

CAREWare 6 Overview

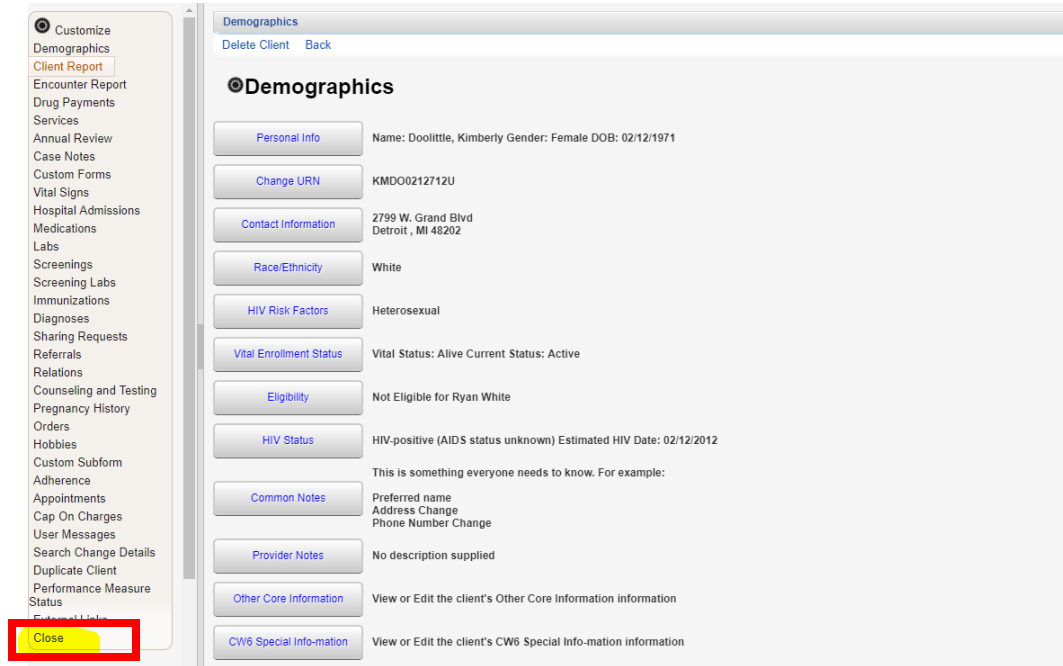
Table of Contents:

1.	What You Need to Know About CAREWare 6.....	2-3
2.	Add a Client.....	4
3.	Find a Client.....	5
4.	The Demographic Page.....	6
5.	Adding Information to the Demographic Page.....	7
6.	Updating Enrollment & Vital Status Information.....	8
7.	Adding Eligibility Records.....	9-10
8.	Add a Case Note.....	11-12
9.	Add a Service.....	13-14
10.	Navigating the Annual Review Tab.....	15-16
11.	Add/Edit a Medication.....	17-18
12.	Add a Lab/Screening Lab/Screening.....	19
13.	Navigating a Custom Tab/Field.....	20
14.	Entering a Custom Tab/Field Record.....	21
15.	Adding Attachments.....	22-33
16.	What Data Needs to Entered for the RSR.....	34

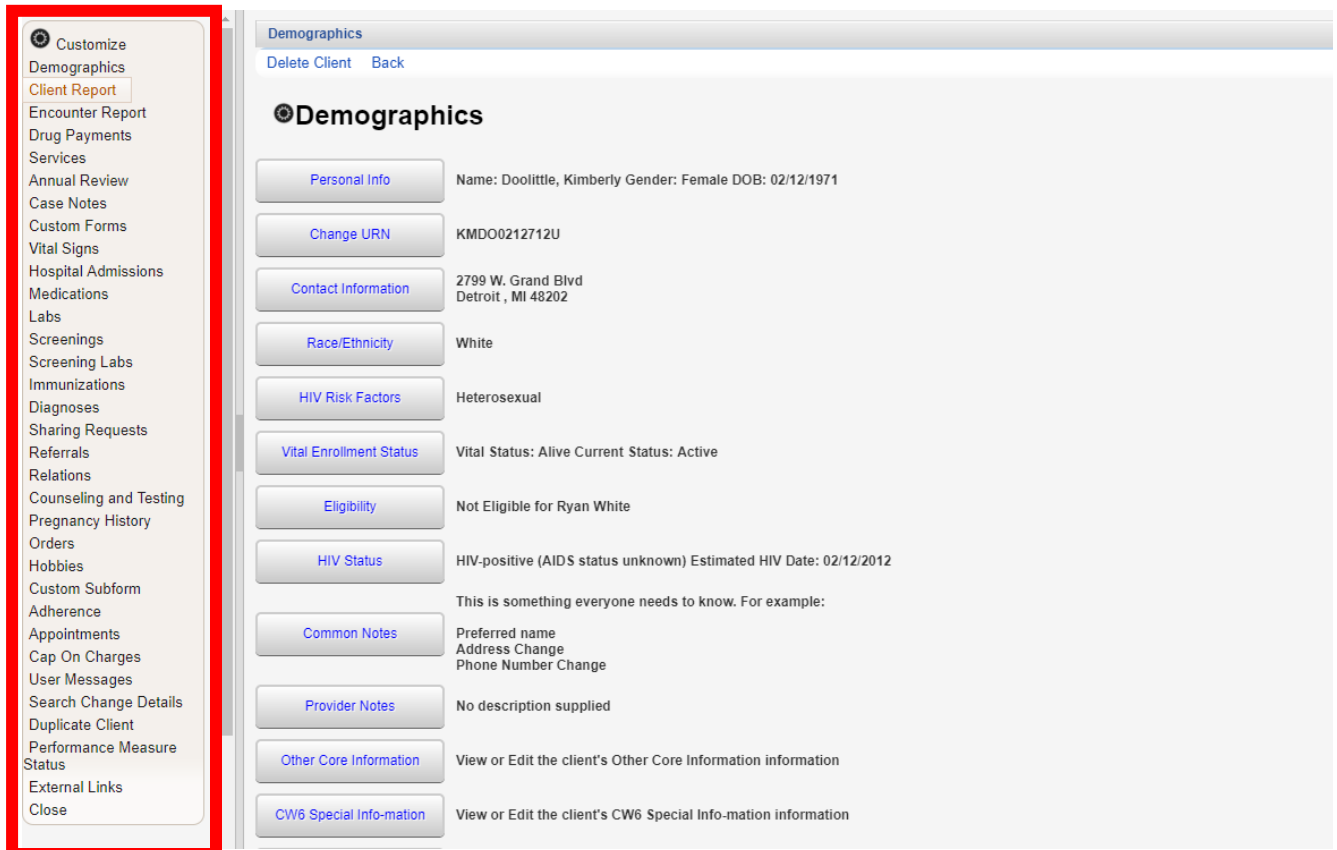
What You Need to Know About CAREWare 6

CAREWare 6 is different than CAREWare 5 in many ways. Here are some things you need to know:

1. When you open a client record, it will open a new tab on your browser. Make sure you close the record after entering in all necessary information. If you don't, it will keep the record open in that tab even if you move on to a new client.

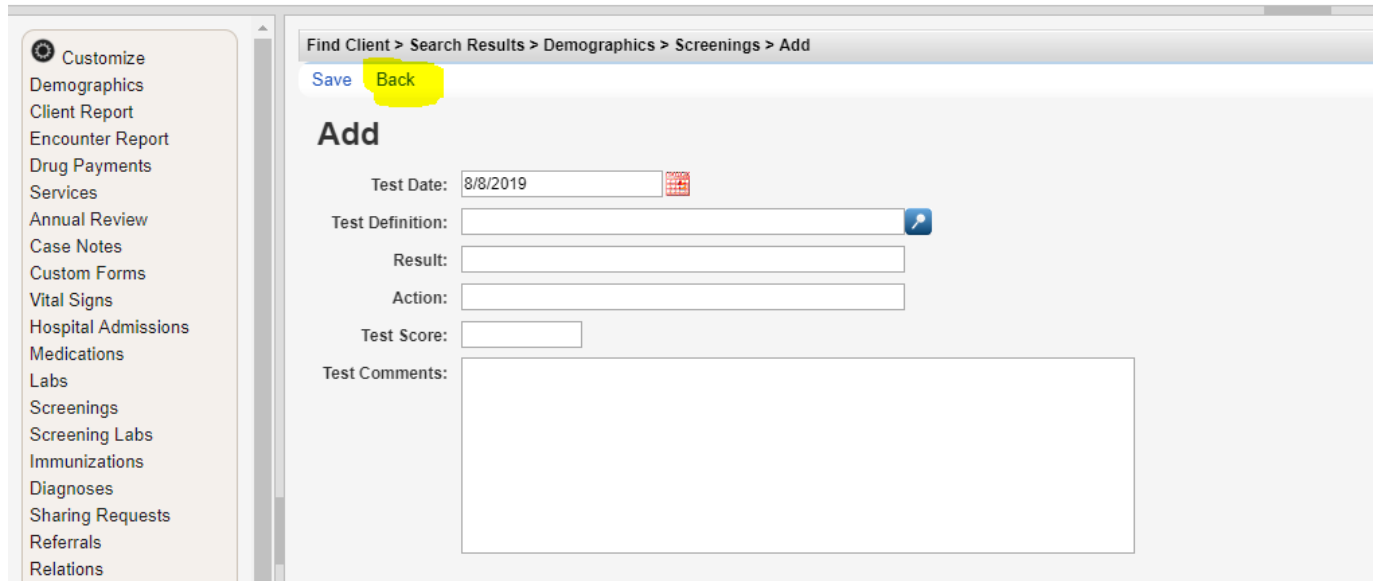


2. You navigate the client's record through the menu options located on the left-hand side of the record. When you want to move from one tab to the other, simply click the tab on the left-hand side. It will take you to that tab. For example, if you want to add a case note, click it.



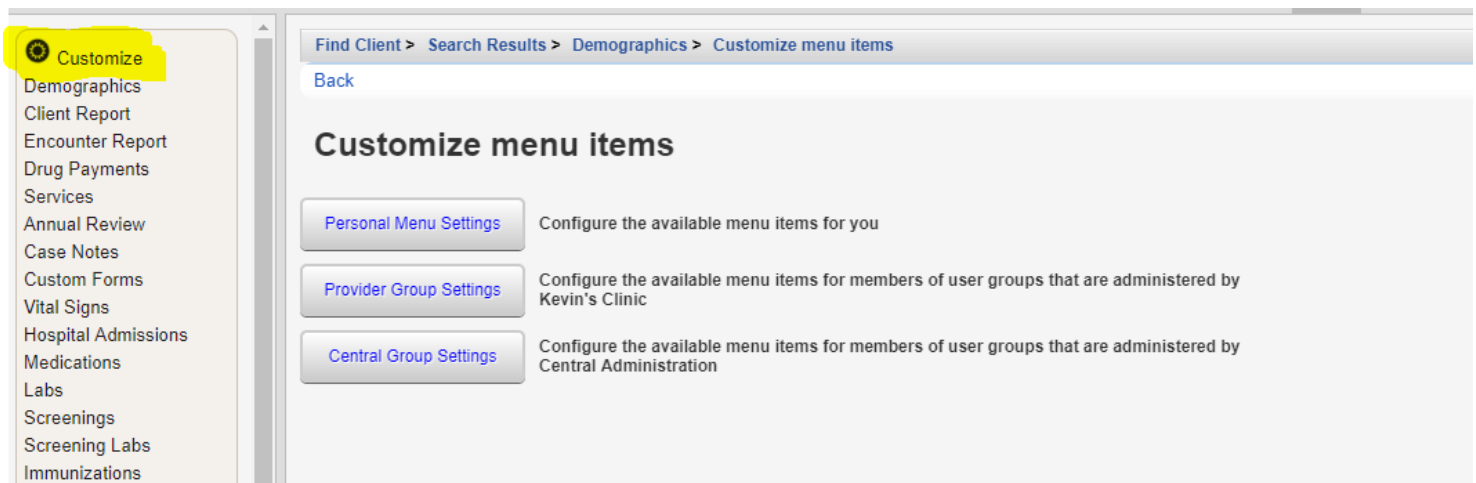
What You Need to Know About CAREWare 6 Continued....

