

Ryan White HIV/AIDS Program Services Report (RSR) Client-Level Data (CLD) Import Merging Rules

Ryan White HIV/AIDS Program providers are allowed to submit more than one client-level data file for the RSR. When HAB receives multiple files for a single provider, the system looks for matching client records by the clients' encrypted Unique Client Identifiers (eUCIs). If a matching client eUCI is found, the new data are "merged" with the existing client data.

If the client's record in the RSR system is missing a value for a data element reported in the new client-level data XML file, the RSR system will save the value. If the client's record in the RSR system has a value for a data element, the following rules are used to merge the data:

- **Append If New:** If more than one value can be reported and the new value(s) does/do not exist in the client record, the new values are added.
- **Merge By Priority:** If the current value has a lower priority than the new value it is replaced with the new value. **NOTE:** The value priorities, if applicable to the data element, are provided below.
- **Keep the Oldest Date:** If the current date value is more recent than the new date value, the date stored in the system is replaced with the new date value. For example, if the current date in the system is 6/1/2014 and the new date is 2/1/1998, the current date stored in the system (6/1/2014) will be deleted and the new date (2/1/1998) will be saved.
- **Keep the Larger Value:** If the current value is less than the new value, the new value will replace the stored value. For example, a client is reported with 2 medical case management services (Item 18) in the first file uploaded. In the new file, the same client is reported with 4 medical case management visits. In this case, the new value (4) reported will replace the old value (2) reported.
- **Merge by Method:** In some cases, a special method has been defined by HAB for a specific data element. These rules are unique to the data element. Refer to the descriptions for further explanation on how the data elements will be merged in the RSR system.

Demographics

Data Element	Merge Rules for this Data Element
Vital Enrollment Status (Item 2)	<ul style="list-style-type: none">• Merge by priority:<ul style="list-style-type: none">○ Active, continuing in program (1)○ Referred to another program or services, or discharged because self-sufficient (2)○ Removed from treatment due to violation of rules (3)○ Incarcerated (4)○ Relocation (5)○ Deceased (6)
Birth Year (Item 4)	<ul style="list-style-type: none">• Keep the oldest date.
Ethnicity (Item 5)	<ul style="list-style-type: none">• Merge by priority:<ul style="list-style-type: none">○ Hispanic/Latino (1)○ Non-Hispanic (2)
Hispanic Subgroup (Item 68)	<ul style="list-style-type: none">• Append if new.
Race (Item 6)	<ul style="list-style-type: none">• Append if new.
Asian Subgroup (Item 69)	<ul style="list-style-type: none">• Append if new.
Native Hawaiian/Pacific Islander Subgroup (Item 70)	<ul style="list-style-type: none">• Append if new.

Data Element	Merge Rules for this Data Element
Sex at Birth (Item 71)	<ul style="list-style-type: none"> • Merge by method: If the value reported for a client in the new file does not match the value saved in the client's record, the system will not add the new response. A value of "Incongruent" will be saved for the client. To clear the incongruent value, all of the client-level data must be cleared from the Provider Report and new XML files must be uploaded.
Gender (Item 7)	<ul style="list-style-type: none"> • Merge by method: If the value reported for a client in the new file does not match the value saved in the client's record and one of the values is "Transgender", then the RSR system will set the value for the client to "Transgender". Otherwise, a value of "Incongruent" will be saved for the client. To clear the incongruent value, all of the client-level data must be cleared from the Provider Report and new XML files must be uploaded.
Transgender Subgroup (Item 8)	<ul style="list-style-type: none"> • Merge by method: If the value reported for a client in the new file does not match the value saved in the client's record and one of the values is "Unknown", then the RSR system will set the value for the client to Unknown. Otherwise, a value of "Incongruent" will be saved for the client. To clear the incongruent value, all of the client-level data must be cleared from the Provider Report and new XML files must be uploaded.
Income – Percent of Federal Poverty Level (Item 9)	<ul style="list-style-type: none"> • Merge by priority: <ul style="list-style-type: none"> ○ Below 100% of the Federal poverty level (1) ○ 100 -138% of the Federal poverty level (2) ○ 139 - 200% of the Federal poverty level (3) ○ 201 – 250% of the Federal poverty level (4) ○ 250 – 400% of the Federal poverty level (5) ○ 401 – 500% of the Federal poverty level (6) ○ More than 500% of the Federal poverty level (7)
Housing Status (Item 10)	<ul style="list-style-type: none"> • Merge by Priority: <ul style="list-style-type: none"> ○ Unstable (1) ○ Temporary (2) ○ Stable/permanent (3)
HIV/AIDS Status (Item 12)	<ul style="list-style-type: none"> • Merge by priority: <ul style="list-style-type: none"> ○ CDC-defined AIDS (1) ○ HIV-positive, not AIDS (2) ○ HIV-indeterminate (infants only) (3) ○ HIV-positive, AIDS status unknown (4) ○ HIV-negative (5)
HIV Risk Factor (Item 14)	<ul style="list-style-type: none"> • Append if new.
Health Insurance (Item 15)	<ul style="list-style-type: none"> • Append if new.
HIV Diagnosis Year (Item 72)	<ul style="list-style-type: none"> • Keep the oldest date.

