



**State of Michigan
CAREWare User's Manual**

Last updated July 8, 2014

Client Data Entry

Adding a New Client

1. From the main menu, select **Add Client**.

The screenshot displays the 'Add Client' interface within the MDCH CAREWare system. The main menu at the top includes 'Add Client' and 'Find Client' buttons. A modal window titled 'Add Client' is open, prompting for the following information:

- Generated URN: [Text Field]
- Last Name: [Text Field]
- First Name: [Text Field]
- Middle Name: [Text Field]
- Gender: [Dropdown Menu]
- BirthDate: [Text Field] Estimated?
- Forms

Buttons for 'Add Client' and 'Cancel' are located at the bottom of the modal window. The background shows the HRSA logo and a red ribbon.

The Add Client screen will appear and prompts you for the minimum information necessary to create a new record. **All of the information requested here is used to generate the Unique Record Number (URN), so it is critical that this information be accurate.**

Please enter this information carefully because you will not be able to change it after you click on Add Client. After you add the client, changes to the name will need to be made by HIV Care Section Staff.

Client Names

Last Name

Enter the **legal** last name of the client.

- Capitalize the first letter of the last name. If the last name is made up of two names (e.g. Hanson Perez), capitalize the first letter of each name. Do not capitalize the whole last name.
- Do not use hyphens, accents (e.g., - , `), tildes (e.g., ~), or other symbols (e.g., ç) in the last name.

- Do not use spaces in the last name, except when using suffixes like Jr. or III. Do not use periods after suffixes like Jr. or Sr.

Last Name	How to Enter into CAREWARE
Johnson	Johnson
Hanson Perez	HansonPerez
O'Connor	OConnor
Smith-Jones	SmithJones
Peña	Pena
Peters Jr.	Peters Jr

First Name

Enter the **legal** first name of the client.

- Capitalize the first letter of the first name. If the first name is made up of two names (e.g. Mary Jo), capitalize the first letter of each name. Do not capitalize the whole first name.
- Do not use hyphens, accents, tildes, or other symbols in the first name.
- Do not use spaces in the first name.

First Name	How to Enter into CAREWARE
Linda	Linda
Mary Jo	MaryJo
Jimmy-John	JimmyJohn
Raúl	Raul

Middle Name

Enter the **legal** middle name of the client.

- Do not use a period following the initial.
- If the client does not have a middle name or is unknown, leave it blank.

Gender

Choices are:

- Male
- Female
- Transgender Unknown - Unknown whether transgender client identifies as 'male to female' or 'female to male'
- Transgender MtF - Transgender Male to Female
- Transgender FtM - Transgender Female to Male
- Refused to Report - Client refused to report their gender
- Unknown - Client's gender is unknown

Birth Date

Enter the date of birth as identified by the client in the mm/dd/yyyy format. Use the birth date on their driver's license, passport, ID card, etc. Do NOT select "estimated date of birth," unless there is no documentation.

If part or all of the client's date of birth is unknown and the client does not have a standard date of birth they use on driver's license, passport, etc., then:

- If month is unknown, report as "01"
- If day is unknown, report as "01"
- Provide the client's best guess for his/her year of birth
- Mark "estimated date of birth"

Only the year of birth is reported to HRSA.

Click Add Client

The screenshot shows a web form titled "Add Client". At the top right, it displays "Generated URN: JHDE9999991U". The form has several input fields: "Last Name:" with "Doe", "First Name:" with "John", "Middle Name:" (empty), and "Gender:" with a dropdown menu set to "Male". Below these is "BirthDate:" with "01/01/1991" and an unchecked checkbox labeled "Estimated?". At the bottom left is an unchecked checkbox labeled "Forms". At the bottom center is a button labeled "Add Client" which is highlighted with a red rectangular box. At the bottom right is a button labeled "Cancel".