3. If you are in the middle of adding any record, whether it is a service, lab, etc., you will not be able to access anything else. For example, if you are in the middle of adding a screening lab and want to add a service, you must either:
 1. Add the current record and save it
 2. Click the **Back** button



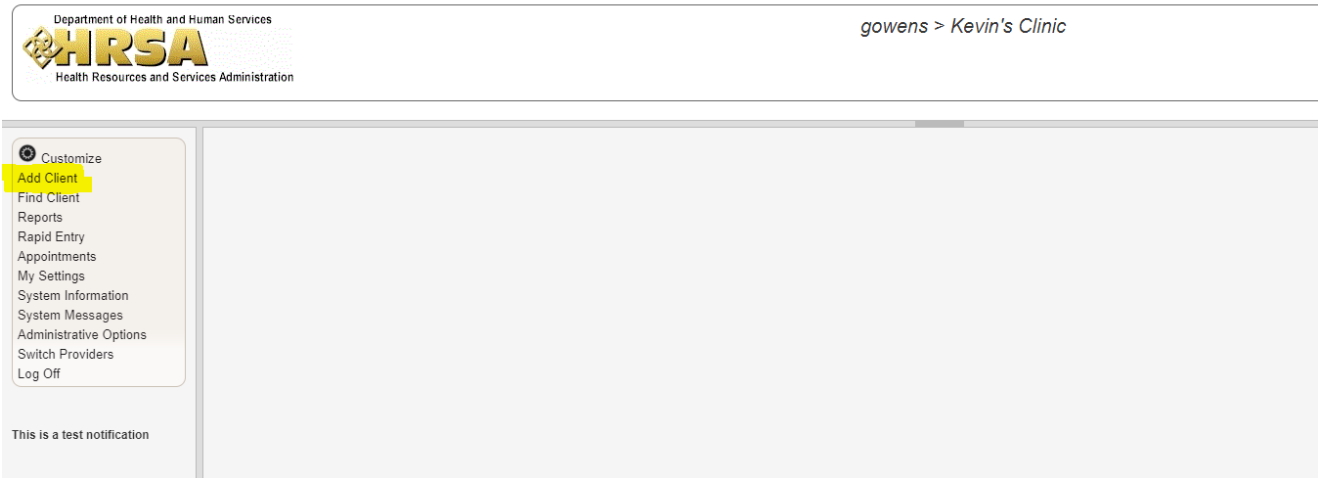
If you try to access the menu on the left-hand side without doing one of the two things listed above, nothing will happen.

4. The **Customize** link allows you to configure the available menu items you see on the left-hand side. **It is not recommended to customize the menu**; instead, leave all of the options available. That way, you don't have to worry about leaving out a menu item that you may need in the future.



How To Add a Client

1. Select **Add Client** . A new tab will open.



2. Enter the Last Name, First Name, Middle Name, Gender, and Date of Birth. All fields must be completed in order to add the client.

3. Click **Add**.

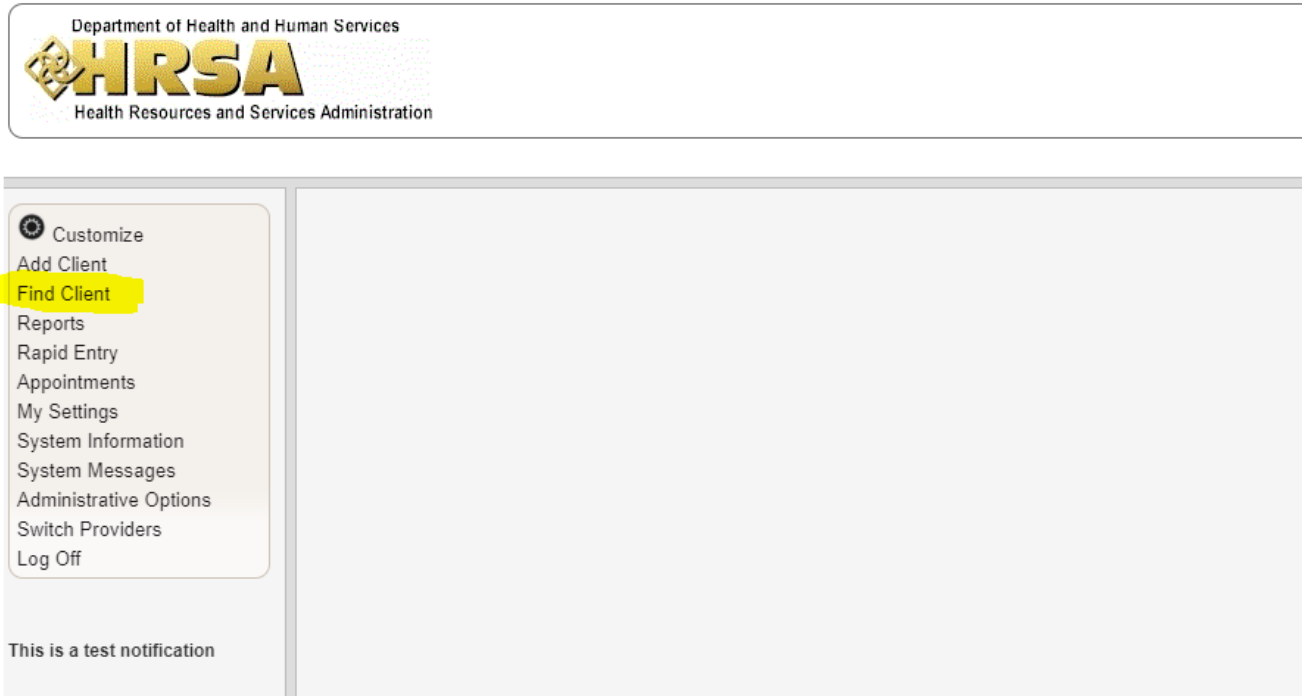
Note: Please enter the name, gender, and date of birth on the **license or other government issued document.**

Note: If the client already exists in CAREWare, you will be prompted with this message. If this happens, select the client and **view more information** to determine if this is the same client. If so, select "This is the same client." If this is not the same client, select "This is a new client."



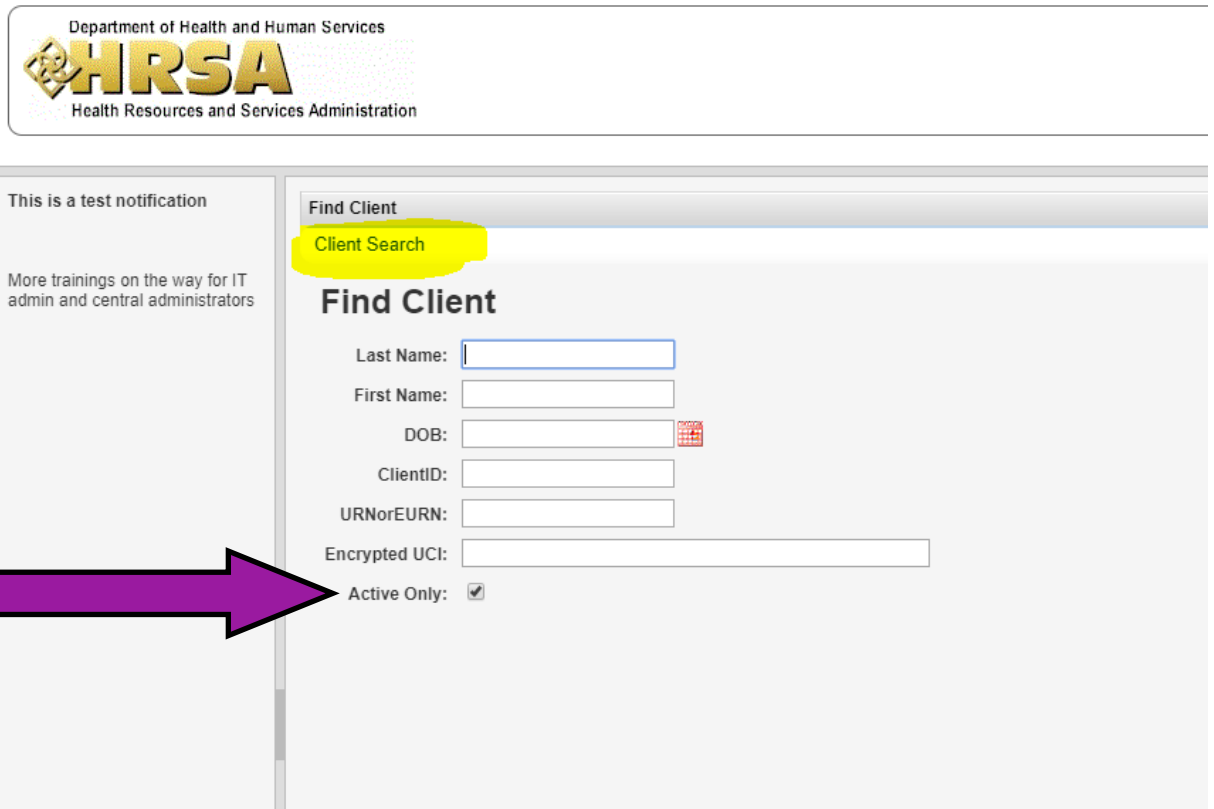
How To Find a Client

1. Select **Find Client**.



2. A new tab will open. Enter the Last Name and First Name, or Client ID/URN.

3. Select **Client Search**.



Note:

By selecting “active only,” you narrow down the results list to only populate active clients. If you want to view all of your clients, regardless of enrollment status, uncheck the box.

This is the Demographics Page—Main Page

The screenshot displays the 'Demographics' page for a client. On the left is a sidebar with a list of navigation options: Customize, Demographics, Client Report, Encounter Report, Drug Payments, Services, Annual Review, Case Notes, Custom Forms, Vital Signs, Hospital Admissions, Medications, Labs, Screenings, Screening Labs, Immunizations, Diagnoses, Sharing Requests, Referrals, Relations, Counseling and Testing, Pregnancy History, Orders, Hobbies, Custom Subform, Adherence, Appointments, Cap On Charges, User Messages, Search Change Details, Duplicate Client, Performance Measure Status, External Links, and Close. The main content area is titled 'Demographics' and includes a 'Delete Client' and 'Back' link. Below the title are several blue-lettered tabs: Personal Info, Change URN, Contact Information, Race/Ethnicity, HIV Risk Factors, Vital Enrollment Status, Eligibility, HIV Status, Common Notes, Provider Notes, Other Core Information, and CW6 Special Information. Each tab is followed by its corresponding data: Personal Info (Name: Doolittle, Kimberly; Gender: Female; DOB: 02/12/1971), Change URN (KMDO0212712U), Contact Information (2799 W. Grand Blvd, Detroit, MI 48202), Race/Ethnicity (White), HIV Risk Factors (Heterosexual), Vital Enrollment Status (Vital Status: Alive; Current Status: Active), Eligibility (Not Eligible for Ryan White), HIV Status (HIV-positive (AIDS status unknown); Estimated HIV Date: 02/12/2012), Common Notes (This is something everyone needs to know. For example: Preferred name, Address Change, Phone Number Change), Provider Notes (No description supplied), Other Core Information (View or Edit the client's Other Core Information information), and CW6 Special Information (View or Edit the client's CW6 Special Information information).

