DHEC HIV Care Programs 2024 Reporting Calendar

MEMORANDUM

TO: DHEC HIV Care Providers (including RWB, HOPWA, EHE, and NHAS)
FROM: Sandy Reidenbach, Ryan White Program Coordinator, South Carolina (SC) DHEC
SUBJECT: 2024 Ryan White and HOPWA Program Reporting Schedule

REPORTING CALENDAR		
DUE DATE	**REPORT DESCRIPTION**	**SUPPORT PROVIDED**

01/16/2024	• 3rd Quarter RWB Monitoring Report Submission for reporting period: 10/01/2023-12/31/2023.
	  • RW/MAI/EC/NHAS/Rebates/ Quarterly Expenditures Report
	  • Quarterly Programmatic Narrative Report
	  • RSR **Client** Summary Report
	  • Updated PDSA Cycles
	  • Quarterly Compliance Report Summary
	• 3rd EHE Quarterly Financial Report: 09/01/2023-11/30/2023
	• 3rd Quarter HOPWA Quarterly Expenditures Report for reporting period: 10/01/2023-12/31/2023
		Questions, contact:
		RWHOPWAQuestions@dhec.sc.gov

01/22/2024	• Begin to work on your RSR in accordance with the RSR TA Plan from DHEC (Provide Enterprise (PE) RSR Completion Reports and RSR Client Summary Report (preliminary for technical assistance only) due in the PE Secure Portal for reporting period: 01/01/2023-12/31/2023. • Conduct a test login to the HRSA Electronic Handbook (EHB)	See RSR Technical Assistance (TA) Plan from DHEC on pages 7-9 of this document describing RSR TA & timeline
02/01/2024	• RW Services and Budget Expenditures Templates (RSR and Implementation Report). Reporting Period: 01/01/2023-12/31/2023	Questions, contact: RWHOPWAQuestions@dhec.sc.gov

02/05/2024-
02/09/2024
	• Enter your **RSR Service Provider Report** in the EHB to include the following sections: (pages 37-54)
	  1. General Information
	  2. Program Information
	    • Including Funding Source Certification
	  3. Service Information
	  4. HC&T Information
	  5. Client by Zip Code
	STOP HERE. Do Not upload client-level data in the EHB until your program has been notified & cleared by SC DHEC
		See RSR Technical Assistance (TA) Plan from DHEC on pages 7-9 of this document describing RSR TA & timeline

02/15/2024	• RSR Technical Assistance Webinar provided by DHEC for RW Part B Providers (Mandatory participation for each RWB provider who has <u>new staff</u> submitting their RSR report).	Webinar log-in information email will be forthcoming

REPORTING CALENDAR		
DUE DATE	**REPORT DESCRIPTION**	**SUPPORT PROVIDED**
02/15/2024	• EHE Triannual Data Report submitted via EHB: 09/01/2023-12/31/2023	Questions, contact: RWHOPWAQuestions@dhec.sc.gov
02/12/2024-02/26/2024	• RSR Staged Upload in EHB by Provider (Individual TA as needed and/or required) **Must wait to be cleared to post by SC DHEC**	See RSR TA Plan from DHEC describing RSR TA process prior to posting and submission to HRSA
02/12/2024-02/26/2024	• RSR Client Summary Report and RSR Clinical Summary Report due to **DHEC** via PE Secure Portal for reporting period: 01/01/2023-12/31/2023 (Due on the scheduled RSR Upload date)	Use instructions provided by DHEC and/or GTI
03/04/2024	• Final date for RSR Provider Reports and Client Level Upload to be submitted directly to **HRSA** for reporting period: 01/01/2023-12/31/2023	See RSR TA Plan from DHEC describing RSR TA process prior to posting and submission to HRSA
03/15/2024	• EHE Year End Narrative Report: 09/01/2023-02/28/2024	Questions, contact: RWHOPWAQuestions@dhec.sc.gov
03/15/2024	• DHEC HOPWA funded providers prepare for HOPWA Year-ending for reporting period: 04/01/2023-03/31/2024	Instructions to be provided by DHEC and/or GTI
Start of New Grant Year	• Annual Budget Narrative and Cost Allocation Plans • Annual Implementation Plans • Organizational Chart • Position Descriptions	DHEC will send notification of due date via the Annual Budget Guidance Letter
04/15/2024	• 4th Quarter (Year-End) RWB Monitoring Report Submission for reporting period: 4/01/2023-03/31/2024. • RW/MAI/EC/NHAS/Rebates Quarterly Expenditures Report **(Due 4/30/2024)** • Year-End Program Income Report **(Due 4/30/2024)** • Year-End Programmatic Narrative Report • RSR **Client** Summary Report • Clinical Report Card • RW/MAI/EC/Rebate Year-End Implementation Plan Reports • MAI Narrative Year-End Report • WICY Year-end Programmatic Report • Updated PDSA Cycles(s) • Annual Needs Assessment • Quarterly Compliance Report Summary • 4th EHE Quarterly (Year-End) Financial Report: 12/01/2023-02/28/2024	Instructions to be provided by DHEC and/or GTI
04/30/2024	• HOPWA Year End CAPER for reporting period: 04/01/2023-03/31/2024	Instructions to be provided by DHEC and/or GTI
	• 4th Quarter (Year End) HOPWA Quarterly Expenditures Report for reporting period: 04/01/2023- 03/31/2024	Questions, contact: RWHOPWAQuestions@dhec.sc.gov

REPORTING CALENDAR		
DUE DATE	**REPORT DESCRIPTION**	**SUPPORT PROVIDED**
06/15/2024	• EHE Triannual Data Report submitted via EHB: 01/01/2024-04/01/2024	Questions, contact: RWHOPWAQuestions@dhec.sc.gov
07/15/2024	• 1st Quarter RWB Monitoring Report Submission for reporting period: 04/01/2024-06/30/2024. 　• RW/MAI/EC/NHAS/Rebates Quarterly Expenditures Report 　• Quarterly Programmatic Narrative Report 　• RSR **Client** Summary Report 　• Updated PDSA Cycle(s) 　• Quarterly Compliance Report Summary • 1st EHE Quarterly Financial Report: 03/01/2024-05/31/2024 • 1st Quarter HOPWA Quarterly Expenditures Report for reporting period: 04/01/2024-06/30/2024	Questions, contact: RWHOPWAQuestions@dhec.sc.gov
9/13/2024	• EHE Mid-Year Narrative Report: 03/01/2024-08/30/2024	Questions, contact: RWHOPWAQuestions@dhec.sc.gov
10/15/2024	• EHE Triannual Data Report submitted via EHB: 05/01/2024-08/31/2024	Questions, contact: RWHOPWAQuestions@dhec.sc.gov
10/15/2024	• 2nd Quarter RWB Monitoring Report Submission for reporting period: 07/01/2024-9/30/2024. 　• RW/MAI/EC/NHAS/Rebates Quarterly Expenditures Report 　• Quarterly Programmatic Narrative Report 　• RSR **Client** Summary Report 　• Updated PDSA Cycle(s) • 2nd EHE Quarterly Financial Report: 06/01/2024-08/31/20234 • 2nd Quarter HOPWA Quarterly Expenditures Report for reporting period: 07/01/2024-09/30/2024	Questions, contact: RWHOPWAQuestions@dhec.sc.gov
December 2024	• Ryan White Service Report (RSR) Error Identification and Correction Technical Assistance Webinar provided by DHEC *(Webinar date TBD in November 2024)*	Questions, contact: RWHOPWAQuestions@dhec.sc.gov
November/ December 2024	• Request For Grant Application (in competitive years) or Annual Grant Continuation Application (in non-competitive years)	Questions, contact: RWHOPWAQuestions@dhec.sc.gov
Unless otherwise noted, send the Programmatic Reports to **Programmatic Submissions** and Expenditure Reports to **Financial Submissions** via the Secure Portal in Provide Enterprise (PE) as indicated in the attached Secure Portal Map.		

SECURE PORTAL MAP TO RW & HOPWA REPORTING CALENDAR

PROGRAMMATIC REPORTS

REPORT TYPE	RECIPIENT ORG/PROGRAM	RECIPIENT NAME	MESSAGE CATEGORY	FUNDING SOURCE	SUBJECT
Programmatic Report(s), includes HOPWA CAPER	SCDHECHIV/AIDS Care Network	Programmatic Submissions	Programmatic Report	• RW Part B • RW Part B Supplemental • HOPWA • MAI • EC • WICY • SC ADAP • RW Part B EHE	• Quarterly Submission • Year-end Submission

IMMPLEMENTATION PLAN

REPORT TYPE	RECIPIENT ORG/PROGRAM	RECIPIENT NAME	MESSAGE CATEGORY	FUNDING SOURCE	SUBJECT
Implementation Plan*	SCDHECHIV/AIDS Care Network	Programmatic Submissions	Implementation Plan GY 23-24	• RW Part B • RW Part B Supplemental • HOPWA • MAI • EC • WICY • SC ADAP • RW Part B EHE	Year-End Submission

*Please submit each Implementation Plan separately with its assigned Funding Source.

FISCAL/BUDGET/GRANT ADMINISTRATION REPORTS

REPORT TYPE	RECIPIENT ORG/PROGRAM	RECIPIENT NAME	MESSAGE CATEGORY	FUNDING SOURCE	SUBJECT
Quarterly Expenditure Reports (all Sources of Funds)	SCDHEC-HIV/AIDS Care Network	Financial Submissions	Financial Report	Combined Grant(s) Expenditures	Quarterly Submission
Annual Program Income Report	SCDHEC-HIV/AIDS Care Network	Financial Submissions	Financial Report	Combined Grant(s) Expenditures	Annual Submission
Annual Budget Narrative and Cost Allocation Plans, Position Descriptions, and Organizational Charts	SCDHEC-HIV/AIDS Care Network	Financial Submissions	Projected Budget	Choose appropriate grant	Annual submission

Budget Revision Justification**	RWHOPWA Invoice Email	N/A	N/A	N/A	Budget Revision
Technical Assistance Prior Approval**	RWHOPWA Invoice Email	N/A	N/A	N/A	Technical Assistance Prior Approval
Monthly Invoice**	RWHOPWA Invoice Email	N/A	N/A	N/A	Month – Program-Invoice
Out-of-State Travel Prior Approval**	RWHOPWA Invoice Email	N/A	N/A	N/A	Out-of-State Prior Approval
Gift Card Prior Approval**	RWHOPWA Invoice Email	N/A	N/A	N/A	Gift Card Approval
Grant(s) Application Information (in non-competitive years)**	SCDHEC HIV/AIDS Care Network	Financial Submissions	Financial Report	Combined Grants	Annual submission

**Please note Budget Revision Justifications, Prior Approvals, and Invoices should all be sent to your designated Contract Monitor at RWHOPWAInvoices@dhec.sc.gov or RWHOPWAInvoices2@dhec.sc.gov or RWHOPWAInvoices3@dhec.sc.gov with the subject of the email clearly named as indicated above.

RSR & SC QM				
REPORT TYPE	**RECIPIENT ORG/PROGRAM**	**RECIPIENT NAME**	**MESSAGE CATEGORY**	**SUBJECT**
RSR Completion Reports (Summary data only)	SCDHECHIV/AIDS Care Network	Programmatic Submissions	RSR	Completion Report CY 2023
RW Services and Budget Expenditures Template	SCDHECHIV/AIDS Care Network	Programmatic Submissions	RSR	RSR Annual Expenditure Submission
RSR Client and Clinical Summary (Summary data only)	SCDHECHIV/AIDS Care Network	Programmatic Submissions	RSR	Client and Clinical Summary CY 2023
Client Needs Assessment Survey Summary (Summary data only)	SCDHECHIV/AIDS Care Network	Programmatic Submissions	SC QM	Needs Assessment GY 2023-2024
SC QM-Clinical Report Card	SCDHECHIV/AIDS Care Network	Programmatic Submissions	SC QM	Clinical Report Card CY 2023
SC QM-Quality Management Plan	SCDHECHIV/AIDS Care Network	Programmatic Submissions	SC QM	Quality Management Plan CY 2023
SC QM-PDSA Cycle Updates	SCDHECHIV/AIDS Care Network	Programmatic Submissions	SC QM	PDSA Update

RW PART B/HOPWA PROGRAMMATIC AND QM COMBINED SITE VISIT DOCUMENTS					
REPORT TYPE	RECIPIENT ORG/PROGRAM	RECIPIENT NAME	MESSAGE CATEGORY	FUNDING SOURCE	SUBJECT
Site Visit Documents	SCDHECHIV/AIDS Care Network	Programmatic Submissions	Combined Site Visit GY2023-2024	Combined Grants	Annual Submission
RW PART B/HOPWA FINANCIAL MONITORING REVIEW DOCUMENTS					
REPORT TYPE	RECIPIENT ORG/PROGRAM	RECIPIENT NAME	MESSAGE CATEGORY	FUNDING SOURCE	SUBJECT
Financial Monitoring Review Documents	SCDHECHIV/AIDS Care Network	Financial Submissions	Combined Site Visit GY2023-2024	Combined Grants	Annual Submission

PROVIDE ENTERPRISE SECURE PORTAL ATTACHMENT INSTRUCTIONS
1. Documents/File being attached must be closed on the computer.
2. Attach the desired file.
3. Upon selecting SEND, it is important to **wait a moment**. Do not select CLOSE.
4. Select YES when prompted to SAVE CHANGES
5. The message with attachment will auto close and send.

RYAN WHITE SERVICES REPORT (RSR) TECHNICAL ASSISTANCE AND SUBMISSION PLAN			
REPORT PERIOD: JANUARY 1, 2023 – DECEMBER 31, 2023			
RSR ACTION ITEM	PURPOSE/RATIONALE	DATE INFORMATION	SUPPORT PROVIDED
Pre-RSR Technical Assistance Webinar: "Clean-up to Wrap-up"	• To be used for RSR technical assistance error checking and corrections • TA must also include expenditures in CY2023	12/19/2023 **Mandatory Participation for Agencies using PE**	Support materials and tools provided to each participant in follow-up to the webinar via email
Conduct a test login to the HRSA Electronic Handbook (EHB).	The EHB is where the Ryan White Services Report (RSR) will be submitted to HRSA.	01/22/2024	• Instructions to be provided • HRSA Contact Center: 1-877-464-4772
Required for RSR Reporting	RW Services and Budget Expenditures Templates (RSR and Implementation Report). Reporting Period: 01/01/2023-12/31/2023	02/01/2024	QA Staff must have this completed tool as a prerequisite for RSR Technical Assistance and Submission. The Business Office Staff **must complete and submit to internal personnel who are responsible for submitting the RSR.**
Review the preliminary **RSR Completion Report and RSR Client Summary Report.** Run this report from the Provide Enterprise RSR template.	To be used for RSR technical assistance review only	02/01/2024	• You do not need to submit the results to DHEC. Review the report and resolve any errors prior to 02/01/2024. • Use instructions provided by DHEC.

Enter your **RSR Service Provider Report** in the EHB to include the following sections: (pages 37-54)
• General Information
• Program Information - Including Funding Source Certification
• Service Information
• HC&T Information
• Client by Zip Code
STOP HERE! Do Not upload client-level data in the EHB until your program has been
	• Applies to providers funded from DHEC Ryan White (RW) Part B funds.
	• RW Part B funds include:
	  • RW Part B;
	  • RW Part B Supplemental;
	  • Emerging Communities;
	  • Minority AIDS Initiative [MAI] funding
		02/05/2024-02/09/2024	• RSR Data Support Helpdesk: 1-888-640-9356 or RyanWhiteDataSupport@wrma.com
			• To access the RSR system, go to page 30 of the 2023 RSR Instruction Manual (Providers Only Option)

notified & cleared by SC DHEC.	• RW/ADAP Rebate (for RWB Providers only)		
RSR Technical Assistance Webinar: "Uploading RSR and Submissions to DHEC"	• To review HRSA's changes to the RSR for eligible clients and services (i.e., clients and service categories eligible to be reported in the RSR). • To review changes included in the RSR template.	• 02/15/2024 • Each new RWB provider with new staff submitting their RSR report must participate in the RSR TA Webinar. • Individual TA as needed and/or required	• Required for ALL RWB New Submitters (i.e., staff who have never submitted the RSR before); Others may sign in if additional TA is needed. • Webinar log-in information email will be forthcoming. **Be sure to have actual expenditures for CY 2023 for all RW funding sources.**
Staged Upload RSR client (.xml) file posting period for **RWB providers**	To be submitted directly to HRSA via Client xml upload in the EHB.	02/12/2024-02/26/2024	Each RW provider/program will receive confirmation of the date when cleared for posting. Dates will vary by provider/program. **Do not upload client data in the EHB until your program has been notified & cleared by SC DHEC.**
Submit the following reports from the RSR template in Provide Enterprise: • RSR Client Summary and RSR Clinical Summary (replaces the PDR/RDR)	To be submitted to DHEC for program monitoring and administration.	On scheduled RSR Upload Date	• Due on the scheduled RSR Upload date • Submit to DHEC via the Provide Enterprise Secure Portal. • Instructions to be provided by DHEC. • See Secure Portal Map to RW & HOPWA Reporting Calendar (above)
Required for RSR Reporting	• Final Date for RSR Provider Reports and Client Level Uploads to be submitted directly to HRSA for reporting period:01/01/2023-12/31/2023.	03/04/2024	• RSR Data Support Helpdesk: 1-888-640-9356 or RyanWhiteDataSupport@wrma.com • To access to the RSR system, go to page 30 of the 2023 RSR

	• See RSR TA Plan from DHEC Describing RSR TA Process prior to posting and submission to HRSA.		Instruction Manual (Providers Only option)
https://targethiv.org/library/rsr-submission-timeline			