December 2020

CAREWare 6 Overview

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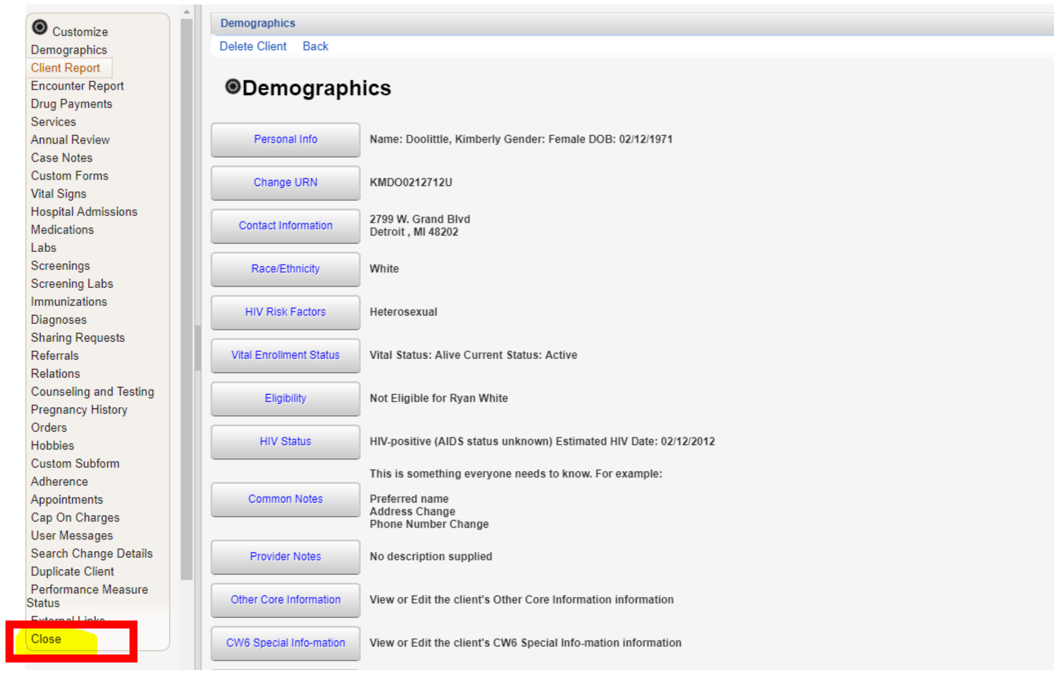
Disclaimer: No real client data was used in creating this handout. All client information in this handout has been created specifically for training purposes.

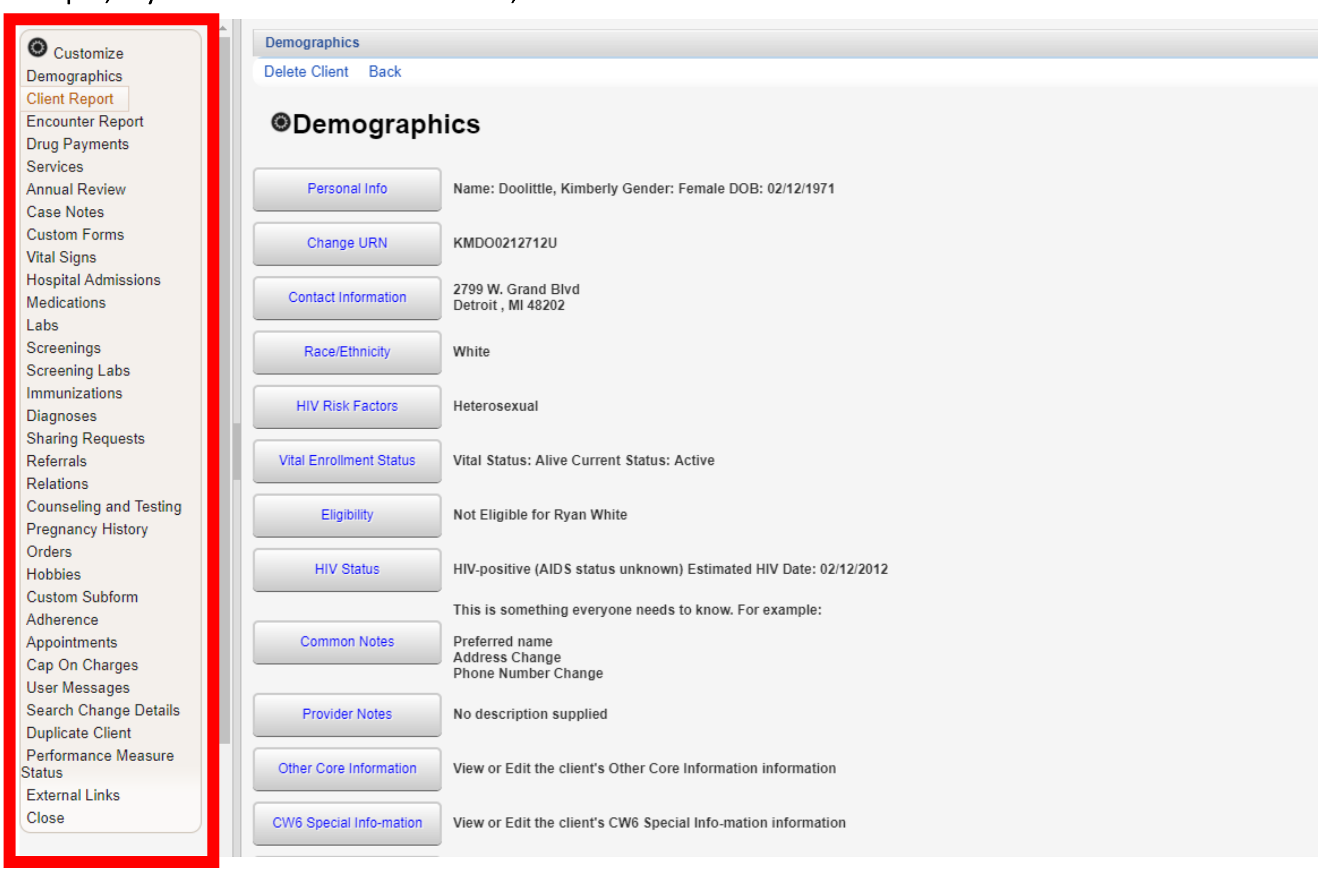
What You Need to Know About CAREWare 6

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.



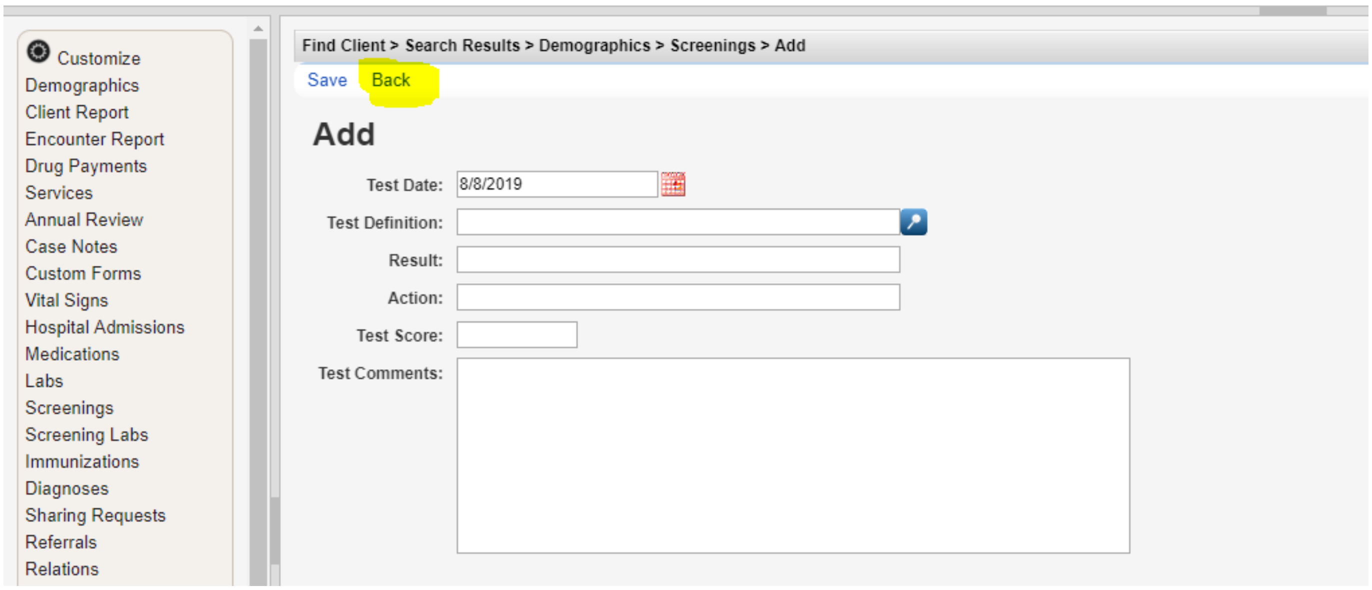
2. You navigate the client's record through the menu options located on the left-hand side of the record. When you want to move from one tab to the other, simply click the tab on the left-hand side. It will take you to that tab. For example, if you want to add a case note, click it.



What You Need to Know About CAREWare 6 Continued….

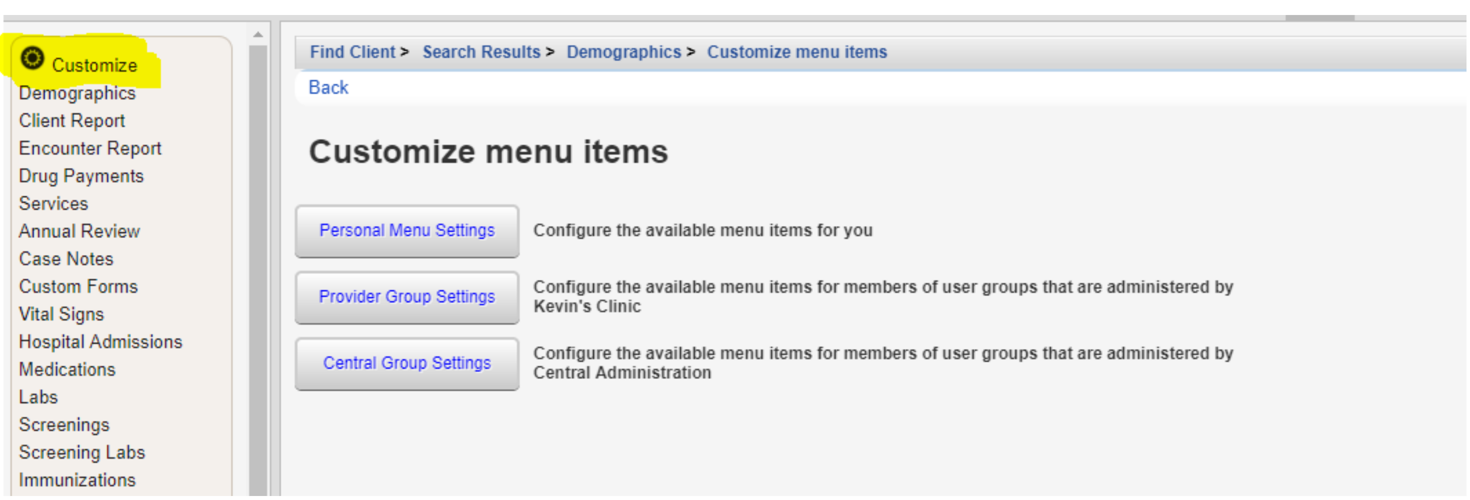
3. If you are in the middle of adding any record, whether it is a service, lab, etc., you will not be able to access anything else. For example, if you are in the middle of adding a screening lab and want to add a service, you must either:

   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 <u>not recommended</u> 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.



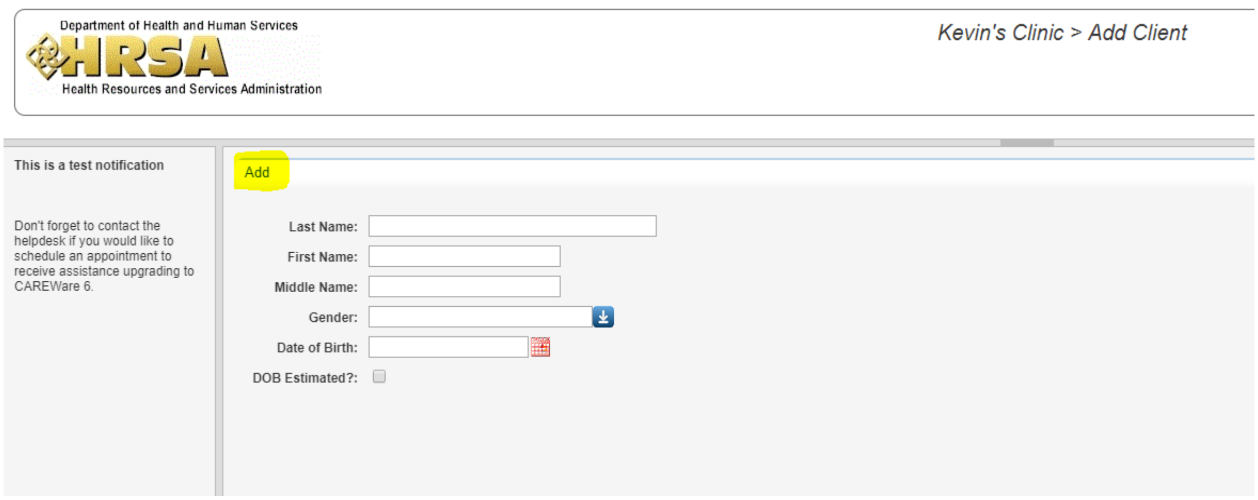
How To Add a Client

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.

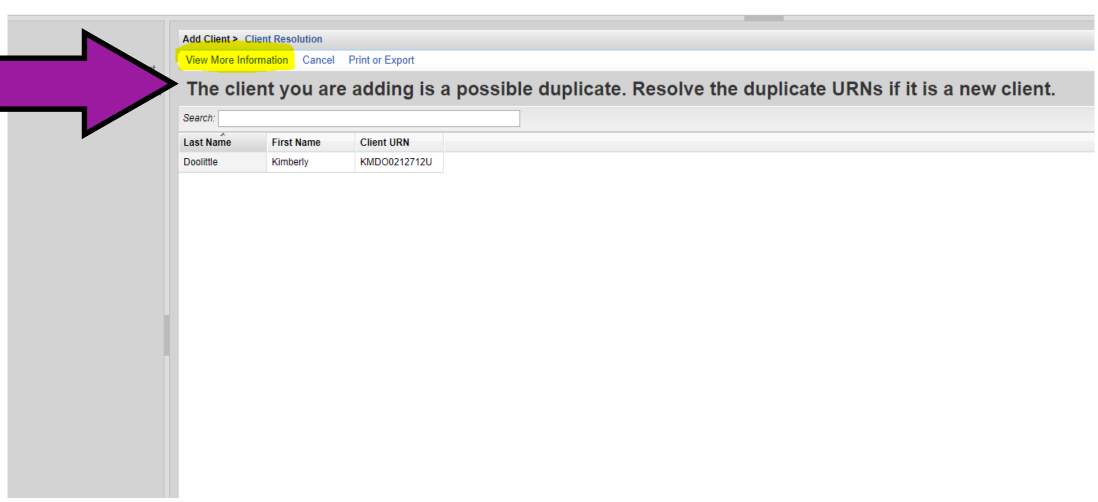
3. Click **Add.**

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



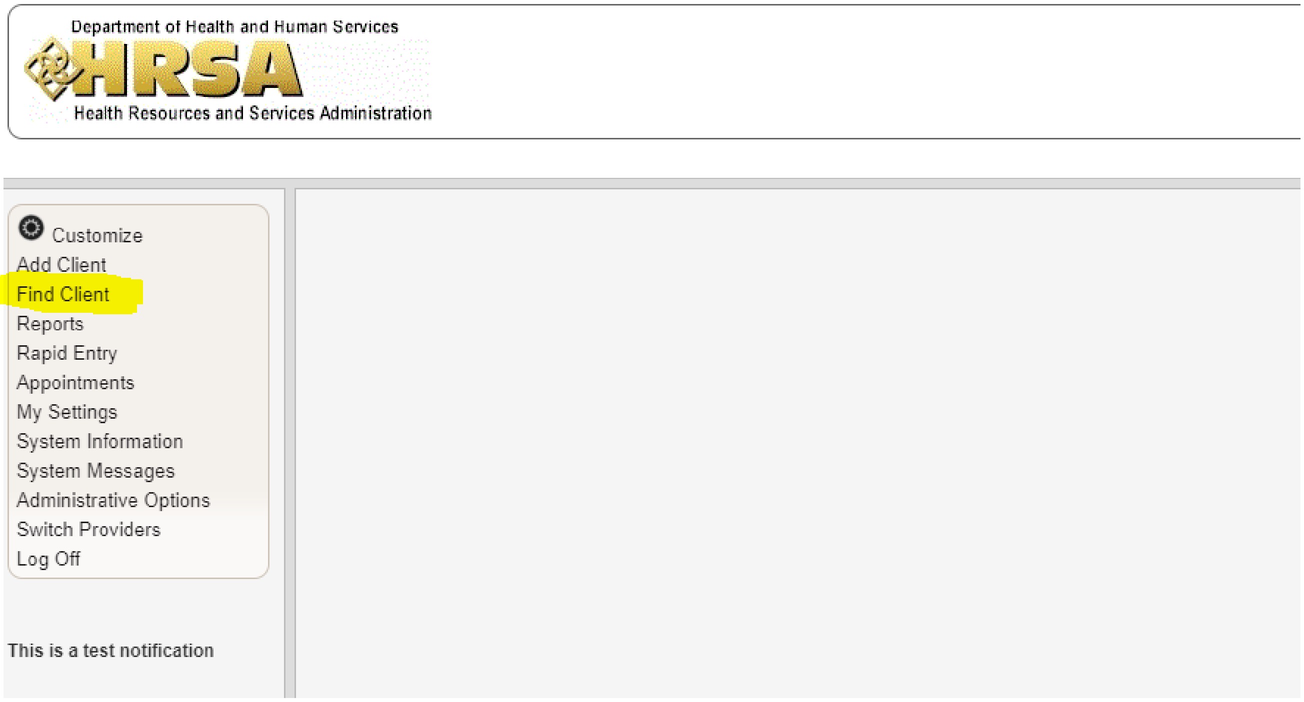
Note: If the client already exists in CAREWare, you will be prompted with this message.