Checking for Duplicate Clients

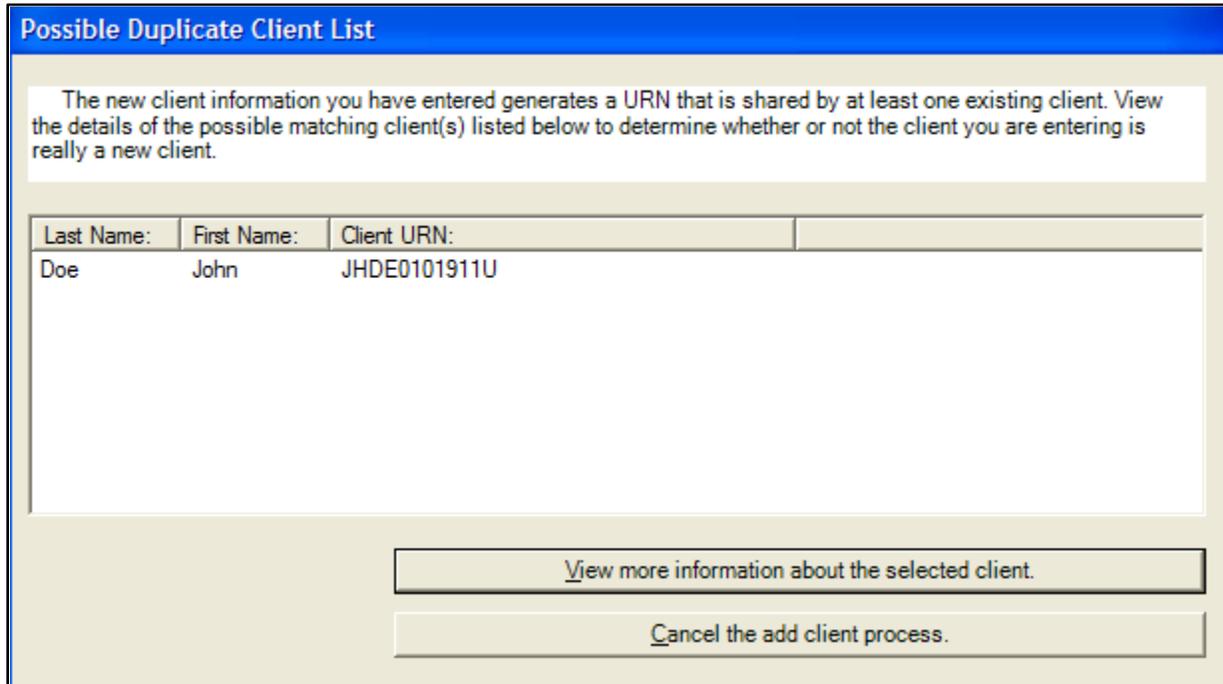
It is possible that:

- A client will receive services from multiple providers within the network.
- Or, two different clients will have the same URN.
 - The URN is generated based on the 1st and 3rd letter of the first name, the 1st and 3rd letter of the last name, the birth date, and a code assigned to each gender value. In addition, CAREWare assigns a "U" at the end if it is the only client with that URN

When you click Add Client, CAREWare will check across all providers to see if the client already exists in the system or if there is another client with the same URN.

Possible Duplicate

When it is a possible duplicate, the following screen will appear:



Possible Duplicate Client List

The new client information you have entered generates a URN that is shared by at least one existing client. View the details of the possible matching client(s) listed below to determine whether or not the client you are entering is really a new client.

Last Name:	First Name:	Client URN:
Doe	John	JHDE0101911U

[View more information about the selected client.](#)

[Cancel the add client process.](#)

Highlight the existing client and click “[View more information about the selected client.](#)”

Check the existing client information. If it is the same client then click “This is the client I was attempting to add. Continue to Client Screen.” If not then click the Create a new client record button.

Possible Duplicate Client Information.

URN Fields:

First Name: Middle Name: Last Name:

Date of Birth: Gender: Client URN:

Address Fields:

Address: City:

State: County: Zip Code: Phone Number:

Ethnicity:

Hispanic Non-Hispanic Unknown

Race

White American Indian or Alaska Native Other

Black or African American Native Hawaiian or Other Pacific Islander Unknown

Asian

[Return to the list of possible matches to view another client.](#)

[This is the client I was attempting to add. Continue to client screen.](#)

[The client I am adding is not on the list. Create a new client record.](#)

This will bring you to the client screen to enter the demographic information where you can continue to edit/add information.

Not a Duplicate, but Same URN

If your client is not the matching client in the system, then select “The client I am adding is not on the list. Create a new client record.”