This page holds all of the basic client information. Here are a few things you need to know:

- Once you add a client, you **cannot** change the First Name, Last Name, Gender, or Date of Birth. If one of these fields need to be changed, you **must** contact the CAREWare data team.
- In order to add any records (such as Race/Ethnicity, HIV Risk Factor, or Contact Information) you must click the blue lettered tabs of the category you wish to edit (located in the middle of the page).
- All information on the demographic page is displayed next to the blue lettered tabs.
- Common notes are not permanent and can be viewed, edited, or deleted by anyone who has access to the client record. Therefore, common notes should only be used when it is something you want everyone to know about the client. If you want to enter something that will be permanently saved in CAREWare or is personal to the client, then enter it into **Case Notes**.
- Everything on the demographics page—with the exception of custom tabs, eligibility status, case notes, enrollment date and status—is shared with other providers that are also providing services to the client and can be changed by those providers.
- Custom tabs are now located on the demographics page.
- The left-hand side is how you will navigate all of the tabs of the client's record.

How to Add Information to the Demographics Page

1. From the main page, you can add, view, and edit various demographic information. To add or edit information, click the blue lettered tab of the category you wish to view or edit.

The screenshot shows the 'Demographics' page for a client named Kimberly Doolittle. The left sidebar contains a menu with various categories. The main content area has several tabs: 'Personal Info', 'Change URN', 'Contact Information' (highlighted in yellow), 'Race/Ethnicity', 'HIV Risk Factors', 'Vital Enrollment Status', 'Eligibility', 'HIV Status', 'Common Notes', 'Provider Notes', 'Other Core Information', and 'CW6 Special Information'. Each tab displays specific information related to that category.

Tab	Information
Personal Info	Name: Doolittle, Kimberly Gender: Female DOB: 02/12/1971
Change URN	KMDO0212712U
Contact Information	2799 W. Grand Blvd Detroit, MI 48202
Race/Ethnicity	White
HIV Risk Factors	Heterosexual
Vital Enrollment Status	Vital Status: Alive Current Status: Active
Eligibility	Not Eligible for Ryan White
HIV Status	HIV-positive (AIDS status unknown) Estimated HIV Date: 02/12/2012
Common Notes	Preferred name Address Change Phone Number Change
Provider Notes	No description supplied
Other Core Information	View or Edit the client's Other Core Information information
CW6 Special Information	View or Edit the client's CW6 Special Information information

2. The tab will open. Enter all relevant information.

3. **Save.**

Note: Some information has to be entered using a drop down menu. If a category has a drop down menu next to it, you must choose from the list provided.

The screenshot shows the 'Contact Information' form. The form fields include: Address (2799 W. Grand Blvd.), City (Detroit), State (Michigan), County (Wayne), Zip Code (48207), and Phone (3139165266). There are also fields for Mailing Address, Mailing City, Mailing State, Mailing Zip Code, and two alternate phone numbers. Red circles highlight the dropdown menus for State, Mailing State, and Phone Type (Alt. Phone 2).

After you save, you will be taken back to the main page. You can view and edit other categories by clicking the blue tab of the category you wish to view and follow the same instructions. Some categories will require you to enter data while others will require you to check the appropriate box.

How To Edit Enrollment Status

When you add a client to CAREWare, the enrollment status will automatically be **Active** and vital status will be **Alive**. However, that information could change. The client may be discharged from your agency or become inactive. You will need to add a record to reflect that. If enrollment or vital status changes, follow these instructions:

1. Open a client record. Enrollment Status is located on the demographics page.
2. Select **Vital Enrollment Status**.

The screenshot shows the 'Demographics' page for a client. The left sidebar contains a navigation menu with options like 'Customize', 'Demographics', 'Client Report', etc. The main content area is titled 'Demographics' and includes a 'Delete Client Back' link. Below this, there are several sections with buttons to expand or edit information: 'Personal Info' (Name: Doolittle, Kimberly Gender: Female DOB: 02/12/1971), 'Change URN' (KMD00212712U), 'Contact Information' (2799 W. Grand Blvd Detroit, MI 48202), 'Race/Ethnicity' (White), 'HIV Risk Factors' (Heterosexual), 'Vital Enrollment Status' (highlighted with a red box, showing 'Vital Status: Alive Current Status: Active'), 'Eligibility' (Not Eligible for Ryan White), 'HIV Status' (HIV-positive (AIDS status unknown) Estimated HIV Date: 02/12/2012), 'Common Notes' (Preferred name, Address Change, Phone Number Change), 'Provider Notes' (No description supplied), 'Other Core Information' (View or Edit the client's Other Core Information information), and 'CW6 Special Info-mation' (View or Edit the client's CW6 Special Info-mation information).

3. Enter the NEW **Enrollment** or **Vital Status**. Choose from the dropdown menu.
4. **Save**.

The screenshot shows the 'Vital Enrollment Status' form. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Find Client > Search Results > Demographics > Vital Enrollment Status'. At the top, there are 'Save' and 'Cancel' buttons. The form contains the following fields:

- Enrollment Status: Referred or Discharged (dropdown menu)
- Enrollment Date: 8/26/2008 (calendar icon)
- Latest Eligibility Status: Ryan White Eligible
- Vital Status: Alive (dropdown menu)
- Case Closed Date: 08/30/2019 (calendar icon)
- Date of Death: (calendar icon)

Note: When you change enrollment status from active, you will be prompted to enter a **Case Closed Date**. You will also be prompted to enter a **Date of Death** if you change vital status to deceased.

How To Add Eligibility Records

If a client has ever received a Ryan White funded service (Part A, B, C, D), they must be marked as **Ryan White Eligible**. This has to be done at the time of the first Ryan White funded service.

When you add a client to CAREWare, the default status will always be “Not Eligible for Ryan White.” Therefore, every time you add a new client, you must create a record that documents the eligibility status. To document eligibility, follow the instructions below:

1. Open the client record. Eligibility is located on the demographics page.
2. Select **Eligibility**.

Note: You can find out if a client has any eligibility records by looking at the information next to **Eligibility**. For more details, click **eligibility**. It will show you a history of all records.

The screenshot shows the 'Demographics' page for a client named Kimberly Doolittle. The 'Eligibility' section is highlighted with a red box, indicating the current status is 'Not Eligible for Ryan White'. Other sections include Personal Info, Change URN, Contact Information, Race/Ethnicity, HIV Risk Factors, and Vital Enrollment Status.

3. Select **Add**.

The screenshot shows the 'Eligibility History' page. The 'Add' button is highlighted with a yellow circle. The page includes a search bar and a table with columns: Date, Is Eligible, Funding Source, Ryan White Funded, Comment, Client Documents, Enrollment End Date, and Eligibility Document.

4. Enter the **Eligibility Date, Eligibility Status, & Funding Source**.
5. Select **Save**.

Find Client > Search Results > Demographics > Eligibility > Add

Save Cancel

Add

Eligibility Date: 4/1/2019

Is Eligible: Yes

Funding Source: Part A

Comment:

6. Once you save the record, the client will be marked as eligible.

Find Client > Search Results > Demographics > Eligibility

View Add Edit Delete Back Print or Export

Eligibility History

Search:

Date	Is Eligible	Funding Source	Ryan White Funde	Comment
04/01/2019	Yes	Part A	Yes	

Clients may receive Ryan White funding from multiple sources. An eligibility record must be created for each funding source in which the client is being served. Once you add a record, CAREWare will create a history that will allow you to track all funding sources over time.

Discharging a Client

1. When a client is **DISCHARGED** from your agency and you enter a case closed date, you will need to update the eligibility status records. You must enter a NEW record that marks the client as NOT eligible for the funding source.
2. Do not edit any previous eligibility records; just add a new record. If you adjust old records, it may appear that you provided services to someone who was not eligible. **YOU DO NOT WANT THIS.**
3. When you return to the demographics page, the client record will be updated.

How To Add Case Notes

1. Open the client record.
2. Select **Case Notes** from the menu of links on the left-hand side of the record.

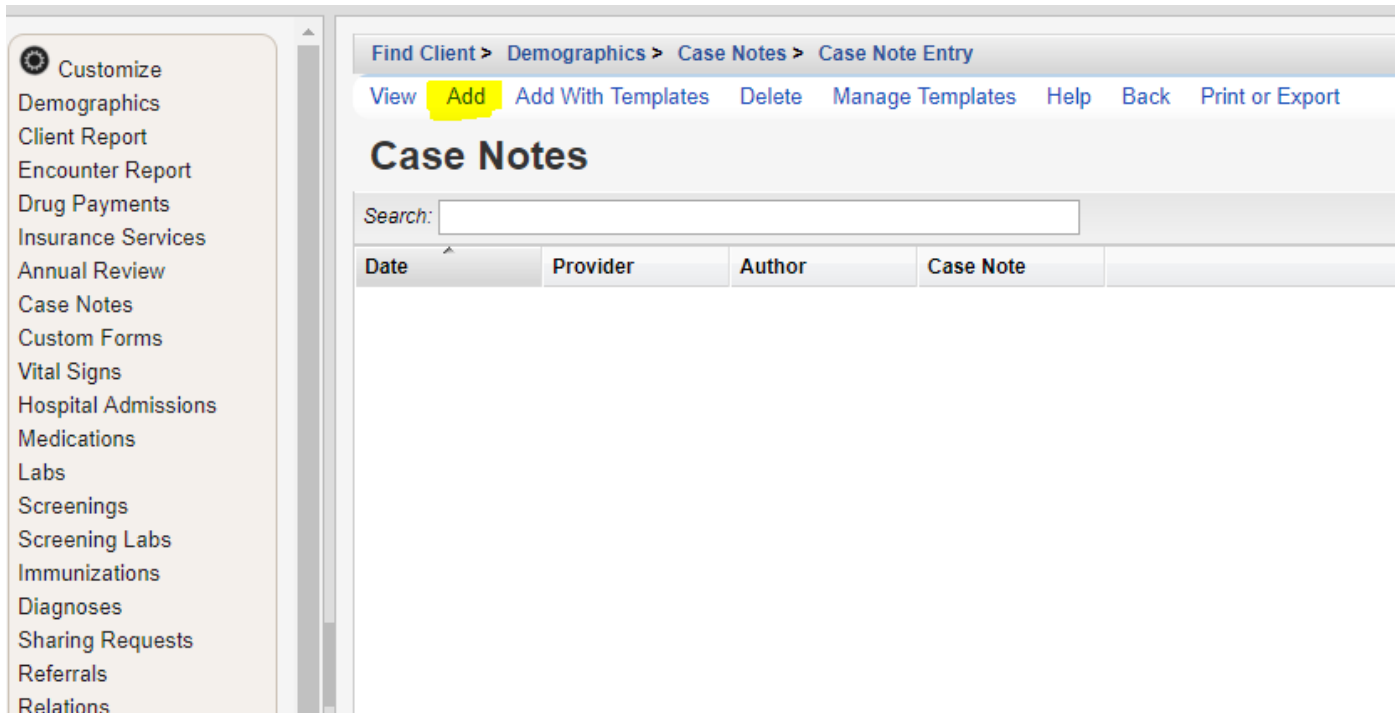
The screenshot shows the 'Demographics' page for a client. On the left is a vertical menu with various options, including 'Case Notes' which is highlighted in yellow. The main content area has a breadcrumb trail 'Find Client > Demographics' and a 'Back' link. Below this is the title 'Demographics' and a series of buttons for different sections: 'Personal Info', 'Change URN', 'Contact Information', 'Race/Ethnicity', 'HIV Risk Factors', 'Vital Enrollment Status', 'Eligibility', 'HIV Status', 'Common Notes', 'Provider Notes', 'Other Core Information', and 'CW6 Special Info-mation'. Each button is followed by its corresponding data for the client.