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

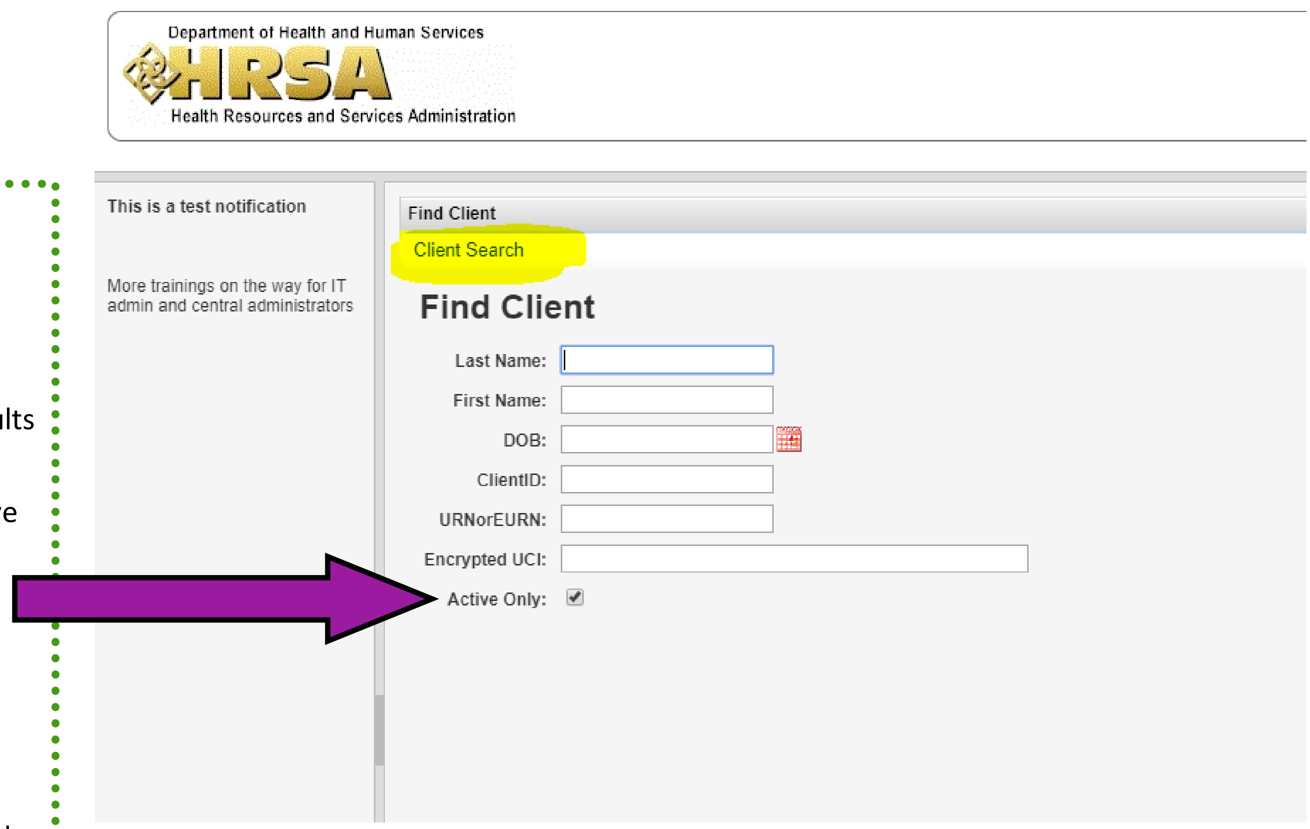
1. Select **Find Client.**



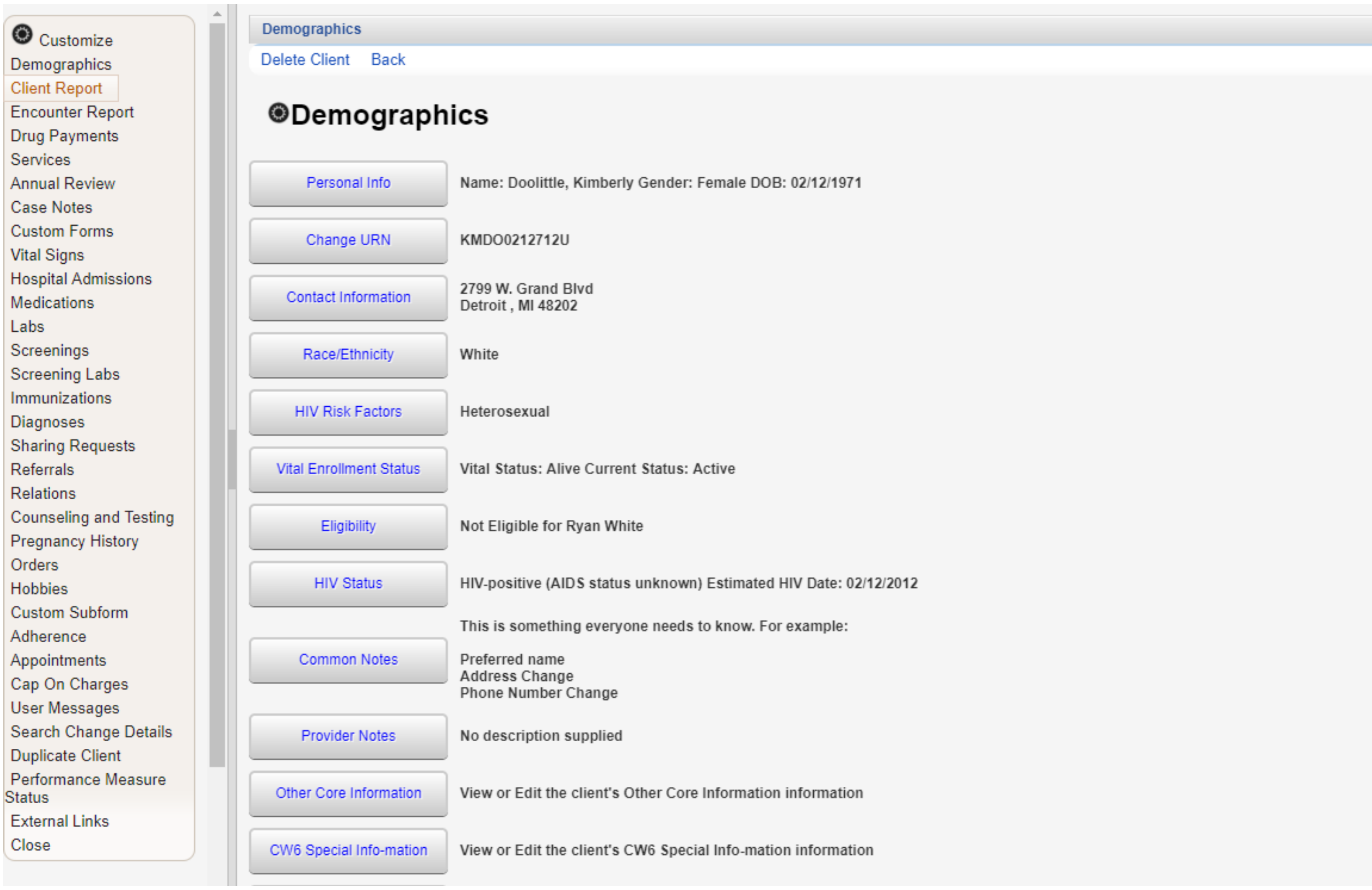
2. A new tab will open. Enter the Last Name and First Name, or Client ID/URN.
3. Select **Client Search.**

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

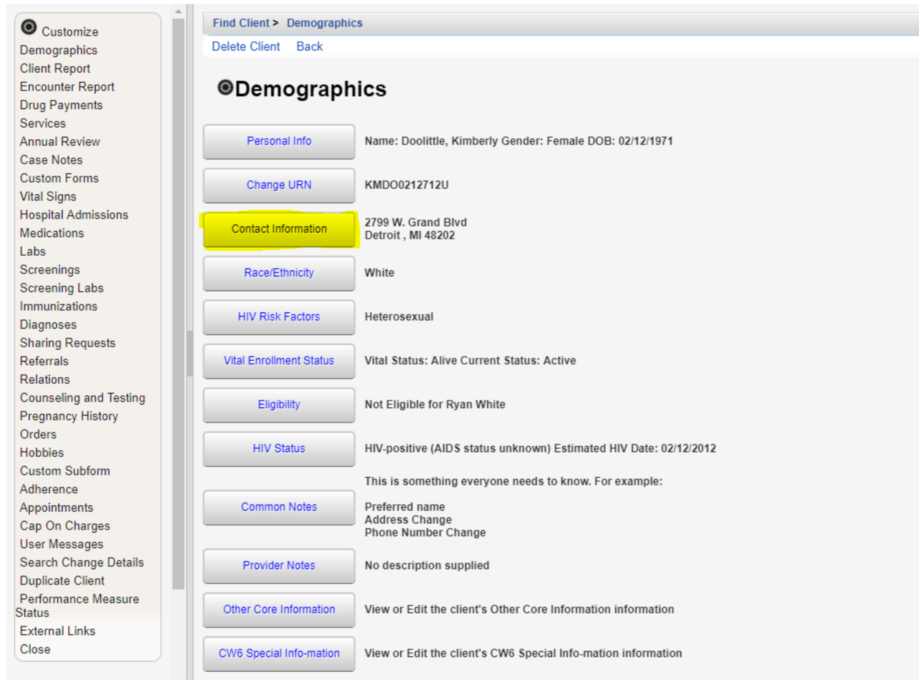


This page holds all of the basic client information. Here are a few things you need to know:

- 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.

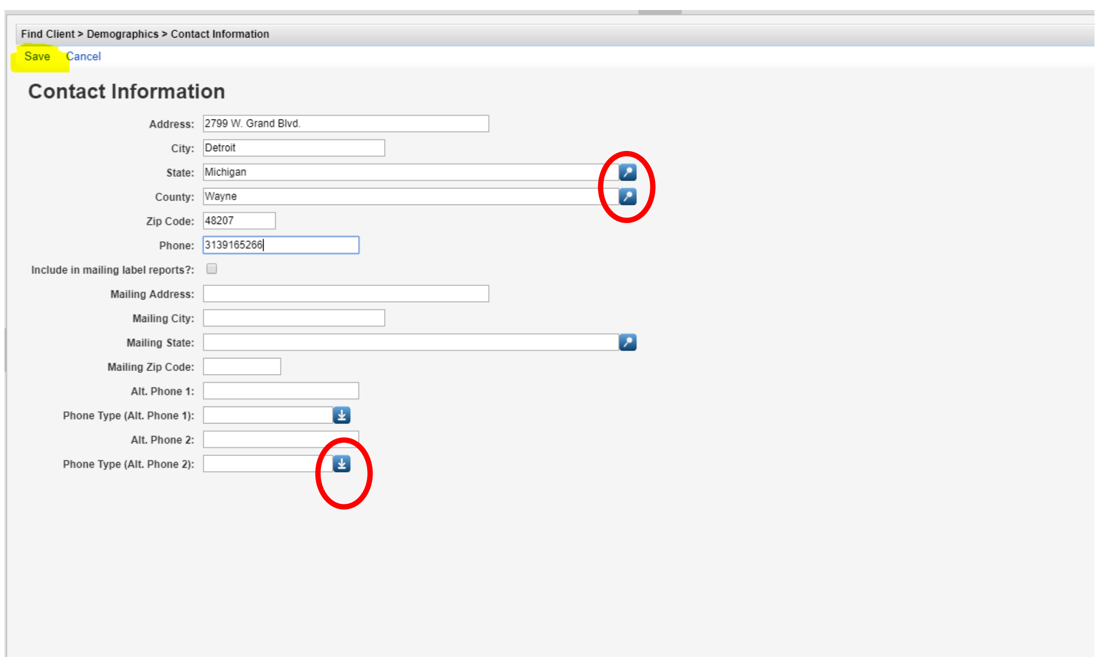
How to Add Information to the Demographics Page

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.



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

3. **Save.**



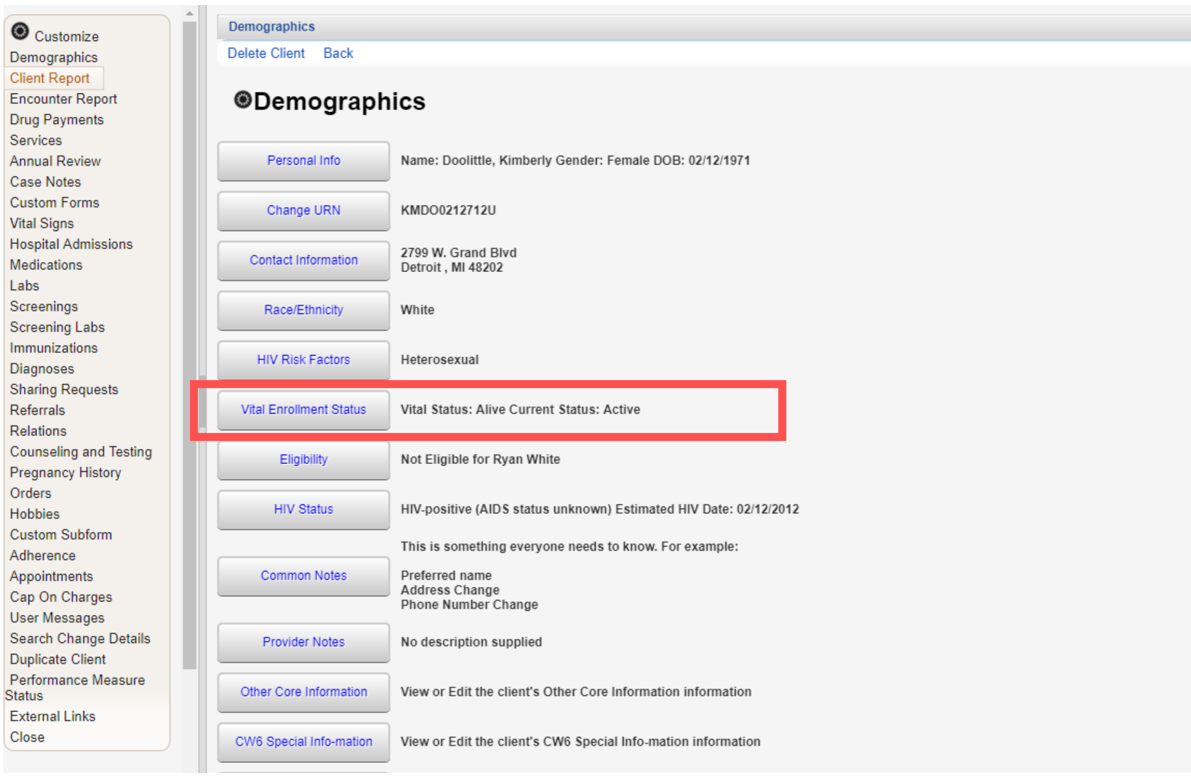
Note: Some information has to be entered using a drop down menu. If a category has a drop down menu next to it,   you must choose from the list provided.

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.

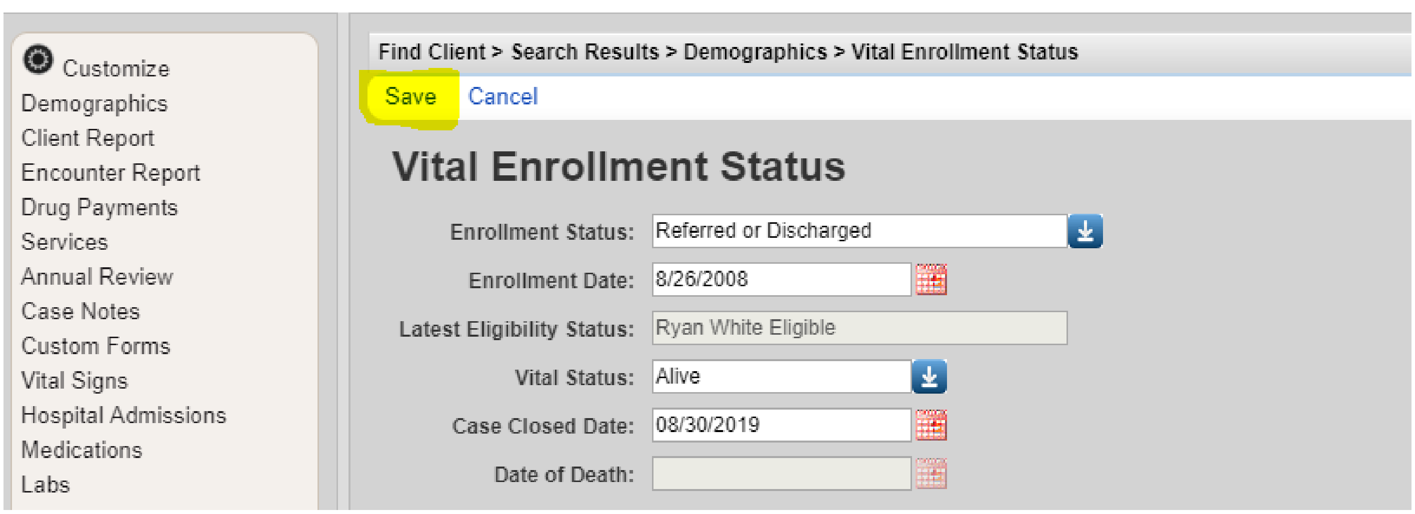
How To Edit Enrollment Status

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.**



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



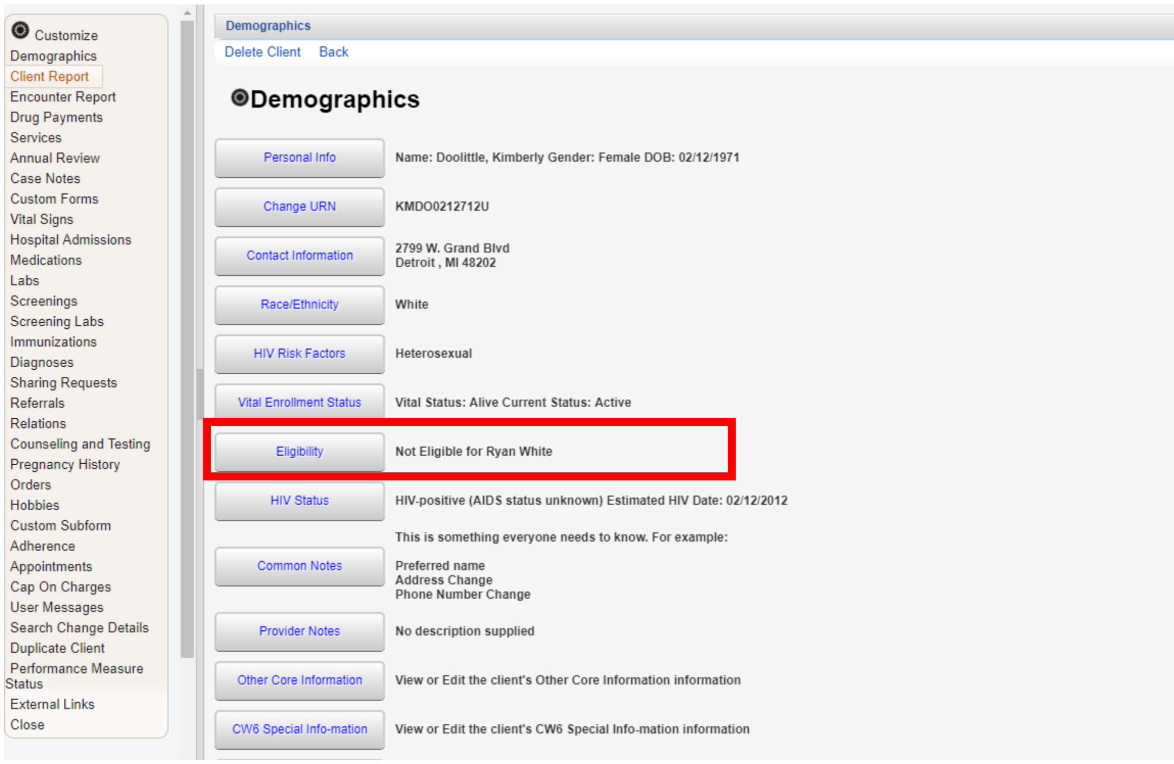
Note: When you change enrollment status from active, you will be prompted to enter a **Case Closed Date.** You will also be prompted to enter a **Date of Death** if you change vital status to deceased.