This will take you to the following screen. Here you just need to assign a different URN suffix to the end of the URN. Click Finish when you are done.

Duplicate URN Resolution

Change the last character of the matching URNs in order to ensure that each client has a unique record number. Modify the new client's final URN letter by selecting it in the combo box. To modify the URN for the matching client whose URN ends with "U", double click the client row in the list, select their new URN and press the Set URN button.

New Client

First Name: Last Name: Base URN:

Matching Clients

First Name: Last Name: Select URN:

Last Name:	First Name:	Client URN:
Doe	John	JHDE0101...

Finding a Client

The Find Client function from the Main Menu searches for a client within your own provider domain only; it does not search for the client across provider domains.

Click Find Client in the Main Menu and the following screen will display:

You can search by any of the fields that appear in the Find Client screen.

- Wildcards allow you to search all clients by entering “ * ” in Last Name and clicking Search.
- You can also use wildcards to search for clients whose last names begin with certain letters (e.g., type “Mc*” in Last Name to search for all clients whose last name starts with or sounds like “Mc”).
- If you uncheck the View Active Clients Only box, your search will include inactive and deceased clients

NOTE: You may search on the eURN of the client by entering the eURN in the Client URN search field

Deleting a Client

CAREWare users do not have the permissions to do this. Please contact HIV Care Section Staff for support.

Demographics Tab

The Demographics tab is where you enter or edit the client's basic demographic information. All fields on this tab are shared between providers (**except for Client ID, Provider Notes, and Case Notes**). Information is automatically saved after you enter it.

URN-Related Fields

Once you enter a new client, the fields that are used to generate the URN will be grayed out and you will not be able to make any changes to them. You will need to contact HIV Care Section Staff to make changes to these fields.

You will see the Client URN and an Encrypted URN. You will also see the Encrypted Unique Client Identifier (UCI), which is what is submitted to HRSA with the client level Ryan White Services Report (RSR).

The screenshot shows the 'TEST, TEST TEST' Demographics tab in the MDCH CAREWare system. The form is organized into several sections:

- Navigation:** Appointments, Orders, Forms, Change Log, Client Report, Merge Client, Delete Client, Find List, New Search, Close.
- Demographics Section:**
 - First Name: TEST, Middle Name: TEST
 - Last Name: TEST, Date of Birth: 4/15/1963, Est?
 - Gender: Male, Client URN: TSTS0415631U, Encrypted URN: 73FS6nNR
 - Encrypted UCI: E76AC6DF5B561C90190DCACAC09207A6CE10C848U
 - Ethnicity: Hispanic, Non-Hispanic, Unknown
 - Race: White, American Indian or Alaska Native, Other, Black or African American, Native Hawaiian or Other Pacific Islander, Asian
- Address Section:**
 - Client ID: 000000000, Address: 123 MAINE LANE, City: LANSING
 - State: Michigan, Zip Code: 48933
 - County: Ingham, Phone Number: 555-555-5555, Include on label report
- Notes Section:** Common Notes, Provider Notes, User Messages, Case Notes.
- HIV Status Section:** HIV Status: HIV-positive (AIDS status unknown), HIV+ Date: 5/25/2007, Est? , AIDS Date: , Est?
- HIV Risk Factors Section:**
 - Male who has sex with male(s), Heterosexual contact, Receipt of transfusion of blood, blood components, or tissue
 - Injecting Drug Use, Perinatal Transmission, Other, specify:
 - Hemophilia/coagulation disorder, Undetermined/unknown, Risk not reported or identified

Fields on the Demographics Tab

Client ID:

Unlike most of the fields on the Demographics tab, this field is provider-specific. If your agency uses its own client ID, you can enter that ID in this field and only other staff at your agency will be able to see/edit it.

Address:

You are required to enter the Address, State, County and Zip Code. When you select the State from the pull down menu, the associated counties will be available in the County pull down menu.

Ethnicity:

Ethnicity is based on the client's self-identification. You may only select one of the following options:

- Hispanic - A person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish-speaking culture or origin, regardless of race.
- Non-Hispanic - A person who does not identify their ethnicity as Hispanic or Latino.
- Unknown - The client's ethnicity is unknown or was not reported -avoid select "Unknown."