Ryan White HIV/AIDS Program Core Medical Service Visits Delivered

Data Element	Merge Rules for this Data Element
<u>Core Medical Services:</u> <ul style="list-style-type: none"> • Outpatient/ambulatory medical care (Item 8) • Oral health care (Item 10) • Early intervention services (Parts A and B) (Item 11) Home health care (Item 13) • Home and community-based health services (Item 14) • Hospice services (Item 15) • Mental health services (Item 16) • Medical nutrition therapy (Item 17) • Medical case management (including treatment adherence) (Item 18) • Substance abuse services-outpatient (Item 19) 	<ul style="list-style-type: none"> • Append if new. • If the service is not new, keep the larger value.

Ryan White HIV/AIDS Program Core Medical and Support Services Delivered

Data Element	Merge Rules for this Data Element
<u>Core Medical Services:</u> <ul style="list-style-type: none"> • Local AIDS Pharmaceutical Assistance (Item 9) • Health Insurance Premium & Cost Sharing Assistance (Item 12) <u>Support Services</u> <ul style="list-style-type: none"> • Case management (non-medical) (Item 20) • Child care services (Item 21) • Pediatric development assessment/early intervention services (Item 22) • Emergency financial assistance (Item 23) • Food bank/home-delivered meals (Item 24) • Health education/risk reduction (Item 25) • Housing services (Item 26) • Legal services (Item 27) • Linguistics services (Item 28) • Medical transportation services (Item 29) • Outreach services (Item 30) • Permanency planning (Item 31) • Psychosocial support services (Item 32) • Referral for health care/supportive services (Item 33) • Rehabilitation services (Item 34) • Respite care (Item 35) • Substance abuse services-residential (Item 36) • Treatment adherence counseling (Item 37) 	<ul style="list-style-type: none"> • Append if new.

Clinical Information

Data Element	Merge Rules for this Data Element
HIV Risk Reduction Screening (Item 46)	<ul style="list-style-type: none"> • Merge by priority: <ul style="list-style-type: none"> ○ Yes (1) ○ No (2)
First Outpatient/Ambulatory Medical Care Visit Date (Item 47)	<ul style="list-style-type: none"> • Keep the oldest date.
Outpatient/Ambulatory Care Visit Dates (Item 48)	<ul style="list-style-type: none"> • Append if new.
CD4 Tests (Item 49)	<ul style="list-style-type: none"> • Append if new.
Viral Load Tests (Item 50)	<ul style="list-style-type: none"> • Append if new.
Prescribed PCP Prophylaxis (Item 51)	<ul style="list-style-type: none"> • Merge by priority: <ul style="list-style-type: none"> ○ Yes (1) ○ Not medically indicated (2) ○ No, client refused (3) ○ No (4)
Prescribed ART (Item 52)	<ul style="list-style-type: none"> • Merge by priority: <ul style="list-style-type: none"> ○ Yes (1) ○ No - Not ready (as determined by clinician) (2) ○ No - Client refused (2) ○ No - Intolerance, side-effects, toxicity (2) ○ No - ART payment assistance unavailable (2) ○ No - Other reason (3) <p>NOTE: For this data element, if the new value has the same priority as the existing value, the new value will NOT replace the existing value.</p>
Screened for Tuberculosis Since HIV Diagnosis (Item 54)	<ul style="list-style-type: none"> • Merge by priority: <ul style="list-style-type: none"> ○ Yes (1) ○ Not medically indicated (2) ○ No (3) ○ Unknown (4)
Screened for Syphilis (Item 55)	<ul style="list-style-type: none"> • Merge by priority: <ul style="list-style-type: none"> ○ Yes (1) ○ Not medically indicated (2) ○ No (3)
Screened for Hepatitis B Since HIV Diagnosis (Item 57)	<ul style="list-style-type: none"> • Merge by priority: <ul style="list-style-type: none"> ○ Yes (1) ○ Not medically indicated (2) ○ No (3) ○ Unknown(4)
Completed Hepatitis B Vaccine Series (Item 58)	<ul style="list-style-type: none"> • Merge by priority: <ul style="list-style-type: none"> ○ Yes (1) ○ Not medically indicated (2) ○ No (3)
Screened for Hepatitis C Since HIV Diagnosis (Item 60)	<ul style="list-style-type: none"> • Merge by priority: <ul style="list-style-type: none"> ○ Yes (1) ○ Not medically indicated (2) ○ No (3) ○ Unknown(4)
Screened for Substance Abuse (Item 61)	<ul style="list-style-type: none"> • Merge by priority: <ul style="list-style-type: none"> ○ Yes (1) ○ Not medically indicated (2) ○ No (3)

Data Element	Merge Rules for this Data Element
Screened for Mental Health (Item 62)	<ul style="list-style-type: none"> • Merge by priority: <ul style="list-style-type: none"> ○ Yes (1) ○ Not medically indicated (2) ○ No (3)
Received Cervical Pap Smear (Item 63)	<ul style="list-style-type: none"> • Merge by priority: <ul style="list-style-type: none"> ○ Yes (1) ○ Not medically indicated (2) ○ No (3) ○ Not applicable (4)
Pregnant (Item 64)	<ul style="list-style-type: none"> • Merge by priority: <ul style="list-style-type: none"> ○ Yes (1) ○ No (2) ○ Not applicable (3)

HIV Counseling and Testing

Data Element	Merge Rules for this Data Element
Confidential Confirmatory HIV Test Date (Item 73)	<ul style="list-style-type: none"> • Keep the oldest date.
First OAMC Visit Date After Positive HIV Test Date (Item 74)	<ul style="list-style-type: none"> • Keep the oldest date.