Section	Client Information
Personal Info	Name: Doolittle, Kimberly Gender: Female DOB: 02/12/1971
Change URN	KMDO0212712U
Contact Information	2799 W. Grand Blvd Detroit, MI 48202
Race/Ethnicity	White
HIV Risk Factors	Heterosexual
Vital Enrollment Status	Vital Status: Alive Current Status: Active
Eligibility	Not Eligible for Ryan White
HIV Status	HIV-positive (AIDS status unknown) Estimated HIV Date: 02/12/2012
Common Notes	This is something everyone needs to know. For example: Preferred name Address Change Phone Number Change
Provider Notes	No description supplied
Other Core Information	View or Edit the client's Other Core Information information
CW6 Special Info-mation	View or Edit the client's CW6 Special Info-mation information

3. Select **Case Note Entry**.

The screenshot shows the 'Case Notes' page. The breadcrumb trail is 'Find Client > Demographics > Case Notes' with a 'Back' link. The title is 'Case Notes'. There are two main buttons: 'Case Note Entry' (highlighted in yellow) and 'Case Note Report'. The 'Case Note Entry' button is accompanied by the text 'Enter a new case note for the client', and the 'Case Note Report' button is accompanied by 'Run a report on case notes entered for this client'. The left-hand menu is visible, with 'Case Notes' selected.

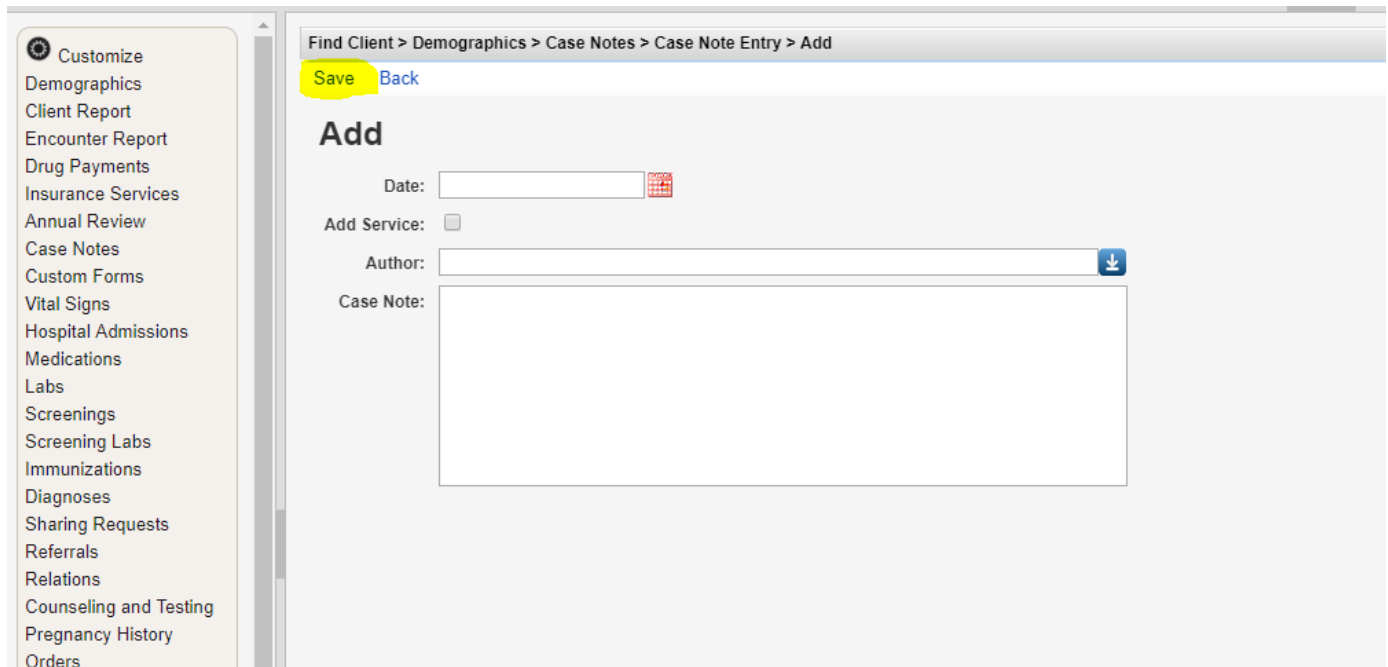
4. Select **Add**.



5. Enter the **Date** of service and **Author** name (if applicable).

6. Enter **Case Note**.

7. **Save**.



Note: If you select the **Add Service** box, you will be directed to the services tab where you can enter the service for the client. This is a short cut to adding a service.

How To Add a Service

1. Open a client record. Select the **Services** tab from the menu of links on the left-hand side of the client record.

The screenshot shows the 'Demographics' page for a client named Kimberly Doolittle. The left-hand navigation menu has 'Services' highlighted in yellow. The main content area has a breadcrumb trail 'Find Client > Demographics' and buttons for 'Delete Client' and 'Back'. Below the title 'Demographics', there are several sections with buttons: 'Personal Info' (Name: Doolittle, Kimberly Gender: Female DOB: 02/12/1971), 'Change URN' (KMD00212712U), 'Contact Information' (2799 W. Grand Blvd Detroit, MI 48202), 'Race/Ethnicity' (White), and 'HIV Risk Factors' (Heterosexual).

2. Select **Add**.

The screenshot shows the 'Services' page for the same client. The breadcrumb trail is 'Find Client > Search Results > Demographics > Services'. The 'Add' button in the top navigation is highlighted in yellow. Below the title 'Services', there is a search box and a table of services. The table has columns for Date, Subservice, Contract, Units, Price, Total, Amount Received, Provider, and Ser.

Date	Subservice	Contract	Units	Price	Total	Amount Received	Provider	Ser
12/05/2014	MCM Face-to-face	First Contract	1	\$0.01	\$0.01	\$0.00	Kevin's Clinic	
11/19/2014	Mental Health Scree	First Contract	1	\$0.01	\$0.01	\$0.00	Kevin's Clinic	
11/17/2014	Mental Health Scree	First Contract	1	\$0.01	\$0.01	\$0.00	Kevin's Clinic	
11/17/2014	Nurse Visit	First Contract	1	\$0.00	\$0.00	\$0.00	Kevin's Clinic	
11/17/2014	MCM Face-to-face	First Contract	1	\$1.00	\$1.00	\$0.00	Kevin's Clinic	
11/17/2014	Non MCM	First Contract	1	\$0.01	\$0.01	\$0.00	Kevin's Clinic	
11/17/2014	Dental Cleaning	First Contract	1	\$1.00	\$1.00	\$0.00	Kevin's Clinic	

3. Enter the **Date** the service was provided and select the **Service Name** from the subservice drop down list.

The screenshot shows the 'Add Service' page. The breadcrumb trail is 'Find Client > Demographics > Services > Add Service'. The 'Add' title is prominent. Below it, there are input fields for 'Client' (Kimberly Doolittle), 'Date' (8/20/2019), and 'Service Name' (Food Bank/Home-delivered Meals). A red box highlights the search icon in the Service Name dropdown menu.

Note: You cannot scroll through the drop down menu. Therefore, if you need to add a service that doesn't immediately appear when you click the drop down menu, enter the first couple of letters in the search box. From there, you can select the correct service.

How To Add a Service Continued....

- Once you enter the date and service, click **Next**. This will take you to the next phase of adding a service.

Find Client > Demographics > Services > Add Service

Next Back

Add

Client:

Date:

Service Name:

- Enter the correct **Contract** and **Units**.

- Save**.

Find Client > Demographics > Services > Add Service > Add Service

Save Back

Next

Client:

Date:

Service Name:

Contract:

Units:

Price: \$

Total: \$

- If you need to edit a service, select the service that needs editing and then click **View**. From there, you can edit the service by selecting **Edit**.

Find Client > Demographics > Services

View Add Delete Receipts Help Print or Export

Services

Search:

Date	Subservice	Contract	Units	Price	Total	Amount Received	Provider	Service Comment	Cognitive
08/20/2019	Food Bank/Home-delivered M	Part A	1	\$0.00	\$0.00	\$0.00	Kevin's Clinic		
06/03/2019	Medical Case Management	Part A	2	\$0.00	\$0.00	\$0.00	Kevin's Clinic		

Find Client > Demographics > Services > View

Edit Receipts Back

View

Provider:

Date:

Service Name:

Contract:

Units:

Price: \$

Total: \$

- Save**.

How to Navigate the Annual Review Tab

Annually, CAREWare users are required to review and update a series of fields. These include the following:

- **Insurance**
- **Federal Poverty Level**
- **Housing Arrangement**
- HIV Risk Reduction Counseling
- Mental Health and Substance Abuse Screenings
- HIV Primary Care Visits

The three bolded fields are RSR-required and must be completed for any client who received a Ryan White funded service during the reporting year.

Entering Annual Review Data

1. Open a client record. Select the **Annual Review** tab from the menu of links on the left-hand side of the client record.
2. Select the field in which you would like to add a record.

The screenshot shows the 'Annual Data' section of the software interface. On the left is a navigation menu with 'Annual Review' highlighted in yellow. The main content area has a breadcrumb trail: 'Find Client > Search Results > Demographics > Annual Data'. Below this is a 'Back' link and the title 'Annual Data'. A red box highlights four buttons: 'Annual Screenings', 'Insurance Assessments', 'Poverty Level Assessments', and 'Annual Custom'. Each button has a corresponding description to its right: 'View or Edit the client's Annual Screenings', 'View or Edit the client's Insurance Assessments', 'View or Edit the client's Poverty Level Assessments', and 'View or Edit the client's Custom Annual data'.

3. Select **Add**.

The screenshot shows the 'Annual Screenings' table in the software interface. The breadcrumb trail is 'Find Client > Search Results > Demographics > Annual Data > Annual Screenings'. Above the table is a search bar and a row of action links: 'View', 'Add' (highlighted in yellow), 'Edit', 'Delete', 'Back', 'Help', and 'Print or Export'. The table has the following data:

Date	Type	Result	Counseled By
12/31/2011	Mental Health	Yes	
12/31/2011	Substance Abuse	Yes	
12/31/2011	HIV Risk Reduction Counseling	Yes	
12/31/2011	Housing Arrangement	Stable/Permanent	
12/31/2011	HIV Primary Care	Hospital outpatient	
12/31/2010	HIV Primary Care	Hospital outpatient	

How To Enter Annual Review Data Continued....

4. Enter the **Date**, and select **Type**, **Result**, and **Counseled By** (if applicable).
5. **Save**.

The screenshot shows the 'Add' form for Annual Screenings. The breadcrumb trail is 'Find Client > Search Results > Demographics > Annual Data > Annual Screenings > Add'. The 'Save' button is highlighted in yellow. The form fields are: Date: 8/1/2019, Type: HIV Risk Reduction Counseling, Result: Yes, and Counseled By: Primary care clinician.

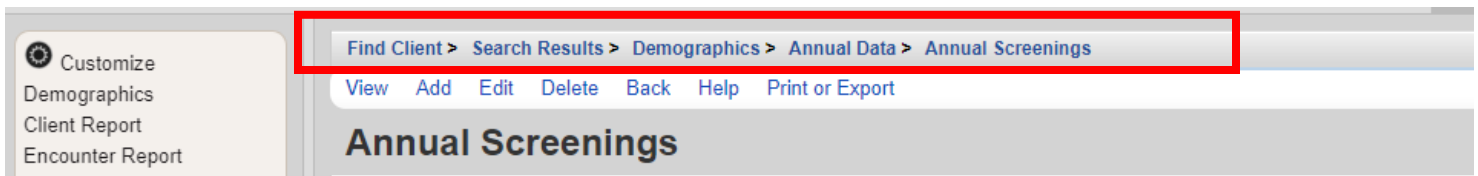
6. If you need to edit an annual review record, select the record in which you would like to edit and then select **Edit**.

