CAREWare 6

June 2019

User Manual

Adapted from HRSA Quick Start User Guides:
https://hab.hrsa.gov/program-grants-management/careware

PLEASE NOTE: The client data used in these manuals is purely fictional.

What is CAREWare?

CAREWare is free, scalable software for managing and monitoring HIV clinical and supportive care. The HIV/AIDS Section, Florida Department of Health (Department), uses CAREWare to track services funded by Ryan White Part B, Patient Care Network, Housing Opportunies for Persons with AIDS (HOPWA) and General Revenue. A number of agencies that are funded by other sources have joined the Section's CAREWare network. This arrangement contributes greatly to the Section's ability to track service usage and monitor the quality of care across multiple providers. In fact, the Department of Health's CAREWare network is the largest in the world, with over 100 participating agencies.

The purpose of this manual is to demonstrate proper methods of data entry into CAREWare. This manual does not encompass every field and functionality available in the application. There are a number of features/fields that most users will not use that are not detailed. If you have any questions about using CAREWare, please call the Help Desk at 1-850-245-4744.

When submitting a ticket to the Help Desk, do not include any client identifying information in the ticket or voicemail; In these circumstances, please simply inform the Help Desk operator that you need client data changed and CAREWare staff will get the specific client information when they return your call. For a listing of information that is confidential, see Appendix A -- Confidential CAREWare Client Identifiers.

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Protocol for Breaches of Confidentiality of CAREWare Data

The highest priority of those working within the CAREWare network is to safeguard client information. This protocol outlines the steps that will be taken when there is a breach of protected health information entered into CAREWare. The protocol is intended to supplement DOHP 50-10-10 Information and Security Policy or local policies written to conform to the security requirements of Department of Health HIV/AIDS patient care contracts and subcontracts. More restrictive state or federal rules, regulations or laws take precedence over this protocol.

Definitions:

1. *Breach of confidentiality of CAREWare data* -- Occurs when individual identifiers, as described in "Confidential CAREWare Client Identifiers" (Appendix A), are accessed by or shared with person(s) who are not legally authorized to know a client's HIV status or other protected health information.

2. *Electronic breach of confidentiality of CAREWare data* -- Occurs when individual identifiers, as described in "Confidential CAREWare Client Identifiers" (Appendix A), are electronically transmitted unencrypted, or accessed or shared with person(s) who are not legally authorized to know a client's HIV status or other protected health information.

Protocol for Breaches of Confidentiality of CAREWare Data (continued)

Procedure:

1. For a first offense of breach of confidentiality of CAREWare data:
   a. The HIV/AIDS Section (HAS) will notify the user of the breach and the user will be locked out of CAREWare until the steps in paragraphs 1.b-d are completed.
   b. HAS will notify the user's supervisor and/or the executive administrator of the user's organization of the seriousness of this issue and require an acknowledgement by their supervisor/administrator in writing. An email to the HAS staff making the notification is acceptable written acknowledgement.
   c. HAS staff will report the breach to HAS's Information Security and Privacy Coordinator, who will submit an Incident Report. Depending on the severity of the breach, the Incident Report will be sent to the Division of Disease Control and Health Protection's (Division) security officer or the Department's Inspector General for review.
   d. If an electronic breach of confidentiality of CAREWare data is by unencrypted transmission via email, the sender and all recipients will be instructed to double- or triple-delete the email, depending on the sender's and recipients' email program(s). The HAS staff member who reports the breach is responsible for notifying Department staff to delete the email. The user is responsible for notifying all other recipients.

2. For a second offense of breach of confidentiality of CAREWare data:
   a. HAS will notify the CAREWare user of the breach and the user will be locked out of CAREWare.
   b. HAS will notify the user's supervisor and/or the executive administrator of the user's organization of the seriousness of this issue and require an acknowledgement by their supervisor/administrator in writing. An email to the HAS staff making the notification is acceptable written acknowledgement.
   c. HAS staff will report the breach to the HAS' Information Security and Privacy Coordinator, who will submit an Incident Report. Depending on the severity of the breach, the Incident Report will be sent to the Division security officer or the Department's Inspector General for review.
   d. If an electronic breach of confidentiality of CAREWare data is by unencrypted transmission via email, the sender and all recipients will be instructed to double- or triple-delete the email, depending on the sender's and recipients' email program(s). The HAS staff member who reports the breach is responsible for notifying Department staff to delete the email. The user is responsible for notifying all other recipients.
   e. If the supervisor/executive director wants the user to have access to the system after the second breach, the supervisor/executive director will send in a written request (email is acceptable) to HAS asking that the user be granted access to CAREWare.
   f. An internal HAS panel comprising representatives of the Division's information security officers, the HIV/AIDS Surveillance Unit and the HIV/AIDS Patient Care Community Programs Unit will review the incident. The panel will meet as soon as possible and decide the appropriate remedy for the violation.
   g. If the user or their organization disagrees with the decision of the panel, they may appeal the decision to the HAS administrator.
3. For a third or subsequent offense of breach of confidentiality of CAREWare data:
   a. HAS will notify the CAREWare user of the breach and the user will be permanently locked out of CAREWare.
   b. HAS will notify the user's supervisor and/or the executive administrator of the user's organization and require an acknowledgement by their supervisor/administrator in writing. An email to the HAS staff making the notification is acceptable written acknowledgement.

Protocol for Breaches of Confidentiality of CAREWare Data (continued)

c. HAS staff will report the breach to the HAS' Information Security and Privacy Coordinator, who will submit an Incident Report. Depending on the severity of the breach, the Incident Report will be sent to the Division security officer or the Department's Inspector General for review.
d. If an electronic breach of confidentiality of CAREWare data is by unencrypted transmission via email, the sender and all recipients will be instructed to double- or triple-delete the email, depending on the sender's and recipients' email program(s). The HAS staff member who reports the breach is responsible for notifying Department staff to delete the email. The user is responsible for notifying all other recipients.
e. The user or their organization may appeal the permanent lock-out to the HAS administrator.

Confidential CAREWare Client Identifiers

The following identifiers of an individual, or of relatives, employers or household members of an individual, are considered confidential for the purposes of the sharing of CAREWare data.
You cannot share any of these identifiers electronically unless the electronic transmission is encrypted. This list is not exhaustive; please contact the HIV/AIDS Section Applications Help Desk at 850-245-4744 if you have any questions. Again, if you must make a change to a client's record, client identifiers should be communicated to the CAREWare team via phone-call (not through voicemail) or email (**only** if you are using a state email address, as it is encrypted).

CAREWare Data Fields

Information in the DEMOGRAPHICS TAB

- Legal First Name
- Any alias or nickname
- Middle Name
- Legal Last name
- Date of Birth (except year; and all ages over 89 and all elements of dates [including year] indicative of such age, except that such ages and elements may be aggregated into a single category of age 90 or older)
- Address
- City
- Zip Code
- County
- Phone Number
- HIV+ Date (except year)
- AIDS Date (except year)
- Deceased Date (except year)
- Enrl Date (except year)

Confidential CAREWare Client Identifiers (continued)

Information in the SERVICE TAB

Service Details

- Date (except year)

Information in the ENCOUNTERS TAB

1. Vital Signs Sub-Tab

- Estimated Conception Date (except year)
- Prenatal Begin Date (except year)
- Delivery/Outcome Date (except year)

2. Medications Sub-Tab

- Every time medication is prescribed complete as applicable: Start, Stop, Correct Data Error, or Change Dose (except year)

3. Labs Sub-Tab

- Test Date (except year)

4. Screening Labs Sub-Tab

- Test Date (except year)

5. Screening Sub-Tab

- Test Date (except year)
- Action Date (except year)
- Annual TB Screening Date (except year)
- Pap (except year)

6. Immunizations Sub-Tab

- Hep B, Date of Shots (except year)
- Hep C, Date of Shots (except year)

Information in the UNIQUE ID TAB

- Do not e-mail any scanned document unencrypted
- Medicaid #
- Medicare #
- PAC #
- Social Security #
- Date eligibility expires (except year)

Required Information in the FORMS TAB

- Eligibility Staff Assessment Worksheet
- Insurance Waiver Form
- Notice of Eligibility or Ineligibility
- Six Month Recertification

Confidential CAREWare Client Identifiers (continued)

Protected Health Information, as per 45 CFR 164.514

- Names
- All geographic subdivisions smaller than a state, including street address, city, county, precinct and zip code
- All elements of dates (except year) for dates directly related to an individual, including birth date, admission date, discharge date, date of death; and all ages over 89 and all elements of dates (including year) indicative of such age, except that such ages and elements may be aggregated into a single category of age 90 or older
- Telephone numbers
- Fax numbers
- Electronic mail addresses
- Social Security numbers
- Medical record number
- Unique Record Number (URNs)
- Health plan beneficiary numbers
- Account numbers
- Certificate/license numbers
- Vehicle identifiers and serial numbers, including license plate numbers
- Device identifiers and serial numbers
- Web Universal Resource Locators (URLs)
- Internet Protocol (IP) address numbers
- Biometric identifiers, including finger and voice prints
- Full face photographic images and any comparable images
- Any other unique identifying number, characteristic or code

CAREWare 6

Section 1:

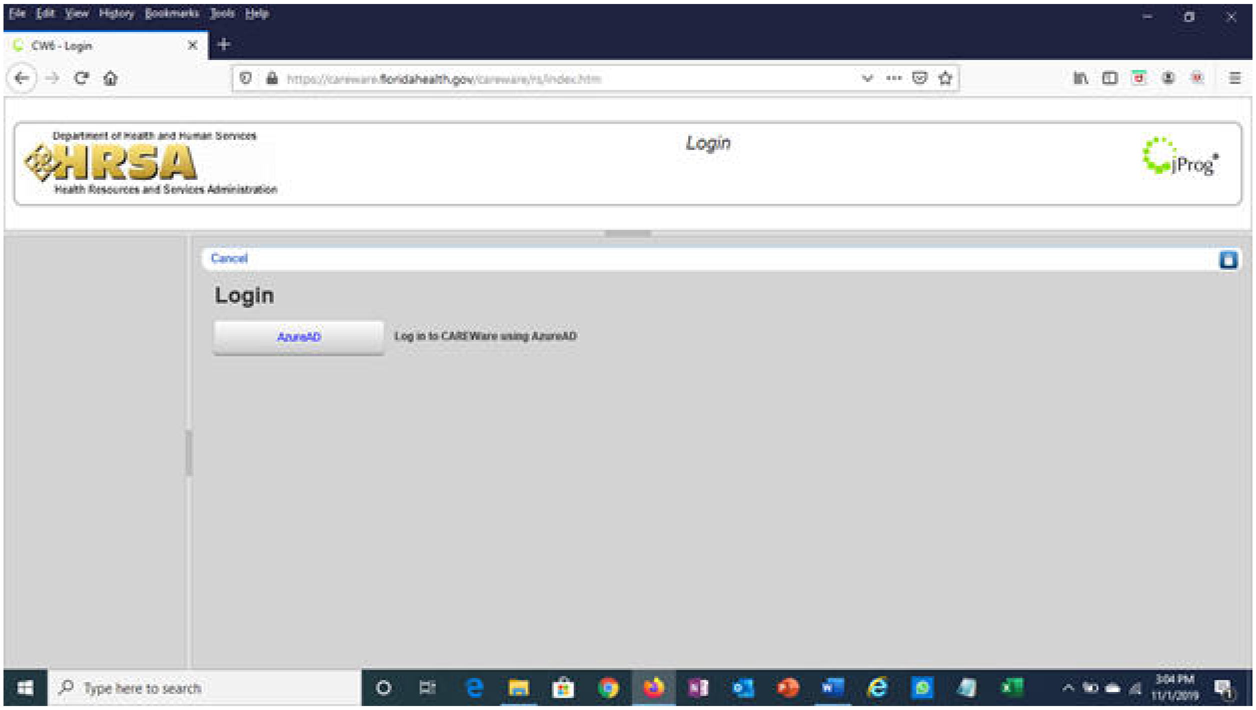
Navigating CAREWare Version 6.0

Adapted from HRSA Quick Start User Guides:
https://hab.hrsa.gov/program-grants-management/careware

PLEASE NOTE: The client data used in these manuals is purely fictional.