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.

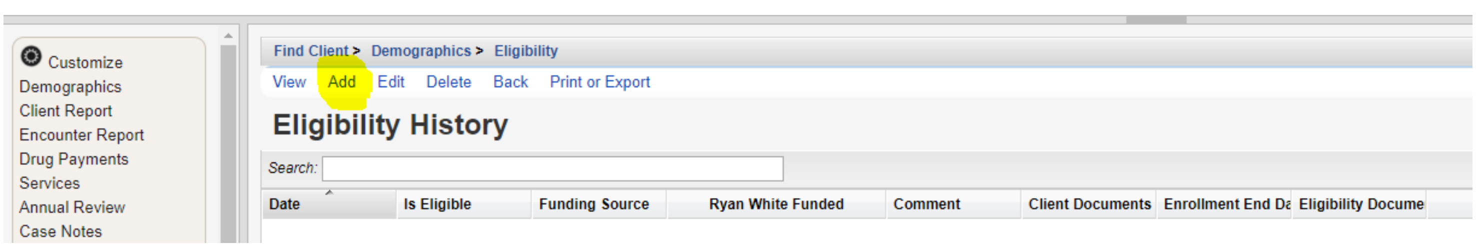
When you add a client to CAREWare, the default status will always be "Not Eligible for Ryan White." Therefore, every time you add a new client, you must create a record that documents the eligibility status. To document eligibility, follow the instructions below:

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



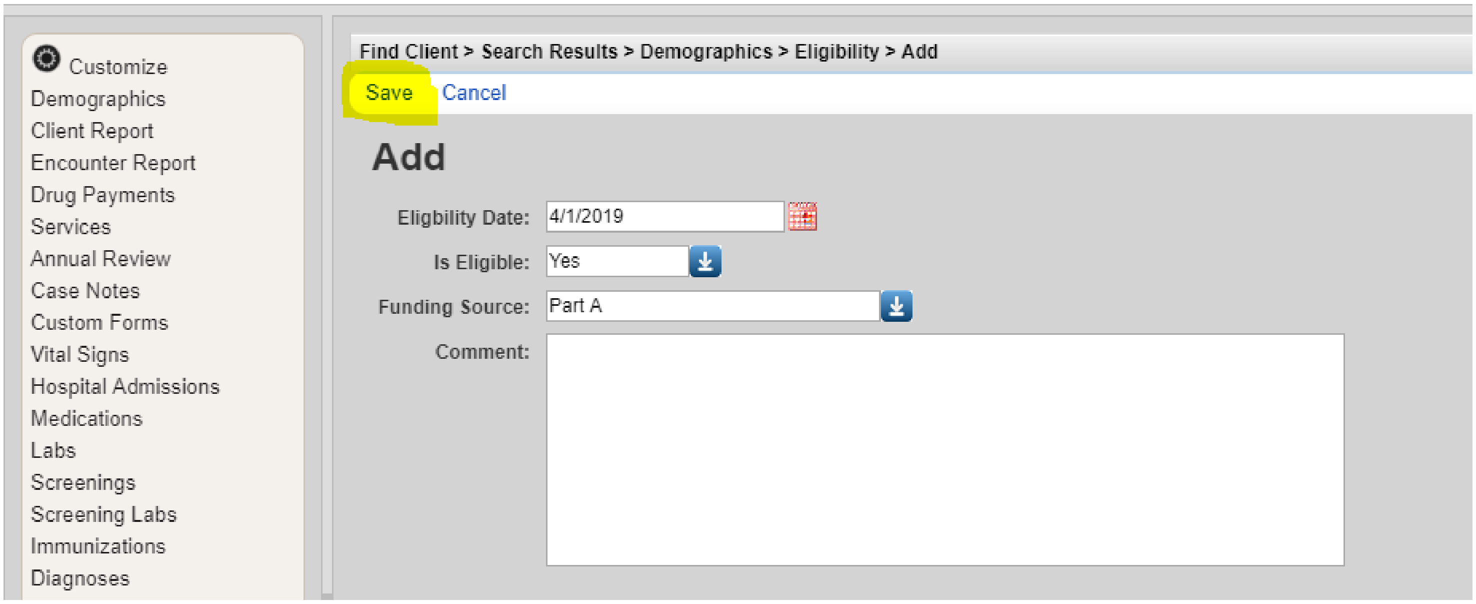
> **Note:** You can find out if a client has any eligibility records by looking at the information next to **Eligibility.** For more details, click **eligibility.** It will show you a history of all records.

3. Select **Add.**

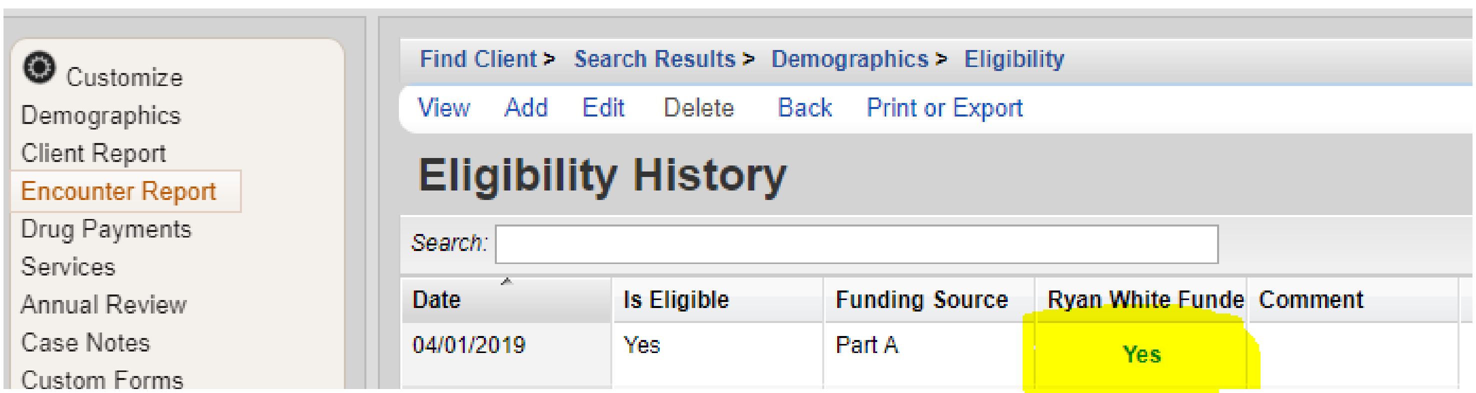


4. Enter the **Eligibility Date, Eligibility Status, & Funding Source**.

5. Select **Save.**



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



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.

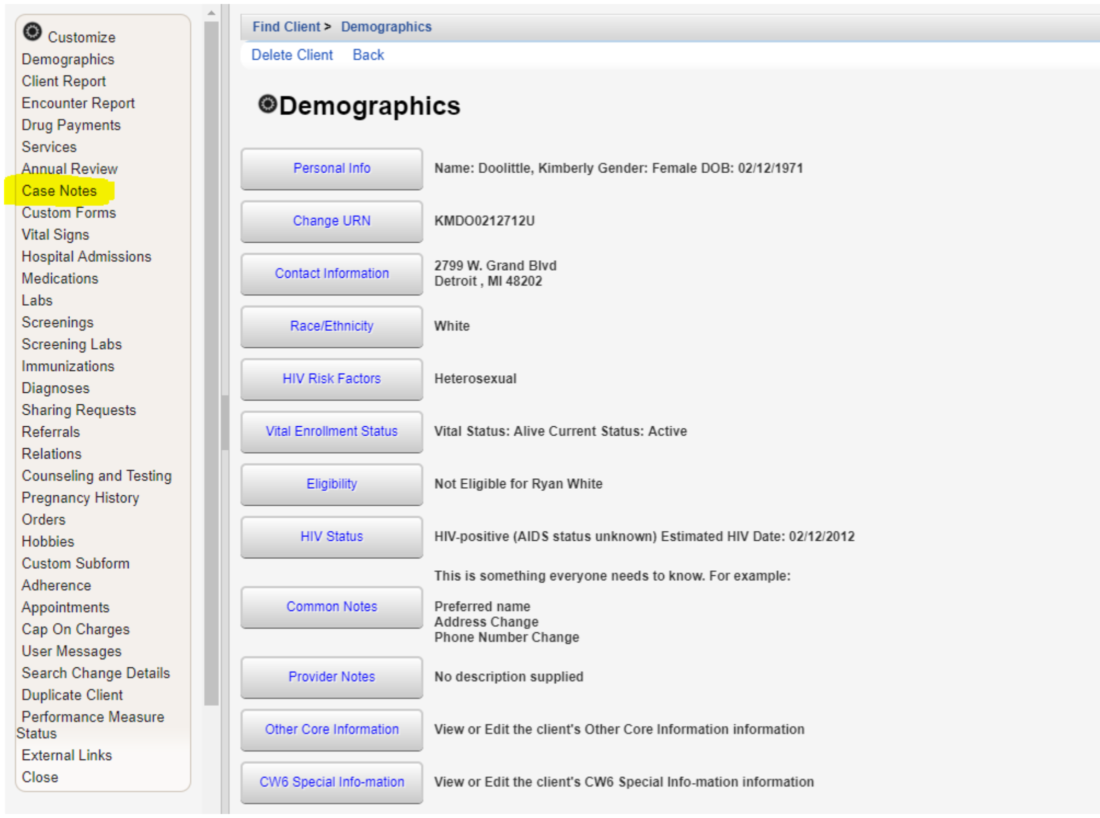
2. Do not edit any previous eligibility records; just add a new record. If you adjust old records, it may appear that you provided services to someone who was not eligible. **YOU DO NOT WANT THIS.**

3. When you return to the demographics page, the client record will be updated.

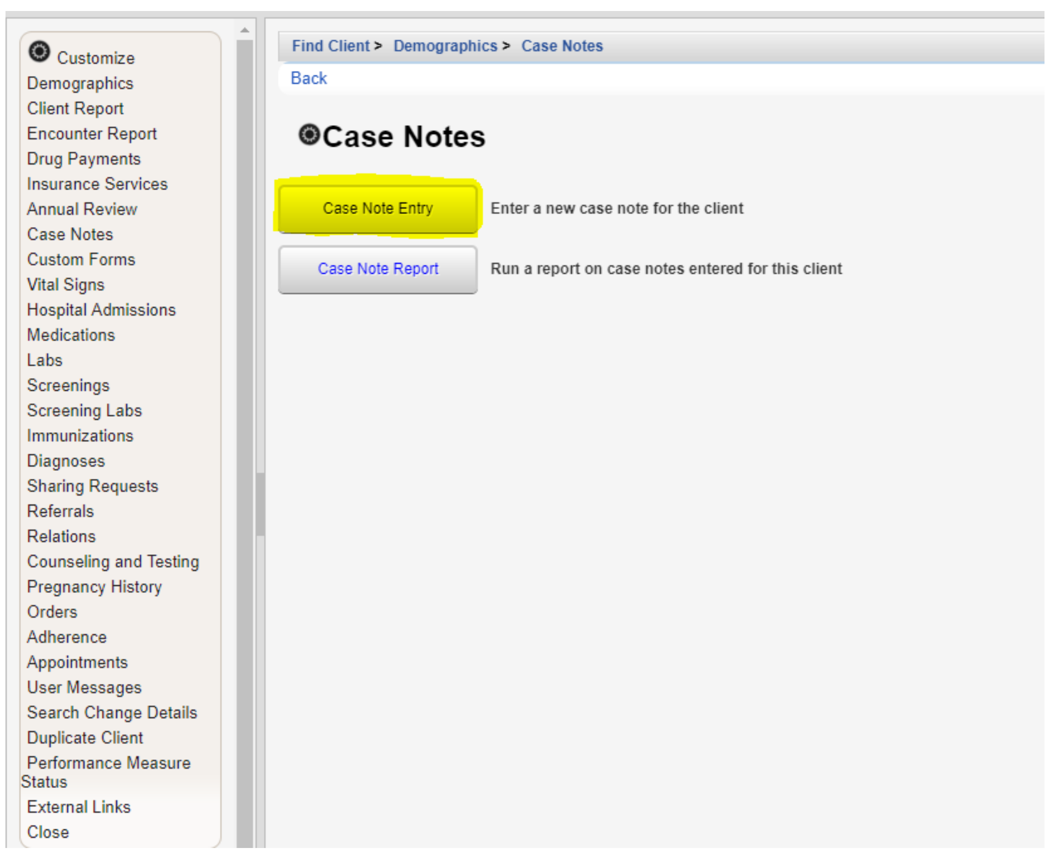
How To Add Case Notes

1. Open the client record.

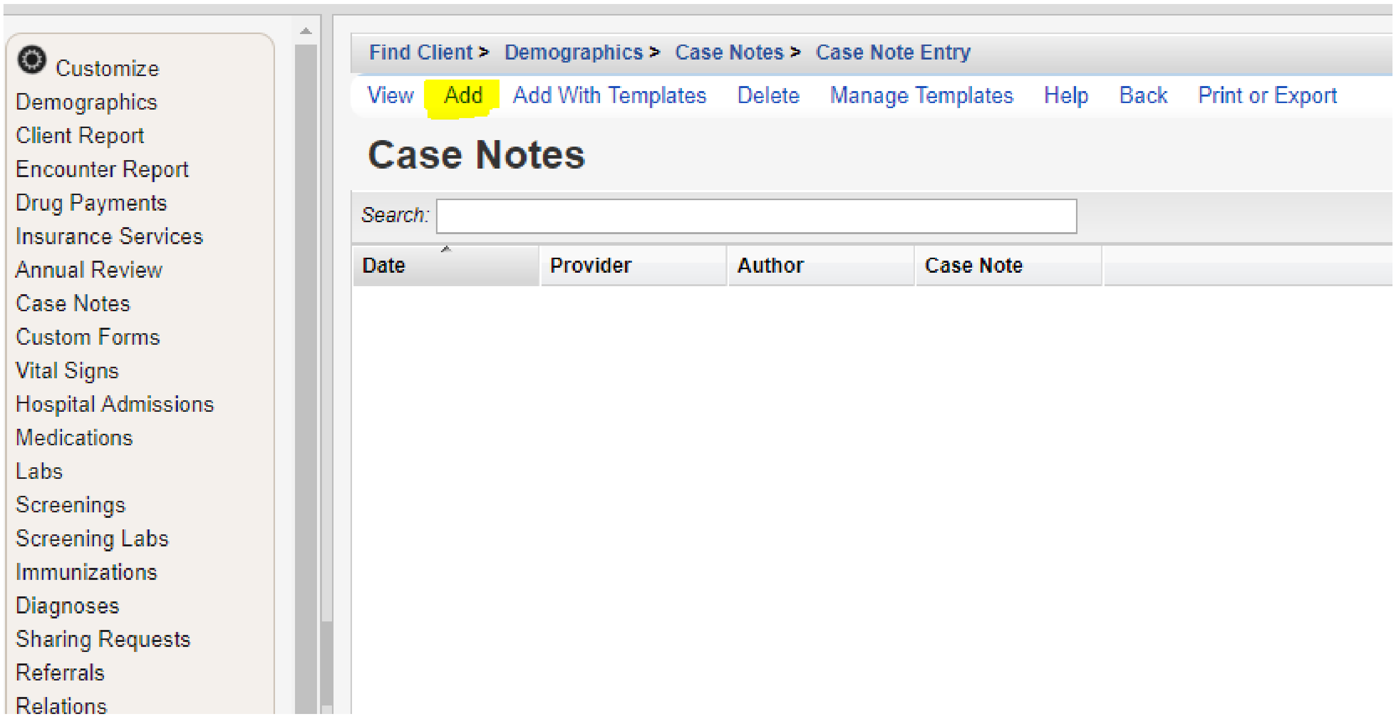
2. Select **Case Notes** from the menu of links on the left-hand side of the record.