The screenshot shows the 'Annual Screenings' list. The breadcrumb trail is 'Find Client > Search Results > Demographics > Annual Data > Annual Screenings'. The 'Edit' button is highlighted in yellow. The table below shows the list of records.

Date	Type	Result	Counseled By
08/01/2019	HIV Risk Reduction Counseling	Yes	Primary care clinician
12/31/2011	HIV Risk Reduction Counseling	Yes	
12/31/2011	Mental Health	Yes	
12/31/2011	Substance Abuse	Yes	
12/31/2011	Housing Arrangement	Stable/Permanent	
12/31/2011	HIV Primary Care	Hospital outpatient	

That will take you back to the field and will allow you to make all the necessary changes. After making the changes, select **Save**.

Note: CAREWare 6 works by navigating tabs, and there are tabs within tabs. If you need to navigate while in a tab, you will need to use the sub-tabs. Below is what a sub-tab looks like. Click the back or next button in order to move through the different phases.



How To Add a Medication

1. Open a client record. Select the **Medications** from the menu of links on the left-hand side of the client record.
2. You can view the client's current medications, past medications, allergies, and add new medications. To add or edit a medication, select **All (Start, Stop, Change)**.

The screenshot shows the 'Client Medications' page. The breadcrumb trail is 'Find Client > Search Results > Demographics > Client Medications'. A 'Back' button is visible. The main heading is 'Client Medications'. Below it, there are four buttons: 'Allergies and ART' (with text 'ART First Prescribed: 10/26/2009 No medication allergies recorded'), 'All (Start, Stop, Change)' (highlighted with a red box and text '2 medication records entered'), 'Current Medications' (with text 'Sustiva (efavirenz) (10/26/2009), Eпивir (lamivudine) (10/26/2009)'), and 'Past Medications' (with text 'No description supplied'). The left sidebar menu has 'Medications' highlighted in yellow.

3. Select **Start**.

The screenshot shows the 'All Medications' page. The breadcrumb trail is 'Find Client > Search Results > Demographics > Client Medications > All (Start, Stop, Change)'. A 'View' button is followed by a 'Start' button (highlighted in yellow), 'Start Regimen', 'Stop', 'Delete', 'Back', and 'Print or Export'. Below the buttons is a search bar and a table of medications.

Medication Name	Abbreviation	Form	Units	Strength (mg)	Dose	Frequency	Total Dose
Sustiva (efavirenz)	EFV		1	1	1	Once a day (qd)	1
Eпивir (lamivudine)	3TC		1	1	1	Once a day (qd)	1

4. From the drop down menu, select the **Start Date, Medication Name, Units, Form, Strength, Frequency, Indication** and comments (if necessary).
5. **Save**.

The screenshot shows the 'Start' medication form. The breadcrumb trail is 'Find Client > Search Results > Demographics > Client Medications > All (Start, Stop, Change) > Start'. A 'Save' button (highlighted in yellow) and a 'Back' button are at the top. The form fields are: 'Start Date: 7/1/2019', 'Medication Name: Vitekta (elvitegravir)', 'Units: [empty]', 'Form: Chewable Tablets', 'Strength: 20 mg', 'Frequency: Every 12 hours (q12h)', 'Indication: ART', 'OI: [empty]', 'Comment: Use this if necessary', and 'Instructions: [empty]'. The left sidebar menu has 'Medications' highlighted in yellow.

How To Edit a Medication

1. If you need to edit a medication, select the medication you would like to change and click **View**.

The screenshot shows a web application interface with a sidebar on the left containing menu items like 'Customize', 'Demographics', 'Client Report', etc. The main content area has a breadcrumb trail: 'Find Client > Search Results > Demographics > Client Medications > All Medications'. Below the breadcrumb are buttons: 'View' (highlighted in yellow), 'Start', 'Start Regimen', 'Stop', 'Delete', 'Back', and 'Print or Export'. The title 'All Medications' is displayed above a search bar and a table. The table has columns: Medication Name, Abbreviation, Form, Units, Strength (mg), Dose, Frequency, Total Dose, and Indication. Three rows are visible, with the last row highlighted in blue.

Medication Name	Abbreviation	Form	Units	Strength (mg)	Dose	Frequency	Total Dose	Indication
Sustiva (efavirenz)	EFV		1	1	1	Once a day (qd)	1	ART
Eпивir (lamivudine)	3TC		1	1	1	Once a day (qd)	1	ART
Vitekta (elvitegravir)	ELV	Chewable Tablets	1	20	20	Every 12 hours (q12h)	40	ART

2. From there, you can either correct a data error or change the dose.
3. Either select **Correct Data Error** or **Change Dose**.

This screenshot shows the 'View' page for a medication. The breadcrumb trail is 'Find Client > Search Results > Demographics > Client Medications > All Medications > View'. Buttons for 'Correct Data Error' (highlighted in yellow), 'Change Dose', and 'Back' are visible. The form fields include: Start Date: 7/1/2019; Medication Name: Vitekta (elvitegravir); Units: 1; Form: Chewable Tablets; Strength: 20 mg.

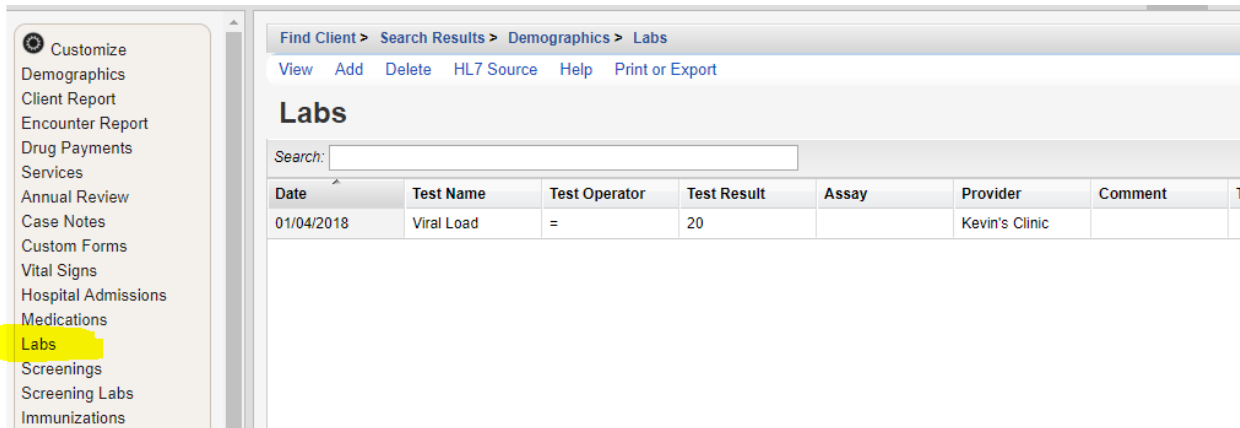
This screenshot is identical to the previous one, but the 'Change Dose' button is highlighted in yellow.

4. Once you make all of the necessary changes, **Save** the record.

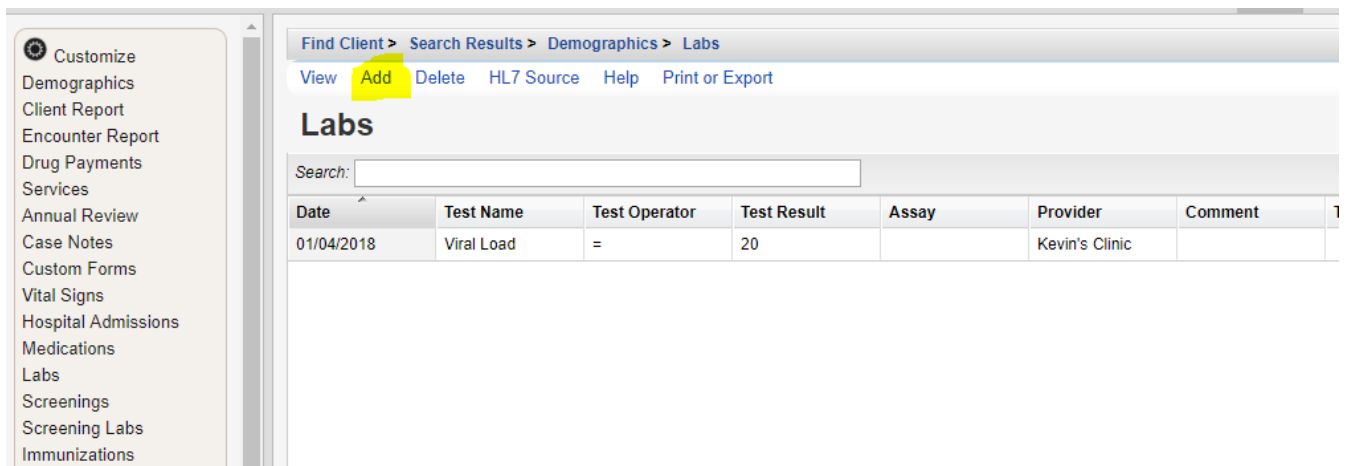
This screenshot shows the 'Change Dose' form. The breadcrumb trail is 'Find Client > Search Results > Demographics > Client Medications > All Medications > View > Change Dose'. Buttons for 'Save' (highlighted in yellow) and 'Cancel' are visible. The form fields include: Change Date: 8/1/2019; Medication: elvitegravir; Current Units: 1; Current Strength: 20 mg; Current Frequency: Every 12 hours (q12h). A red box highlights the 'New Units' field (empty), 'New Strength' field (50 mg), and 'New Frequency' field (Every 6 hours (q6h)).

How To Add a Lab/Screening Lab/Screening

1. Open a client record. Select **Labs** or **Screening Labs** or **Screenings** from the menu of links on the left-hand side of the client record. Each is a different tab, but the information is entered the same way.

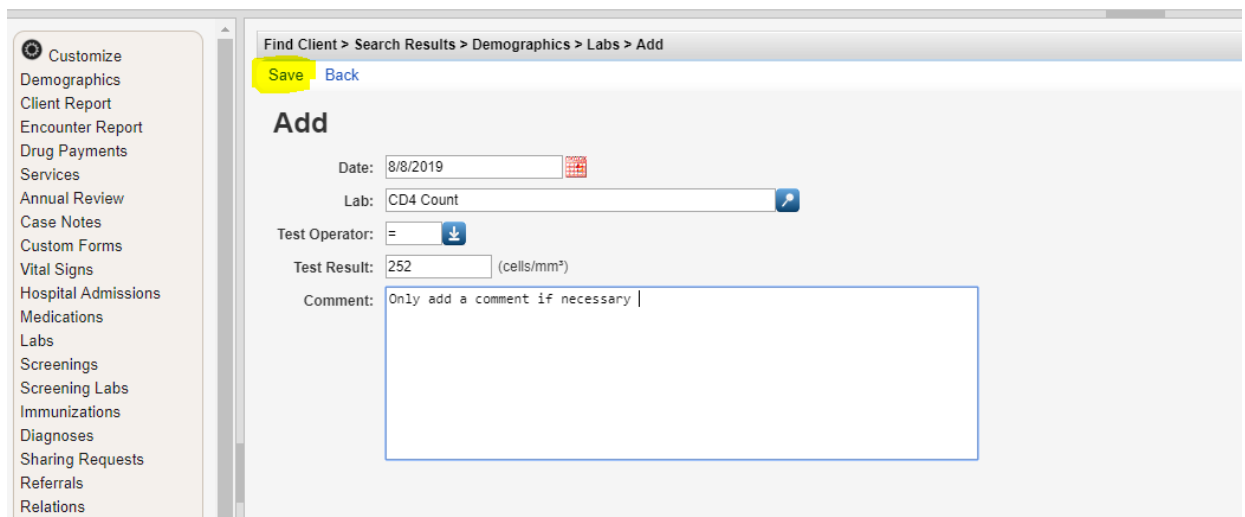


2. Click **Add**.



3. Under the drop down menu, select the appropriate **lab**, **test operator**, and the **result**.

4. **Save**.