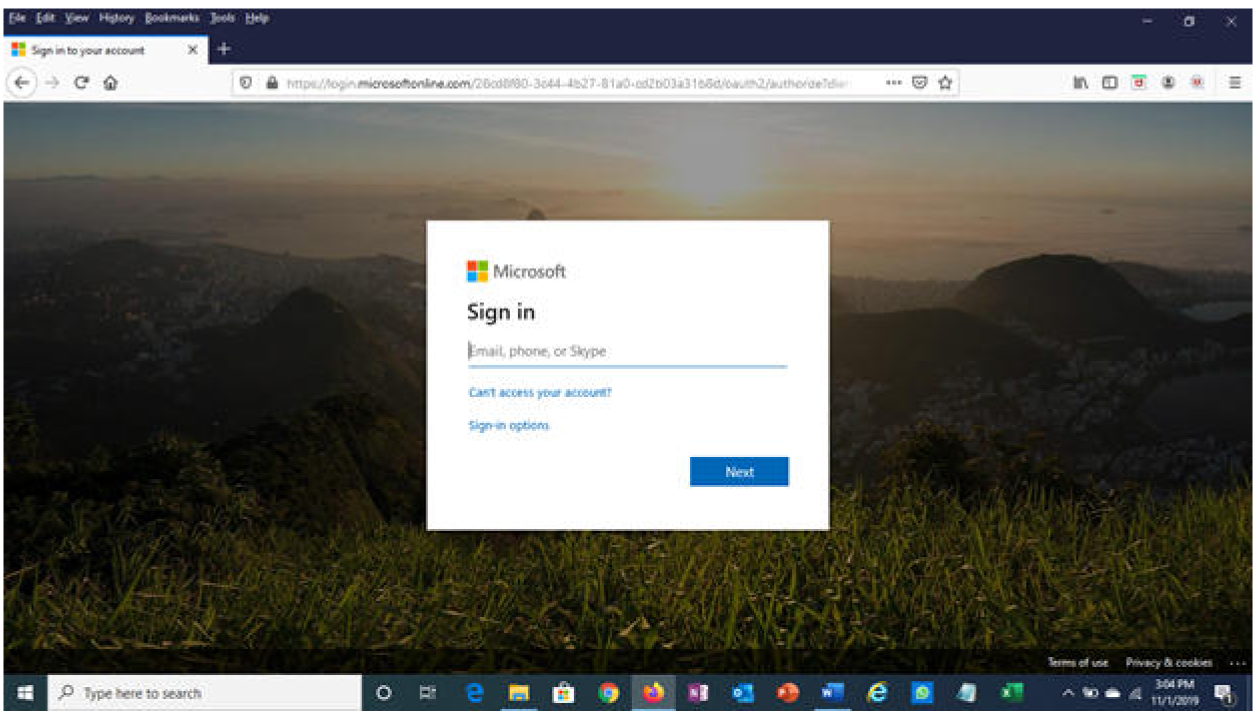
Logging in to CAREWare

1. Open your browser and enter the secure webpage address to connect to your CAREWare system. The CAREWare URL: https://careware.floridahealth.gov/careware/rs/index.htm



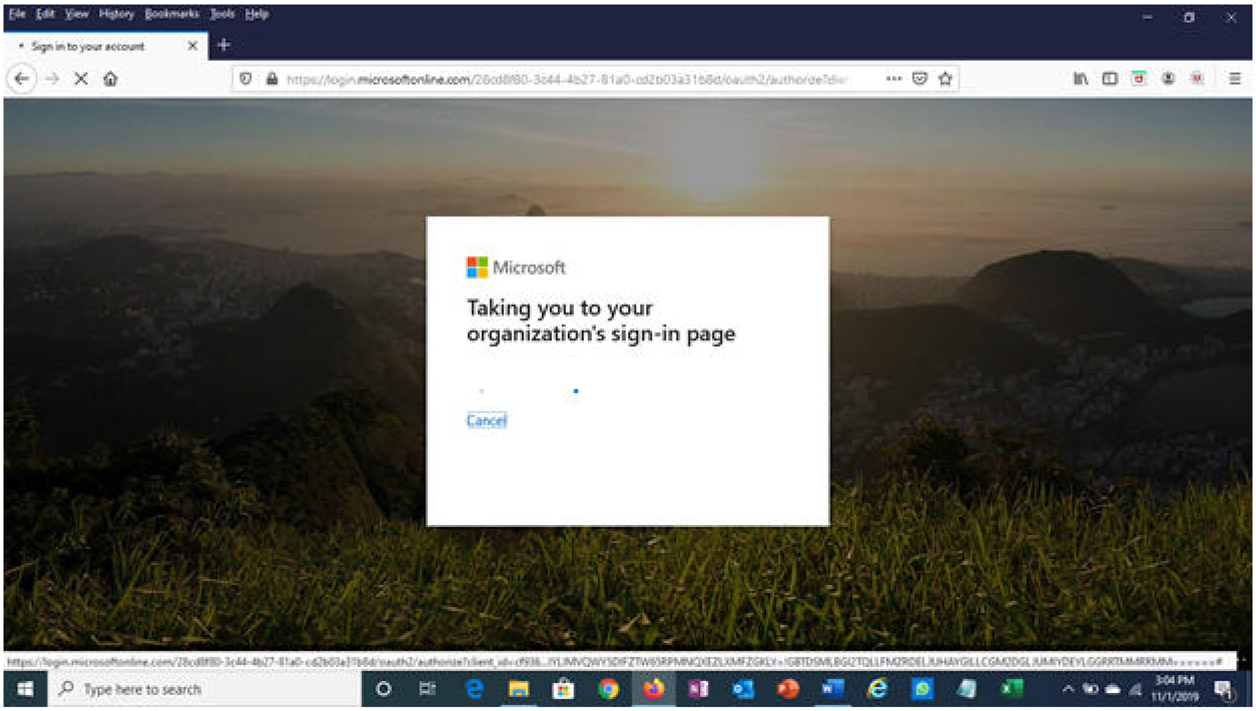
2. Click the AzureAD button to login to the system. Users will then be redirected to the login process below.

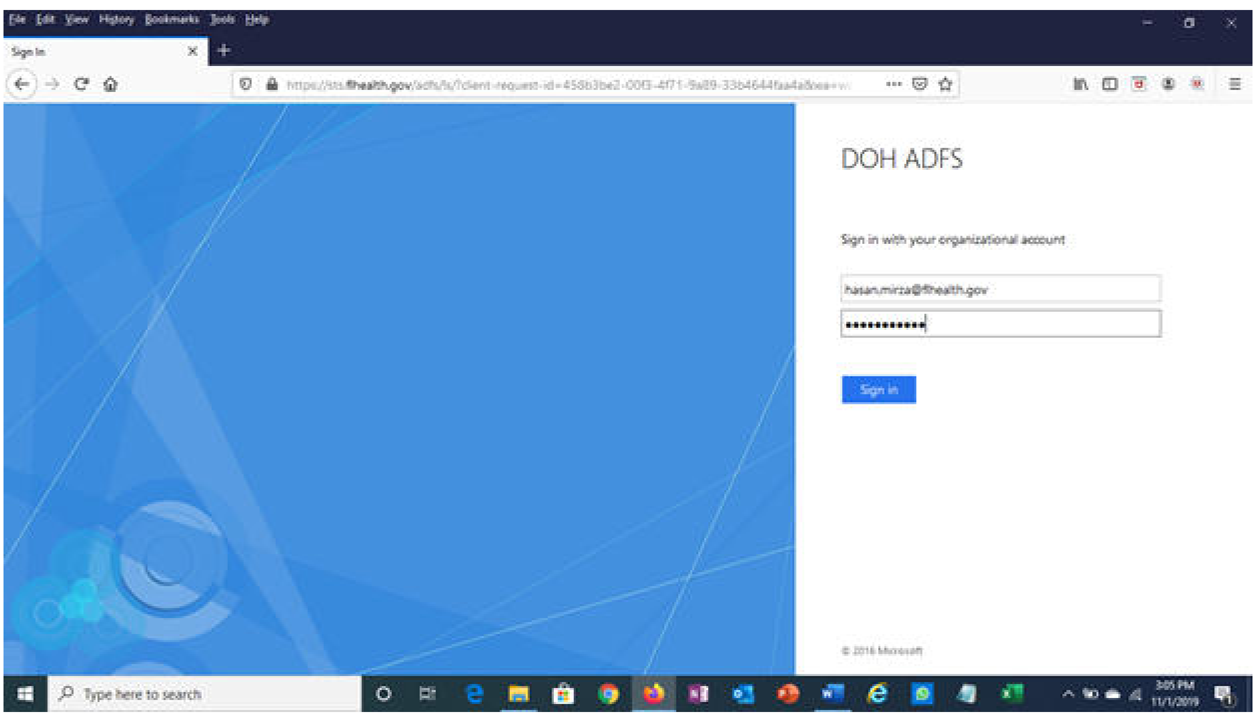
a) Enter your email address.



Logging in to CAREWare (continued)

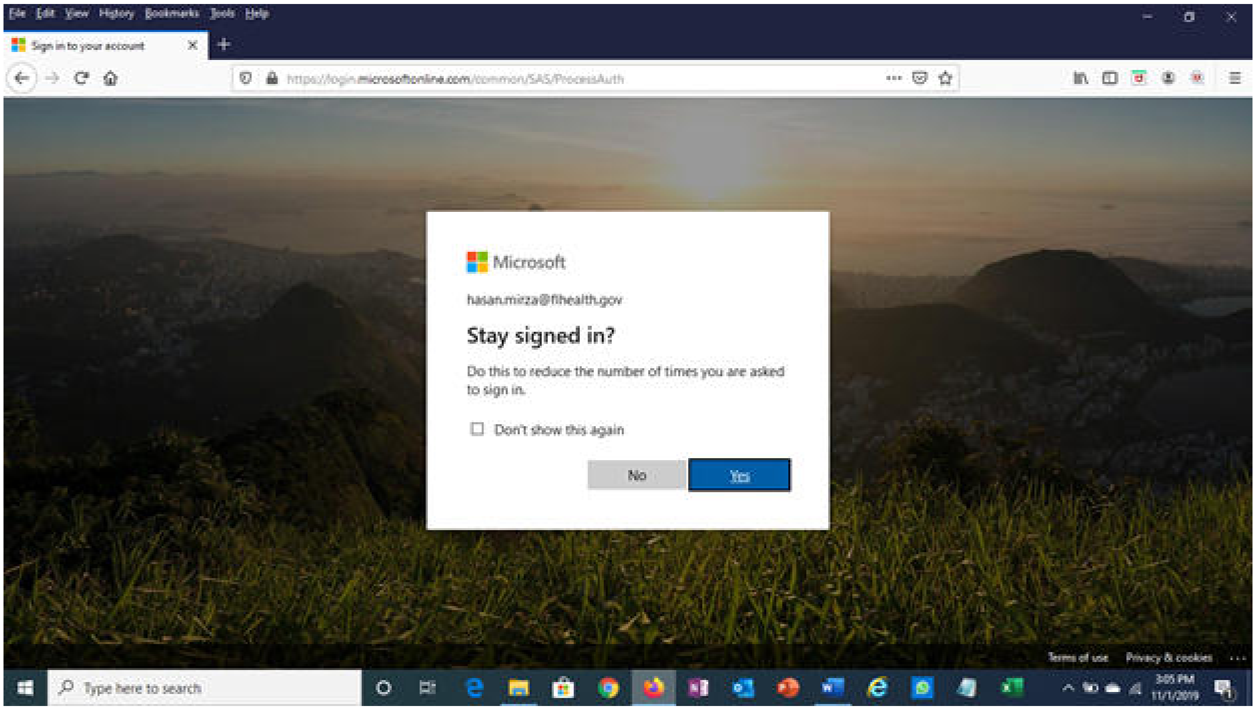
b) After being directed to the DOH ADFS login page, enter your email and password. You will be given the option to stay signed in, which will reduce the number of times you will be asked to sign in.



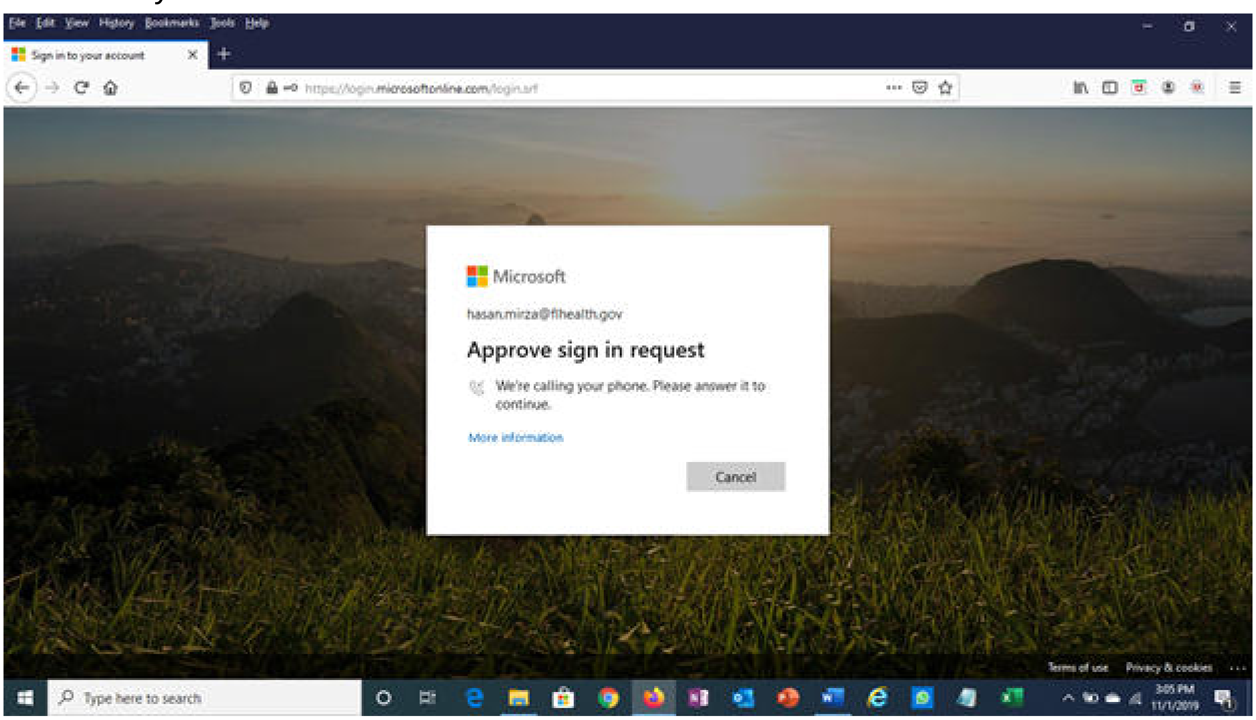


Logging in to CAREWare (continued)

b) You will be given the option to stay signed in; choosing **Yes** will reduce the number of times you will be asked to sign in in the future.