Race:

Race is based on the client's self-identification. Select all that apply. If a client is Hispanic try to gather if the race is "White", "Black", etc. Use the same rules the Census does. Avoid using "Other" or "Unknown."

HIV Status:

Select the response from the pull down menu that best describes the client's HIV status.

Note that the HIV Status field is closely related to the HIV+ Date and AIDS Date fields.

- HIV Positive (not AIDS) - Client has been diagnosed with HIV infection but has not advanced to AIDS. If you select this response, you will be required to add the HIV+ Date.
- HIV Positive (AIDS status unknown) - Client has been diagnosed with HIV infection and it is unknown whether s/he has advanced to AIDS. If you select this response, you will be required to add the HIV+ Date.
- CDC-defined AIDS - Client has received an AIDS diagnosis at some time based on the CDC AIDS case definition, although his/her health may have improved since then. If you select this response, you will be required to add the HIV+ Date and the AIDS Date.
- HIV Negative (affected) - Client has tested negative for HIV. Client is an affected partner or family member of an individual who is HIV positive and client has received at least one Ryan White funded service from your agency during this reporting period.
- Unknown - A client who is not an infant and whose HIV/AIDS status is unknown or was not reported.

HIV+ Date and AIDS Date:

HIV+ Date is the date that the client was diagnosed with HIV.

AIDS Date is the date the client was diagnosed with AIDS.

You must enter the HIV+ Date or AIDS Date if you select any of the following in the HIV Status field:

- HIV Positive (not AIDS),
- HIV Positive (AIDS status unknown)

- CDC-defined AIDS

Service Tab

To add a Service, click on **Service Tab**.

1. Click on **New Service**.
2. Enter the **Date** and in the **Service Name** dropdown box select the appropriate Service.
3. Click **Save**.

Searching for Services

Once a client has received many services, it will not be possible to view all services received at one time. To conduct a search about the services a client has received, use the Search Criteria and Column fields.

First, specify how you want to define your search in the **Column field**. You can choose from the following options:

- Date - to search for a service(s) provided on a specific date
- Service Name - to search for a specific type of service
- Contract - to search for services funded through a specific contract
- Units - to search for services for which a specific number of units were provided
- Total - to search for services that have a specified total unit cost
- Received - to search for services for which a specified payment amount was received from client

- Provider - to search for services provided by a specified provider (only applicable if service information is being shared across providers)

In the **Search Criteria field**, you can then limit your search. For example, if you selected 'Service Name' in the Contract field, you can type 'Medical Case Management' in the Search field, and only Medical Case Management services will be listed.

Annual Review Tab

Insurance

Primary Insurance:

Select the client's primary source of health insurance at the end of the current six-month reporting period:

- **Medicaid** - A jointly funded Federal and State health insurance program for some low income and needy people.
- **Medicare** - Health insurance program for people 65 years of age and older, some disabled people under 65 years of age, and people with End-Stage Renal Disease (permanent kidney failure treated with dialysis or a transplant).
- **Medicare Part A/B- Part A** covers inpatient hospital stays, care in a skilled nursing facility, hospice care, and some home health care.
Part B covers certain doctors' services, outpatient care; medical supplies and preventative services.
- **Medicare Part C** (Medicare Advantage Plan) - An optional type of Medicare Health plan offered by a private company that contracts with Medicare to provide Medicare recipients with all Part A and Part B benefits. Most Medicare Advantage Plans offer prescription drug coverage.
- **Medicare Part D**- Part D adds prescription drug coverage to original Medicare. Some Medicare Cost Plans, some Medicare Private-Fee for Service Plans and Medicare Medical Savings Account

Plans. These plans are offered by insurance companies and other private companies approved by Medicare. Medicare Advantage Plans may also offer prescription drug coverage that follows the same rules as Medicare Prescription Drug Plans.