Note: You cannot scroll through the drop down menu. In order to access the necessary lab, type in the first couple of letters of the lab in the search box.

How To Navigate a Custom Tab/Field

Some agencies utilize custom tabs. In CAREWare 6, custom tabs are the last three links at the bottom of the demographics page. However, the names of the tabs have not changed. Therefore, the name in CAREWare 6 will be the same name that was in CAREWare 5.

If your tab was never given a name, then the default name will be Custom Tab 1, Custom Tab 2, or Custom Tab 3.

The screenshot shows the 'Demographics' page for a client named Kimberly Doolittle. The page is divided into several sections, each with a tab button and associated information:

- Personal Info:** Name: Doolittle, Kimberly Gender: Female DOB: 02/12/1971
- Change URN:** KMDO0212712U
- Contact Information:** 2799 W. Grand Blvd Detroit, MI 48202
- Race/Ethnicity:** White
- HIV Risk Factors:** Heterosexual
- Vital Enrollment Status:** Vital Status: Alive Current Status: Active
- Eligibility:** Not Eligible for Ryan White
- HIV Status:** HIV-positive (AIDS status unknown) Estimated HIV Date: 02/12/2012
- Common Notes:** Preferred name, Address Change, Phone Number Change
- Provider Notes:** No description supplied
- Other Core Information:** View or Edit the client's Other Core Information information
- CW6 Special Info-mation:** View or Edit the client's CW6 Special Info-mation information
- Linkage:** View or Edit the client's Linkage information

Every custom tab will look different, but the way you enter a record will be the same. Just remember the following:

1. If a custom tab has a drop down menu, you must select a field from that menu.
2. You cannot scroll through the drop down list. Therefore, type in the first couple of letters of the field name and it will appear.
3. If a custom tab requires a check mark, all you have to do is check the appropriate box.
4. If you want to close out of a custom tab before completion, simply click **Cancel**. That will take you back to the demographics page of that client's record.

How To Enter a Custom Tab/Field Record

1. Click the custom tab that you need to access.

Find Client > Demographics
Delete Client Back

Demographics

Personal Info Name: Doolittle, Kimberly Gender: Female DOB: 02/12/1971

Change URN KMDO0212712U

Contact Information 2799 W. Grand Blvd
Detroit, MI 48202

Race/Ethnicity White

HIV Risk Factors Heterosexual

Vital Enrollment Status Vital Status: Alive Current Status: Active

Eligibility Not Eligible for Ryan White

HIV Status HIV-positive (AIDS status unknown) Estimated HIV Date: 02/12/2012

Common Notes This is something everyone needs to know. For example:
Preferred name
Address Change
Phone Number Change

Provider Notes No description supplied

Other Core Information View or Edit the client's Other Core Information information

CW6 Special Information View or Edit the client's CW6 Special Information information

Linkage View or Edit the client's Linkage information

2. Click **Edit**.

Find Client > Demographics > Other Core Information
Edit Back

Other Core Information

Client Documents: [0 Attachments](#) (Access in view mode only)

Preferred Name:

Eligibility Documents: [0 Attachments](#) (Access in view mode only)

testmemo:

hyperlink: <https://www.google.com/>

MD EVS Site: <https://encrypt.emdhealthchoice.org/medicaid/>

Agency Case Manager:

3. Add all of the necessary information.

4. **Save**.

Find Client > Demographics > Other Core Information
Save Cancel

Other Core Information

Client Documents: [0 Attachments](#) (Access in view mode only)

Preferred Name: Preferred name is klm

Eligibility Documents: [0 Attachments](#) (Access in view mode only)

testmemo:

hyperlink: <https://www.google.com/>

MD EVS Site: <https://encrypt.emdhealthchoice.org/medicaid/>

Agency Case Manager: Genna Owens

Adding Attachments

Space has been created in CAREWare within the Annual Review tab to store PDF attachments with the primary purpose of reducing the burden of documenting Ryan White eligibility. There are five categories/folders:

Income Documentation

Insurance Documentation

Residency Documentation

Status Documentation

Miscellaneous Documentation (ex. license, lab report, etc.)

Think of attachments like any other information in the annual review tab. Other providers that serve the same client will have access to this information. Additionally, anyone serving that client can delete the attachments regardless of who added them into CAREWare. Therefore, please do not delete any attachments that are not your own.

Attachments Parameters

File Type: PDF files are the only file type supported in these folders.

Number of Attachments: Each Provider may upload two attachments per category for each year.

This means that you may upload two income documentation attachments and two insurance documentation attachments every year; however, if you want to upload a third in any category, then you must delete one of your previous two. Keep in mind that some clients are served by multiple providers, so there may be more than two in each category as each provider may upload two.

Page Limit for Attachments: Each PDF should be no more than three pages.

File Naming: In order to keep things consistent across providers, include your agency name and the document name in your title. The date of the upload is automatically provided in the description, so it isn't necessary in the file name. Here are a few examples:

Income_WSU Adult

March 2019 Income_WSU Adult

HIV Status_Matrix

Using Attachments for Eligibility: Providers may use documentation from other providers to prove eligibility. However, an attachment could accidentally be deleted, so we strongly recommend that you save a copy elsewhere. For example, let's say WSU Adult is serving a client and is getting ready for reassessment. They can see that HELP has already assessed and uploaded proof of residency and income. Because an updated income document has already been uploaded, WSU can utilize that information for their reassessment as well. We would advise that WSU Adult download those documents and save in their client record.

Deleting Attachments: Only delete attachments that were uploaded by your agency. If you have a question about one of the attachments, please contact either the Detroit Health Department for Part A, Genna Owens (owensg@detroitmi.gov), for Parts B, C and D, MDHHS - Division of HIV/STD Programs (MDHHS-DHSP-TAandData-Requests@michigan.gov), or the provider that uploaded the attachment. Once a document is deleted, it cannot be recovered.

Uploading Attachments (Basic Overview)

1. Login to CAREWare.
2. Select **Find Client** and search for the correct one.
3. Once the client file is open, select **Annual Review** from the menu of links on the left-hand side.
4. Select **Annual Custom**.
5. From there, you have a few options. More than likely, the page will be blank, which means you will need to add the year in order to add an attachment. If the year is already there, then you can select **View**. However, if there is no year, select **Add**.
6. Select the **current** year. Then select **Save**.
7. Double-click the year again. Everything will be grayed out. (It is supposed to look like that, so don't be alarmed). **Do not** select edit. Instead, select the category that you want to add an attachment (ex. HIV Status Documentation).
8. Select **Add**.
9. Select **Choose Files** and choose the correct file. Again, make sure it is a PDF.
10. After selecting the file, make sure it says **Upload Completed Successfully**. Then select **Next**.
11. Under content type, select **PDF** from the drop down menu. You can also add a comment.
12. Select **Save**.
13. You will be taken back to the main page of that attachment category. You can add another document under that category if needed. If you don't need to add any additional documents, then select **Back**.
14. Follow steps 7—13 to add a document under other categories.

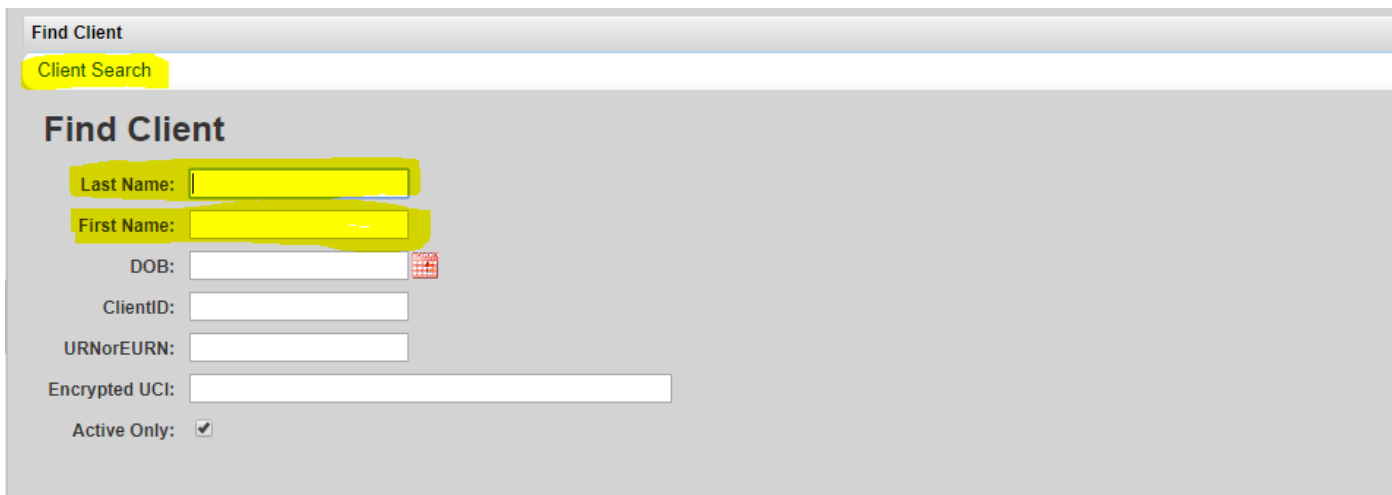
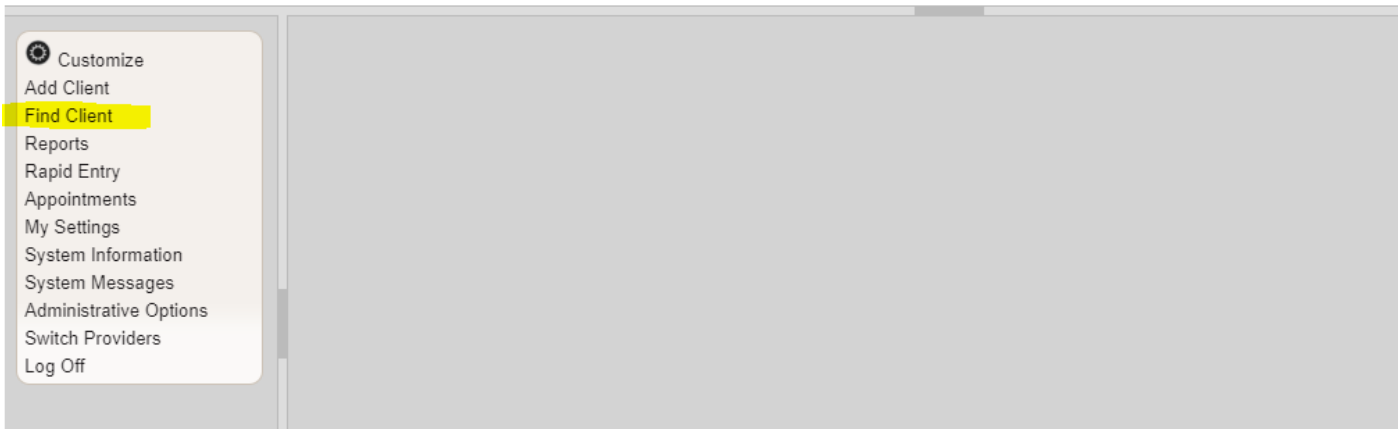
Note: If you need to delete an attachment, click the attachment (one time) and select **Delete** at the top of the page. It will ask you to confirm. Select **Confirm**. Once you do that, the attachment will be deleted.

Viewing Other Agency Attachments (Basic Overview)

1. Login to CAREWare.
2. Select **Find Client** and search for the correct one.
3. Once the client file is open, select **Annual Review** from the menu of links on the left-hand side.
4. Select **Annual Custom**.
5. From there, you have a few options. More than likely, the page will be blank, which means you will need to add the year in order to add or view any attachments. If the year is already there, then you can select **View**. However, if there is no year, select **Add**.
6. Select the **current** year. Then select **Save**.
7. Notice that it still says zero attachments. In order to see if another agency has already added an attachment, either double-click the year or click once and select **View**.
8. If an attachment has been added, there will be a number next to the category. For example, if it says **1 Attachments** next to income documentation, that means that one attachment has been uploaded.
9. To view the attachment in that category, click it. The attachment page will open and show all of the attachments under that category.
10. Double-click the attachment to view it in detail. Then click the name of the file. It will open in a separate tab.
11. Print or download the document for your records.
12. Exit the tab when you are done viewing the document. That will take you back to CAREWare.
13. Select **Back** to return to the main page.

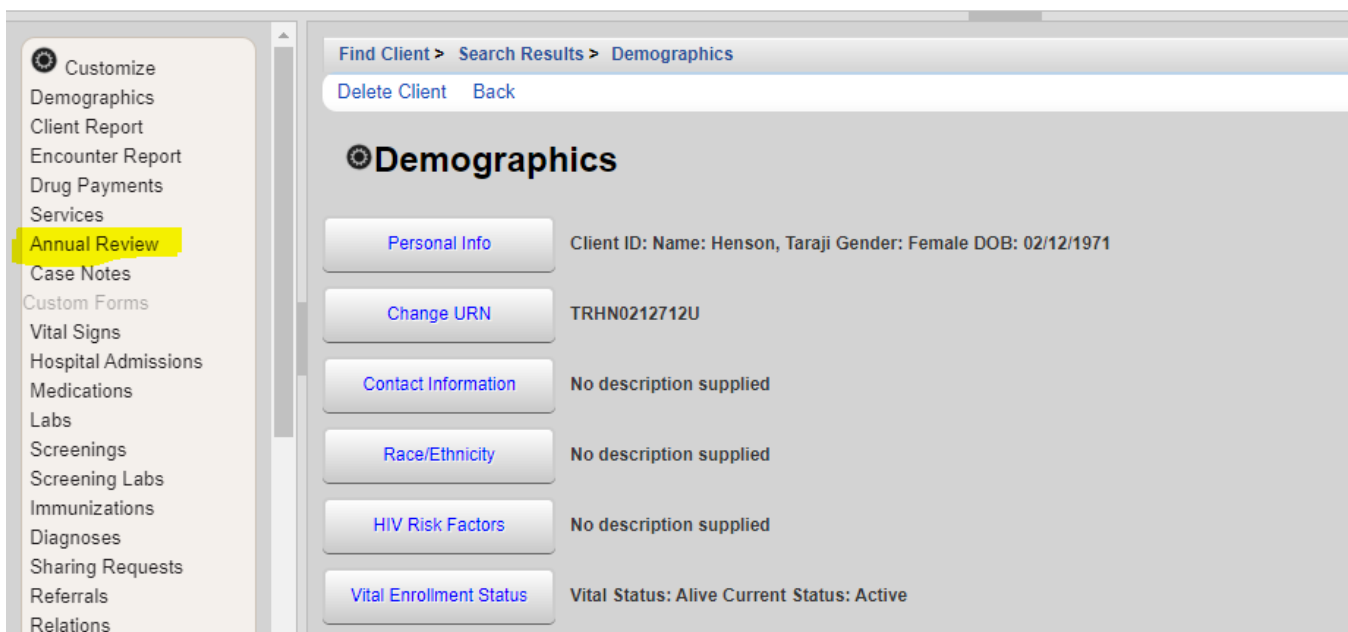
Uploading Attachments (Detailed Overview)

1. Select **Find Client**.



A screenshot of the 'Find Client' search form. The form is titled 'Find Client' and has a 'Client Search' button. Below the title are several input fields: 'Last Name:', 'First Name:', 'DOB:' (with a calendar icon), 'ClientID:', 'URNorEURN:', and 'Encrypted UCI:'. There is also a checkbox labeled 'Active Only:' which is checked.

2. Once the client file is open, select **Annual Review** from the menu of links on the left-hand side.



A screenshot of the 'Demographics' page for a client. The page is titled 'Demographics' and has a breadcrumb trail: 'Find Client > Search Results > Demographics'. There are two buttons at the top: 'Delete Client' and 'Back'. The page contains several sections, each with a button and associated information:

- Personal Info**: Client ID: Name: Henson, Taraji Gender: Female DOB: 02/12/1971
- Change URN**: TRHN0212712U
- Contact Information**: No description supplied
- Race/Ethnicity**: No description supplied
- HIV Risk Factors**: No description supplied
- Vital Enrollment Status**: Vital Status: Alive Current Status: Active

The left-hand side of the page shows a menu of links, with 'Annual Review' highlighted in yellow.

3. Select **Annual Custom**.

[Find Client](#) > [Search Results](#) > [Demographics](#) > [Annual Data](#)

[Back](#)

Annual Data

[Annual Screenings](#) View or Edit the client's Annual Screenings

[Insurance Assessments](#) View or Edit the client's Insurance Assessments

[Poverty Level Assessments](#) View or Edit the client's Poverty Level Assessments

Annual Custom View or Edit the client's Custom Annual data

[Quarter 1](#) View or Edit the client's Custom Quarter 1 data

[Quarter 2](#) View or Edit the client's Custom Quarter 2 data

4. If the page is blank, select **Add**.

[Client Resolution](#) > [View More Information](#) > [Personal Info](#) > [Demographics](#) > [Annual Data](#) > [Annual Custom](#)

[View](#) **Add** [Edit](#) [Back](#) [Help](#) [Print or Export](#)

Annual Custom

Search:

Ye	HIV	Inco	Insu	Misc	Resi
----	-----	------	------	------	------

4B. If there is a year available, either double-click the year or click once and select **View**.

[Client Resolution](#) > [View More Information](#) > [Personal Info](#) > [Demographics](#) > [Annual Data](#) > [Annual Custom](#)

[View](#) [Add](#) [Edit](#) [Back](#) [Help](#) [Print or Export](#)

Annual Custom

Search:

Year	HIV	Inco	Insu	Misc	Resi
2020	0 Att	0 Att	0 Att	0 Att	0 Att

5. Select the **current** year. Then select **Save**.

Find Client > Search Results > Demographics > Annual Data > Annual Custom > Add

Save Cancel

Add

Year:

HIV Status Documentation: [0 Attachments](#) (Access in view mode only)

Income Documentation: [0 Attachments](#) (Access in view mode only)

Insurance Documentation: [0 Attachments](#) (Access in view mode only)

Miscellaneous Documentation: [0 Attachments](#) (Access in view mode only)

Residency Documentation: [0 Attachments](#) (Access in view mode only)

6. Double-click the year again. Everything will be grayed out. (It is supposed to look like that, so don't worry.) **Do not** select edit. Instead, select the category that you want to add an attachment.

Find Client > Search Results > Demographics > Annual Data > Annual Custom > Add > View

Edit Back

View

Year:

HIV Status Documentation: [0 Attachments](#) (Access in view mode only)

Income Documentation: [0 Attachments](#) (Access in view mode only)

Insurance Documentation: [0 Attachments](#) (Access in view mode only)

Miscellaneous Documentation: [0 Attachments](#) (Access in view mode only)

Residency Documentation: [0 Attachments](#) (Access in view mode only)

7. Select **Add**.

Find Client > Search Results > Demographics > Annual Data > Annual Custom > Add > View > 0 Attachments

View **Add** Edit Delete Link Back Print or Export

Attachments

Search:

Content Type	Attach Date	Attach User	Mod Date	Mod User	File Type	File Name
--------------	-------------	-------------	----------	----------	-----------	-----------

8. Select **Choose Files** and choose the correct file. Again, make sure it is a PDF.

Find Client > Search Results > Demographics > Annual Data > Annual Custom > Add > View > 0 Attachments > Add

[Next](#) [Back](#)

Add

File Name(s): No file chosen

9. After selecting the file, make sure it says **Upload Completed Successfully**. Then select **Next**.

Find Client > Search Results > Demographics > Annual Data > Annual Custom > Add > View > 0 Attachments > Add

[Next](#) [Back](#)

Add

File Name(s): Income_HFHS.pdf Upload Completed Successfully. (307.09 KB of 307.09 KB)


10. Under content type, select **PDF** from the drop down menu. You can also add a comment. When complete, **Save**.

Find Client > Search Results > Demographics > Annual Data > Annual Custom > Add > View > 0 Attachments > Add > Next

[Save](#) [Back](#)

Next

Income_HFHS.pdf

Content Type: PDF 

Comment:

This is what a fully submitted attachment looks like. If you need to add another under the same category, follow steps 4 -10.

Find Client > Search Results > Demographics > Annual Data > Annual Custom > Add > View > 0 Attachments

[View](#) [Add](#) [Edit](#) [Delete](#) [Link](#) [Back](#) [Print or Export](#)

Attachments

Search:

Content Type	Attach Date	Attach User	Mod Date	Mod User	File Type	File Name
PDF	4/23/2020	Owensg4561	4/23/2020	Owensg4561	.pdf	Income_HFHS

If you don't need to add any additional documents, then select **Back**.

11. If you need to delete an attachment, click the attachment and then select **Delete**.

Find Client > Search Results > Demographics > Annual Data > Annual Custom > Add > View > 0 Attachments

View Add Edit **Delete** Link Back Print or Export

Attachments

Search:

Content Type	Attach Date	Attach User	Mod Date	Mod User	File Type	File Name
PDF	4/23/2020	Owensg4561	4/23/2020	Owensg4561	.pdf	Income_HFHS

12. You will be asked to confirm. Select **Confirm**.

Delete Confirm ✕

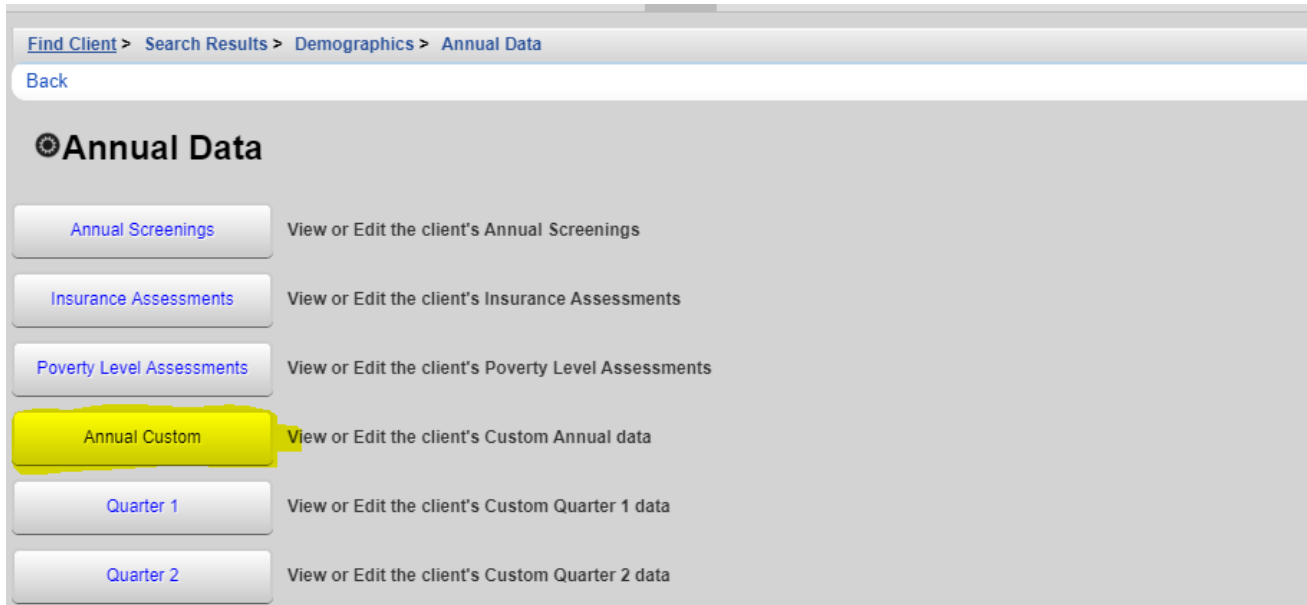
Please confirm before deleting the selected record