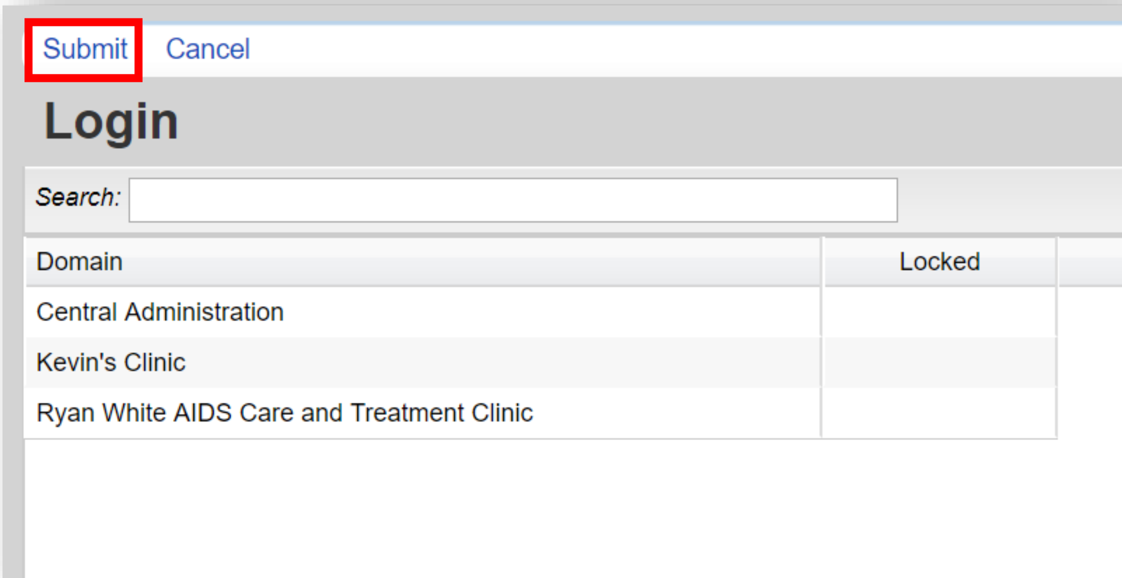
b) Finally, you will be asked to approve your sign-in request via your designated Multi-Factor Authentication (MFA) option. Once the sign-in request has been confirmed you will be directed to the CAREWare 6 homescreen.



Logging in to CAREWare (continued)

3. If you have administrative privileges, you may see a list of several domains. If choosing between Central Administration ("Read-only") and Provider ("Default" until you change the name), log into a Provider domain.

   Select a Provider domain, click **Submit** or double-click on **Domain** name.



Getting Started

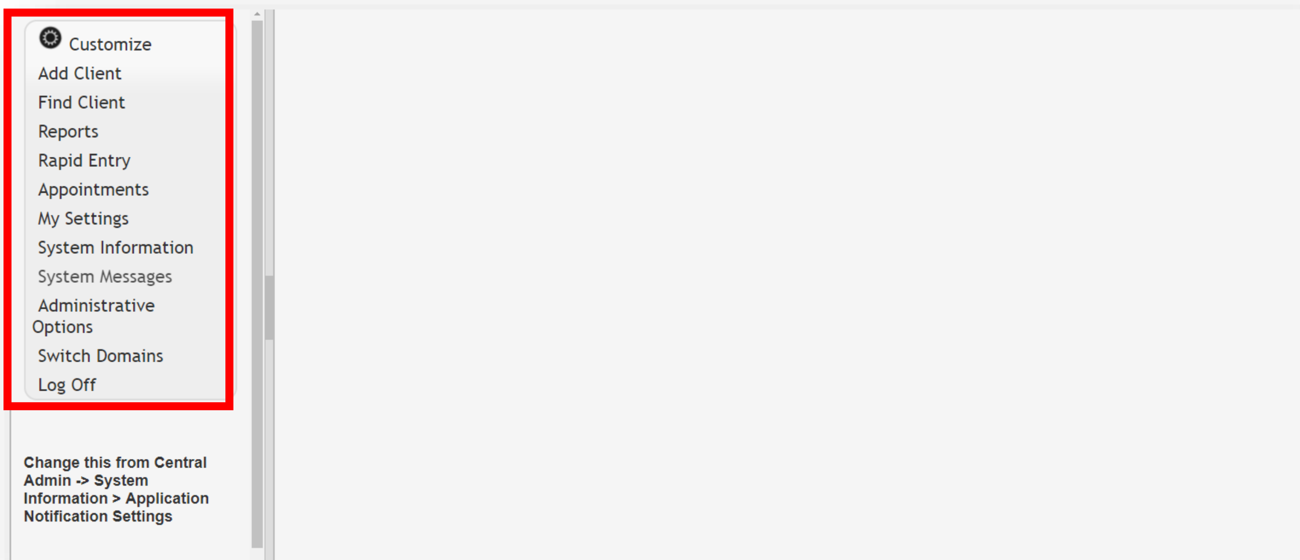
CAREWare Version 6.0 is a design change that performs more like a web application than previous versions of CAREWare. After logging into CAREWare, a **Menu of Links** will be displayed on the left.

Links will list common user tasks in CAREWare. Upon selecting a particular link, the **Link Summary** description will be displayed on the right.

Similar formats, link menus, and descriptions are the same throughout CAREWare Version 6.0!

Menu of Links

Upon logging in to CAREWare, you will find a **Menu of Links** on the left-hand side of the screen. Simply click on the item you wish to access. Clicking **Add Client** or **Find Client** will open a new tab within your browser.



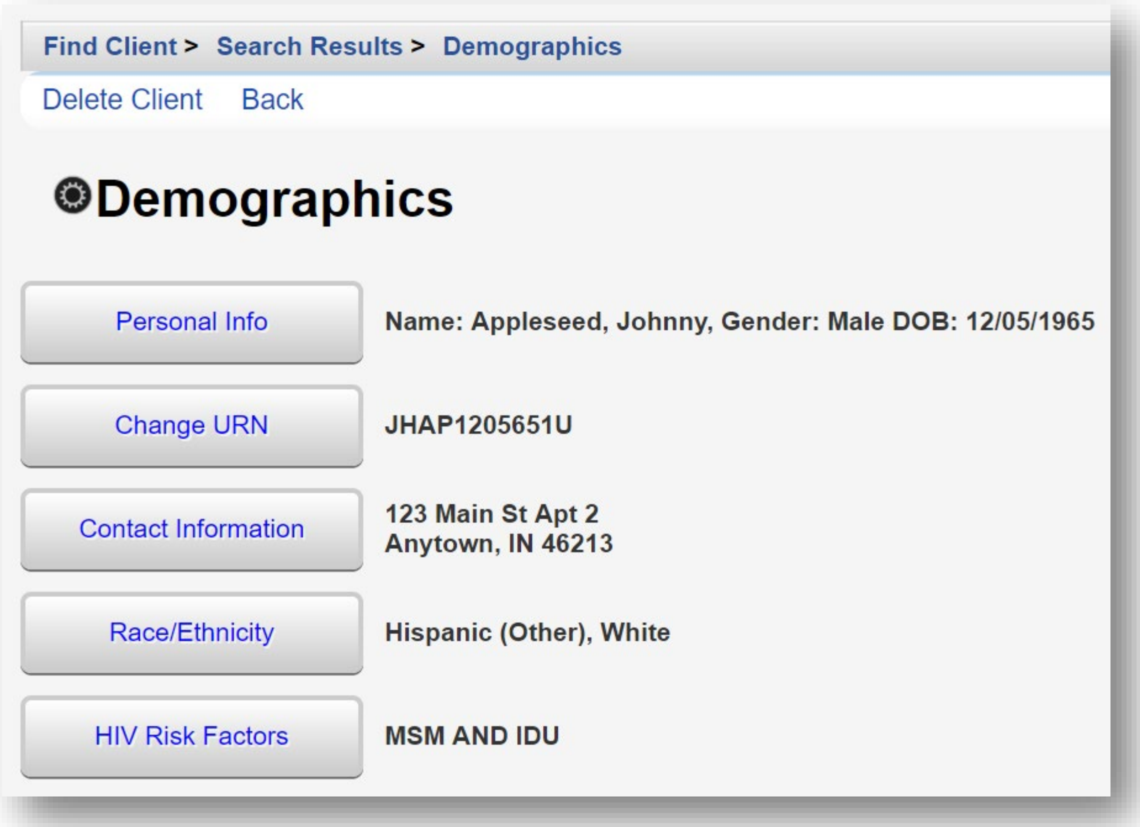
Link Summary

A **Link Summary** is displayed to the right of each link item. In the example below, once Reports is selected from the **Menu of Links**, a new screen appears with additional link items. To the right of each is a **Link Summary**.

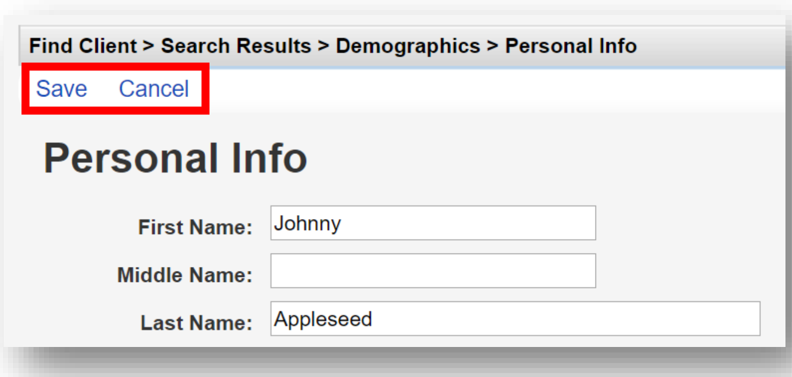
Breadcrumbs and Link Actions

Breadcrumbs or **breadcrumb trails** allow users to keep track and maintain awareness of their locations within CAREWare 6.

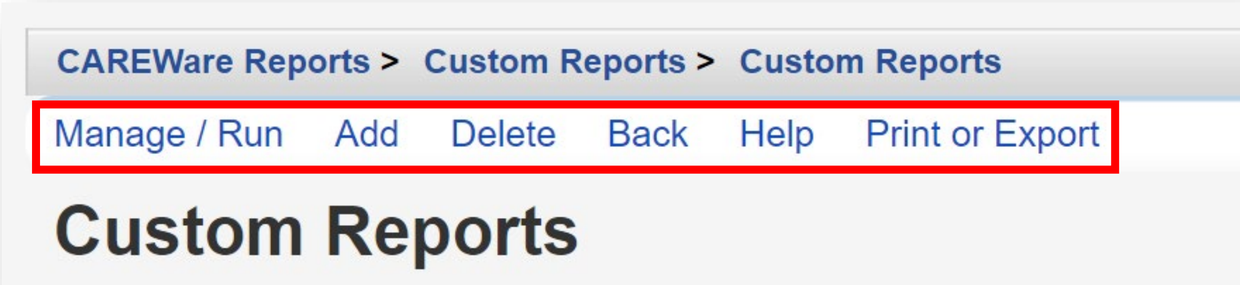
In this example: **Find Client > Search Results > Demographics** is considered the **Breadcrumb trail**.



If the items in the Breadcrumb trail are blue (as in the example above), click on the item link to return to that section. If they are black, you must either click **Save** or **Cancel** to return to the previous section, as seen below.



Link Actions are displayed below the Breadcrumb trail and are actions that can be taken on each screen.

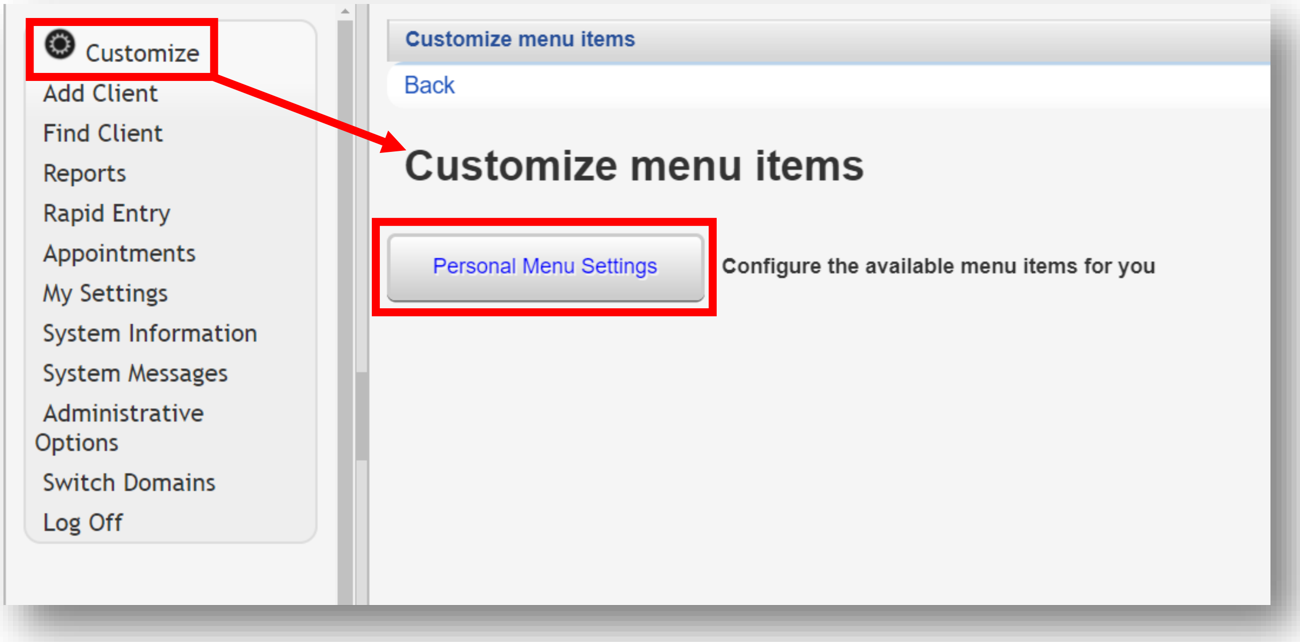


TIP: Using the **Help** option within the **Link Actions** will open a new tab within your browser with more information on the section you are currently in.