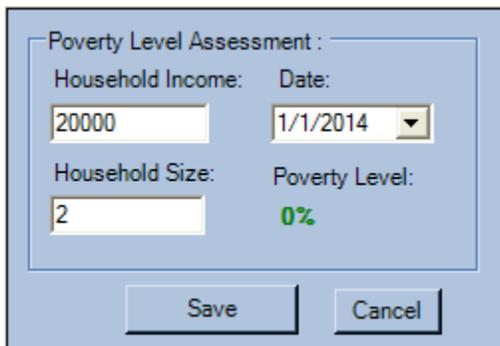
- **No Insurance** - The client does not have insurance to cover health care costs, the client self-pays, or services are covered by Ryan White funds.
- **Other** - The client has an insurance type other than the options listed.
- **Other Public** (e.g. Champus, VA) - Includes other Federal, State, and/or local government programs providing a broad asset of benefits for eligible individuals. Examples include: military health care (CHAMPUS), Indian Health Services, and Veterans Health Administration (VA)
- **Private** – Private health insurance plans such as Kaiser, Blue Cross/Blue Shield, etc. Includes group insurance programs provided through the client's employer.
- **Unknown** - Source of health insurance is unknown and not documented. This should never be used because you must verify insurance status to provide services.

Other Insurance:

Once you select the client's primary source of insurance, the Other Insurance field will activate. Do nothing with this field if client has only one source of insurance, or has no insurance.

If the client had an additional source(s) of health insurance, select all that apply. Note that the option you selected for Primary Insurance will not be available for your selection in this field.

Federal Poverty Level



Poverty Level Assessment :	
Household Income:	Date:
<input type="text" value="20000"/>	<input type="text" value="1/1/2014"/>
Household Size:	Poverty Level:
<input type="text" value="2"/>	<input type="text" value="0%"/>
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>

Household Income:

Enter the anticipated annual Household Income for the current year.

A family income refers only to the income on which this individual can legally rely on (e.g., includes income of spouse or minor children). Remember that family income is based on the legal definition of family (e.g., if married and both people work, use both incomes). However, if two people live together and share expenses but are not legally married, do not use both incomes.

Household Size:

In the Household Size field, enter the number of people of any age (including the client) in the household who are **legally** dependent on the annual household income.

- The response must always be at least '1' for the client.
- If the client is unclear, ask the client how many family members they are able to claim as dependents on their income taxes.

Poverty Level:

CAREWare will automatically calculate the Poverty Level for you based on the Household Income and Household Size.

Encounters Tab

Select the correct **Sub Menu** that corresponds with that specific encounter.

1. Select **Rapid Entry**.

The screenshot displays the 'TEST, TEST TEST' encounter form. The 'Encounters' tab is selected, and the 'Vital Signs' sub-menu is active. The 'Rapid Entry' button is highlighted with a red box. The form includes fields for 'Prior Value', 'Date Taken', 'Current Value', and 'Current Value Provider' for various vital signs: Height (inches), Weight (lbs), Pulse (bpm), Temperature (F), and B.P. Sys/Dia. There are also radio buttons for 'English' and 'Metric' units, and checkboxes for 'Pregnant?' (Last visit, Currently). A 'View/Edit History' button is located at the bottom right of the vital signs section.

2. Select the **Test Dropdown Arrow** and select the specific test you are entering.
3. Enter the **Date** and **Result** of the specific test.
4. **Save**.

