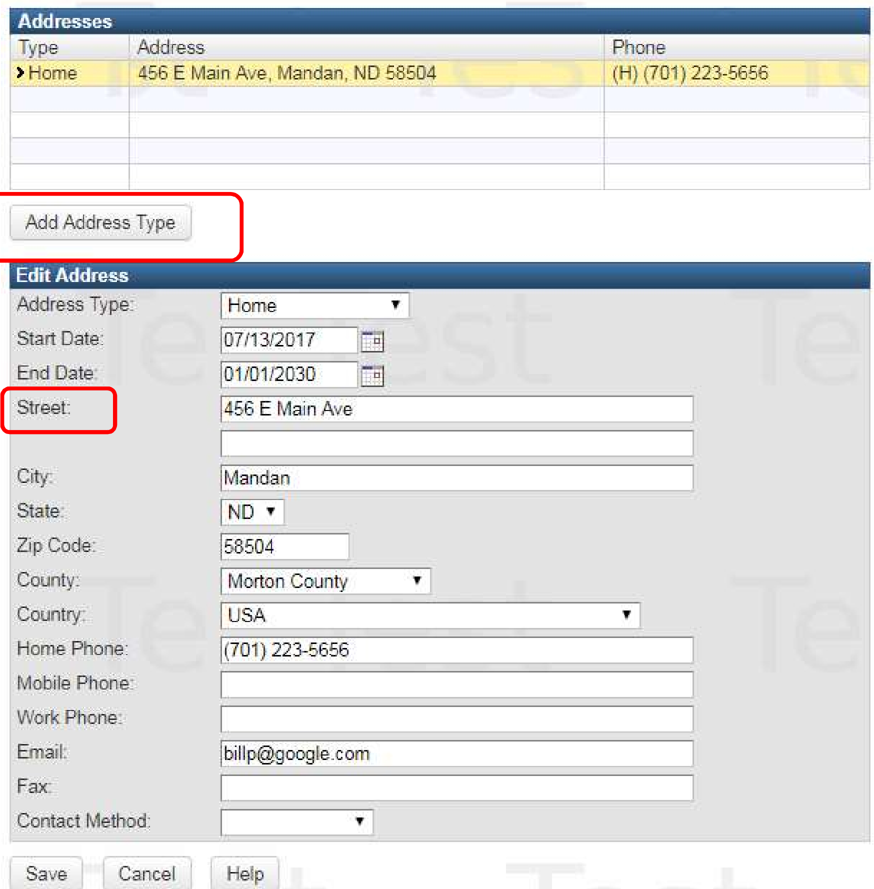
12. Vaccine Information Package

Vaccine Information package imports vaccine information from ND Immunization Information System (NDIIS). To import the newest information from NDIIS, click on Query Registry.

13. Updating Client's Address



To add or update or update a client's address, click on the Persons Tab and Edit Person.



To add another address type, click on Add Address Type, and enter the new address information.

To update the current address, select the start date for the new address. The start date would be the earliest date of which you knew that persons lived at that address. Enter the street, city, state, zip code, and county and click on the Save button in the lower left corner.

If the client moved out of state, select the start date and delete the street address. Enter the city (if known) and state where the client moved to.

Note: Client address is updated with incoming labs. Sometimes the address will have additional numbers because of this. Those numbers can be deleted as they are not a part of the address.

Click on the Save button on the bottom left.

14. Reengagement Into Care

A person is considered out of care when they have a high viral load or have no reported labs within the past 12 months. HIV Surveillance coordinator will start the reengagement process by determining who is out of care, and assigning persons out of care to a RW case manager if that person was previously enrolled in RW, or to a field epidemiologist for the area where the person resides.

To document reengagement interview, go to Reengagement Into Care package, and complete the following questions.

MAVEN Question	Answer Options	Person(s) Responsible
Were interview attempts made?	Yes No	Field Epidemiologist, Ryan White Case Manager
Was case interviewed?	Yes No	Field Epidemiologist, Ryan White Case Manager
Date of interview	Mm/dd/yyyy	
Facility Type	Drop Down	
Facility	Drop Down	
Interviewer	Free Text	
Interpreter used	Yes No	
Method of interview	Telephone In person Text Internet	
Why not in care?	Financial barriers Medication side effects No health insurance Other	
What high risk behaviors occurred during suspected infectious period?	Anonymous sex partners Injection drug use Multiple sex partners Unprotected sex	

Were contacts identified as being exposed during the suspected infectious period? Total number or reported contacts: Total number of named contacts:	Yes No Free text Free Text	
Disposition	No intervention initiated Linkage/Reengagement declined by case Returned to care before intervention initiated Linkage/reengagement intervention initiated, not successful Linked to/reengagement in care documented Linked to/reengagement in care, case self-report only Linkage/reengagement status unknown	Field Epidemiologist, Ryan White Case Manager

Interview Attempts

To document all interview attempts, complete this portion.

MAVEN Question	Answer Options	Explanation	Person(s) Responsible
Were interview attempts made by the NDDoH? Was a phone call attempted? Date Was a text sent? Date Was a letter sent? Date	Yes No Yes No Mm/dd/yyy	Space to document all interview attempts for reengagement.	Field Epidemiologist/ RW Case Manager

Was a home visit made? Date Was internet notification attempted? Date Were other means of contacting case used? Specify	Free Text		
Were interview attempts made by NON-NDDoH staff? Who made the attempt? Explain	Yes No Free Text Free text	For staff outside of the Health Department, document type of interview attempts	Field Epidemiologist/RW Case Manager