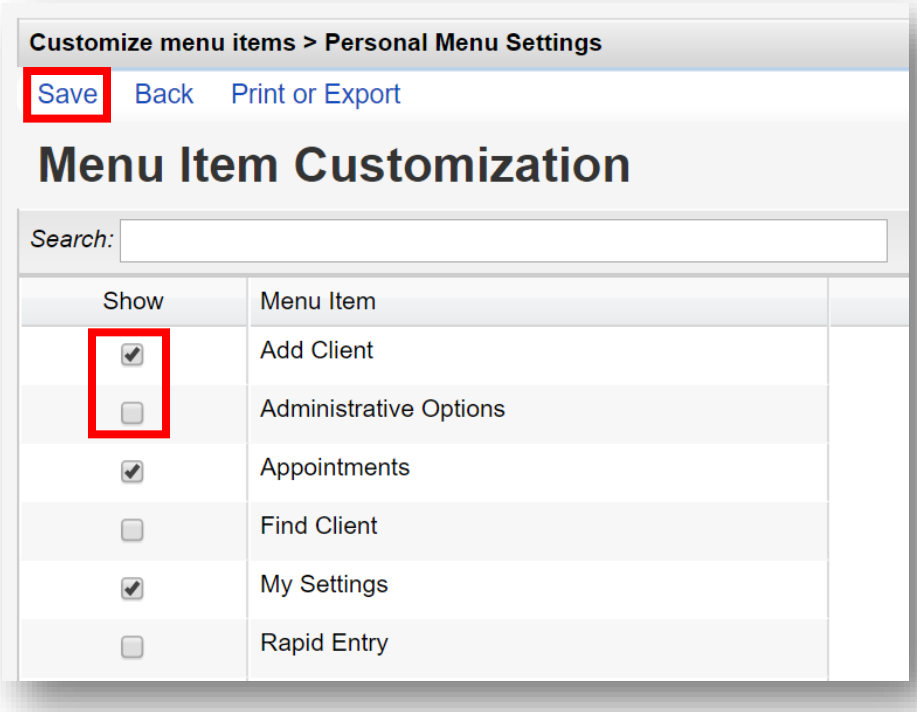
Menu Customization

With adequate permissions, the user can personalize and customize the **Menu of Links**.

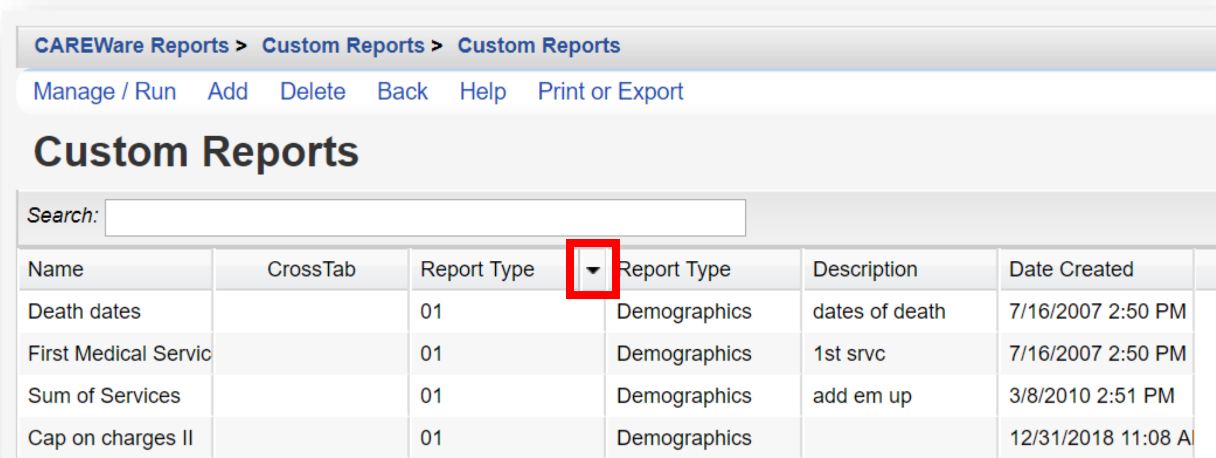
1. From the **Menu of Links**, select **Customize**. Then, click **Personal Menu Settings**.



2. *Show* or *hide* items in the CAREWare Menu of Links by checking or un-checking the box next to the relevant Menu Item. Once complete, click **Save**.



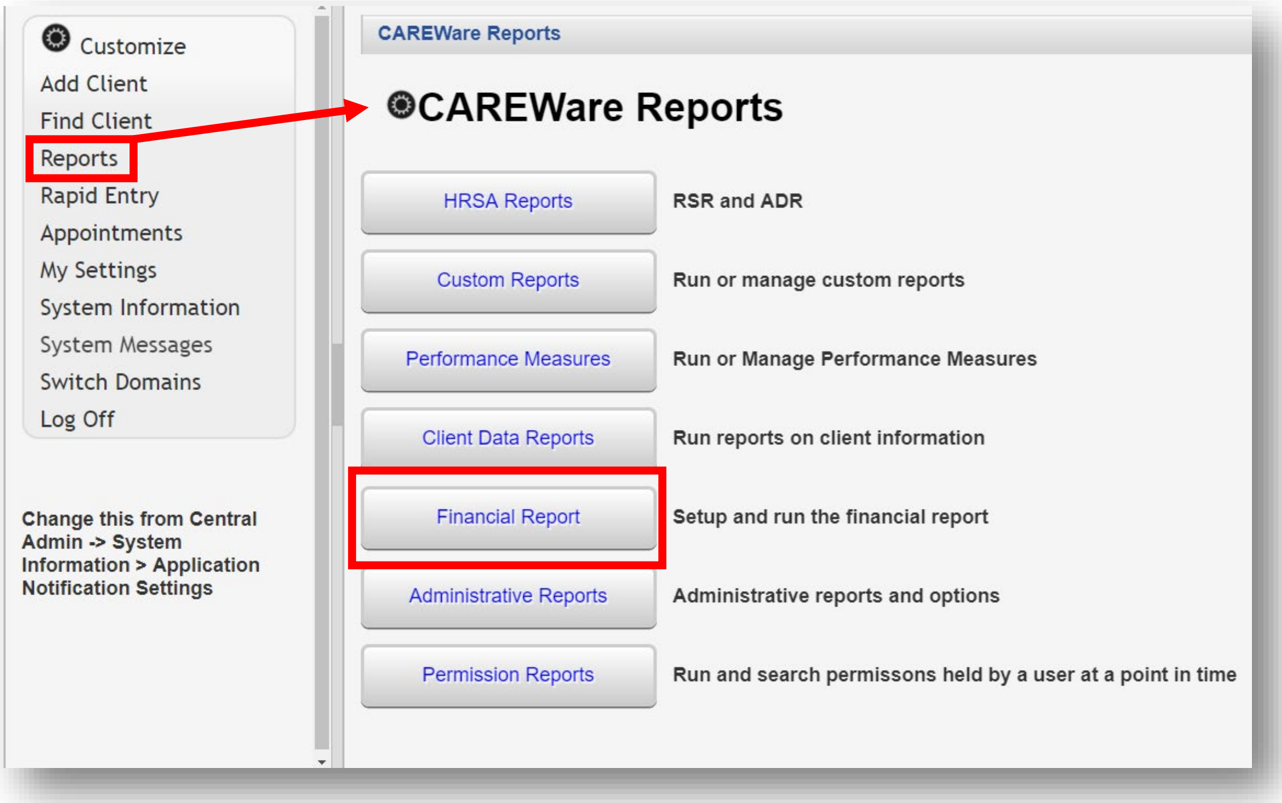
3. Click on the down arrow at the top of any column to **Hide/Show Columns**.



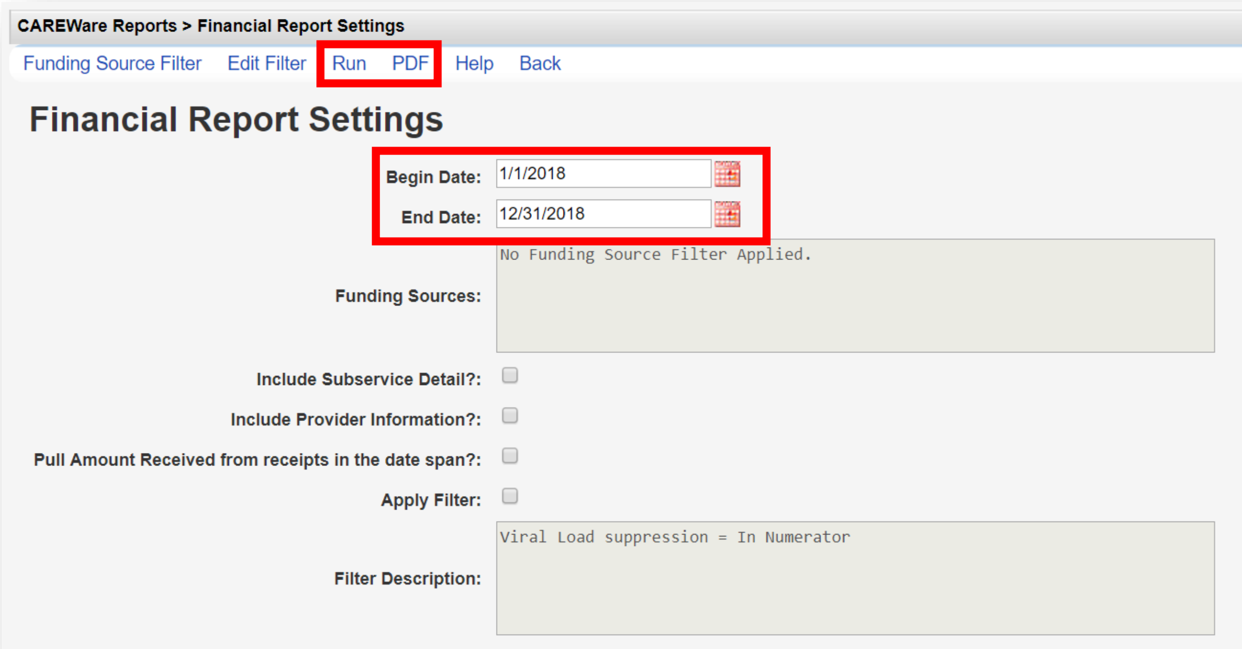
4. Click-and-drag the column header to reposition it within the table.

Menu Navigation

1. From the **Menu of Links**, select **Reports** and the CAREWare Reports screen will appear. For this example, click **Financial Report**.

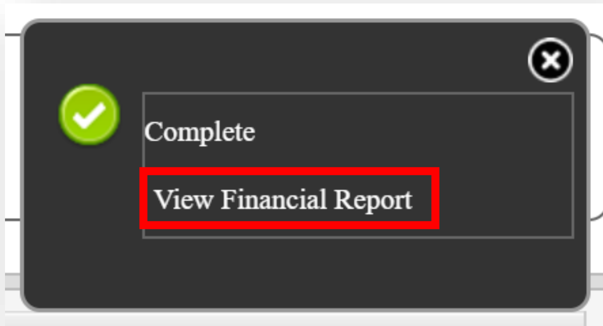


2. You will now be on the Financial Report Settings screen.
    - Enter **Begin Date**
    - Enter **End Date**
    - Click **Run** to open the report in a new tab. Click **PDF** to open the report as a PDF.



TIP: You may also filter the report by selecting either **Funding Source Filter** or **Edit Filter**.

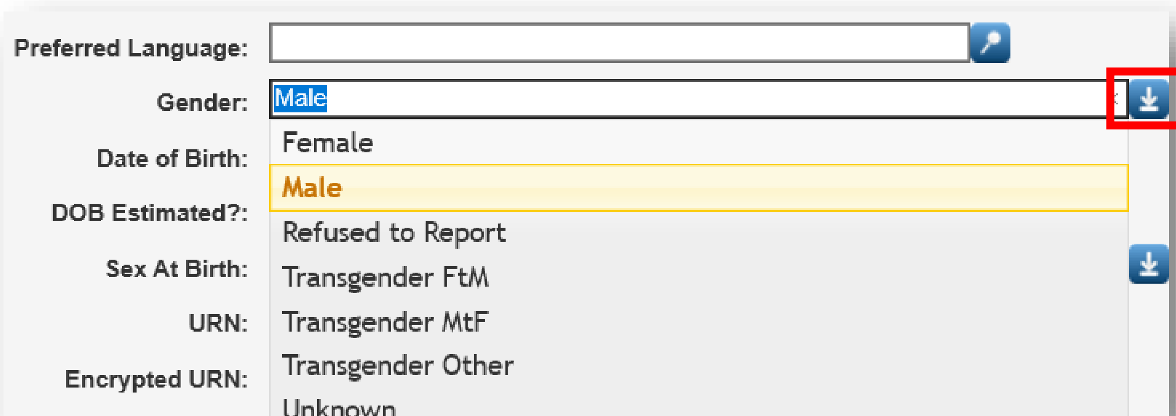
3. Once you click **Run**, a report confirmation message will open in the upper right corner of the screen. Select **View Financial Report**. Your report will be displayed in a new tab.



4. Some screens will have editable fields:

- Fields with a Magnifying-Glass icon indicate longer lists which are searchable.