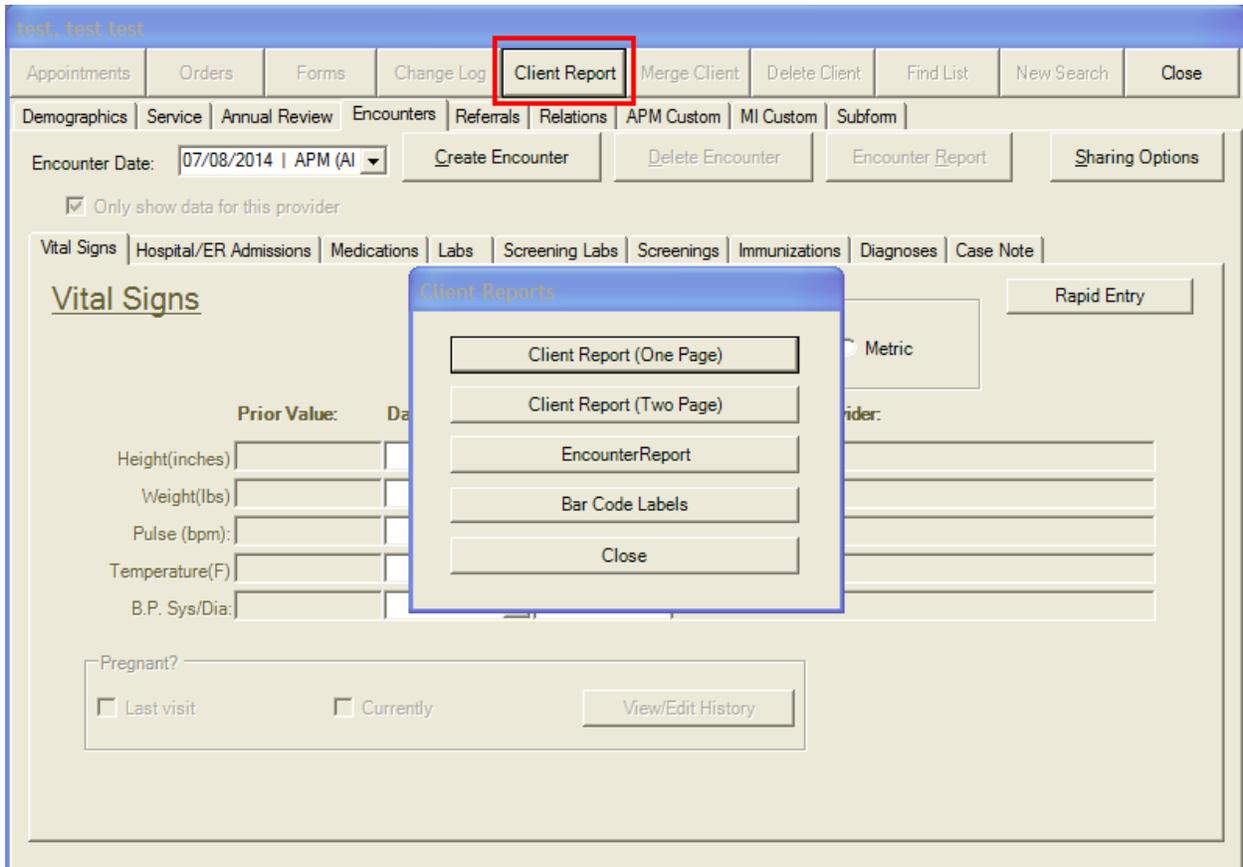
Reports

Standard CAREWare Reports

CAREWare has a number of standard reports. Your access to reports will depend on your user permissions.

Standard CAREWare Client Report

All CAREWare users will be able to run the Client Report, which is accessed by clicking Client Report from any tab in a specific client's record.



Client Report (One page)

In most cases, this will be the only selection made here.

The Client Report provides a summary of Demographic, Annual Review information for the client.

Below is an example. This page can be printed out and put in the client's file if needed.

Demographics:

First Name: MI: Last Name: Birth Date: Gender: Client ID: Client URN: Client Encrypted URN:

Address: City: State: Zip Code: County: Phone:

Ethnicity: Hispanic Non-Hispanic Unknown Race: White Black or African American American Indian or Alaska Native Native Hawaiian or Other Pacific Islander Asian Other

Common Notes:

Vital Status: Deceased Date: Enrollment Status: Enrollment Date:

HIV Status: HIV Date: Est? AIDS Date: Est?

HIV Medication History: Date ARVs First Prescribed: Pre-ART Reason:

HIV Risk Factors: Male who has sex with male(s) Heterosexual contact Receipt of transfusion of blood, blood components, or tissue Injecting Drug Use Perinatal Transmission Other, specify: Hemophilia/coagulation disorder Undetermined/unknown, Risk not reported or identified

Annual Review:

Insurance Assessment 7/8/2014

Primary Insurance:

Other Insurance:

Poverty Level Assessment 07/08/2014

Household Income: Household Size:

Poverty Level:

Primary HIV Medical Care:

Housing Arrangement:

HIV Risk Reduction Counseling:

Mental Health:

Substance Abuse:

Custom Tab 1

APM Prevention Specialist: APM HIV Primary Care Provider: APM Acuity At Discharge: APM Case Manager: