

ADR

Completing the ADR: Recipient Report and Client-Level Data Upload

AIDS Drug Assistance Program Data Report (ADR)

HIV/AIDS Bureau

April 7, 2021



Welcome to today's Webinar. Thank you so much for joining us today!

My name is AJ Jones. I'm a member of the DISQ Team, one of several groups engaged by HAB to provide training and technical assistance to recipients and providers for the Ryan White HIV/AIDS Program Services Report or RSR.

Today's Webinar is Presented by:



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Today's Webinar is presented by Melissa Melendez from RWHP Data Support, the experts on RWHP reporting requirements, and myself representing the DISQ team's work with client-level data. Melissa will review the process for completing the ADAP Data Report (ADR) and how to upload the client-level data file.

Throughout the presentation, we will reference some resources that we think are important. To help you keep track of these and make sure you have access to them immediately, my colleague Audrey is going to chat out the link to a document right now that includes the locations of all the resources mentioned in today's webinar.

At any time during the presentation, you'll be able to send us questions using the "Question" function on your settings on the bottom of the screen. You'll also be able to ask questions directly "live" at the end of the presentation. You can do so by clicking the "raise hand" button (on your settings) and my colleague Ruchi will conference you in.

Now before we start, I'm going to answer one of the most commonly asked questions about the slides. The recording of today's webinar will be available on the TargetHIV website within one week of the webinar; the slides and written question and answer are usually available within two weeks.

Disclaimer

Today's webinar is supported by the following organizations and the contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement by, the Health Resources and Services Administration (HRSA), the U.S. Department of Health and Human Services (HHS), or the U.S. government.

The DISQ Team is comprised of CAI, Abt Associates, and Mission Analytics and is supported by HRSA of HHS as part of a cooperative agreement totaling \$4,000,000.00.

Ryan White HIV/AIDS Program Data Support is comprised of WRMA and CSR and is supported by HRSA of HHS as part of a contract totaling \$5,092,875.59.

Today's webinar is supported by the organizations shown on the slide, and the contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by the Health Resources and Services Administration, the U.S. Department of Health and Human Services, or the U.S. Government.

Now I'd like to turn the webinar over to Melissa.

Overview

ADR Overview & Submission Timeline

Completing the ADR Recipient Report

Uploading the Client-Level Data

Validating & Submitting the ADR

Upcoming ADR Webinars & TA Resources

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Thanks, AJ, and everyone for joining today's webinar.

Today, we will go over how to complete the AIDS Drug Assistance Program Data Report, also known as the ADR. We'll begin with an overview of the ADR, the submission timeline, and how to access the report in the HRSA Electronic Handbooks (EHBs). Furthermore, I'll discuss how to complete the ADR Recipient Report. Next I'll go over uploading the client-level data, and afterward I will go over validating/submitting the ADR. And finally, we'll end the presentation by reviewing upcoming ADR webinars and additional technical assistance resources available to assist you.



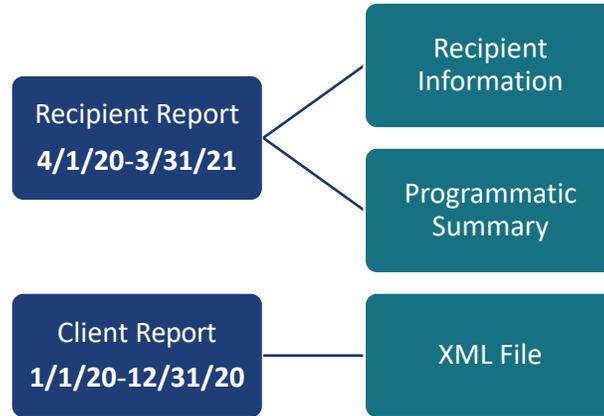
Before we move onto an overview of the ADR, we are going to move onto the first poll question of today's webinar. I will now pass the presentation to Audrey from the DISQ team to launch the poll question. Audrey?

Is this your first time working on the ADR submission?

- a. Yes, this is my first time working on the ADR.
- b. No, I have submitted the ADR once or twice before.
- c. No, I have submitted the ADR three times or more.

For all of the newcomers, today's presentation is a great place to start. Also, for everyone that has submitted the ADR more than once, this webinar will be a great refresher. Now let's move onto the presentation.

ADR Overview



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Let's begin today's presentation with an overview of the ADR Submission. The ADR consists of the Recipient Report and the Client Report.

The ADR Recipient Report includes data based on the Part B Grant year reporting period, which is April 1st, 2020 to March 31st, 2021. The ADR Recipient Report contains the Recipient Information and Programmatic Summary.

The Client Report contains data collected during the 2020 calendar year. The data is reported as an XML File which includes one record for every client enrolled in ADAP regardless if they received services or not during the reporting period. I will go over more information on what is required to be reported in the client report later in the presentation.

ADR Timeline

Date	Client XML File Reporting Period: 1/1/20-12/31/20	Recipient Report Reporting Period: 4/1/20-3/31/21
Monday, February 1, 2021	2020 ADR Check Your XML and Data Quality Feature opens	--
Monday, April 5, 2021	ADR Web System opens for 2020 data submission	
Monday, April 26, 2021	Target upload date for all 2020 ADR client-level data files	--
Monday, June 7, 2021	ADRs must be in "Submitted" status by 6:00 PM ET	

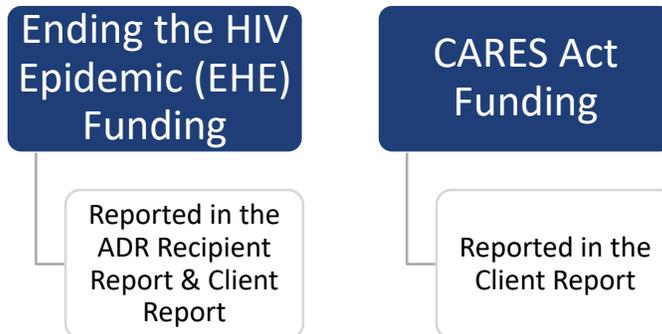
Available on the [TargetHIV](#) website

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Now let's take a quick moment to review the ADR Submission timeline. On February 1st, the check your XML feature opened up to allow you to start checking your data quality. Monday, February 5th, the ADR Web system officially opened, so now all ADAPs can work on the Recipient Report and uploading the client-level data. Monday, April 26th, is the target upload date for all client-level data files. We recommend uploading by this date so that you have enough time to review and update any data before the final ADR submission deadline, which is on Monday, June 7th at 6:00 pm Eastern time. By this date, all ADRs must be In "submitted" status.

Reporting New Funding Sources

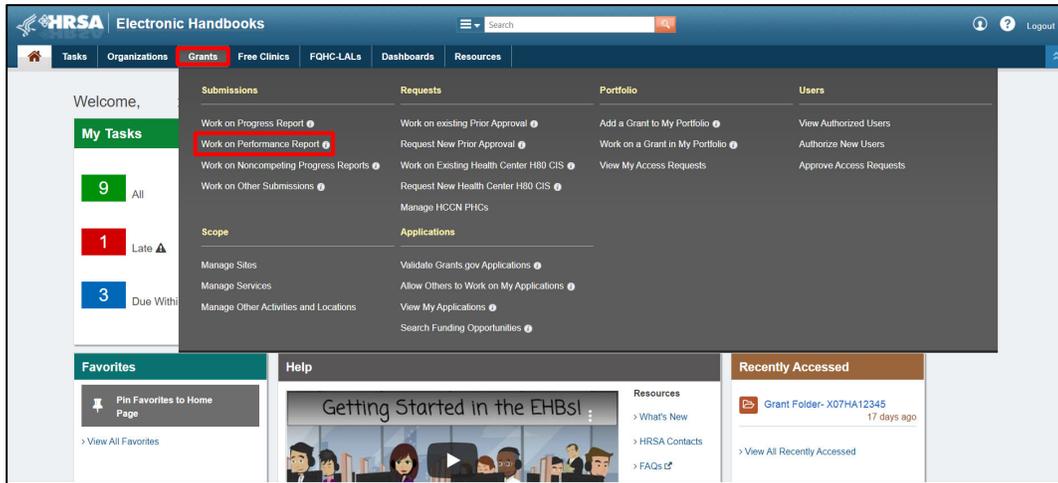
ADAPs that received Ending the HIV Epidemic (EHE) funding and/or CARES Act funding, will report clients who received services funded by either of these funding sources in the Client Report.



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Before I move on to accessing the ADR, I wanted to take a quick moment to discuss reporting Ending the HIV Epidemic (EHE) funding and CARES Act funding in the 2020 ADR. As a reminder, there are no changes to the 2020 ADR reporting and validation messages. Still, it is required for any ADAPs to report any ADAP eligible clients and services funded by either of these funding sources in the client Report. For example, ADAPS who received EHE Funding will report it in the ADR Recipient Report and Client Report, while any ADAPS who received CARES Act Funding will only report the clients in the client report. Also, I definitely recommend reviewing the ADR Instruction Manual to learn more about reporting Ending the HIV Epidemic funding and CARES Act Funding.

Accessing the ADR



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Now let's go over how to access the ADR. ADAPs will access the ADR through the HRSA Electronic Handbooks, also known as HRSA EHBs. After logging in, you will need to hover your mouse over the Grants tab at the top of the page. From here, a drop-down menu will appear, and you will click on Work On Performance Reports under the Submissions header.

Performance Report List

Page size: 15 Go 5 items in 1 page(s)

Submission Name	Submission Type	Organization	Grant #	Tracking #	Reporting Period	Deadline	Submitted Date	Status	Options
RSR 2020 Annual Performance Report	Performance Reports	Takoma Department of Health	X07HA12345	0000	1/1/2020-12/31/2020	3/29/2021	3/1/2021	Submitted	Performance Reports
ADR 2020 Annual	Performance Reports	Takoma Department of Health	X07HA12345	1111	4/1/2020-3/31/2020	06/03/2021		Not Started	Start

After clicking on the Work on Performance Reports link, you will be taken to the Submissions-All page, where you will see a list of submissions for your organization. From this page, scroll down to locate your 2020 ADR Performance Report under the Submission Name Header. Once you have located the 2020 ADR Submission, you will either select Start or edit under the options header.

ADR Inbox

The screenshot shows the HRSA Electronic Handbooks interface. At the top, there is a navigation bar with 'Tasks', 'Organizations', 'Grants', 'Free Clinics', 'FHHC-LALS', and 'Resources'. Below this is a 'Getting Started with the Handbooks' banner with links for 'Recommended Browser Settings', 'User Interface Crosswalk', and 'Tour the Handbooks!'. A 'NAVIGATION' sidebar on the left includes 'Home', 'Inbox', 'Reference', 'Validation Rules', and 'Merge Rules'. The main content area is titled 'ADAP Data Report' and contains a table with columns: Report ID, Reporting Period, Status, Un-submit Request, PO, State, Action, Comments, Print, History, Clients, Created By, Date Created, Modified By, and Last Modified. The first row has Report ID '0', Reporting Period '2020 Annual', Status 'Not Started', Un-submit Request 'No', PO 'N/A', State 'N/A', and an 'Action' column containing a 'Create' link highlighted with a red box. The second row has Report ID '12345', Reporting Period 'Check Your XML', Status 'Working', Un-submit Request 'No', PO 'XX', and an 'Action' column containing 'Open', 'Comment', 'PDF', and 'History' links. At the bottom, a footer indicates the user is logged in as 'GranteeDataViewer, GranteeDataEditor, GranteeDataSubmitter' and provides a note about Adobe Acrobat Reader.

Report ID	Reporting Period	Status	Un-submit Request	PO	State	Action	Comments	Print	History	Clients	Created By	Date Created	Modified By	Last Modified
0	2020 Annual	Not Started	No	N/A	N/A	Create					N/A		N/A	
12345	Check Your XML	Working	No	XX		Open	Comment	PDF	History	0				

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Once you have clicked on either start or edit, you will be navigated to the ADR Inbox, and you should see your organization's ADR listed. To start the report, you will click on the Create link, or to continue working on the report, you will click on the open link.

ADR Recipient Report-Cover Page

ADAP Data Report

Report id: 22222 Report Period: 2020 Annual Status: Working Due Date: 6/3/2021 6:00:00 PM (86 days left)
Mode: ReadWrite Client Count: DUNS: 87-6543210 Last Modified: Esetfield@dooh.org

Required
Form fields 1 through 6 are system populated and will be displayed in the printable version of the report. You must complete fields 6a through 6d. Field 6e is optional.

1. Recipient Name	TAKOMA DEPARTMENT OF HEALTH
2. Grant Number	X07HA12345
3. DUNS Number	87-653210
4. Recipient Address	248 Central Perk Ave, Park City, XX 00000
5. Contact information of person completing the Recipient Report:	
a. Contact Name	
b. Contact Title	
c. Contact Email	
d. Contact Telephone	
e. Contact Teletax	

Save Cancel

Logged in as: GranteeDataViewer, GranteeDataEditor, GranteeDataSubmitter
The HAB Web Applications also require Adobe Acrobat Reader 5 or higher installed on your PC. To download Adobe Acrobat Reader, click

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Once you open the ADR, you will be navigated to the Cover Page, which is the first section of the Recipient Report. The Cover page includes essential recipient information, including the Recipient's name, Grant number, Duns number, Recipient's address, and the person's contact information that is completing the Recipient Report. The first four items of the cover page are prepopulated from the EHBs; therefore, if any of the information listed is incorrect, please contact the EHBs Customer Support Center to make corrections. I will provide their contact information towards the end of the presentation. Once you completed the cover page, make sure to click on the save button on the lower left side of the page. Now that you have completed the cover page, you can use the **blue navigation panel on the left side of your screen to navigate to the next section.

Program Administration

REMINDER:
The Recipient Report (Questions 1 – 7) should be reported for the grant year April 1, 2020 – March 31, 2021, whereas the uploaded client level data should be 2020 calendar year data.

Required
All items in the Recipient Report should be reported for the most recent grant year. Please review the Instructions for Completing the ADAP Recipient Report to ensure that you respond to each item appropriately.

A. PROGRAM ADMINISTRATION

1. Please indicate which of the following limits applied to your ADAP during the reporting period. For each item that applied, complete the blank with the information requested on that limit.
(Check all that apply)

- Waiting list anytime during the reporting period
- Enrollment cap- Max number of enrollees: _____
- Capped number of prescriptions per month- Max number of prescriptions/month: _____
- Capped expenditure- Monetary cap per client \$ _____
 - Per Month
 - Annual
- Drug-specific enrollment caps for ARVs, Hepatitis B, or Hepatitis C medications
- Formulary reduction
- Decrease in financial eligibility criteria
- None of these limits were applied to the ADAP during the reporting period

2. Please indicate the maximum ADAP eligibility requirements as a percentage of Federal Poverty Level (FPL):
Maximum ADAP eligibility requirements as a percentage of FPL: _____ %

3. Please indicate the clinical eligibility criteria required to enroll in the ADAP in your State/Territory:
(Check all that apply)

- CD4 - Please specify the CD4 count requirement: _____
- Viral load - Please specify the VL count requirement: _____
- Other- Please specify: _____
- No clinical eligibility criteria are required to enroll in the ADAP

Save | Cancel

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The next section we will go over is the Programmatic Summary, which includes questions 1-3. The first question of the Program Administration asks to indicate whether your organization has adopted any of the following limits to control cost shown on the screen; if so, you will need to check all that apply. If you select either enrollment cap, capped number of prescriptions per month, or capped expenditure, you will be required to enter additional information. For example, if you selected capped expenditure, you will need to enter the monetary cap per client and whether the cap applies monthly or annually.

The next question of the Programmatic Administration section is ADAP income eligibility. For this question, you will need to enter the maximum income eligibility for the participation in your ADAP that was set at the end of the grant year, which is expressed as a percentage of the Federal Poverty Level (FPL). The last question of this section addresses the clinical criteria for ADAP eligibility. You will check all that is required for enrolling in your organization's ADAP. If you check off the CD4 count or viral load criteria, you will need to indicate the threshold number. If you select Other, you will need to mark each criteria used and the corresponding threshold number.

Purchasing Mechanism

The screenshot displays the ADAP Data Report interface for user X07HA12345 at Takoma Department of Health. The interface includes a navigation sidebar on the left with sections for Home, Workflow, and Data Entry. The main content area shows a 'REMINDER' about reporting dates, a 'Required' section with instructions, and a section titled 'B. PURCHASING MECHANISMS'. Under this section, question 4 asks the user to check all that apply to their Drug Pricing Program. The options are: 340B Rebate, 340B Direct Purchase, Prime vendor, and Department of Defense. The '340B Direct Purchase' option is checked. Below the options are 'Save' and 'Cancel' buttons. The footer indicates the user is logged in as GranteeDataViewer, GranteeDataEditor, and GranteeDataSubmitter, and provides a link to download Adobe Acrobat Reader.

NAVIGATION << ADAP Data Report Your session will expire in: 27:57

Home

Inbox

Workflow

Validate

Submit

Un-Submit

History

Clear Clients

Data Entry

Cover Page

Q1-3

Q4

Q5

Q6

Q7a

Q7b

Q7c

Client Upload

▼ X07HA12345: Takoma Department of Health

REMINDER:
The Recipient Report (Questions 1 – 7) should be reported for the grant year April 1, 2020 – March 31, 2021, whereas the uploaded client level data should be 2020 calendar year data.

Required
All items in the Recipient Report should be reported for the most recent grant year. Please review the Instructions for Completing the ADAP Recipient Report to ensure that you respond to each item appropriately.

B. PURCHASING MECHANISMS

4. Please check all that apply to your Drug Pricing Program:

340B Rebate

340B Direct Purchase

Prime vendor

Department of Defense

Save Cancel

Logged in as: GranteeDataViewer, GranteeDataEditor, GranteeDataSubmitter
The HAB Web Applications also require Adobe Acrobat Reader 5 or higher installed on your PC. To download Adobe Acrobat Reader, click

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After completing and saving the Programmatic Administration section, the next section is question 4 which is the purchasing mechanisms. In this section, you will indicate which options apply to your drug pricing program. If you check off 340B Direct Purchase, you will need to specify if your organization is the prime vendor. If you need any clarification on any of the listed drug pricing cost-saving strategies, I recommend reviewing the Glossary of the 2020 ADR Instruction manual.

Funding

ADAP Data Report Your session will expire in: 28:57

Home | X07HA12345: Takoma Department of Health

REMINDER:
The Recipient Report (Questions 1 – 7) should be reported for the grant year April 1, 2020 – March 31, 2021, whereas the uploaded client level data should be 2020 calendar year data.

Required
All items in the Recipient Report should be reported for the most recent grant year. Please review the Instructions for Completing the ADAP Recipient Report to ensure that you respond to each item appropriately.

C. FUNDING
5. Please enter the funding received during this reporting period from each of the following sources: (if no funding was received enter "0")

Funding Source	Amount Received (to nearest dollar)
a. Total contributions from Part A EMA(s)/TGAs	\$
b. Total contributions from Part B Base Funding	\$
c. Total contributions from Part B Supplemental Funding	\$
d. Total contributions from Part C/D recipients	\$
e. Total contributions from EHE recipients	\$
f. State general fund contributions	\$
g. Carry-over of Ryan White funds from previous year	\$
h. Manufacturer Rebates Reinvested in the ADAP	\$
i. All Insurance Reimbursements, excluding Medicaid	\$
j. Medicaid Reimbursements	\$
Resources received this reporting period (Total of a through j)	\$ 0

Save | Cancel

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Now let's take a look at the funding section of the Recipient Report. For question 5, you are expected to enter data regarding the funding your organization received during the reporting period. Please enter a value for every funding that your organization received; if your organization did not receive the funding, then you can enter a zero for the field.

An important note to pay attention here is that will you report the amount of funding your organization received for Ending the HIV Epidemic (EHE) funding in this section. As you can see on the slide, EHE Funding was added to this year's report. You will report the funding amount for EHE Funding that was used to provide services to ADAP clients.

Expenditures

NAVIGATION << ADAP Data Report Your session will expire in: 28:52

Home

Inbox

Workflow

- Validate
- Submit
- Un-Submit
- History
- Clear Clients

Data Entry

- Cover Page
- Q1-3
- Q4
- Q5
- Q6**
- Q7a
- Q7b
- Q7c
- Client Upload

X07HA12345: Takoma Department of Health

REMINDER:
The Recipient Report (Questions 1 – 7) should be reported for the grant year April 1, 2020 – March 31, 2021, whereas the uploaded client level data should be 2020 calendar year data.

*** Required**
All items in the Recipient Report should be reported for the most recent grant year. Please review the Instructions for Completing the ADAP Recipient Report to ensure that you respond to each item appropriately.

D. EXPENDITURES
* 6. For each of the following categories, please enter total expenditures for this reporting period:

Expenditure Category	Total Cost
a. Full pay medication assistance	\$
b. Dispensing costs	\$
c. Other administrative costs	\$
d. Health insurance assistance (including co-pays, deductibles, and premiums)	\$
Total ADAP expenditures this reporting period (Total of a through d)	\$ 0

Save Cancel

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Once completing the funding section of the Recipient Report, you can move onto the next section which is question 6. For question 6, you will enter the total expenditures for pharmaceuticals, dispensing costs, other administrative costs, and health insurance coverage. For other administrative costs, you will report all fees (except dispensing costs) that were paid by your ADAP that relate to purchasing and distributing medication, like pharmacy fees and other bulk order fees. Make sure not to include any ADAP general administrative costs such like staffing costs here. Also, any pharmacy-negotiated rates or fees for services, can be reported under Other administrative costs, depending on what the rates or fees covered.

If your organization does not have any expenditures for any of the listed categories, you can enter a zero in the field. You cannot leave any of the responses blank. Once you click save, the total expenditures for the reporting period will be calculated automatically.

ADAP Medication Formulary

ADAP Data Report Your session will expire in: 25:25

REMINDER:
The Recipient Report (Questions 1 – 7) should be reported for the grant year April 1, 2020 – March 31, 2021, whereas the uploaded client level data should be 2020 calendar year data.

E. ADAP MEDICATION FORMULARY
Alternative View
Please provide information on Antiretroviral (ARV), Hepatitis B, Hepatitis C and 'A1-OI' medications currently on your ADAP formulary.

7a. Recipient-level Formulary Information - Antiretroviral Medications
Please indicate which of the following ARV medications are included in your ADAP formulary. If the medication was added to your formulary during the grant year, check the box in the "Med Added" column and enter the date that the medication was added in the "Date Added" column.

Included In Formulary	Generic Name	Brand Name	DIN	Med Added?	Date Added
<input checked="" type="checkbox"/>	abacavir	Ziagen	d04376	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	abacavir/dolutegravir/lamivudine	Triumeq	d08284	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	abacavir/lamivudine	Epzicom	d05354	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	abacavir/lamivudine/zidovudine	Trizivir	d04727	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	atazanavir	Reyataz	d04882	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	atazanavir and cobicistat	Evotaz	d08340	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	bictegravir, emtricitabine, and tenofovir alafenamide	Biktarvy	d08736	<input type="checkbox"/>	

[Multum Database](#)

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The final section of the ADR Recipient Report is the Medication Formulary section. This section includes questions 7a, 7b, and 7c where you will update your organization's antiretroviral, opportunistic infection medications, and hepatitis B and C medications. As shown on the slide, the medication's generic name appears first, along with the brand name and its D-code number, which is the five digit drug identification number developed by the Multum Center. I provided a link to the Multum database if you need any information regarding D-codes.

The medication listed in this section will automatically generate from last year's ADR; therefore, make sure to review the medications listed are still included and make any updates if needed. If a medication was added to the the medication formulary during the April 1,st 2020 to March 31st, 2021 reporting period, then you will need to check the Med Added box and enter the date it was added.

After saving the Medication Formulary section, you have successfully completed the ADR Recipient Report. Now you can begin the second component of the ADR, which is the Client Report.

Client Report Overview

Reporting Period

- 1/1/20-12/31/20

Client Record must include:

- Encrypted Unique Client Identifier (eUCI)
- Demographic Data
- Enrollment & Certification Data
- Health Insurance Services
- Medication Services
 - Clinical Data

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Before I walk you through the steps of uploading the client-report, I wanted to give you a quick overview. As I noted earlier, the client-level data includes data for certified eligible ADAP clients specifically enrolled from January 1, 2020 to December 31, 2020, regardless if the client received an ADAP service or not. Specifically, an ADAP client may have received medications and/or insurance assistance, been placed on a waiting list, been disenrolled, and been eligible but did not receive any services.

In the client-level data, it is expected to report demographic and certification data for all enrolled clients, regardless if they received services or not. Also, for ADAP clients that did receive services, you will need to report if they received health insurances services and/or medication services. For clients who received medication services, clinical data is required.

Upload Client-Level Data

NAVIGATION << ADAP Data Report Your session will expire in: 29:41

Home > X07HA12345: Takoma Department of Health

REMEMINDER:
The Recipient Report (Questions 1 – 7) should be reported for the grant year April 1, 2020 – March 31, 2021, whereas the uploaded client level data should be 2020 calendar year data.

CLIENT UPLOAD
Please upload ADR Client-Level Data in XML or Compressed Zip format. You will receive an email confirmation after you have successfully uploaded your clients.

[Choose File](#) No file chosen
[Upload File](#) [Cancel](#)

If you have uploaded your clients and answered all required questions, please validate your report before proceeding to submit your report.

This feature only works with ADR Client XML files or compressed zip files that conform to the ADR Client-Level Data XML Schema Definition. The most recent ADR XML Schema Definitions are available at [ADR XML Schema Definitions](#)

ID	Description	Vendor	Clients	Clear Clients	Status	Uploaded By	Request Date	Processed Date
10528	ADRDData2020.xml	TRAX, 5.2	0	No	Pending	Eseinfeld@tdoh.org	4/04/2020 11:28:00 AM	N/A
10528	ADRDData2020.xml	TRAX, 5.2	50	No	Success	Eseinfeld@tdoh.org	4/04/2021 11:30:05 AM	4/04/2021 11:31:10 AM

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Now that I gave you a quick overview about the Client Report, I can now go over the steps to successfully uploading your client-level data, which you will need to extract from your data systems as an XML file. If you need any assistance with creating your XML file, I definitely recommend reaching out to the DISQ team for assistance. I will go over their contact information near the end of the presentation.

To upload your client-level data, you will need to use the blue navigation panel on the left side of your screen to navigate to the Client upload link. Once you click on the link, you will be taken to the client upload, where you will need to select the Choose file link to locate your client-level data file. Once you have found the file, you will click on the upload file link and it will take a few moments to successfully process the file. Once the system has processed the file, the status will go from pending to success. You will also receive a confirmation email stating that your client-level data file was successfully uploaded.

Schema Check Errors

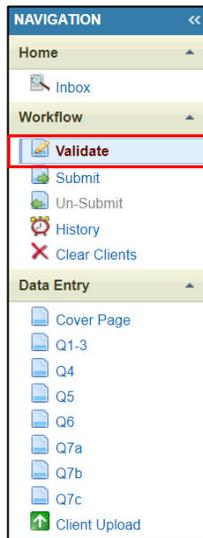
The screenshot shows the ADAP Data Report interface for user X07HA12345. It features a navigation sidebar on the left with sections like Home, Workflow, Data Entry, Client Upload, and Comments. The main content area displays a 'REMINDER' about reporting dates, a warning about file size (29MB), and a 'CLIENT UPLOAD' section. In the 'CLIENT UPLOAD' section, a message states: '[+] Schema check error(s) (Please click on this to view the error(s)).' This message is highlighted with a red box. Below this, a table header is visible with columns: ID, Description, Vendor, Clients, Clear Clients, Status, Uploaded By, Request Date, and Processed Date. The table content is currently empty, showing 'No records to display.'

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One issue that you may run into while attempting to upload your client-level data file are schema check errors, which essentially means that your file is not compatible with the system. To address the schema check error, click on the link that says "Please click on this to view the errors". As a reminder, schema check errors must be fixed. If you need any assistance with resolving the schema check error, I recommend contacting the DISQ team. Please make sure to include a screenshot of the list of schema check errors when contacting the DISQ team, which will give them more information to assist you. Once the schema check errors have been corrected, you can re-upload your client-level data file.

If you would like to learn more about schema check errors and reviewing data quality I recommend viewing the "Reviewing your Data at Upload: Tools within the ADR Web System and the Check your XML feature" webinar that was recently presented by my fellow Data Support Colleague James Tedrow on the TargetHIV website.

Validating the ADR



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Now that you have completed the ADR Recipient Report and uploaded the client-level data, you will need to validate the report. You can navigate to the Validate Section by using the blue navigation panel on the left side of your screen again and click on the validate link. It may take a few moments for the validation results to generate, so after a few moments you can click on the validate link again to refresh the screen.

There are three types of validation messages that may appear in your validation result which are errors, warnings, and alerts. Errors must be fixed or the system will not allow you to submit. For warning messages that appear in the validation result, you can either resolve it or enter a comment explaining the data. For example, some users may receive warning validations indicating there is missing data although the data is reflected in the XML file, for this instance, a user can enter a comment explaining the data is not missing. Also, alerts we recommend reviewing and fixing if possible, but you do not have to enter a comment for an alert. We certainly recommend reviewing and updating the data according to the data validations you receive to ensure accurate data.

Upload Completeness Report

The screenshot shows the ADAP Data Report interface for user X07HA12345: Takoma Department of Health. The page is titled "Upload Completeness Report". The navigation menu on the left includes: Home, Inbox, Workflow, Validate, Clear Clients, Quality Checker, Check your XML and Data Quality, Reports, Upload Completeness (highlighted with a red box), Reference, Validation Rules (highlighted with a red box), and Merge Rules. The main content area features a message: "Message: Welcome to the Check your XML and Data Quality page! This page will allow you to upload an XML to ensure it conforms to the schema. Once you successfully upload your XML, you will have the option to Validate your XML allowing you to see all the client-level validation messages that have been triggered and/or view the Upload Completeness Report. Please note: This information will not be submitted to HRSA. You will still have to upload your XML in your ADR report. This site simply allows you to check the quality of your data prior to uploading it in the live report. Please be aware that all files are deleted 48 hours after they are uploaded." Below this is a warning: "You will be unable to upload files larger than 29MB. Please zip your file before upload." The "CLIENT UPLOAD" section prompts the user to upload ADR Client-Level Data in XML or Compressed Zip format, with a "Choose File" button and "Upload File" and "Cancel" buttons. A table below shows current uploads:

ID	Description	Vendor	Clients	Clear Clients	Status	Uploaded By	Request Date	Processed Date
10528	ADRDData2020.xml	TRAX, 5.2	50		Success	Eseinfeld@tdoh.org		4/04/2021 11:31:10 AM

Logged in as: GranteeDataViewer, GranteeDataEditor, GranteeDataSubmitter
The HAB Web Applications also require Adobe Acrobat Reader 5 or higher installed on your PC. To download Adobe Acrobat Reader, click

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Two great resources to use during the validation process to ensure data quality is the Upload Completeness Report and the Validation rules, which you can find on blue navigation panel. To generate the Upload Completeness Report, you will click on the Upload Completeness link under the Reports header. The Upload Completeness Report, is an aggregate report that summarizes all of the client level data that was uploaded by data element in a table format. As a note, the Upload Completeness Report is available only after the client-level data is uploaded. Also, the Validation Rules is a great tool to review the possible validation messages you may receive during the validation process.

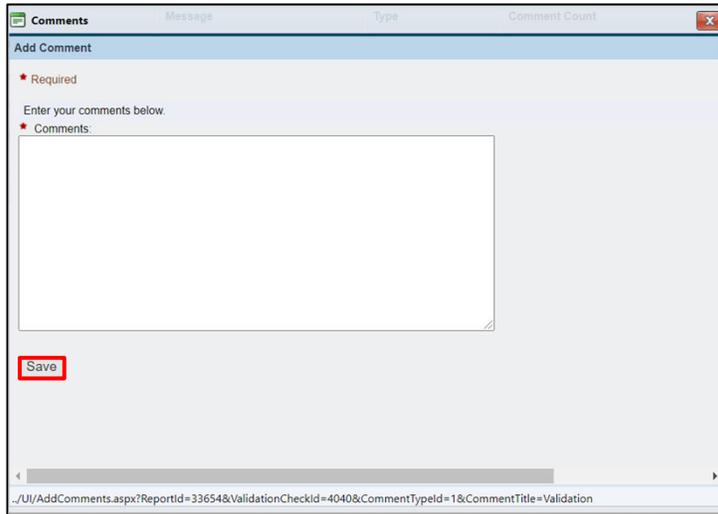
Adding Warning Comments

The screenshot shows the 'ADAP Data Report' interface for 'X07HA12345: Takoma Department of Health'. It features a navigation sidebar on the left and a main content area. The main area is titled 'Validate Reports' and contains two sections: 'Recipient Validation Results' and 'Client Validation Results'. The 'Client Validation Results' section includes a warning message and a table of validation errors. The table has columns for Row No., Check No., Message, Type, Comment Count, and Action. The first row (Row No. 1, Check No. 38) is highlighted with a red box, and its 'Add Comment' button is also highlighted with a red box. The table contains 8 rows of validation messages, including warnings and alerts.

Row No.	Check No.	Message	Type	Comment Count	Action
1	38	2 client(s) with an ADAP-Funded Medication Dispensed Start Date before the reporting period.	Warning	0	Add Comment
2	39	1 client(s) with an ADAP-Funded Medication Dispensed Start Date after the reporting period.	Warning	0	Add Comment
3	45	1 client(s) with an ADAP Application Received Date before the reporting period.	Alert	0	
4	46	1 client(s) with an ADAP Application Received Date after the reporting period.	Alert	0	
5	51	4 client(s) with an ADAP Recertification Date before the reporting period.	Alert	0	
6	58	1 client(s) with ADAP-Funded Medication Dispensed but 'no' reported for ADAP-Funded Medications Dispensed Flag.	Warning	0	Add Comment
7	60	1 client(s) with ADAP-Funded Medication Dispensed Start Date but 'no' reported for ADAP-Funded Medications Dispensed Flag.	Alert	0	
8	62	1 client(s) reported with ADAP-Funded Medications Dispensed Number of Days but 'no' reported for ADAP-Funded Medications Dispensed Flag.	Alert	0	

Let's take a quick moment to go over how to add comments to address any warning messages. As shown on the slide, this ADR has a few validation messages that will need to be addressed. Also, a great way to view which eUCIs triggered the validation, is by selecting the expand icon to the left of each validation message.

Adding Warning Comments Continued



The screenshot shows a 'Comments' dialog box with a title bar containing 'Comments', 'Message', 'Type', and 'Comment Count'. The dialog has a close button (X) in the top right corner. The main content area is titled 'Add Comment' and contains a red asterisk icon followed by the word 'Required'. Below this, it says 'Enter your comments below.' and 'Comments:'. A large, empty text input field is provided for the user to enter their comment. At the bottom left of the dialog, there is a red-bordered 'Save' button. The bottom of the dialog shows a URL: `../UI/AddComments.aspx?ReportId=33654&ValidationCheckId=4040&CommentTypeId=1&CommentTitle=Validation`.

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Once you have reviewed the data quality and validation, and would like to add a comment to any warning message, you can click on the Add comment link under the action column. Once you do, a tab will appear for you to enter the comment. After writing your comment, make sure to click on save.

Clear Clients

NAVIGATION << ADAP Data Report Your session will expire in: 29:47

Home ▾
Inbox
Workflow ▾
Validate
Clear Clients
Quality Checker ▾
Check your XML and Data Quality
Reports ▾
Upload Completeness
Reference
Validation Rules
Merge Rules

▼ X07HA12345: Takoma Department of Health

Clear Client Records

Client records that were imported by your organization can be cleared by selecting the checkbox next to the file or files that you would like to clear. Then select the "Clear Selected File(s)" button to schedule your request.

<input type="checkbox"/>	Request ID	User	Description	Clients in File	Status	Processed Date	Software System	Marked For Delete
<input type="checkbox"/>	10528		ADRData2020.xml	50	Success	4/04/2021 11:31:10 AM	TRAX	

Logged in as: GranteeDataViewer, GranteeDataEditor, GranteeDataSubmitter
The HAB Web Applications also require Adobe Acrobat Reader 5 or higher installed on your PC. To download Adobe Acrobat Reader, click

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If you determine that some of the data in the client-level data needs to be corrected, you will need to remove the older file in the system and re-upload a new file. To remove an uploaded file, you will need to click on the clear clients link on the blue navigation panel. It may take a few moments to successfully clear the file, but once the file has been removed, you can upload a new file.

Submitting the ADR

The screenshot shows the ADAP Data Report submission interface. The navigation panel on the left includes 'Home', 'Inbox', 'Workflow', 'Validate', 'Submit', 'Un-Submit', 'History', 'Clear Clients', 'Data Entry', and 'Comments'. The 'Submit' link is highlighted with a red box. The main content area displays the following information:

X07HA12345: Takoma Department of Health			
Report Id: 22222	Report Period: 2020 Annual	Status: Working	Due Date: 6/3/2021 6:00:00 PM (85 days left)
Mode: ReadWrite	Client Count: 50	DUNS: 87-6543210	Last Modified: (by Eseinfeld@tdsh.org)

Submit Report

* Required

Please enter comments regarding your submission.

* Comments

I certify that the data in this report is accurate and complete. I understand that reporting accurate and complete data is a condition of this grant award and is subject to federal audit.

Submit Report

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Once you have reviewed your data quality and resolved all validations, you can move onto submitting your ADR. To navigate to the submit page, you will use the blue navigation panel to select on the Submit link under the Workflow header. Once you do, you will be taken to the submit section where you will see a textbox listed for comments. We recommend entering a comment regarding any feedback. HAB will review this comment after the submission. After you entered any comments, make sure to check off the box that states “I certify that the data in the report is accurate and complete.” The final step is to click “submit report”. Congratulations, you have successfully completed the ADR!



Now that we have gone over how to submit the ADR, I will pass the presentation to Audrey for the last poll question.

Which of the following statements, best describes your technical assistance needs with submitting the 2020 ADR?

- a) I need assistance.
- b) I may need assistance, but don't need any as of now.
- c) I don't need any assistance.

Great, thank you, Audrey. For everyone who would like assistance, the Data Support team and DISQ team are gladly here to help. We can reach out to you after the webinar and I will go over our contact information in the upcoming slides as well.

Past & Upcoming ADR Webinars

Date	Title	Link
Wednesday, March 3, 2021	Reviewing Your Data at Upload: Tools in the ADR Web System and the Check Your XML Feature	Webinar
Wednesday, April 14, 2021 2:00pm – 3:00pm ET	ADR: Data Quality: Lessons from Outreach	Register Here

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Here is a list of past and upcoming webinars that will be useful in completing the ADR.

On March 3rd, my Data Support Colleague James Tedrow presented the Reviewing Your Data at Upload: Tools in the ADR Web System and the Check your XML Feature webinar. He provided an explanation for how to use the Check Your XML feature to check ADR data quality prior to submission. He also covered other features of the ADR Web System available to review data prior to submission, including the upload completeness report (UCR) and the validation reports.

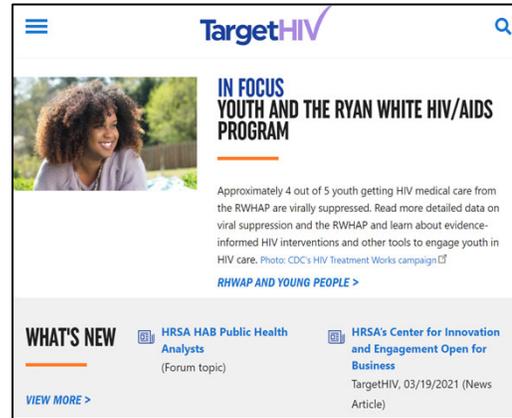
On April 14th, the DISQ team will provide a summary of ADR data quality in 2019 and improvements for 2020. Presenters will focus on the data elements that were most difficult to submit, potential reasons for incomplete data, and strategies to improve completeness for the 2020 submission.

You can view this schedule at any time on the TargetHIV website.

TA Resources

TargetHIV Website

- [2020 ADR Instruction Manual](#)
- [2020 ADR Download Package](#)
- [2020 ADR Data Validations](#)
- [Archived ADR Webinars](#)
- [ADR Training Video Series](#)
- [ADR in Focus Series](#)
- [ADR TA Brochure](#)
- [Data Reporting Changes to the 2021 ADR](#)



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Shown in the screen are great resources to use while working on your 2020 ADR. The TargetHIV website contains a lot of great information relating to the ADR. Here you can find the 2020 ADR instruction manual, the 2020 submission timeline, past webinars, and a lot more resources related to the ADR that I have included on the slide. Also, Audrey from the DISQ Team will chat out a link to a PDF file which you can use to access the resources mentioned in today's webinar. As a note, for anyone who downloaded the 2020 ADR instruction manual before March 9th, an updated version of the manual that includes corrections on reporting CARES Act Funding has been uploaded to the TargetHIV website.

TA Contact Information

TA Resource Contact Information	Type of Technical Assistance
Ryan White HIV/AIDS Program Data Support 888-640-9356 RyanWhiteDataSupport@wrma.com	<ul style="list-style-type: none"> • ADR-related content and submission questions • Interpretation of the ADR Manual and HAB's reporting requirements • Data-related policy and validation questions • Instructions for completing the ADR
The DISQ Team Data.TA@caiglobal.org TA Request Form Subscribe for DISQ Email Updates	<ul style="list-style-type: none"> • Guiding new users on where to start • Assisting recipients in data mapping and reporting in the required XML schema • TRAX, CHEX, and the eUCI Application • Identifying and addressing data quality issues
EHBs Customer Support Center 877-464-4772 Online TA Request Form	<ul style="list-style-type: none"> • ADR software-related questions • Electronic Handbook navigation, account registration, access, and permissions
CAREWare Help Desk 877-294-3571 cwhelp@iprogram.com Online TA Request Form CAREWare Listserv	<ul style="list-style-type: none"> • CAREWare-related issues • Generating the XML file from CAREWare • Creating custom reports • Viewing sample client summary files

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Let's take a moment to review technical assistance resources available to assist you while completing the 2020 ADR.

The Data Support team addresses ADR-related content and submission questions including interpretation of the ADR Manual, HAB's reporting requirements, data-related policy and validation questions as well as instructions for completing the ADR.

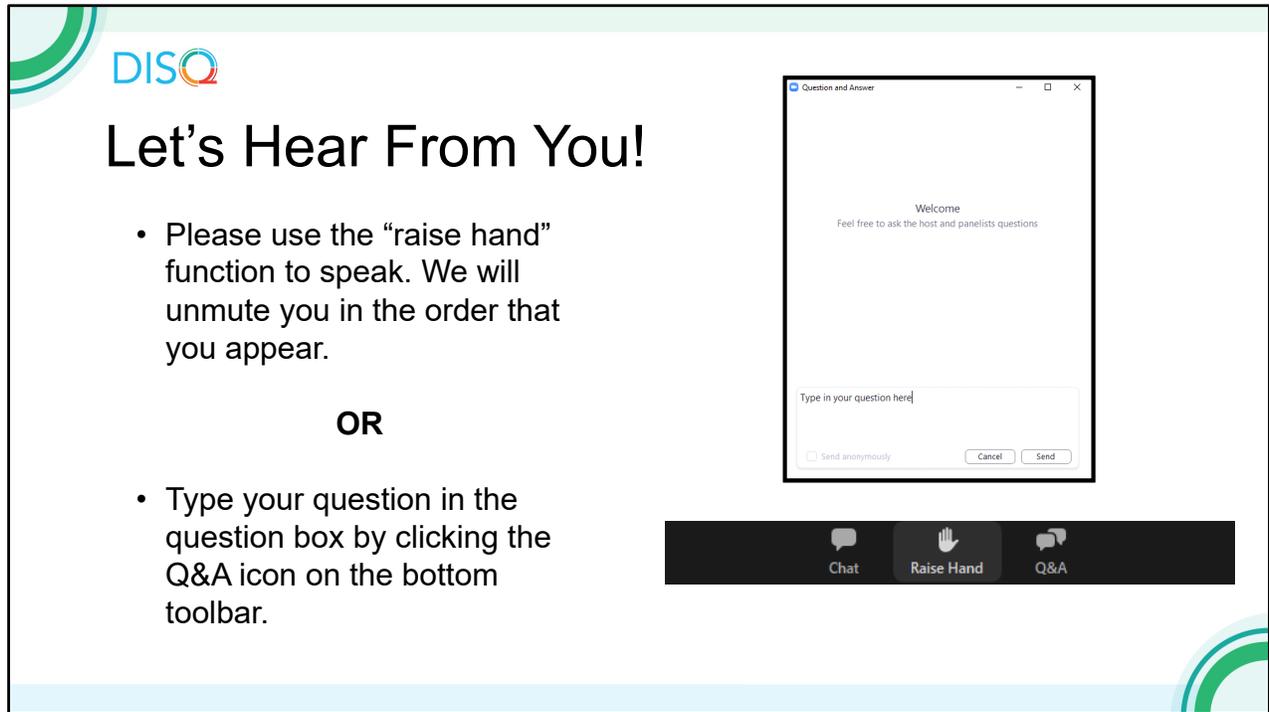
The DISQ team helps guide new users on where to start. Also, helps those needing significant assistance to meet data reporting requirements including making sure recipients' data systems collect required data, data mapping, and making sure recipients are reporting in the required XML schema. DISQ also provides TA for the TRAX, Chex, and eUCI applications as well as addresses questions related to data quality including analyzing completeness reports.

The EHB Customer Support Center addresses EHBs and ADR software related questions such as navigating the EHBs, account registration, and access and permissions.

For CAREWare users, the CAREWare Help Desk is the best place to find assistance with CAREWare-related inquiries, such as generating the XML file from CAREWare, creating custom supports, and viewing sample client summary files. For information regarding the CAREWare 6 minimum build, I recommend signing up for the CAREWare listserv. Remember, CAREWare 6 minimum build 102 is required to create the ADR this year. CAREWare users are also encouraged to sign up for the listserv.

As I stated during the previous slide, you can also find all of this information in the ADR TA Brochure available at the TargetHIV web site. And remember if you are unsure of who to contact, feel free to reach out to any of the resources listed here and we will be sure to direct you exactly where you need to go.

I'd like to take a moment to thank everyone for joining us on today's presentation and I will now turn it back over to AJ for the Q&A portion of the webinar.



DISQ

Let's Hear From You!

- Please use the “raise hand” function to speak. We will unmute you in the order that you appear.

OR

- Type your question in the question box by clicking the Q&A icon on the bottom toolbar.

The screenshot shows a 'Question and Answer' window with the following text: 'Welcome', 'Feel free to ask the host and panelists questions', a text input field 'Type in your question here', a checkbox for 'Send anonymously', and 'Cancel' and 'Send' buttons. The bottom toolbar contains three icons: 'Chat', 'Raise Hand', and 'Q&A'.

Thanks Melissa. Before we start the Q & A, I did want to let everyone know that there will be a short evaluation at the end of the webinar. Your feedback is really important to help us ensure that our webinars are meeting your needs. Ruchi is going to put a link out in the chat feature which you can click on to access the evaluation after the webinar is over. We'll also send out a final reminder via email shortly after the webinar to make sure that we have a chance to get your input.

Now let's move on to the Q & A. As a reminder, you can send us questions using the “Question” function on your settings the bottom of the screen. You can also ask questions directly “live.” You can do this by clicking the raise hand button (on the bottom of the screen) and my colleague Ruchi will unmute at the right time. We hope you consider asking questions “live”, we really like hearing voices other than our own.

We do want to get all of your questions answered, and we do not usually run over an hour. If you have submitted your question in the question box and we cannot respond to your question today, we will contact you to follow up. We often need to explore your question in order to give you the most appropriate answer.

[After the Q&A]: As a reminder, please be sure to complete the evaluation for today's webinar.