- Fields with a Down-Arrow icon will display the complete list for ten (10) or fewer choices.



CAREWare 6

Section 2:

Setting Up Contracts and Services

Adapted from HRSA Quick Start User Guides:
https://hab.hrsa.gov/program-grants-management/careware

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First Things First

What are contracts?

CAREWare has been set up to mirror the way services are delivered in the real world. For instance, your agency may have a contract to provide Outpatient Ambulatory Health Services (OAHS) services, funded by the Ryan White HIV/AIDS Program (RWHAP) Part B. Under that contract, you may provide a variety of subservices - including lab, medical visit, nurse visit etc. In CAREWare, you'll be setting up your contracts to reflect those subservices.

Remember:

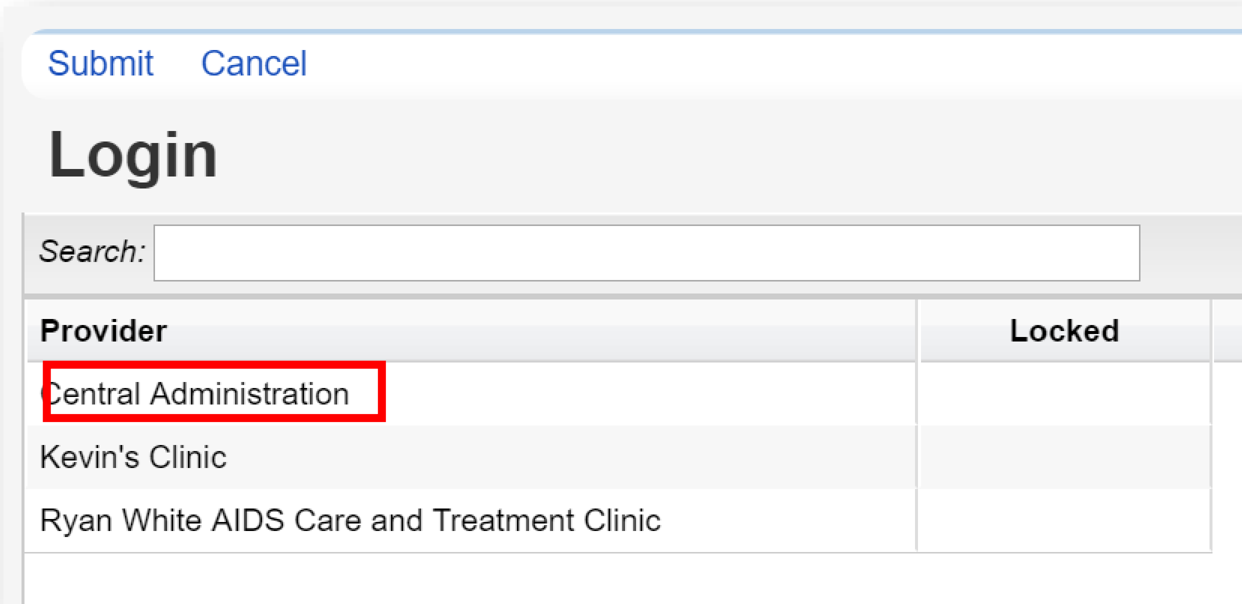
- At least one contract must be set up in CAREWare before you can begin entering services!
- A client needs to have received at least one CARE Act-funded service AND reported as RWHAP Eligible within the reporting period to be included in the RSR report.
- Standardized setup of contracts, services, and subservices in CAREWare is essential to ensure accurate client-level data collection and throughout the reporting year. Proper setup of contracts before you begin data entry helps avoid data inconsistencies in the future.
- Starting in 2019, a new funding source, "Ryan White-related (including program income and pharmacy rebates)" has been added to CAREWare 6 and can now be used.

What do I need to get started?

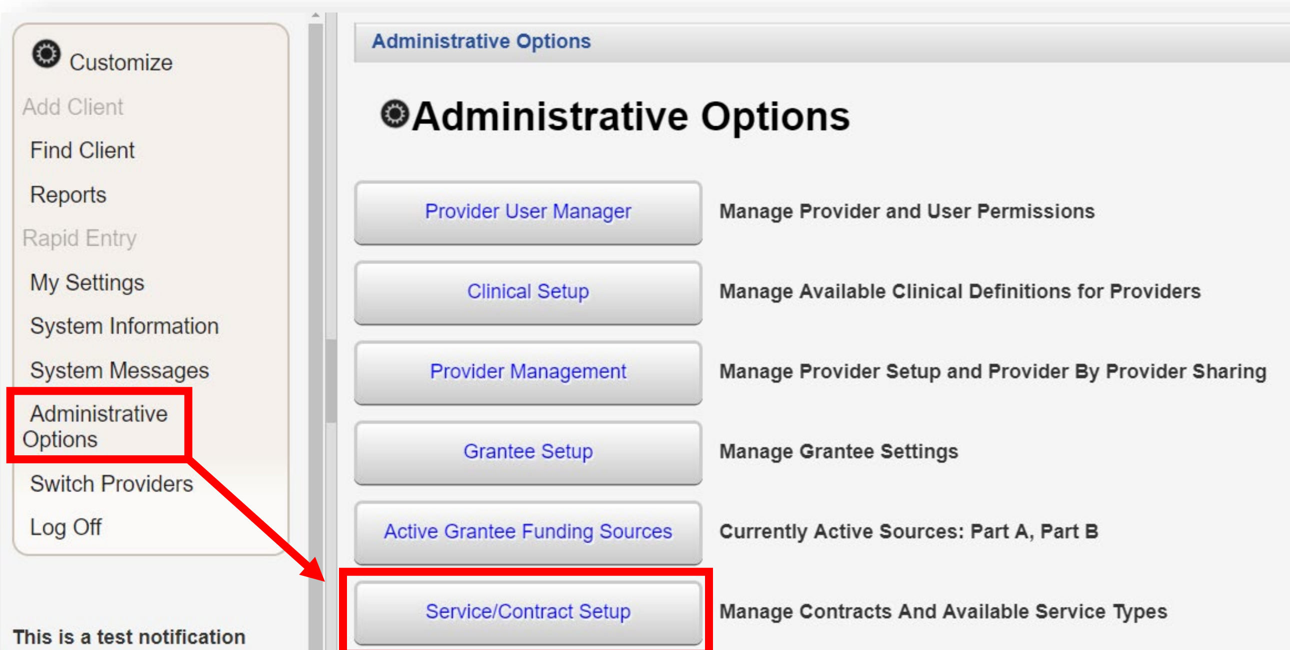
- You will need to know the funding sources and services provided for each of your agency program contracts to configure them properly in CAREWare.
- If you have multiple providers, it is recommended that contracts be created in the Central Administration domain (and therefore only editable by users with access to Central Administration) for quality control purposes.

Contract Management

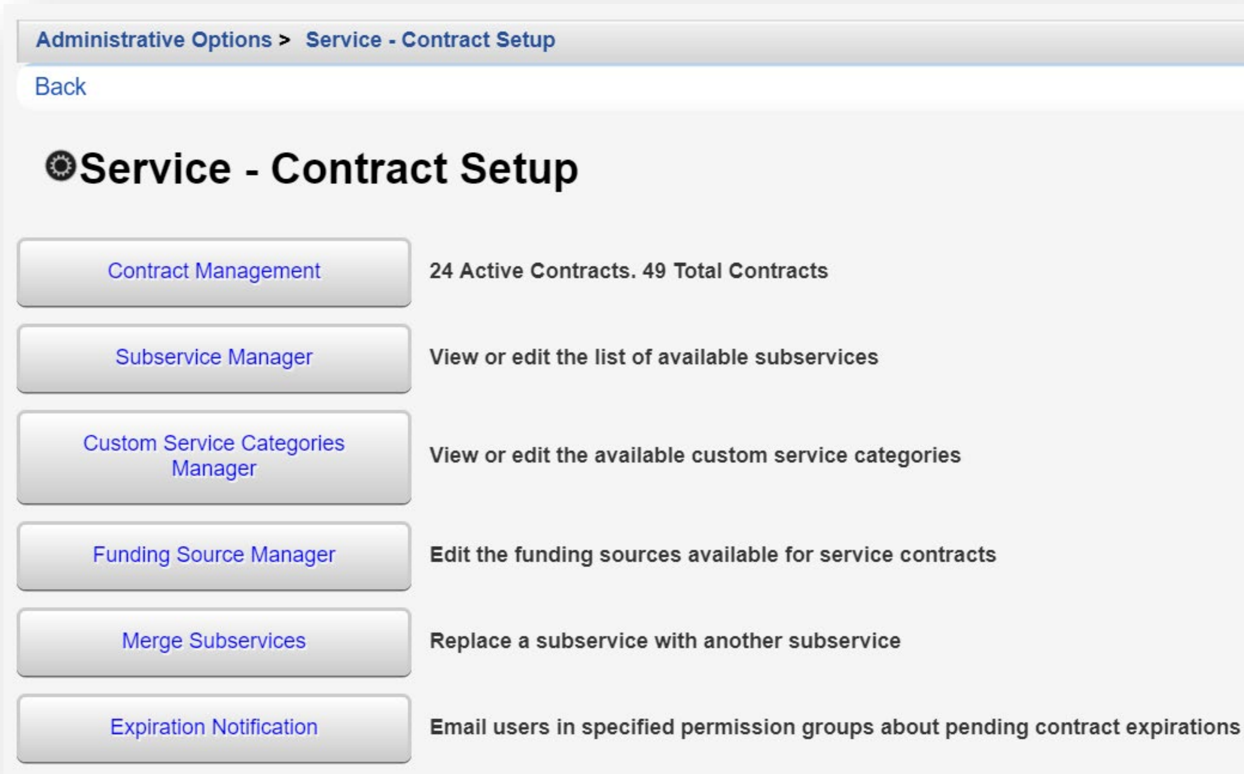
1. Log into CAREWare with sufficient permissions to manage and configure provider contracts, services, and subservices. For security and quality management purposes, we recommend configuring all contracts under the **Central Administration** domain.



2. Select **Administrative Options** from the **Main Menu** and then **Service/Contract Setup** from the **Links** menu.

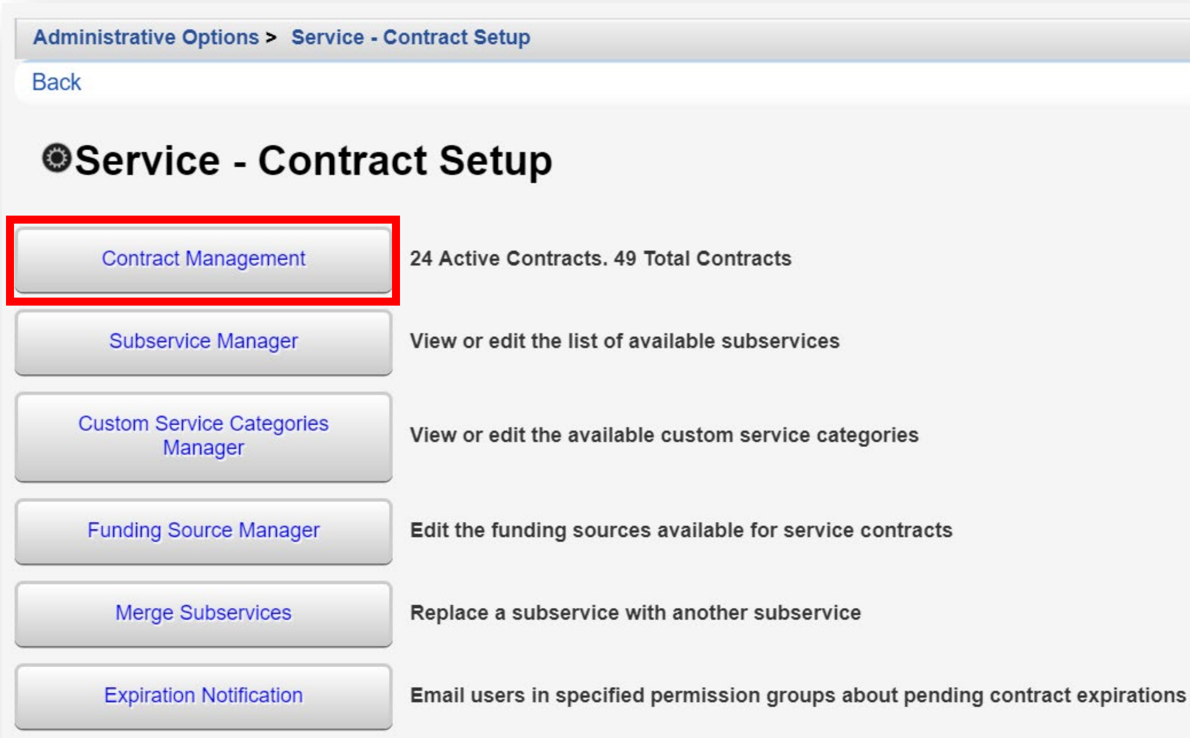


3. You will now be on the **Service - Contract Setup** menu.

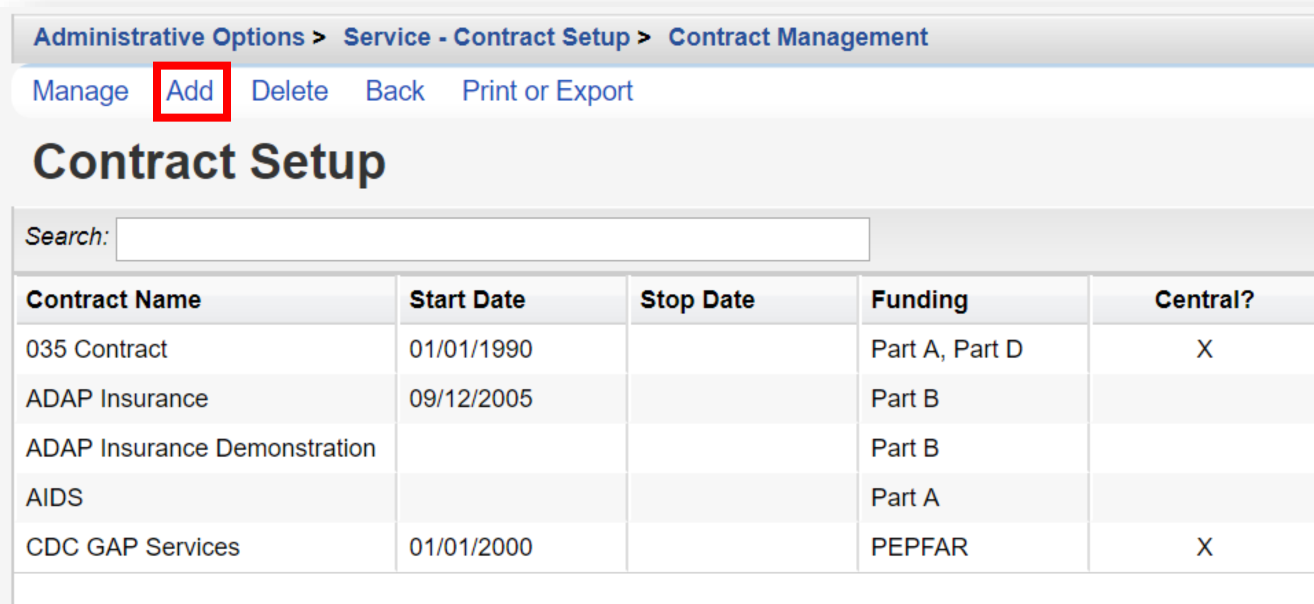


Adding a Contract

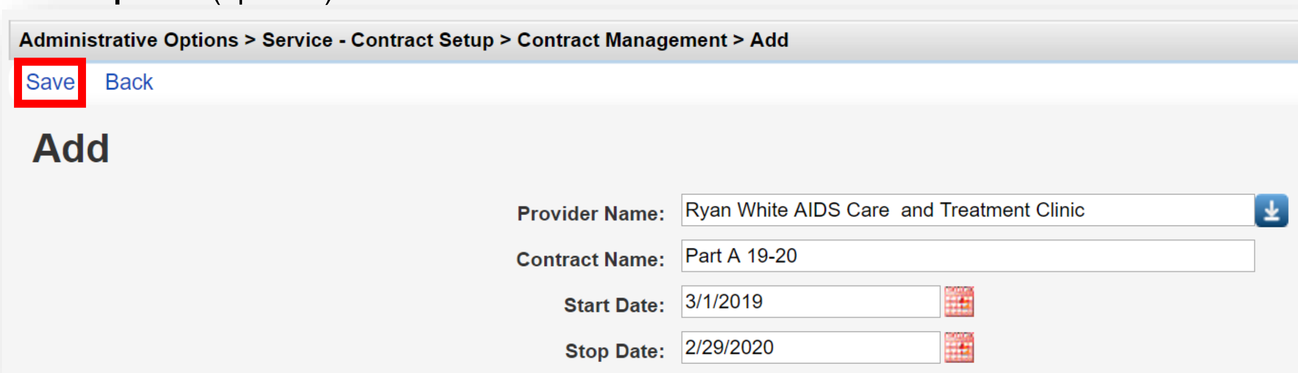
1. From the **Service - Contract Setup** menu, select **Contract Management**.



2. From the **Contract Setup** menu, select **Add**.

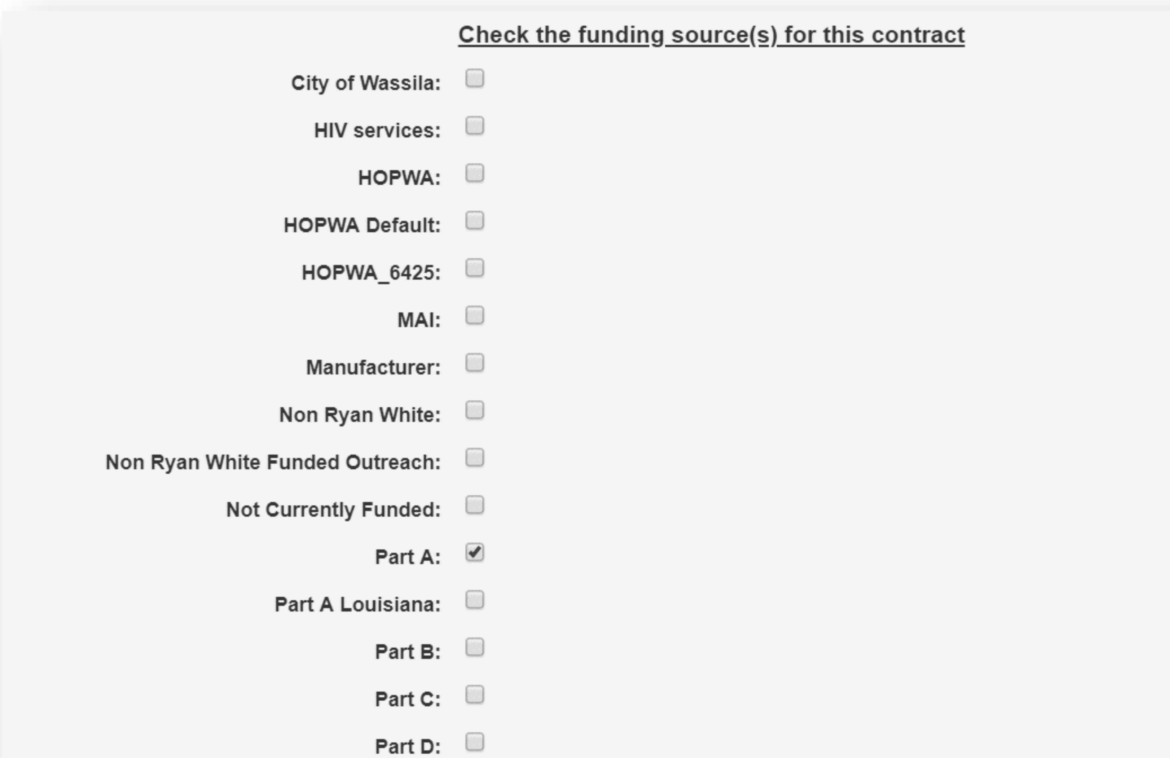


3. Enter in the following information (as applicable).
   - **Provider Name**
   - **Contract Name**
     - It is recommended to use the CARE Act-funded grant source in the name of your contract(s).
   - **Start Date**
   - **Stop Date** (optional)



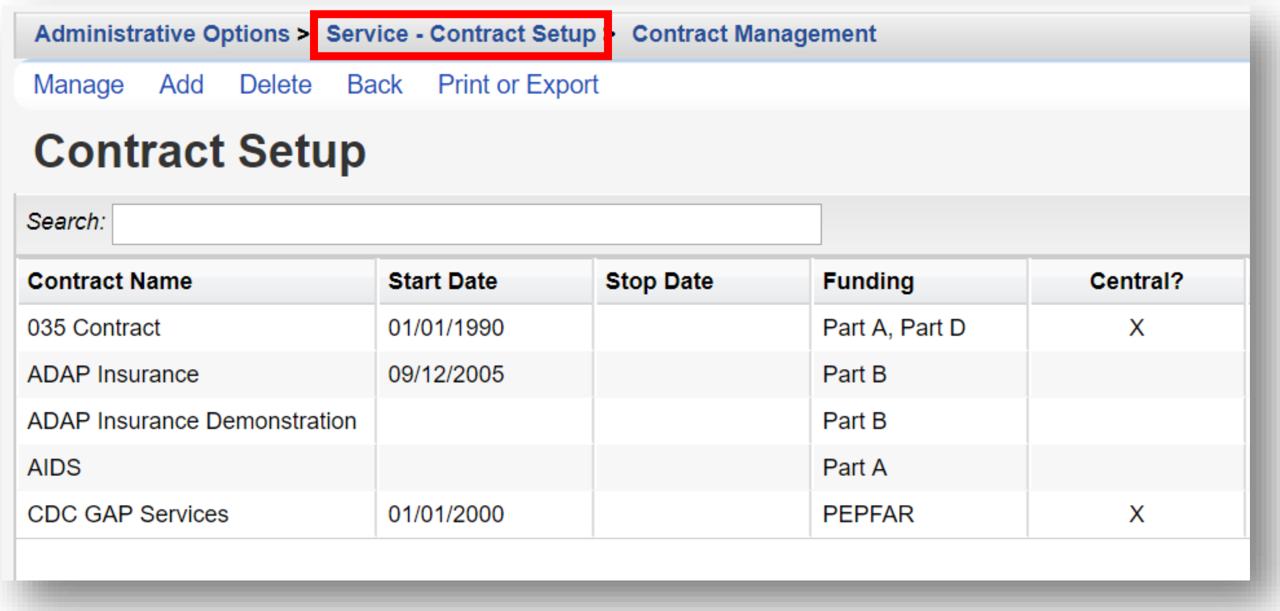
If a **Stop Date** is entered, services cannot be entered past this date! You may wish to enter a stop date for quality control purposes or if your contracts and services vary from year-to-year.

4. Scroll down and select the **funding source** for the contract. Once complete, click **Save** (see previous screenshot). You will now return to the **Contract Setup** menu.



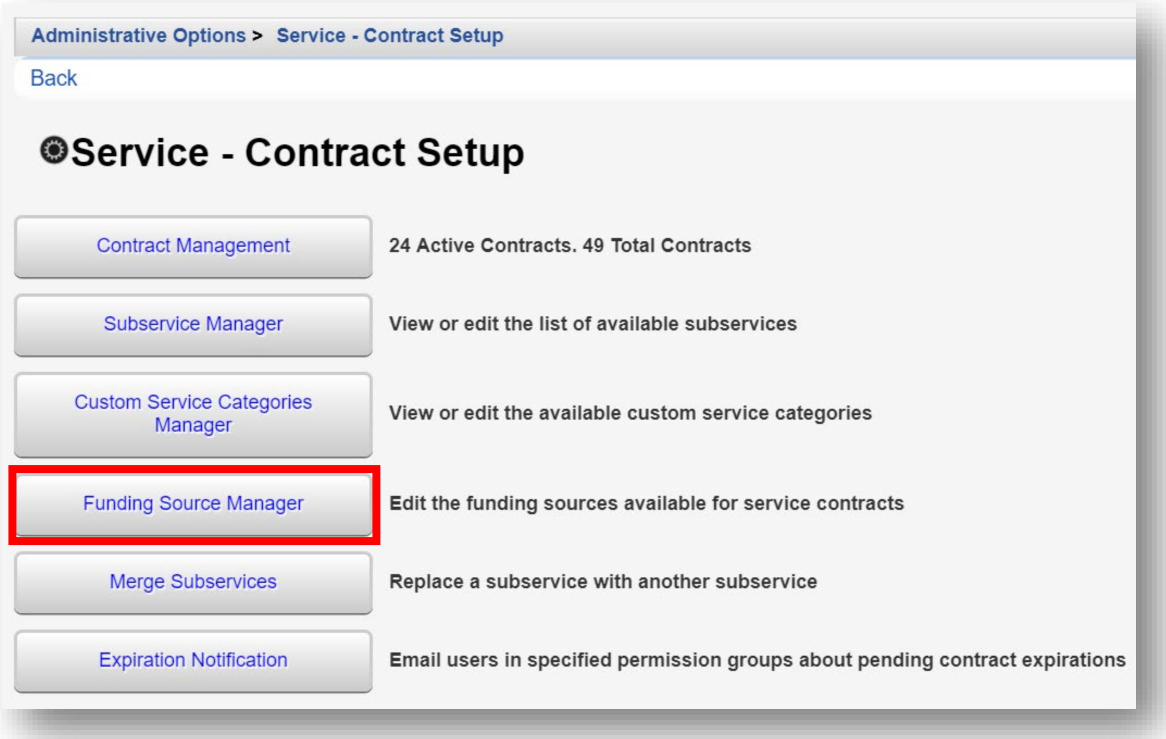
NOTE: It is highly recommended that you setup contracts under a single funding source, such as, Part A or Part B or Non-RWHAP. If multiple funding sources are selected for a single contract, separation of services by individual funding sources will not be possible.

5. From the **Contact Setup** menu, click **Service - Contract Setup** within the **Bread Crumb** trail to return to the **Service - Contract Setup** menu.

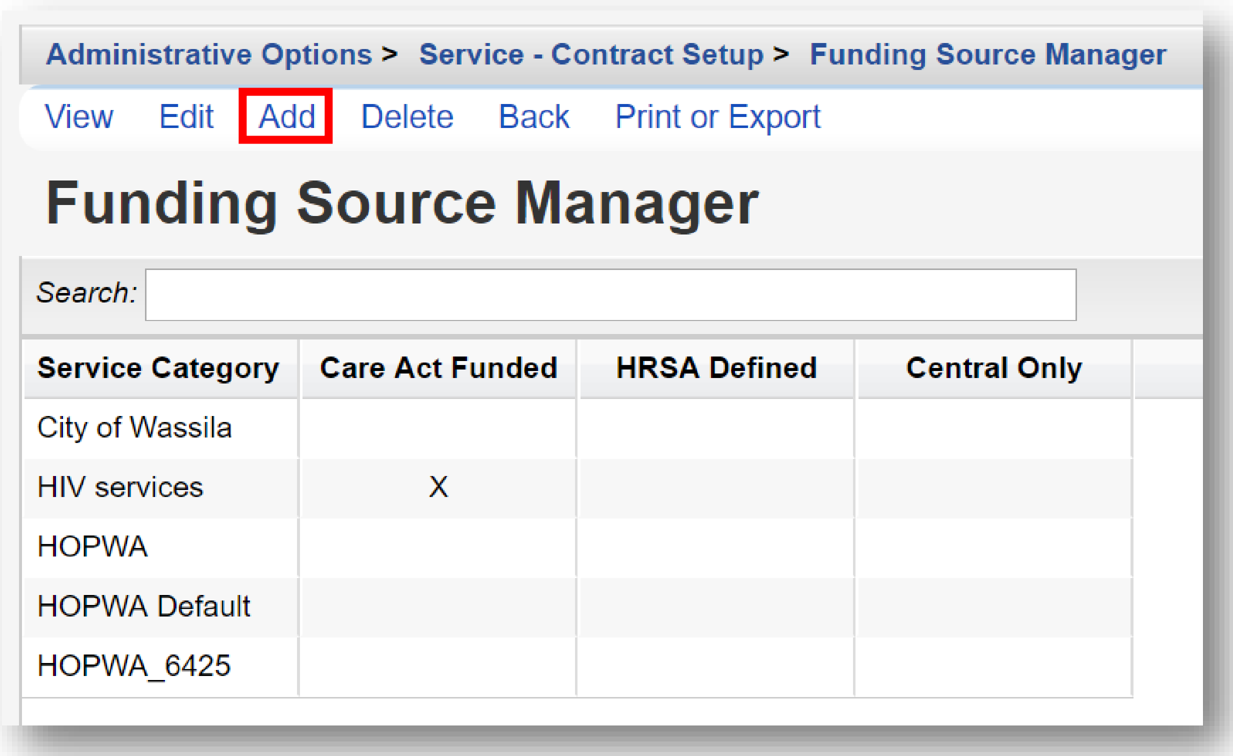


Adding Custom Contract Funding Sources

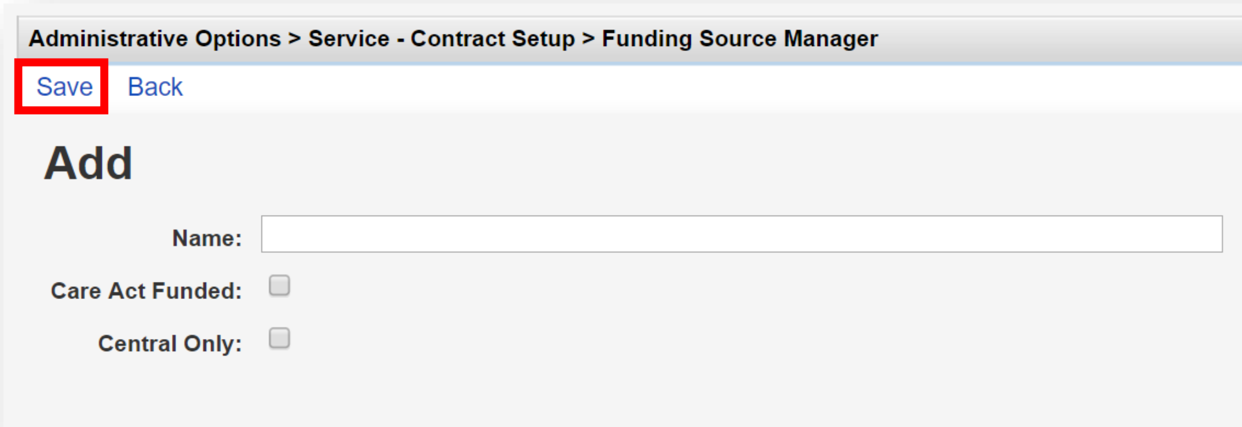
1. From the **Service - Contract Setup** menu, select **Funding Source Manager**.



2. From the **Funding Source Manager** menu, select **Add**.



3. Enter in the following information (as applicable).
   - **Funding Source Name**.
   - Use the check box to indicate if the funding source is **Care Act Funded**.
   - Use the check box to indicate if the funding source is **Central Only**.

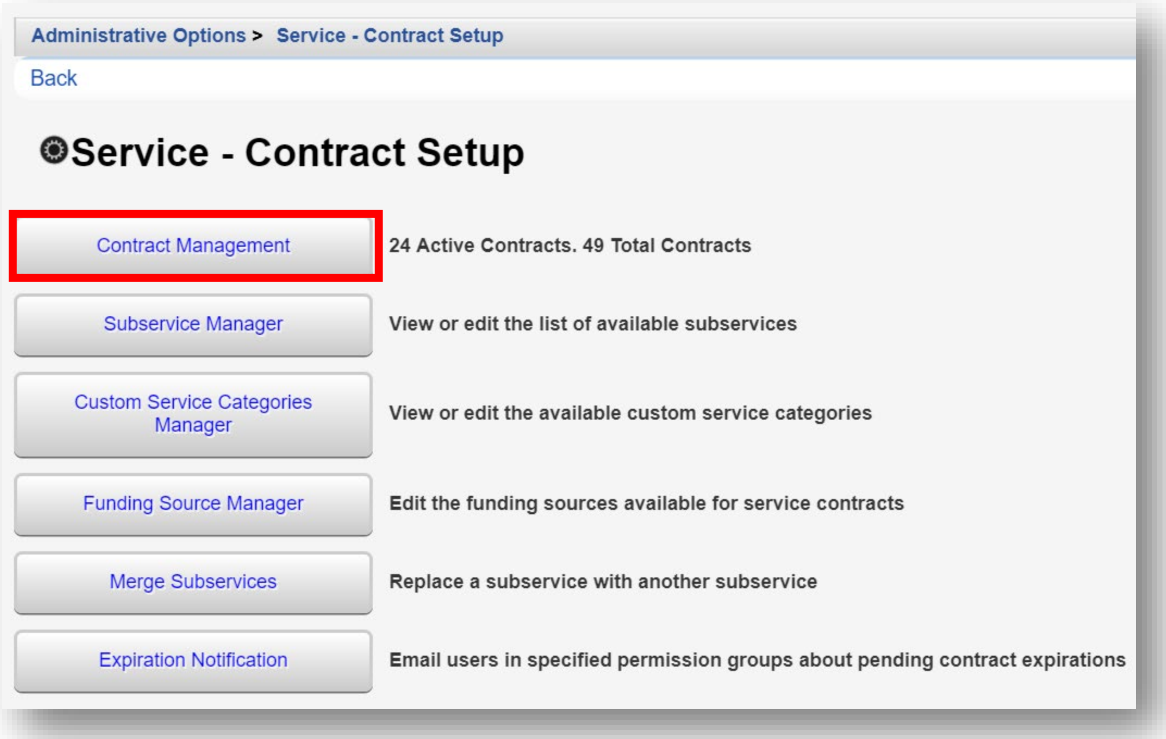


4. Once complete, click **Save** (see previous screenshot). You will now return to the **Funding Source Manager** menu.

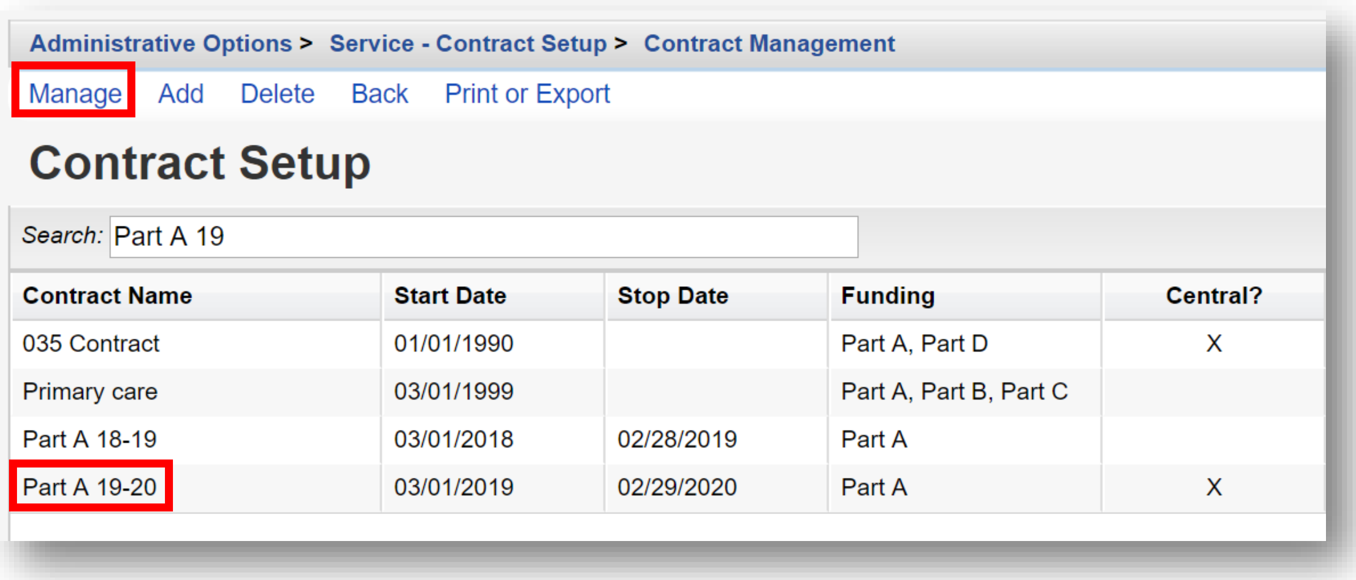
5. From the **Funding Source Manager** menu, click **Service - Contract Setup** within the **Bread Crumb trail** to return to the **Service - Contract Setup** menu.

Adding Contract Items

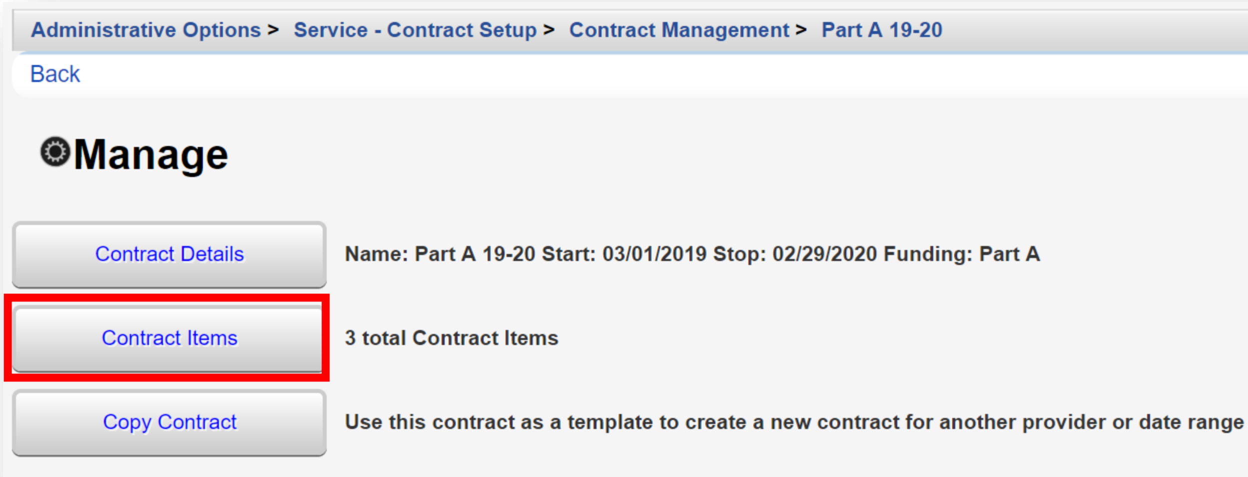
1. From the **Service - Contract Setup** menu, select **Contract Management**.