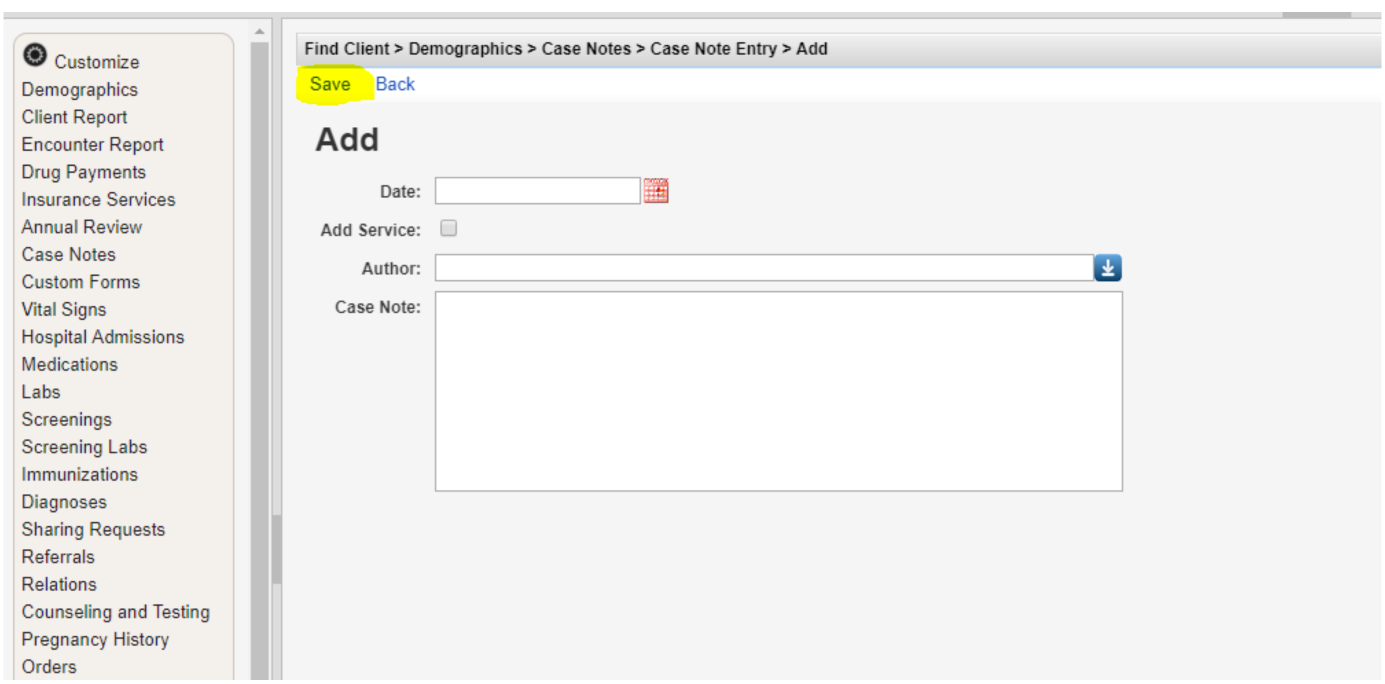
3. Select **Case Note Entry.**



4. Select **Add.**



5. Enter the **Date** of service and **Author** name (if applicable).
6. Enter **Case Note.**
7. **Save.**



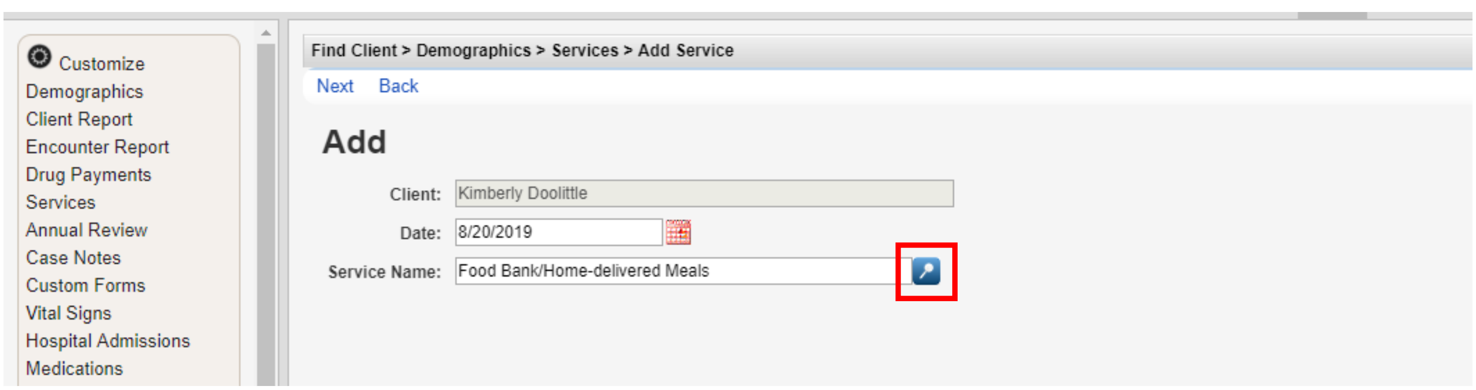
Note: If you select the **Add Service** box, you will be directed to the services tab where you can enter the service for the client. This is a short cut to adding a service.

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.

2. Select **Add.**

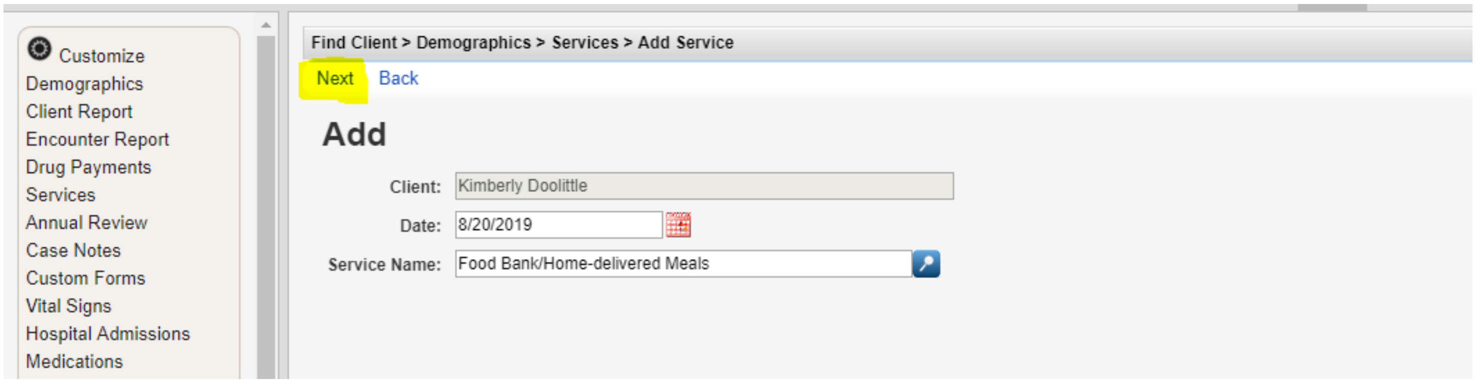
3. Enter the **Date** the service was provided and select the **Service Name** from the subservice drop down list.



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.

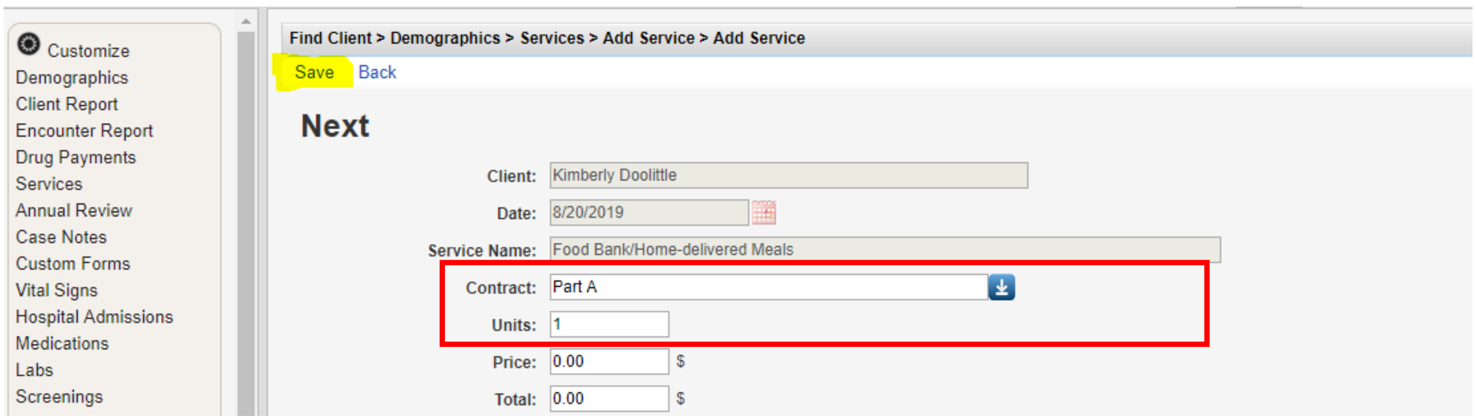
How To Add a Service Continued….

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

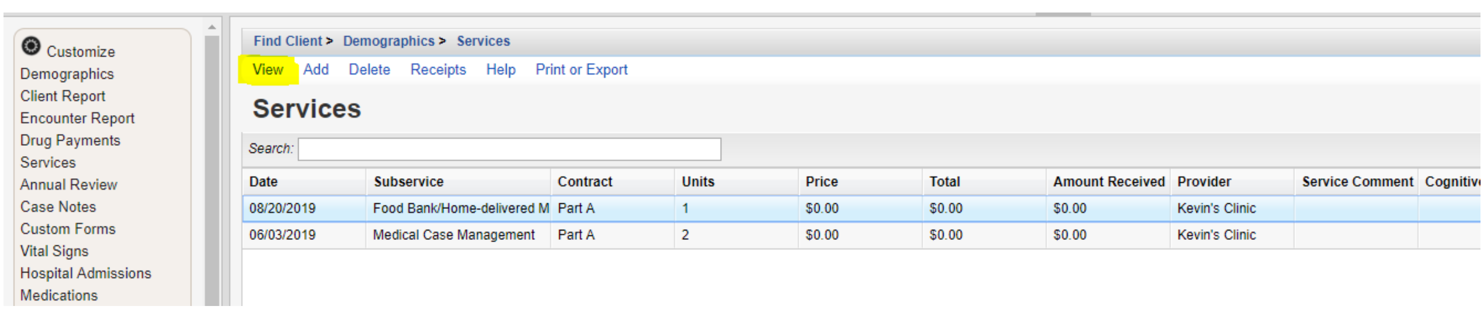


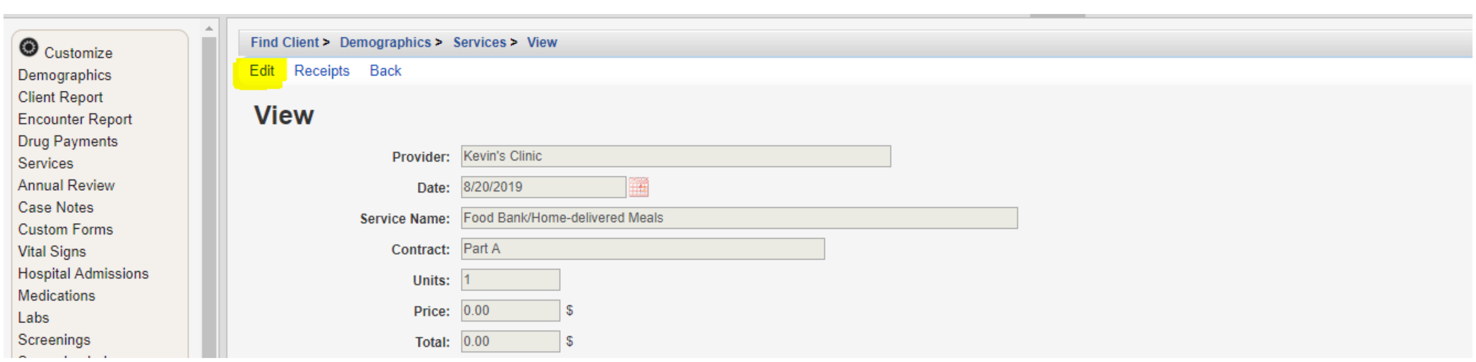
5. Enter the correct **Contract** and **Units.**

6. **Save.**



7. 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.**





8. **Save.**

How to Navigate the Annual Review Tab

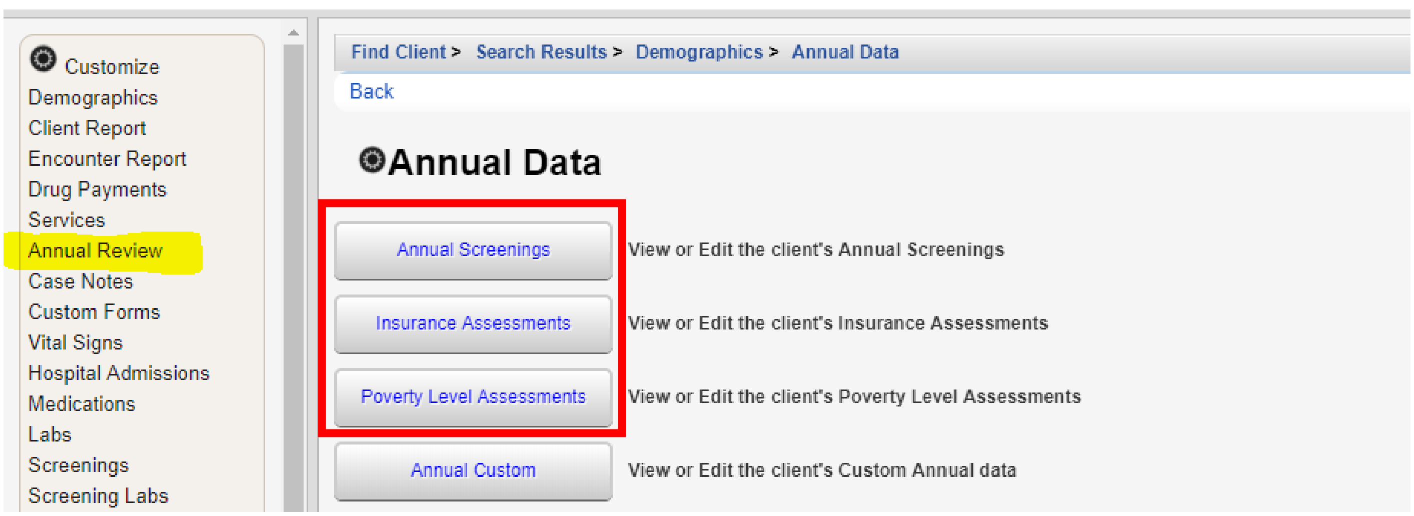
Annually, CAREWare users are required to review and update a series of fields. These include the following:

- **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.

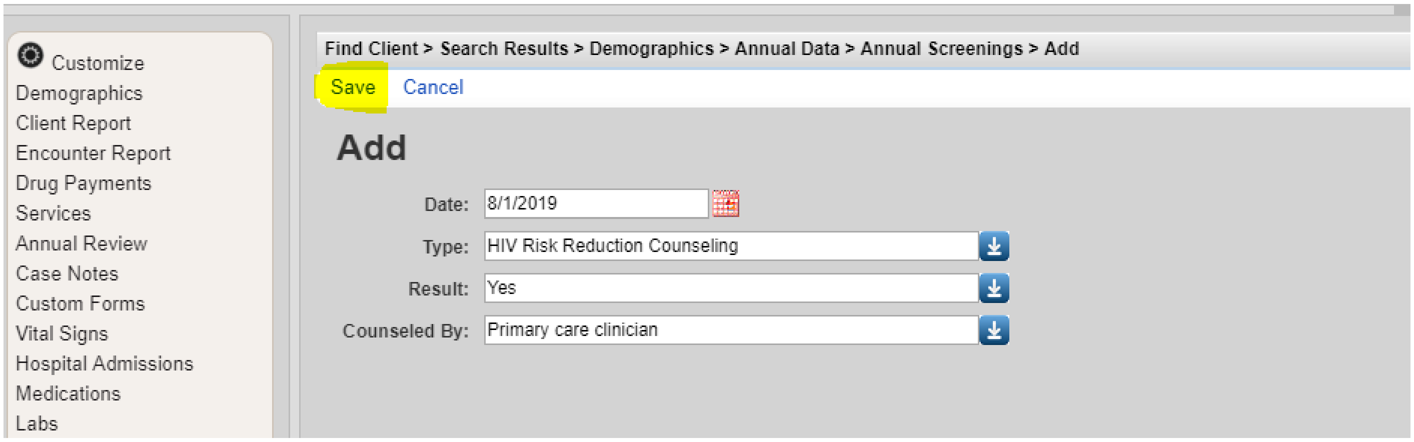


3. Select **Add.**

How To Enter Annual Review Data Continued….

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

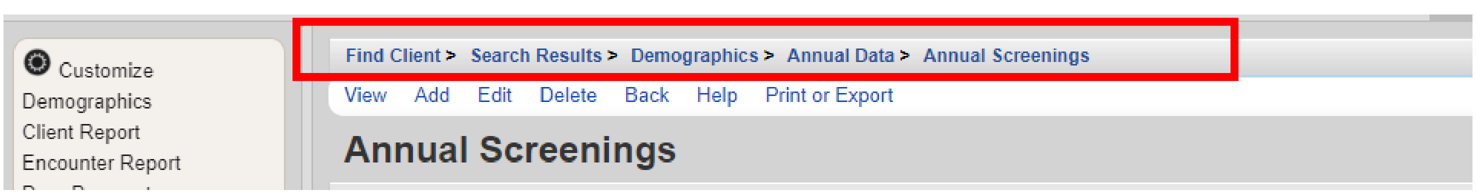
5. **Save.**



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

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

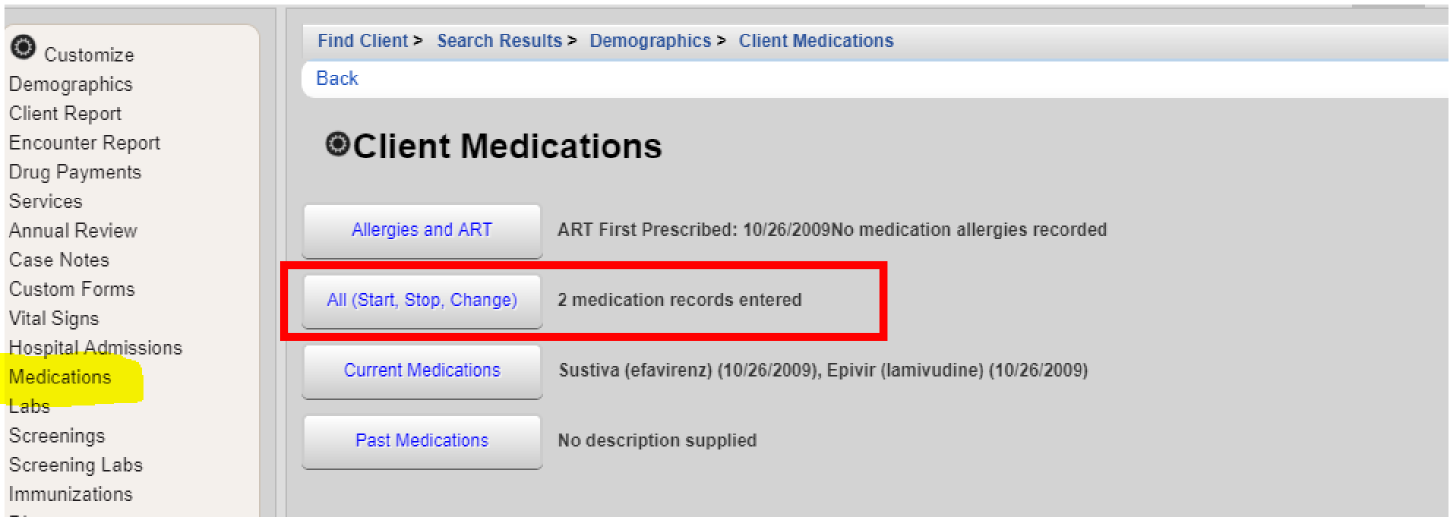
Note: CAREWare 6 works by navigating tabs, and there are tabs within tabs. If you need to navigate while in a tab, you will need to use the sub-tabs. Below is what a sub-tab looks like. Click the back or next button in order to move through the different phases.



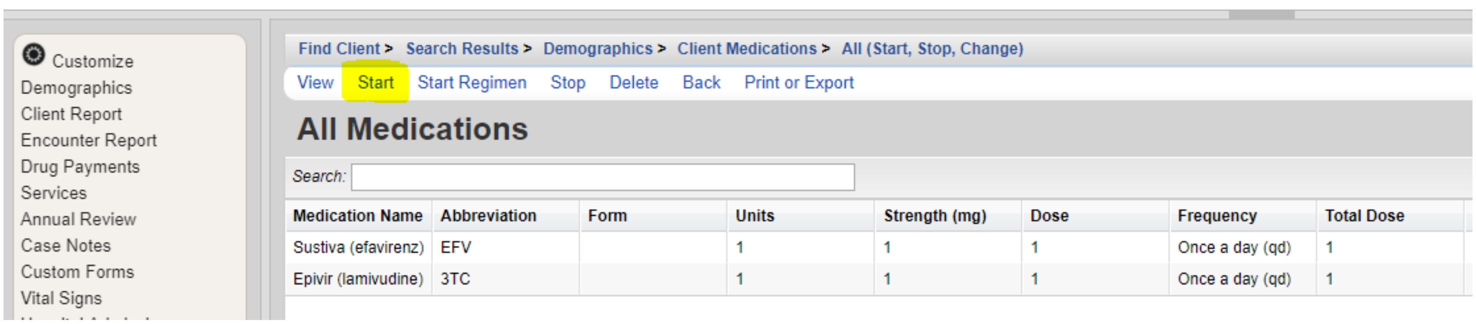
How To Add a Medication

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).**

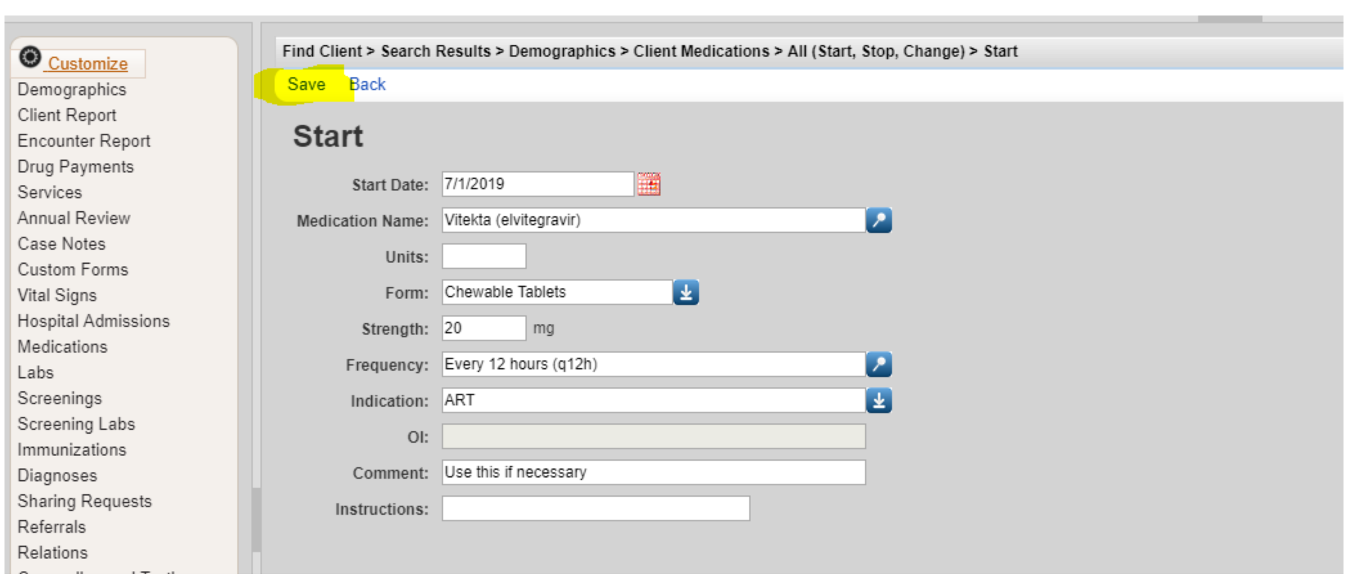


3. Select **Start.**



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

5. **Save.**

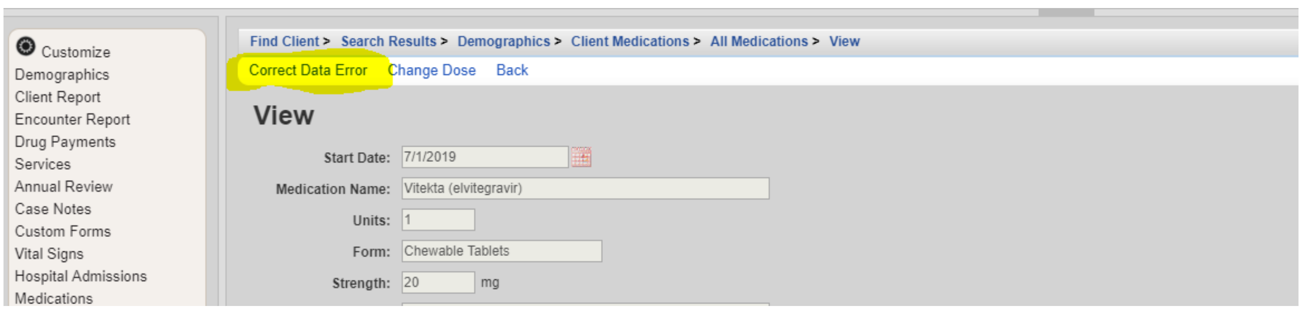


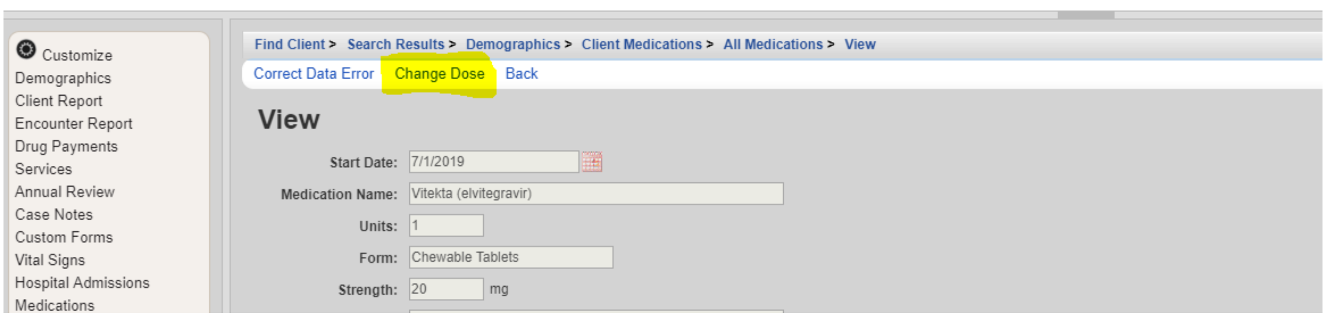
How To Edit a Medication

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

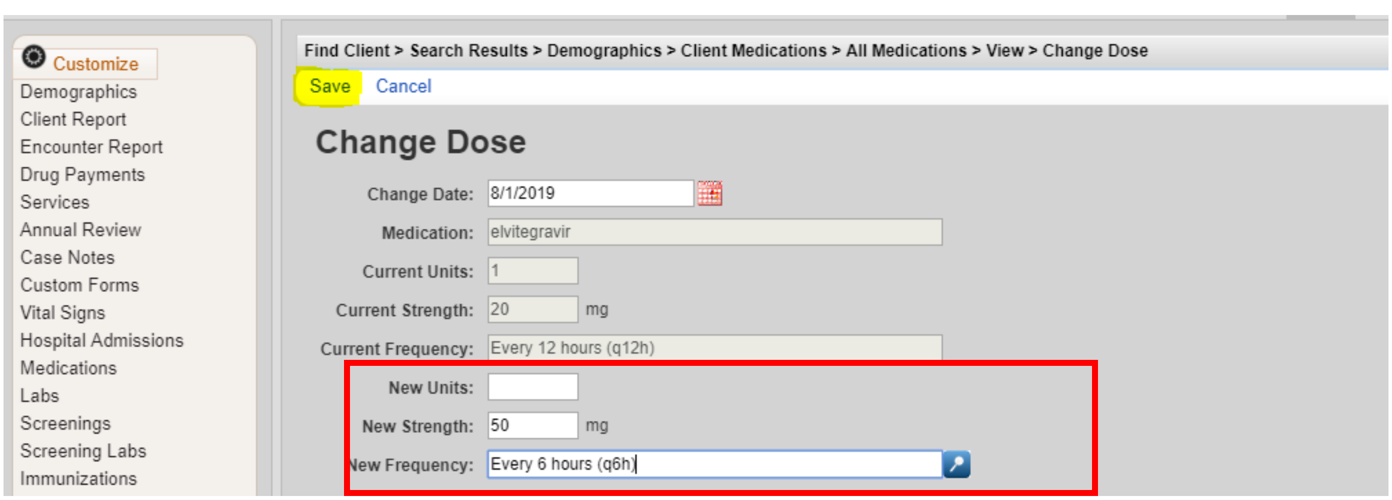
2. From there, you can either correct a data error or change the dose.

3. Either select **Correct Data Error** or **Change Dose.**



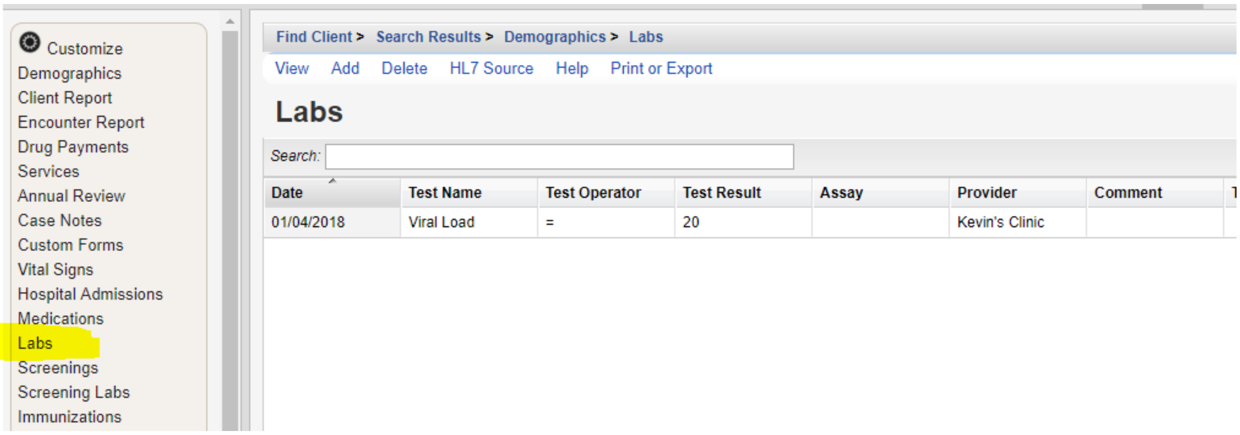


4. Once you make all of the necessary changes, **Save** the record.

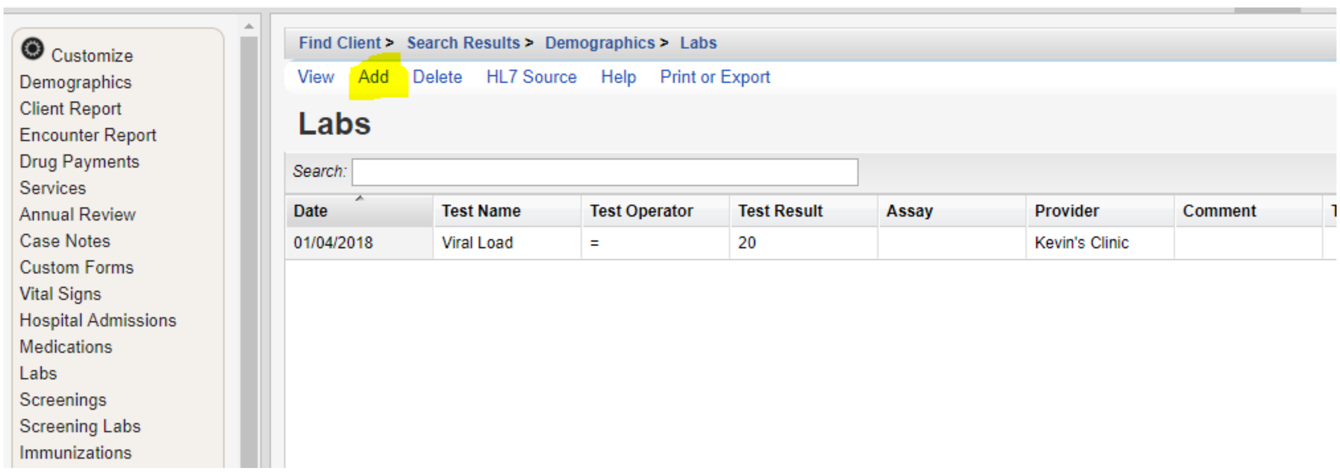


How To Add a Lab/Screening Lab/Screening

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.

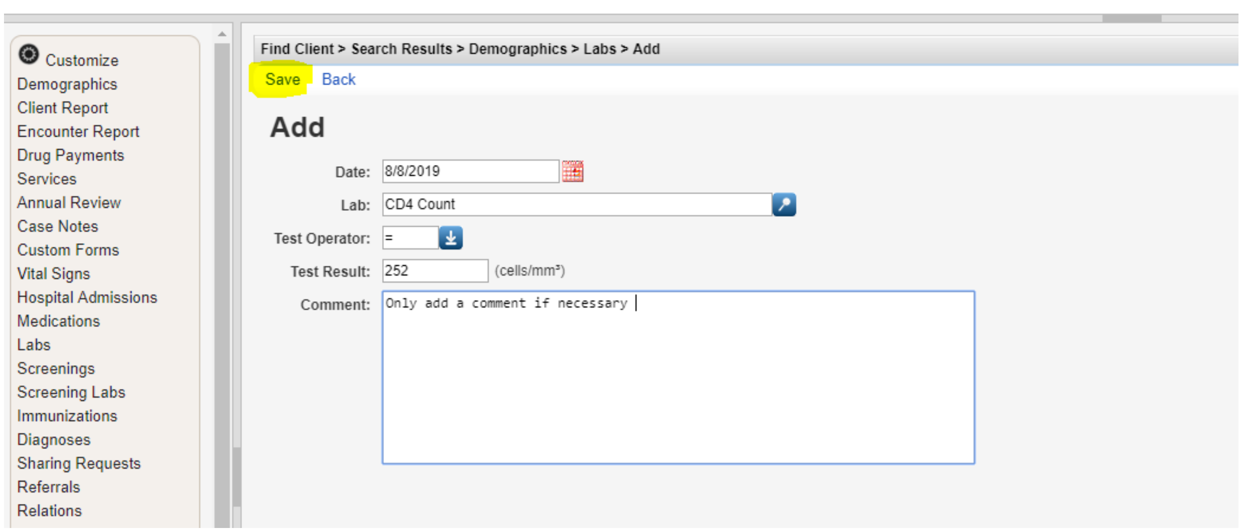


2. Click **Add.**



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

4. **Save.**

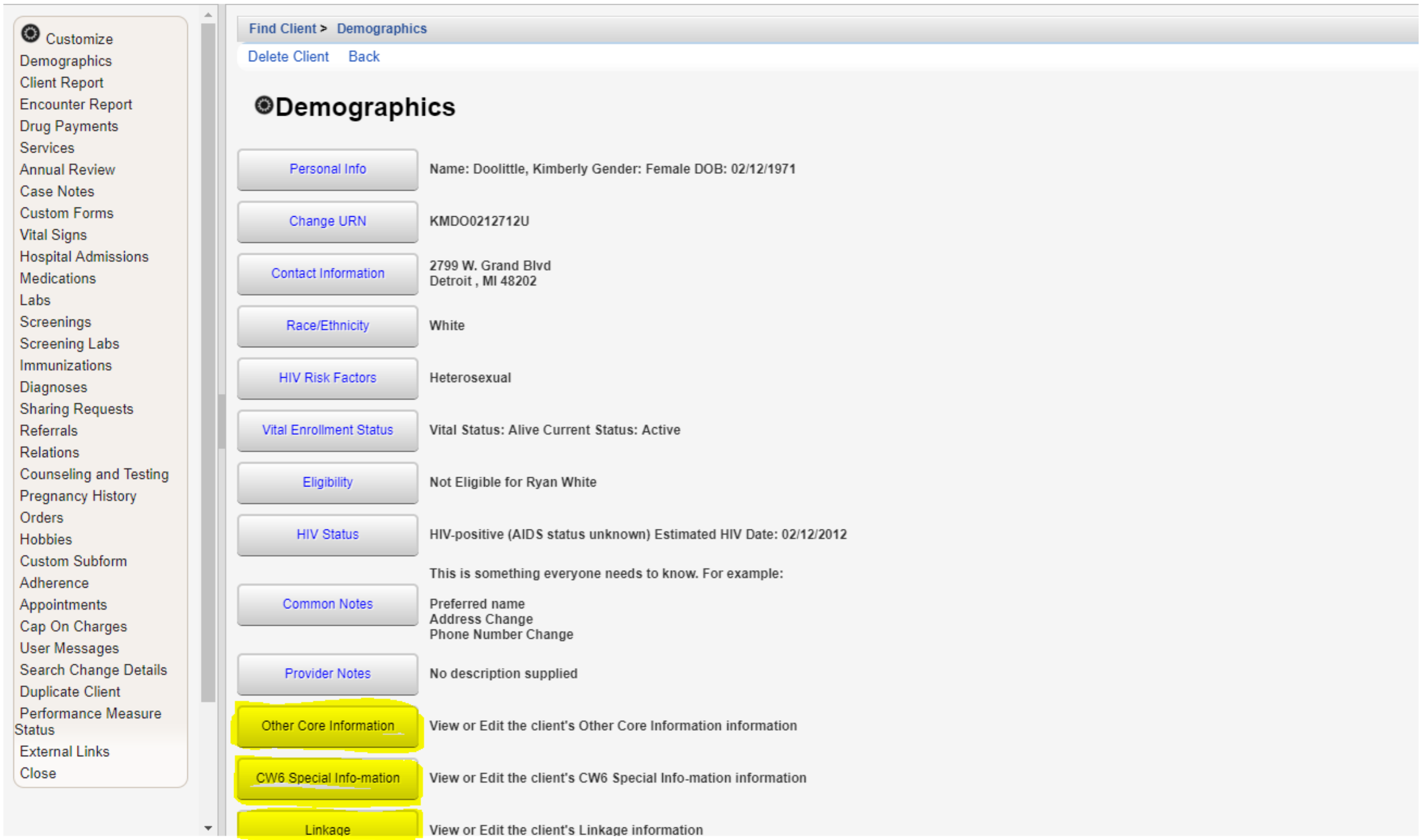


Note: You cannot scroll through the drop down menu. In order to access the necessary lab, type in the first couple of letters of the lab in the search box.

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.

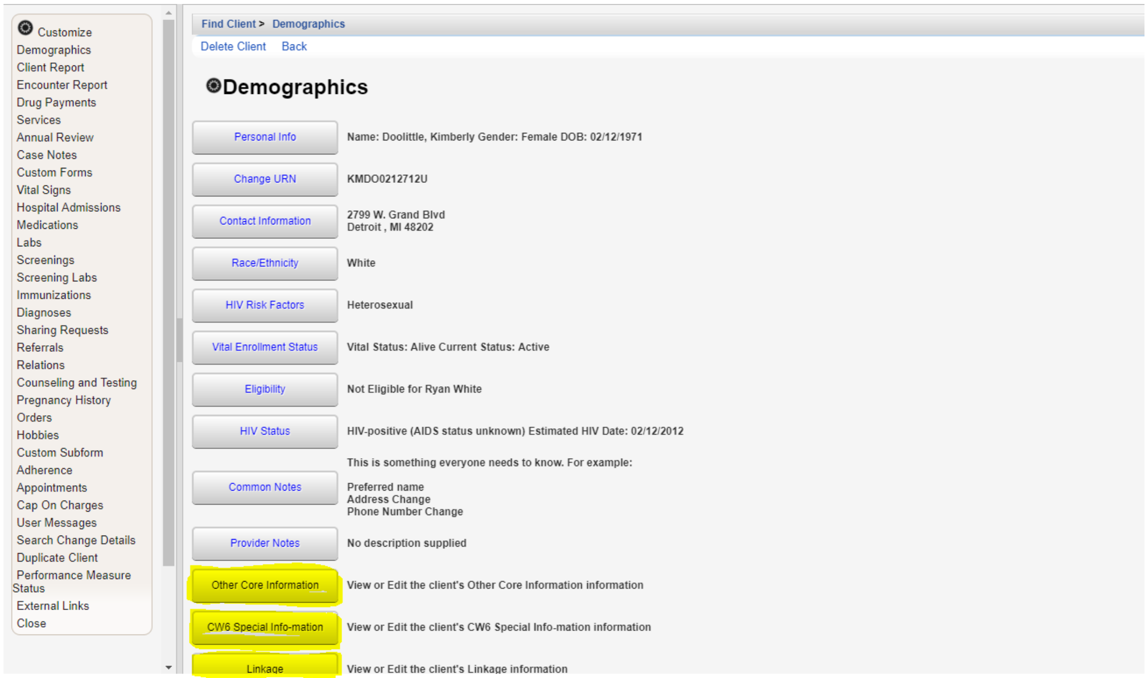


Every custom tab will look different, but the way you enter a record will be the same. Just remember the following:

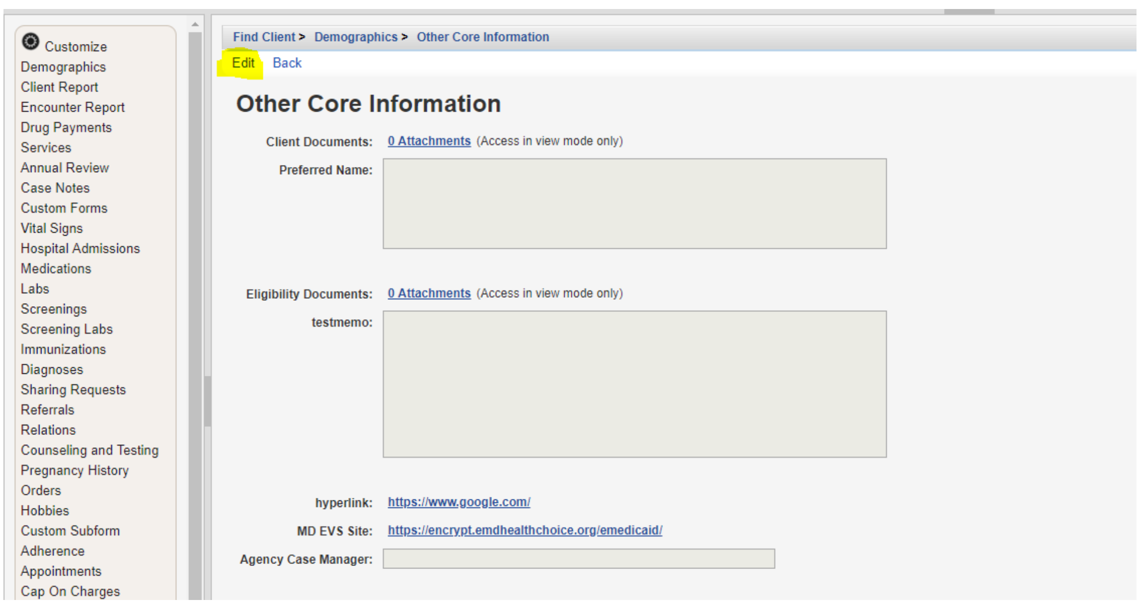
1. If a custom tab has a drop down menu, you must select a field from that menu.
2. You cannot scroll through the drop down list. Therefore, type in the first couple of letters of the field name and it will appear.
3. If a custom tab requires a check mark, all you have to do is check the appropriate 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.

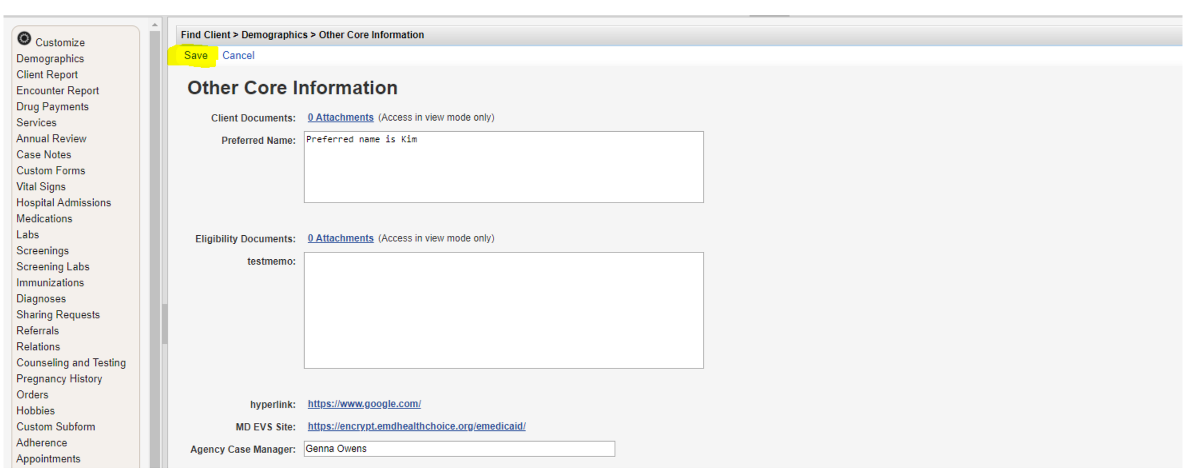


2. Click **Edit.**



3. Add all of the necessary information.

4. **Save.**



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.

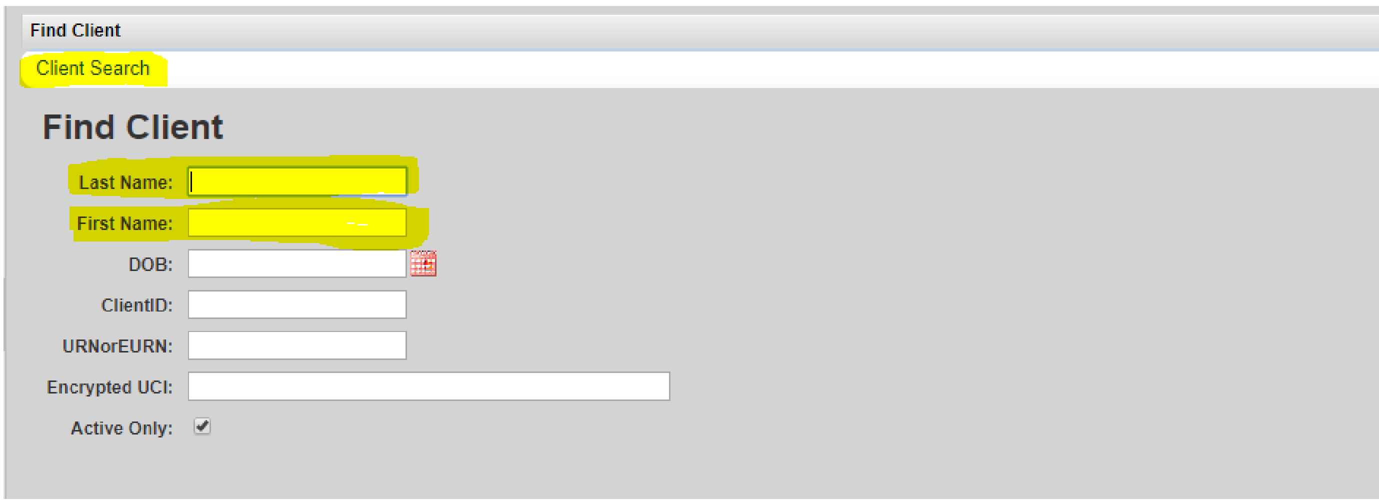
Note: If you need to delete an attachment, click the attachment (one time) and select **Delete** at the top of the page. It will ask you to confirm. Select **Confirm.** Once you do that, the attachment will be deleted.

Viewing Other Agency Attachments (Basic Overview)

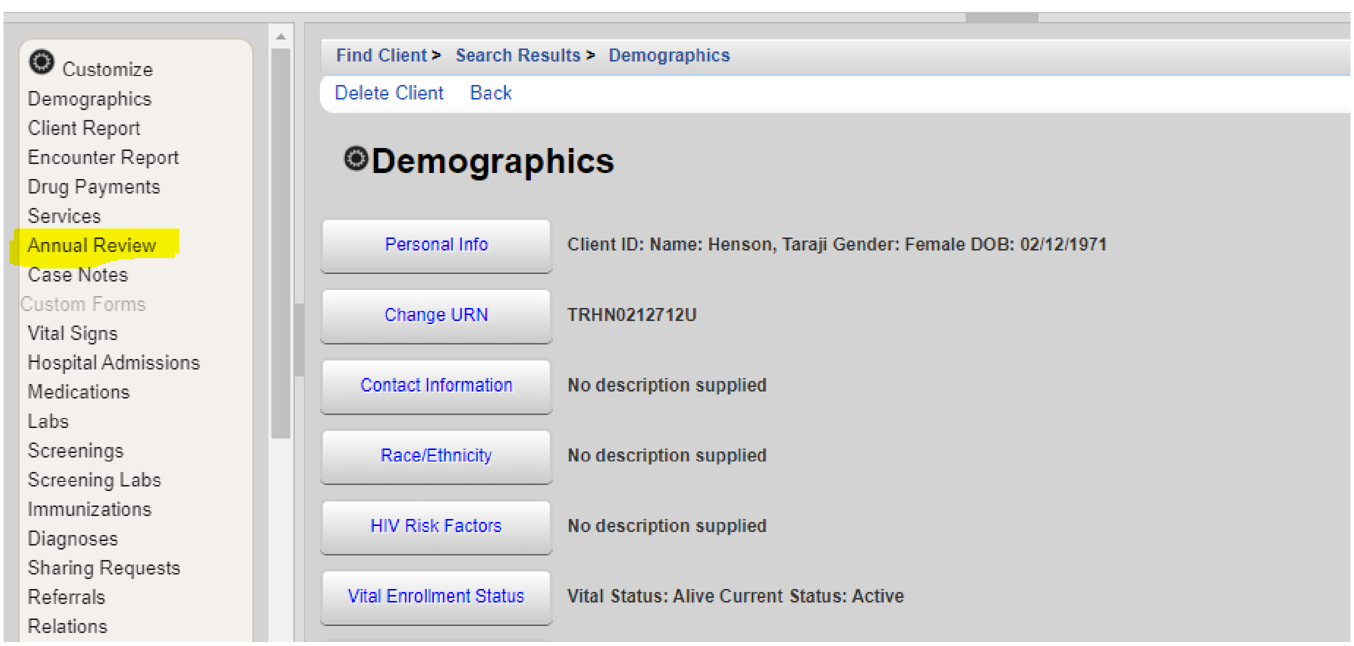
1. Login to CAREWare.
2. Select **Find Client** and search for the correct one.
3. Once the client file is open, select **Annual Review** from the menu of links on the left-hand side.
4. Select **Annual Custom.**
5. From there, you have a few options. More than likely, the page will be blank, which means 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)

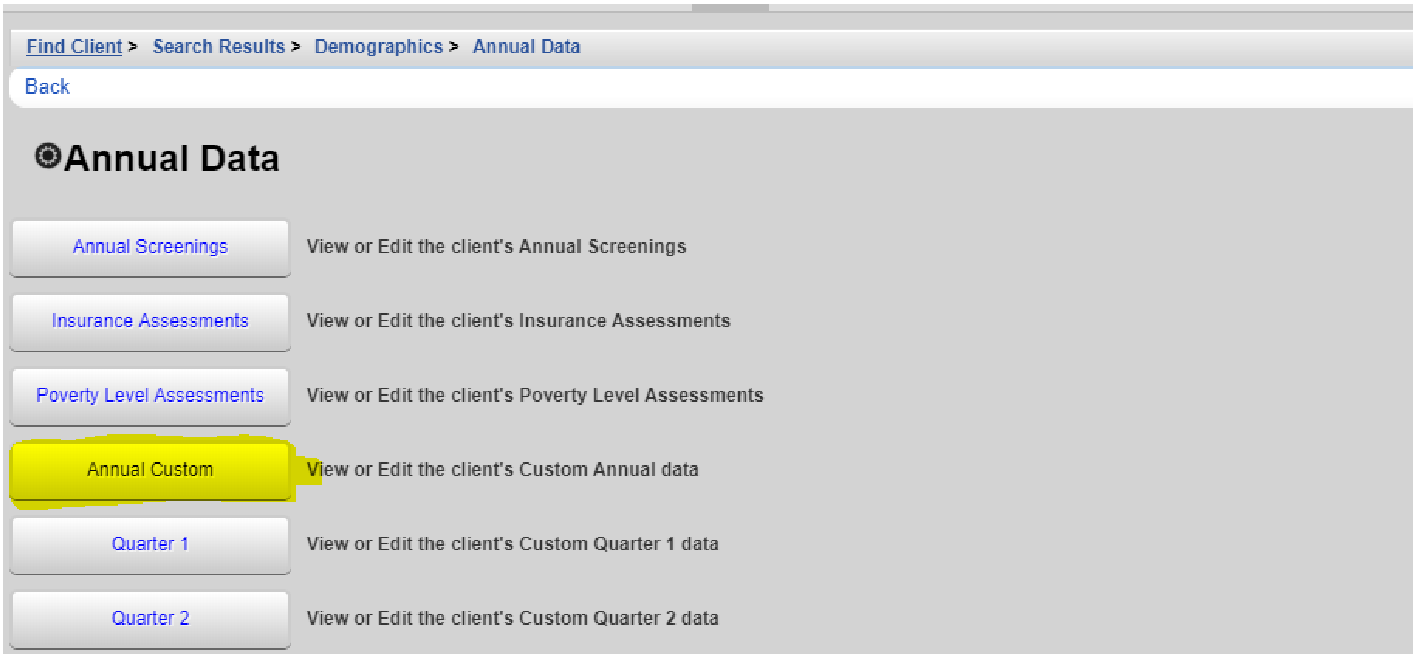
1. Select **Find Client.**



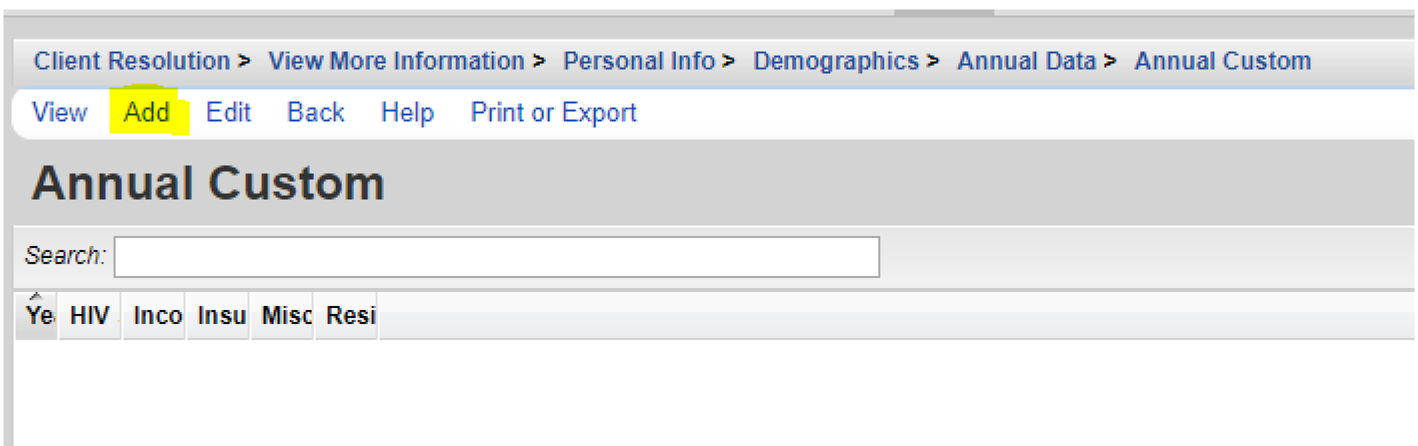
2. Once the client file is open, select **Annual Review** from the menu of links on the left-hand side.



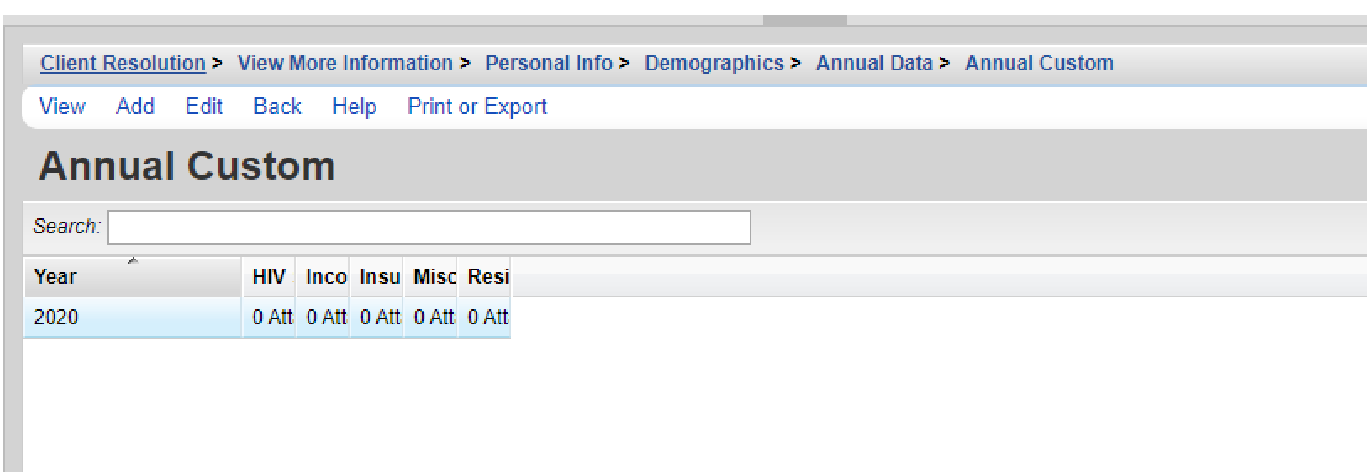
3. Select **Annual Custom.**



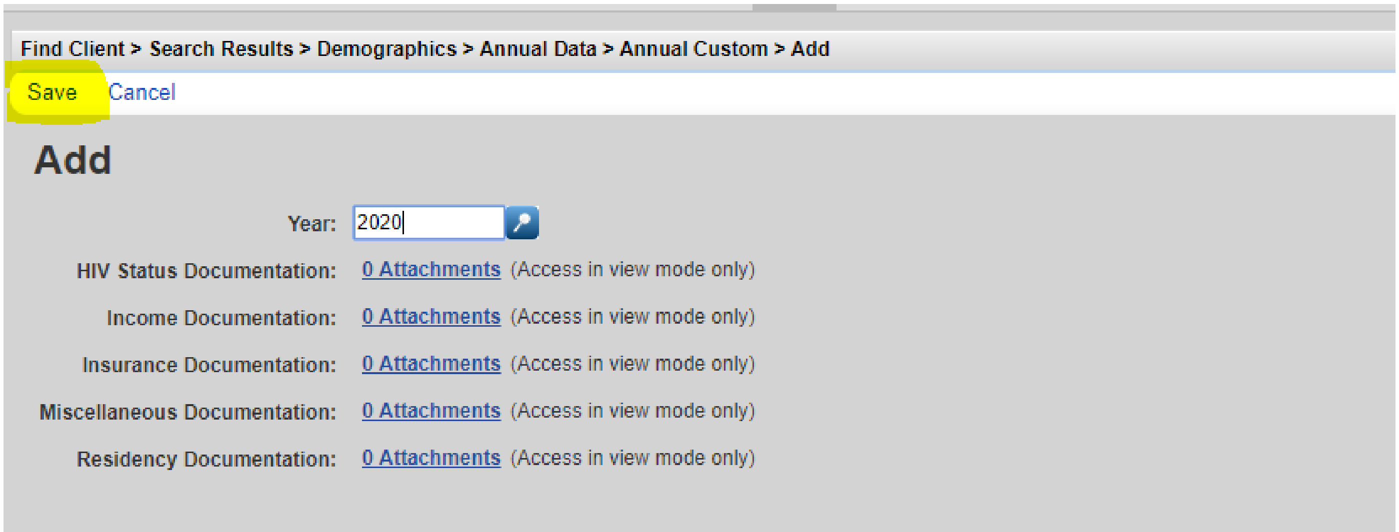
4. If the page is blank, select **Add.**



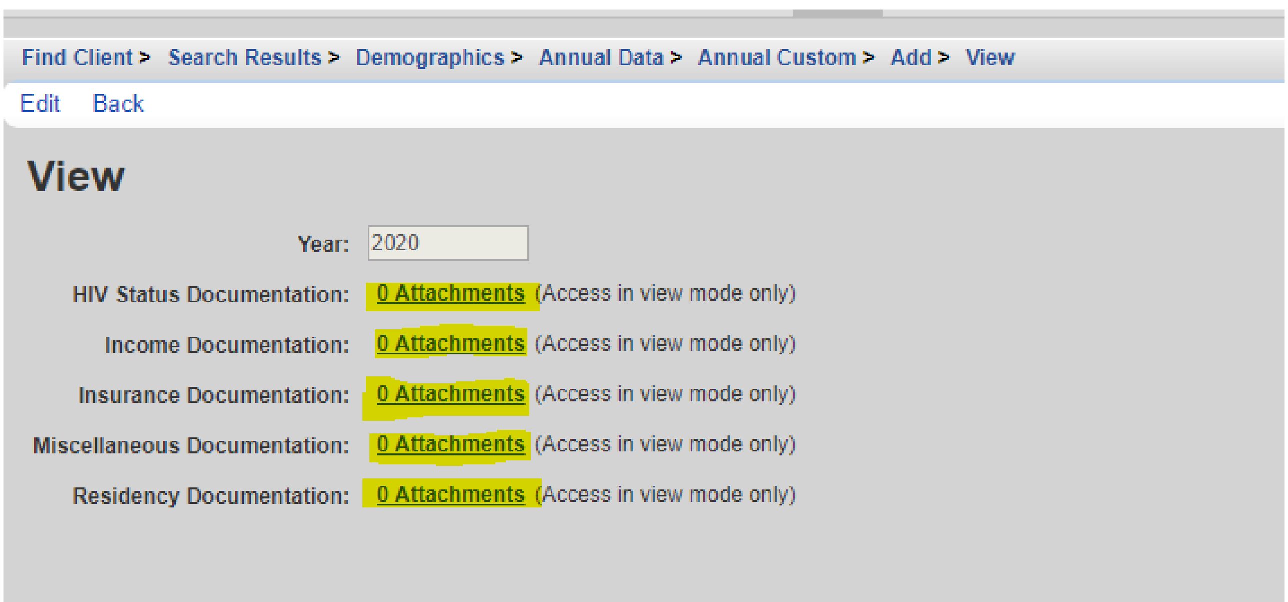
4B. If there is a year available, either double-click the year or click once and select **View.**



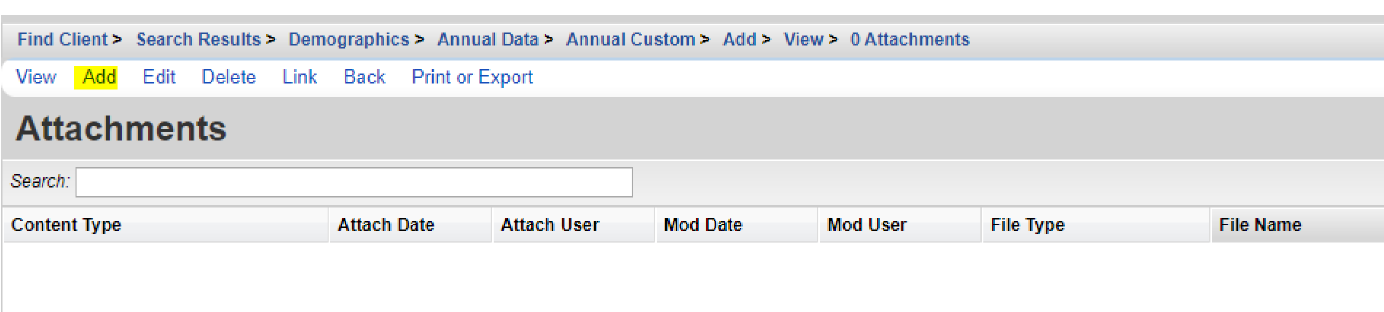
5. Select the **current** year. Then select **Save.**



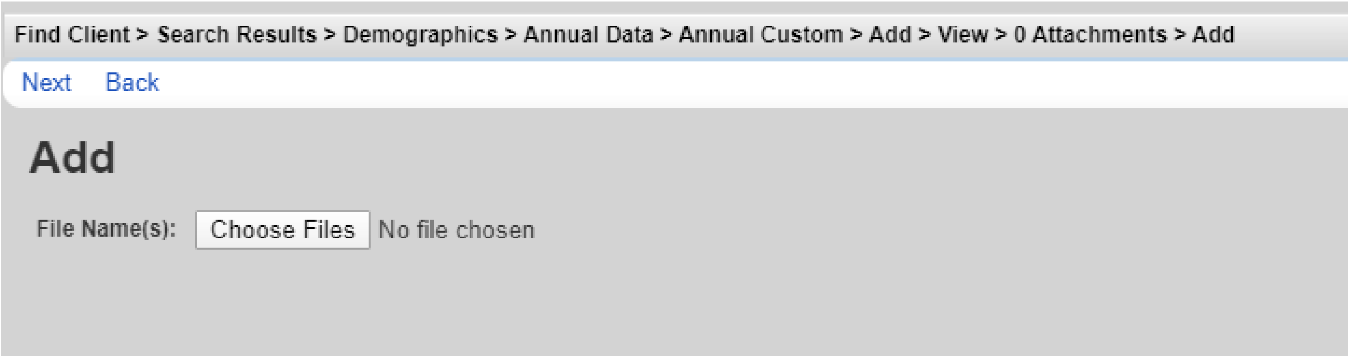
6. Double-click the year again. Everything will be grayed out. (It is supposed to look like that, so don't worry.) **Do not** select edit. Instead, select the category that you want to add an attachment.



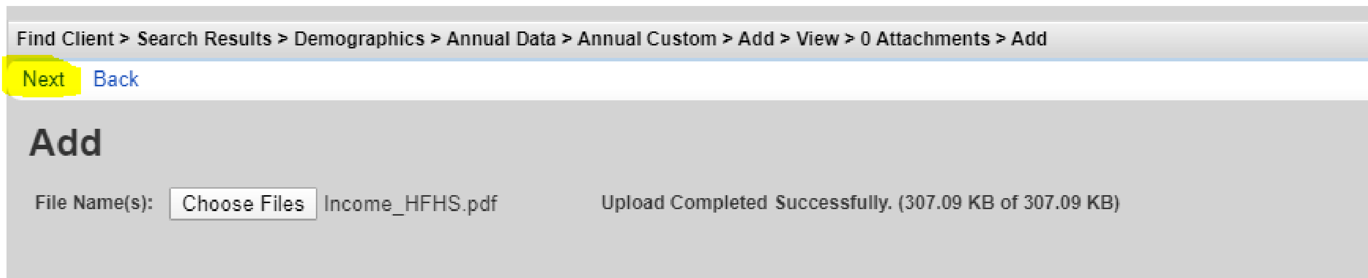
7. Select **Add.**



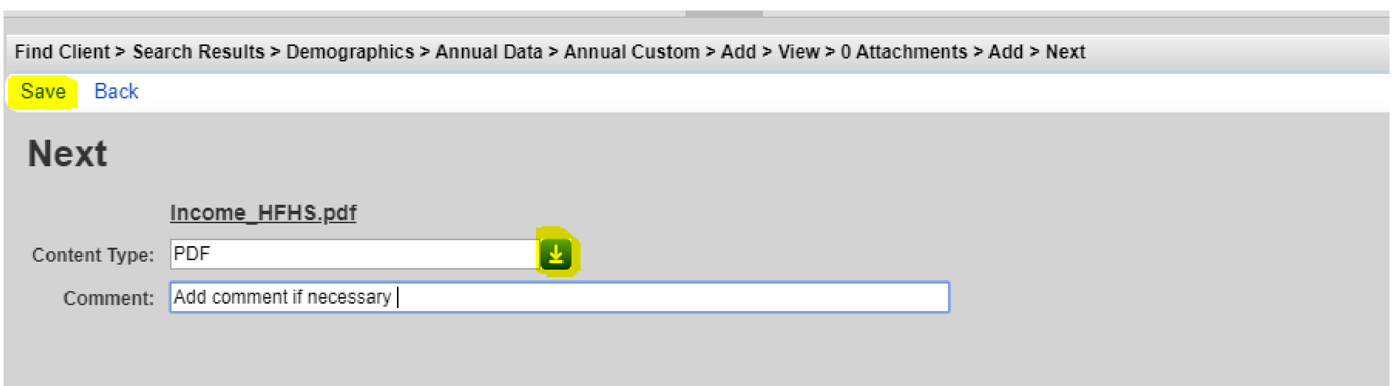
8. Select **Choose Files** and choose the correct file. Again, make sure it is a PDF.



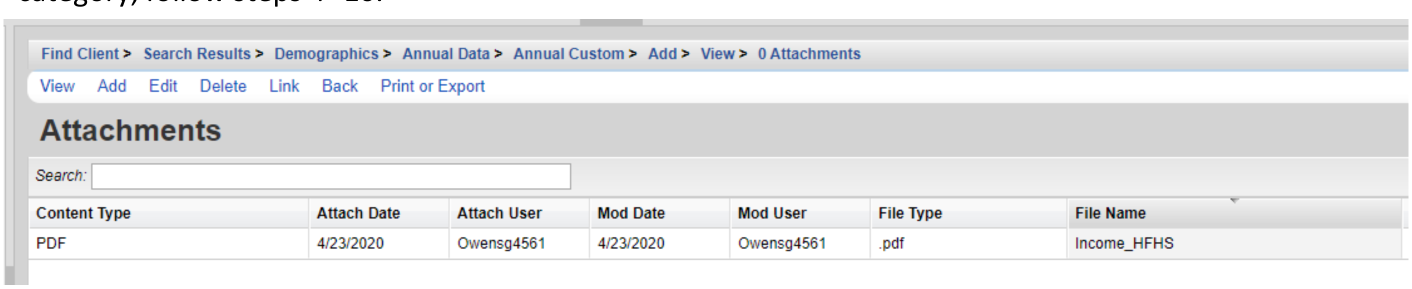
9. After selecting the file, make sure it says **Upload Completed Successfully.** Then select **Next.**



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

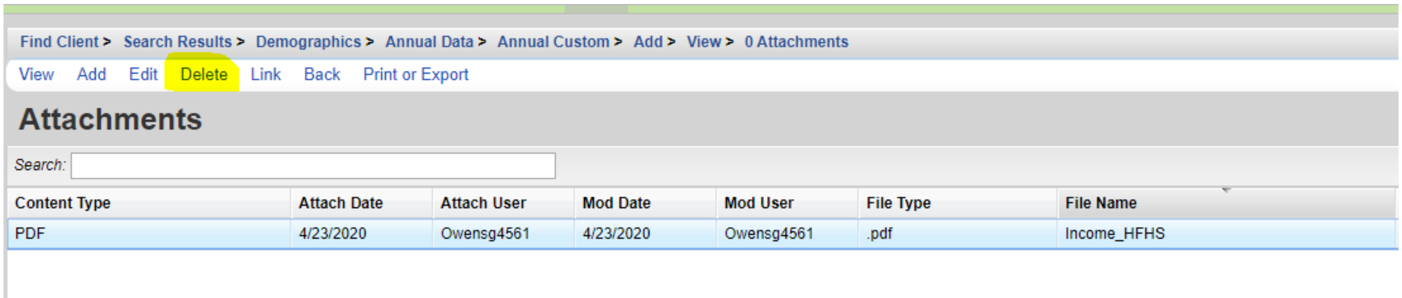


This is what a fully submitted attachment looks like. If you need to add another under the same category, follow steps 4 -10.

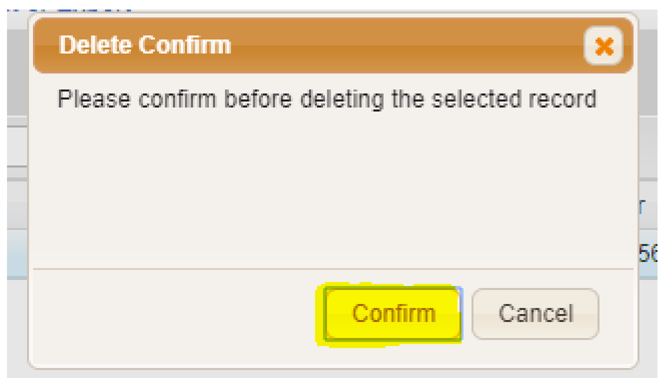


If you don't need to add any additional documents, then select **Back.**

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



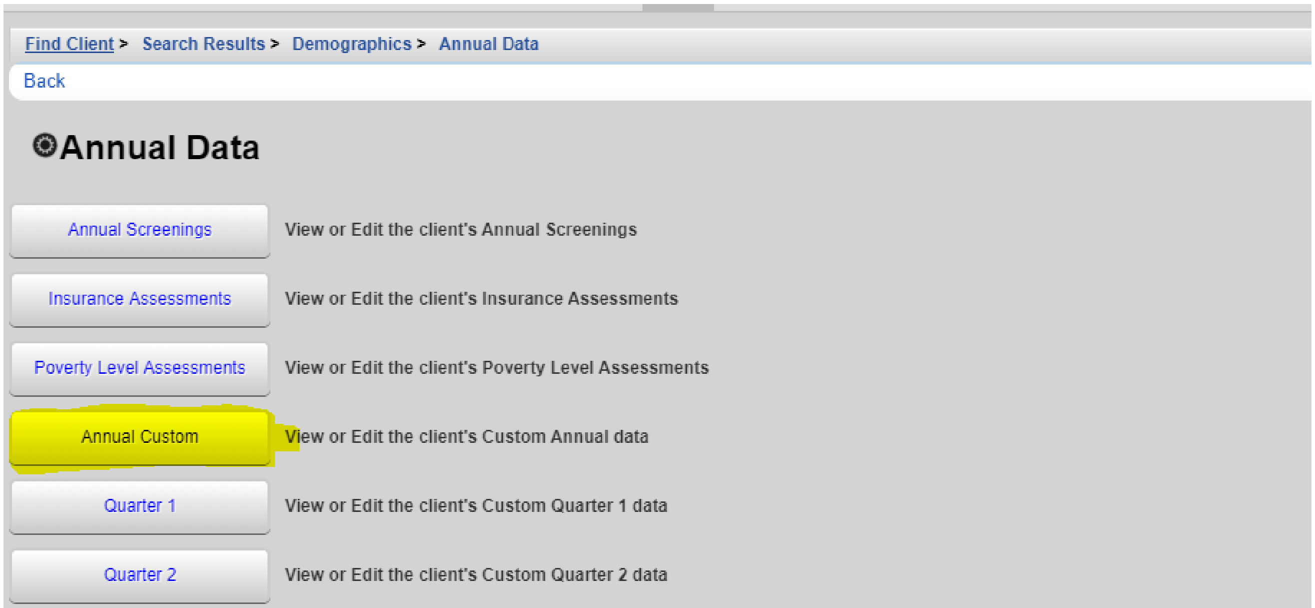
12. You will be asked to confirm. Select **Confirm.**



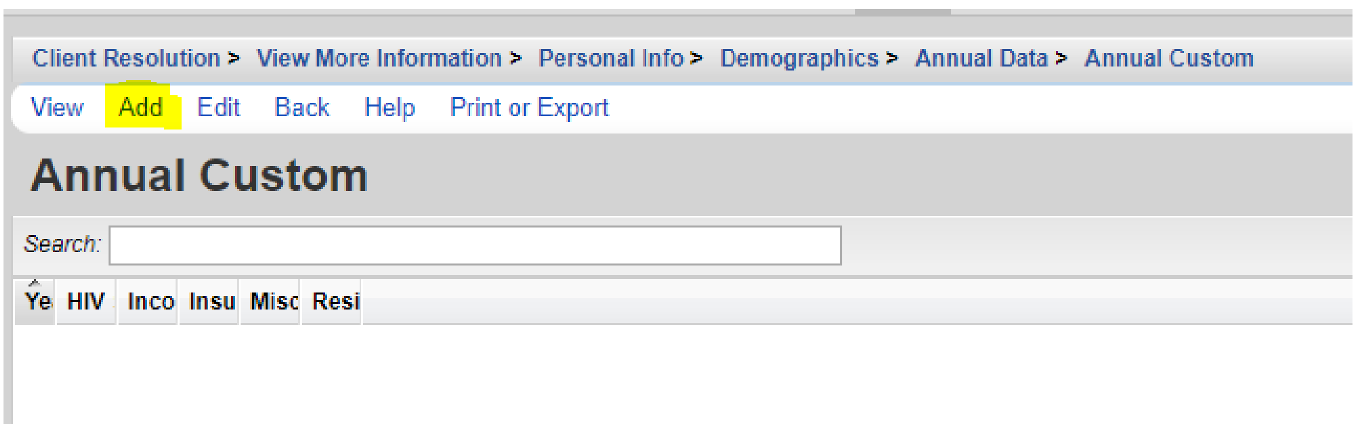
13. Once you confirm, the attachment will be deleted.

Viewing Other Agency Attachments

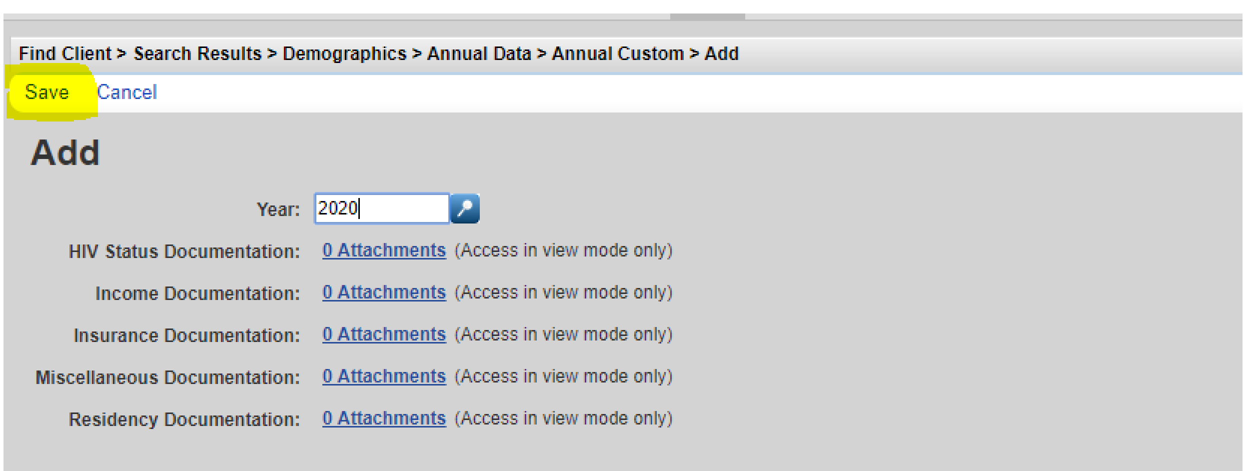
1. Select **Annual Custom**.



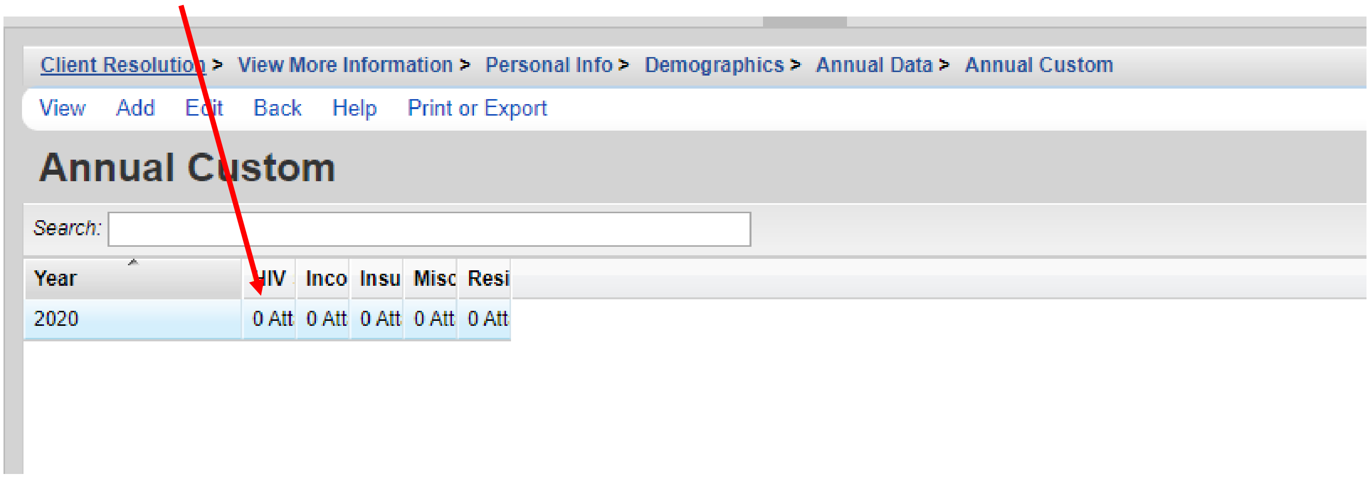
2. You will need to add the current year in order to see any attachments that have been uploaded. Select **Add.**



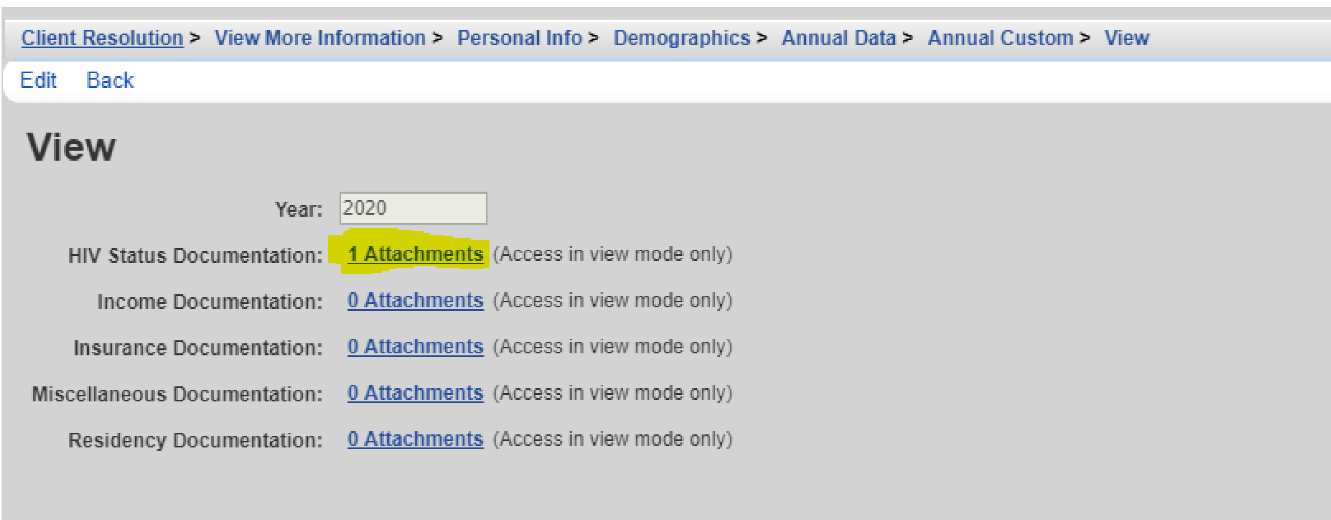
3. Select the current year. **Save.**



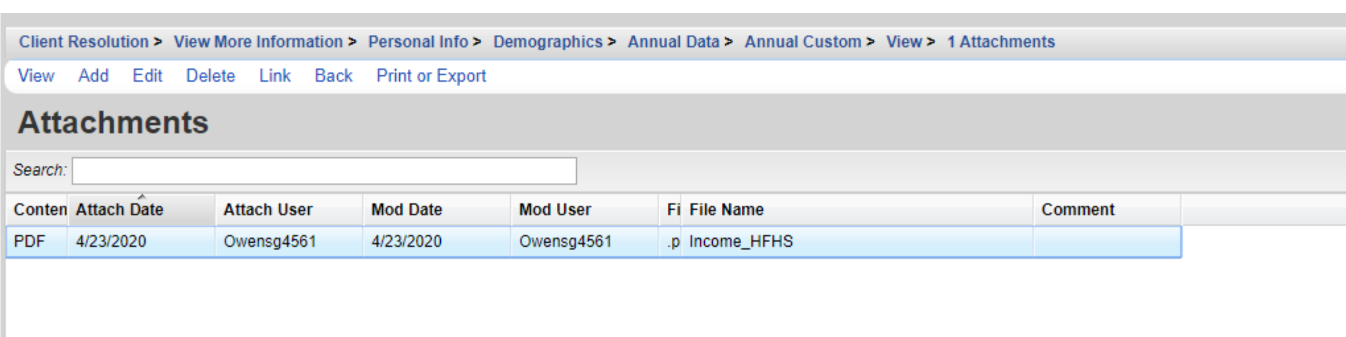
4. Notice that it still says zero attachments. In order to see if another agency has already added an attachment, either double-click the year or click once and select **View.**



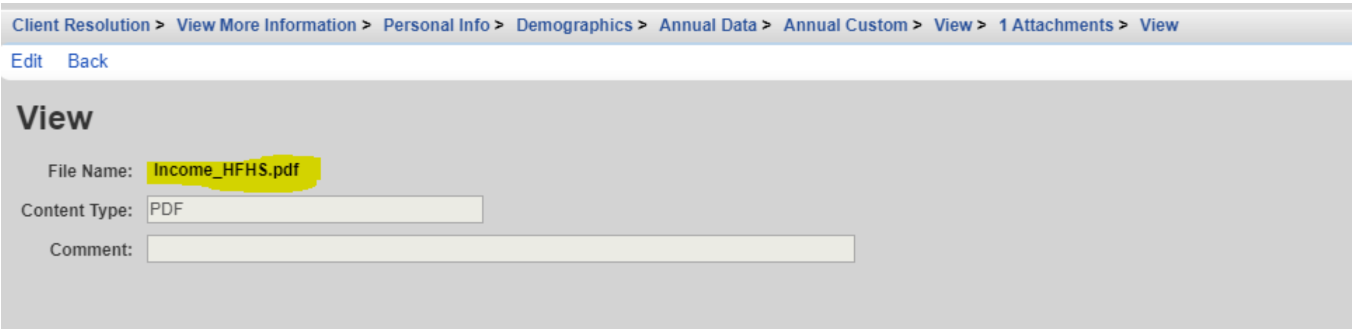
5. Now, you will be able to see if an attachment has been added to any of the categories. Click the attachment.



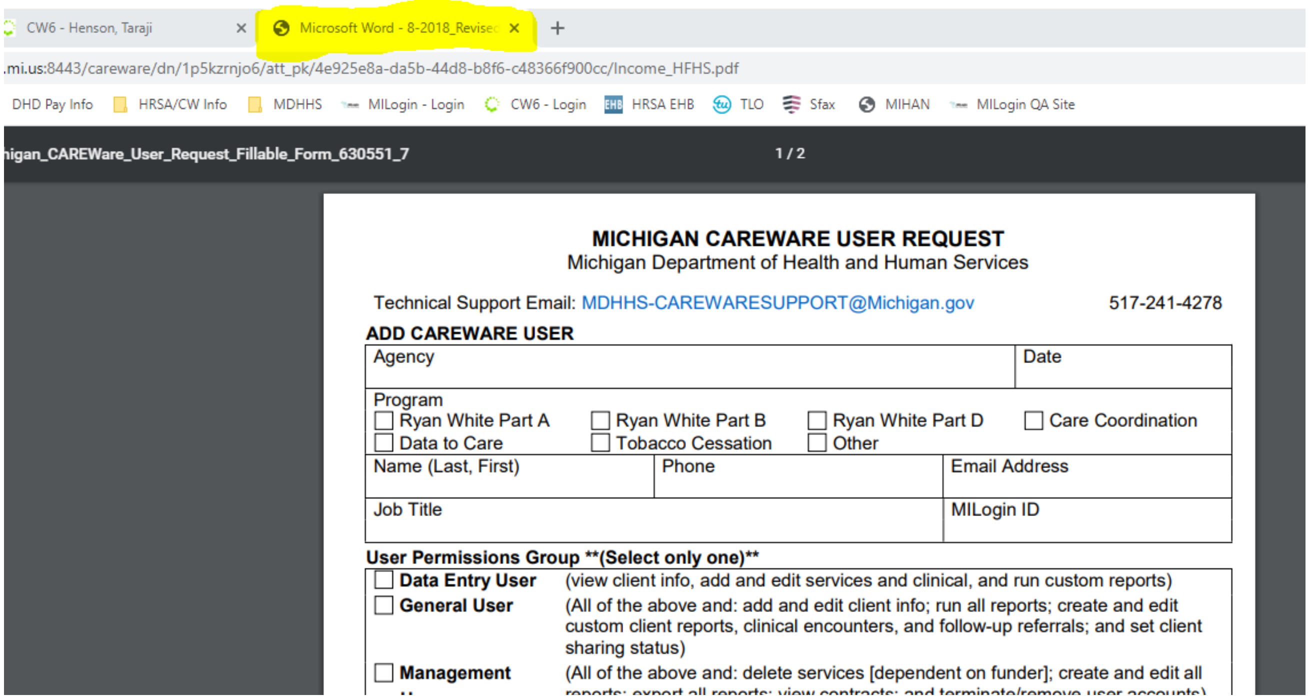
6. To view the attachment, either double-click or click once and select **View.**



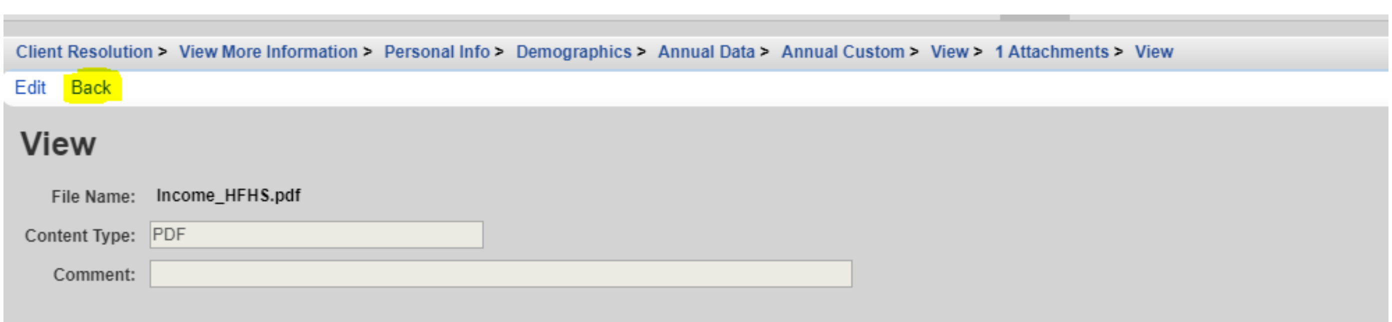
7. Click the name of the file.



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



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



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

CITY OF DETROIT HEALTH DEPARTMENT

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