Confirm Cancel

13. Once you confirm, the attachment will be deleted.

Viewing Other Agency Attachments

1. Select **Annual Custom**.



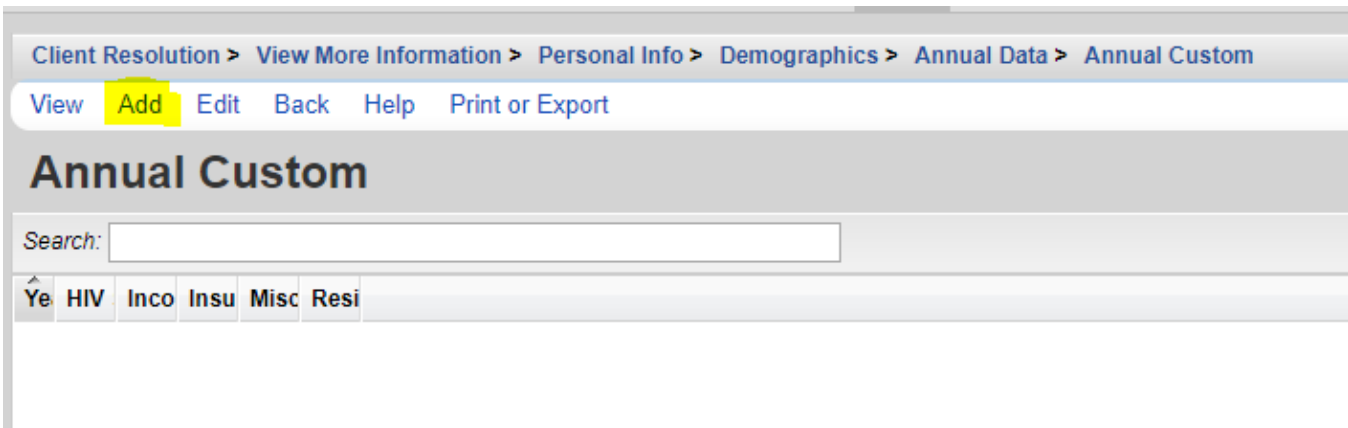
Find Client > Search Results > Demographics > Annual Data

Back

Annual Data

- Annual Screenings View or Edit the client's Annual Screenings
- Insurance Assessments View or Edit the client's Insurance Assessments
- Poverty Level Assessments View or Edit the client's Poverty Level Assessments
- Annual Custom** View or Edit the client's Custom Annual data
- Quarter 1 View or Edit the client's Custom Quarter 1 data
- Quarter 2 View or Edit the client's Custom Quarter 2 data

2. You will need to add the current year in order to see any attachments that have been uploaded.
Select **Add**.



Client Resolution > View More Information > Personal Info > Demographics > Annual Data > Annual Custom

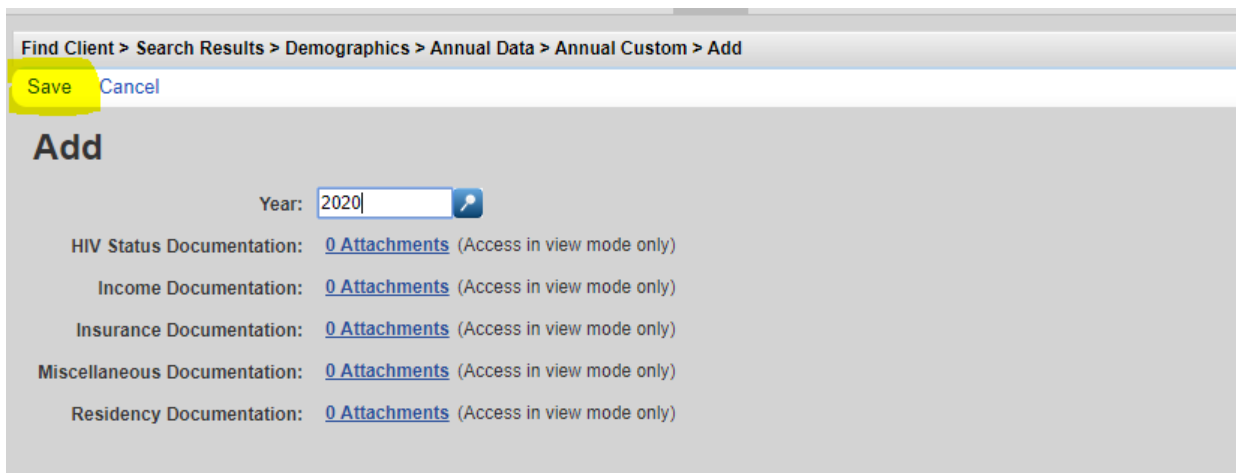
View **Add** Edit Back Help Print or Export

Annual Custom

Search:

Ye	HIV	Inco	Insu	Misc	Resi
----	-----	------	------	------	------

3. Select the current year. **Save**.



Find Client > Search Results > Demographics > Annual Data > Annual Custom > Add

Save Cancel

Add

Year:

HIV Status Documentation: [0 Attachments](#) (Access in view mode only)

Income Documentation: [0 Attachments](#) (Access in view mode only)

Insurance Documentation: [0 Attachments](#) (Access in view mode only)

Miscellaneous Documentation: [0 Attachments](#) (Access in view mode only)

Residency Documentation: [0 Attachments](#) (Access in view mode only)

- Notice that it still says zero attachments. In order to see if another agency has already added an attachment, either double-click the year or click once and select **View**.

Client Resolution > View More Information > Personal Info > Demographics > Annual Data > Annual Custom

View Add Edit Back Help Print or Export

Annual Custom

Search:

Year	HIV	Inco	Insu	Misc	Resi
2020	0 Att	0 Att	0 Att	0 Att	0 Att

- Now, you will be able to see if an attachment has been added to any of the categories. Click the attachment.

Client Resolution > View More Information > Personal Info > Demographics > Annual Data > Annual Custom > View

Edit Back

View

Year:

HIV Status Documentation: **1 Attachments** (Access in view mode only)

Income Documentation: [0 Attachments](#) (Access in view mode only)

Insurance Documentation: [0 Attachments](#) (Access in view mode only)

Miscellaneous Documentation: [0 Attachments](#) (Access in view mode only)

Residency Documentation: [0 Attachments](#) (Access in view mode only)

- To view the attachment, either double-click or click once and select **View**.

Client Resolution > View More Information > Personal Info > Demographics > Annual Data > Annual Custom > View > 1 Attachments

View Add Edit Delete Link Back Print or Export

Attachments

Search:

Conten	Attach Date	Attach User	Mod Date	Mod User	Fi File Name	Comment
PDF	4/23/2020	Owensg4561	4/23/2020	Owensg4561	.p Income_HFHS	

7. Click the name of the file.

Client Resolution > View More Information > Personal Info > Demographics > Annual Data > Annual Custom > View > 1 Attachments > View

Edit Back

View

File Name: **Income_HFHS.pdf**

Content Type: PDF

Comment:

8. The file will open in a separate tab. Print or download the document for your records.

CW6 - Henson, Taraji x Microsoft Word - 8-2018_Revise x +

.mi.us:8443/careware/dn/1p5kzrnjo6/att_pk/4e925e8a-da5b-44d8-b8f6-c48366f900cc/Income_HFHS.pdf

DHD Pay Info HRSA/CW Info MDHHS MILogin - Login CW6 - Login HRSA EHB TLO Sfax MIHAN MILogin QA Site

Michigan_CAREWare_User_Request_Fillable_Form_630551_7 1 / 2

MICHIGAN CAREWARE USER REQUEST

Michigan Department of Health and Human Services

Technical Support Email: MDHHS-CAREWARESUPPORT@Michigan.gov 517-241-4278

ADD CAREWARE USER

Agency	Date		
Program			
<input type="checkbox"/> Ryan White Part A	<input type="checkbox"/> Ryan White Part B	<input type="checkbox"/> Ryan White Part D	<input type="checkbox"/> Care Coordination
<input type="checkbox"/> Data to Care	<input type="checkbox"/> Tobacco Cessation	<input type="checkbox"/> Other	
Name (Last, First)	Phone	Email Address	
Job Title	MILogin ID		

User Permissions Group ** (Select only one) ******

<input type="checkbox"/> Data Entry User	(view client info, add and edit services and clinical, and run custom reports)
<input type="checkbox"/> General User	(All of the above and: add and edit client info; run all reports; create and edit custom client reports, clinical encounters, and follow-up referrals; and set client sharing status)
<input type="checkbox"/> Management	(All of the above and: delete services [dependent on funder]; create and edit all reports; export all reports; view contracts; and terminate/remove user accounts)

9. Exit the tab when you are done. That will take you back to CAREWare. Select **Back** to return to the main page.

Client Resolution > View More Information > Personal Info > Demographics > Annual Data > Annual Custom > View > 1 Attachments > View

Edit **Back**

View

File Name: Income_HFHS.pdf

Content Type: PDF

Comment:

Note: Do not select Edit. This is only needed if you want to edit the document. The only time you will need to use this function is if you need to edit a document you have uploaded.

What You Must Enter into CAREWare for the Ryan White Services Report (RSR)

The Ryan White HIV/AIDS Programs Services Report (RSR) is a client-level data reporting requirement that monitors the characteristics of Ryan White HIV/AIDS Program Parts recipients, providers, and clients served. All Ryan White HIV/AIDS Program-funded recipients (Parts A-D) and their contracted service providers are required to report client-level data annually to the HIV/AIDS Bureau through the RSR.

In order to limit the amount of data clean up that has to be done at the end of the year, it is imperative that you enter in all of the relevant information that is needed for the report. **Below is a list of items that must be entered in CAREWare for the RSR:**

Located under the **Demographics** tab

1. Enrollment Status/Eligibility
2. Vital Status (Alive, Deceased)
3. Race/Ethnicity (includes Asian and Hispanic Subgroups)
4. Gender
5. HIV Status
6. HIV Risk Factor

Located under the **Annual Review** tab

7. Housing Status
8. Poverty Level
9. Medical Insurance

Located under the **Medications** tab

10. ART Medications

Located under the **Services** tab

11. Services Provided

Located under the **Labs** tab

12. CD4/Viral Load Tests

This guide was created in partnership By Genna Owens



For any questions, please contact MDHHS - Division of HIV/STD Programs
(MDHHS-DHSP-TAandData-Requests@michigan.gov).