2. From the **Contract Setup** menu, select the relevant contract under the Contract Name column and click **Manage**.

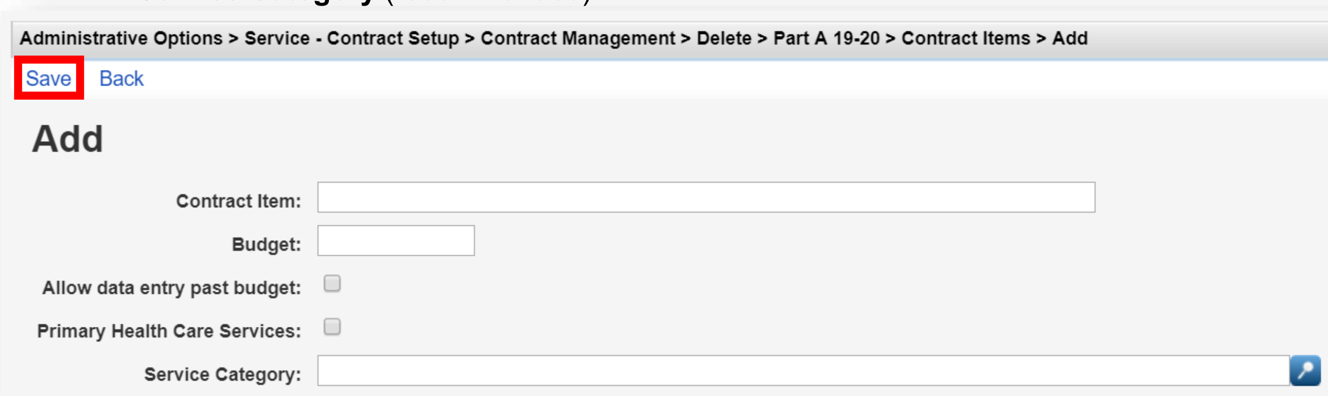


3. From the **Manage** menu, select **Contract Items**.



4. From the **Contract Item Setup** menu, click **Add**.

5. Enter in the following information (as applicable).
   - **Contract Item**
     - It is recommended that 1) contracts be single-source funded (such as Part A, Part B, Part C, etc.) and 2) contract items mirror HRSA-defined Service Categories, such as Outpatient Ambulatory Health Services (OAHS) and Medical Case Management (MCM).
   - **Budget** amount (optional),
     - Can be useful for fee-for-service programs or to designate per-unit costs of subservices to track overall expenditures in CAREWare.
   - **Allow data entry past budget** checkbox (optional)
   - **Primary Health Care Services** checkbox (optional)
   - **Service Category** (recommended)

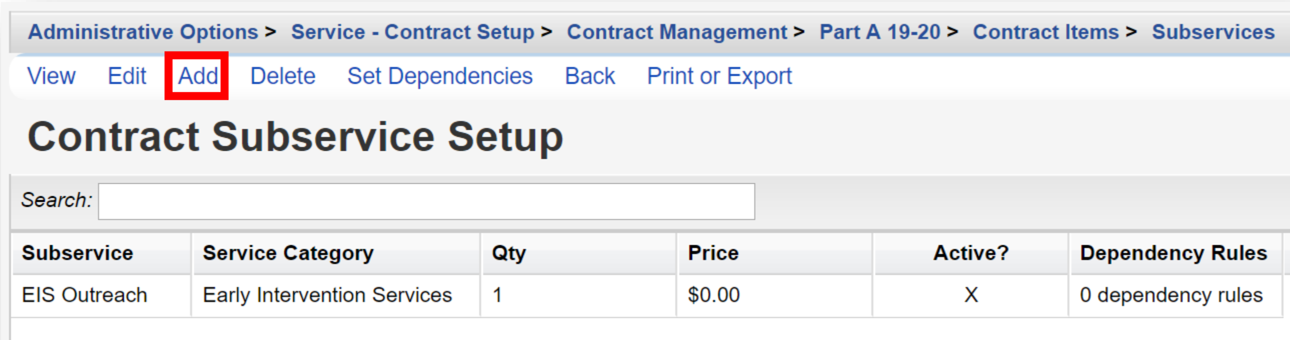


6. Once complete, click **Save** (see previous screenshot). You will now return to the **Contract Item Setup** menu.

7. To add a Subservice, select the relevant contract item under the Contract Item column and click **Subservices** from the action bar.

Contract Item	Subservices	Budget	Primary Health Care Services	Service Category
Early Intervention Services	1	$10,000.00		Early Intervention Services
Outpatient/Ambulatory Health Services	2	$20,000.00	X	Outpatient/Ambulatory Health Services
Medical Case Management	2	$15,000.00		Medical Case Management

8. From the **Contract Subservice Setup** menu, click **Add**.



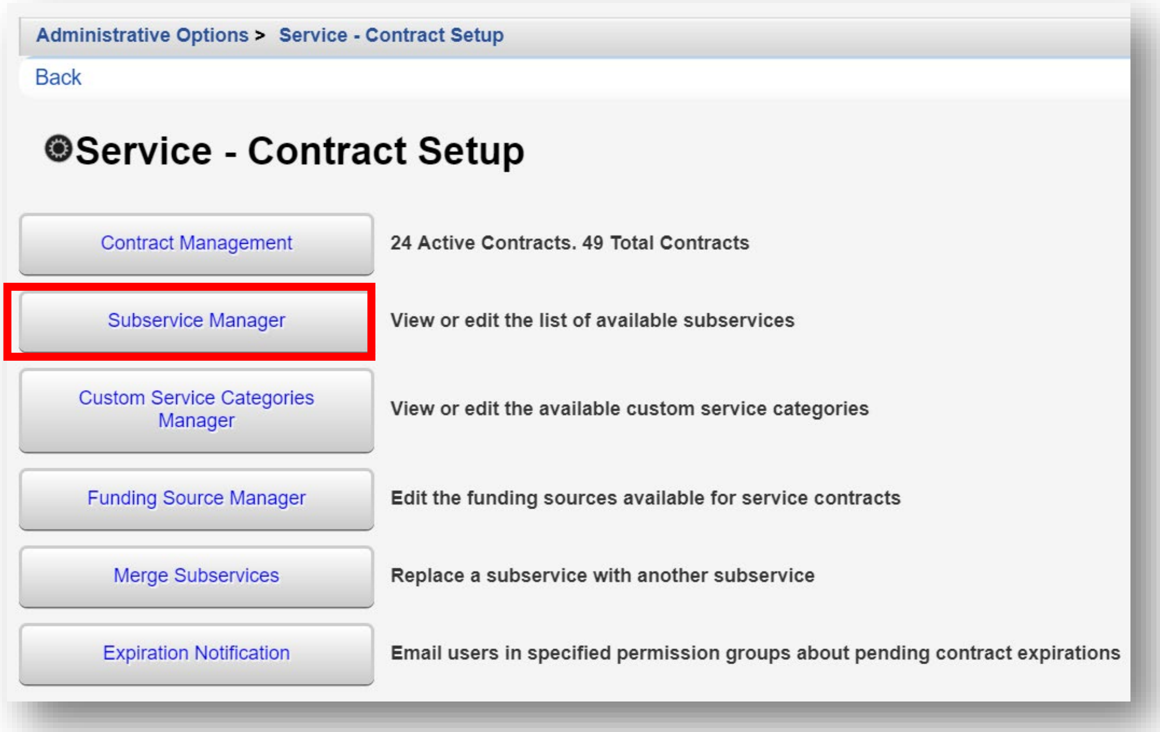
9. Enter in the following information (as applicable).
   - **Subservice**
     - The **Subservice** box can be used to search for available subservices.
   - **Qty** (quantity)
     - Default is "1" (recommended).
     - For agencies that provide Medical Case Management services—including, intake, assessment, face-to-face, and non face-to-face, etc.— one unit of "case management" could represent a unit of time, such as 15 or 30 minute increments. For example, if a client assessment took 2 hours to complete by the case manager, it may be represented in CAREWare as entering 8 units of service (if each unit of service equals 15 minutes).
   - **Price** (optional)
     - If tracking expenditures, a unit cost (price) can be entered or remain at the default value of "0."

10. Once complete, click **Save** (see previous screenshot). You will now return to the **Contract Subservice Setup** menu.

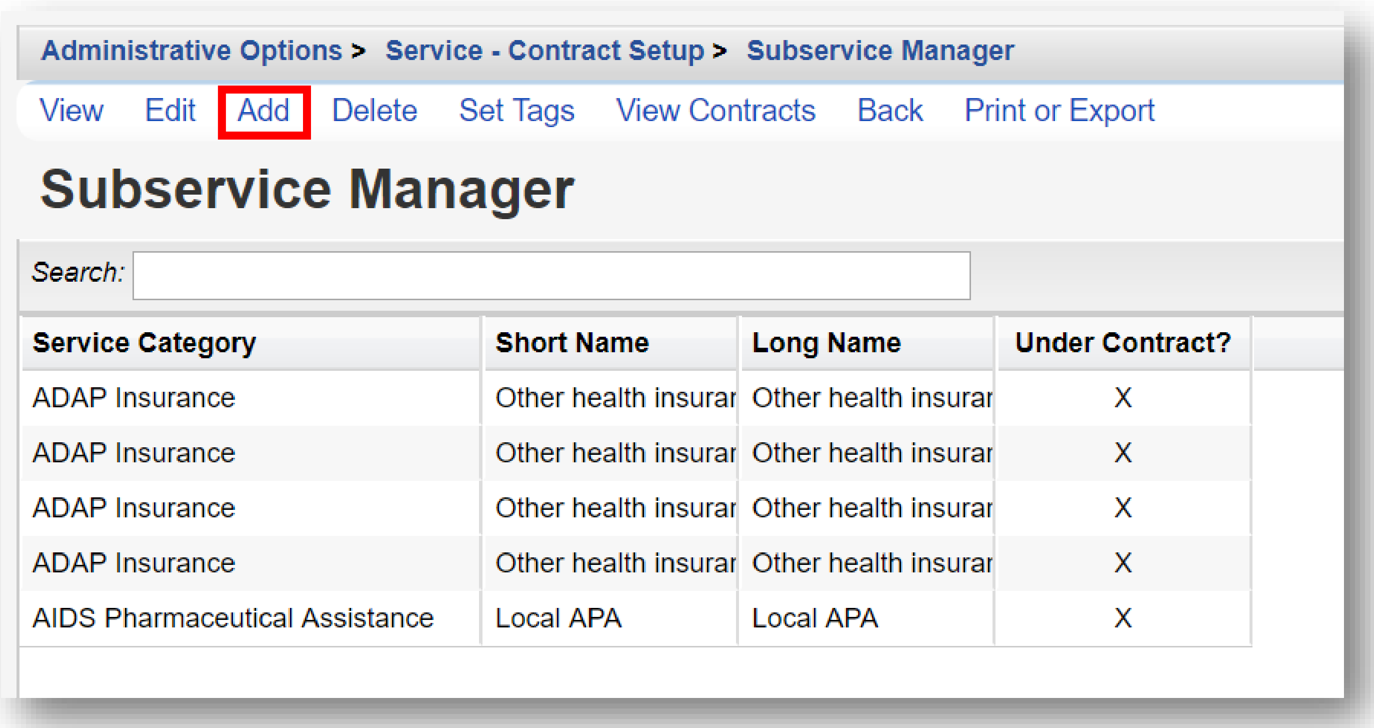
> **NOTE:** In a new CAREWare installation, there are no pre-loaded subservices. To create new subservices or make changes to the available subservices, follow the instructions below.

Managing Subservices

1. From the **Service - Contract Setup** menu, select **Subservice Manager**.



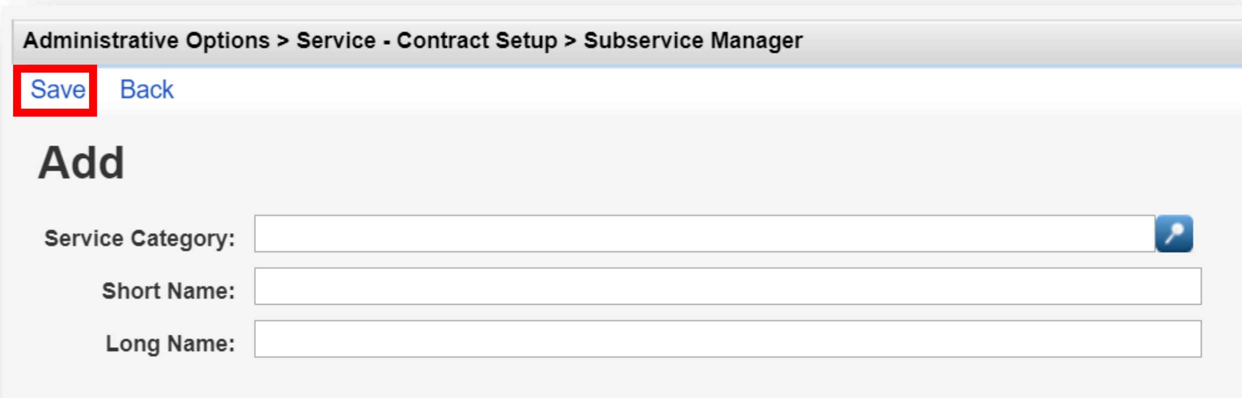
2. From the **Subservice Manager** menu, select **Add**.



To add a subservice, you'll need to specify the **Service Category** (also known as the service). The Category is a HRSA-defined Service Category and matches the RSR report.

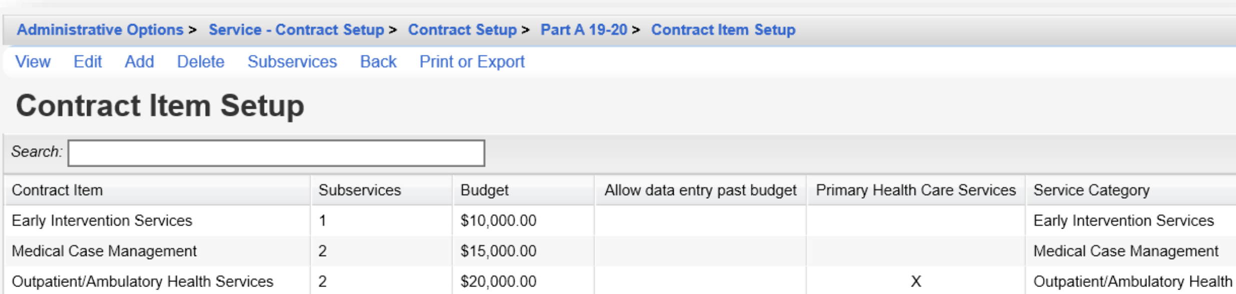
- Create a **Short Name**
  - This is the subservice name which will be displayed in the drop-down menu during service data entry.
- Create a **Long Name**

It is recommended to use clear, easily understood subservice names, perhaps beginning each with service category abbreviations. Please note, it is very important to ensure consistent subservice names across contracts.



3. Once complete, click **Save** (see previous screenshot). You will now return to the **Subservice Manager** menu.

Repeat these steps as necessary to complete all other contracts, service categories, and subservices. Here is a sample of a RWHAP Part A contract with three contract items.


Administrative Options > Service - Contract Setup > Contract Setup > Part A 19-20 > Contract Item Setup

View Edit Add Delete Subservices Back Print or Export

Contract Item Setup

Search:

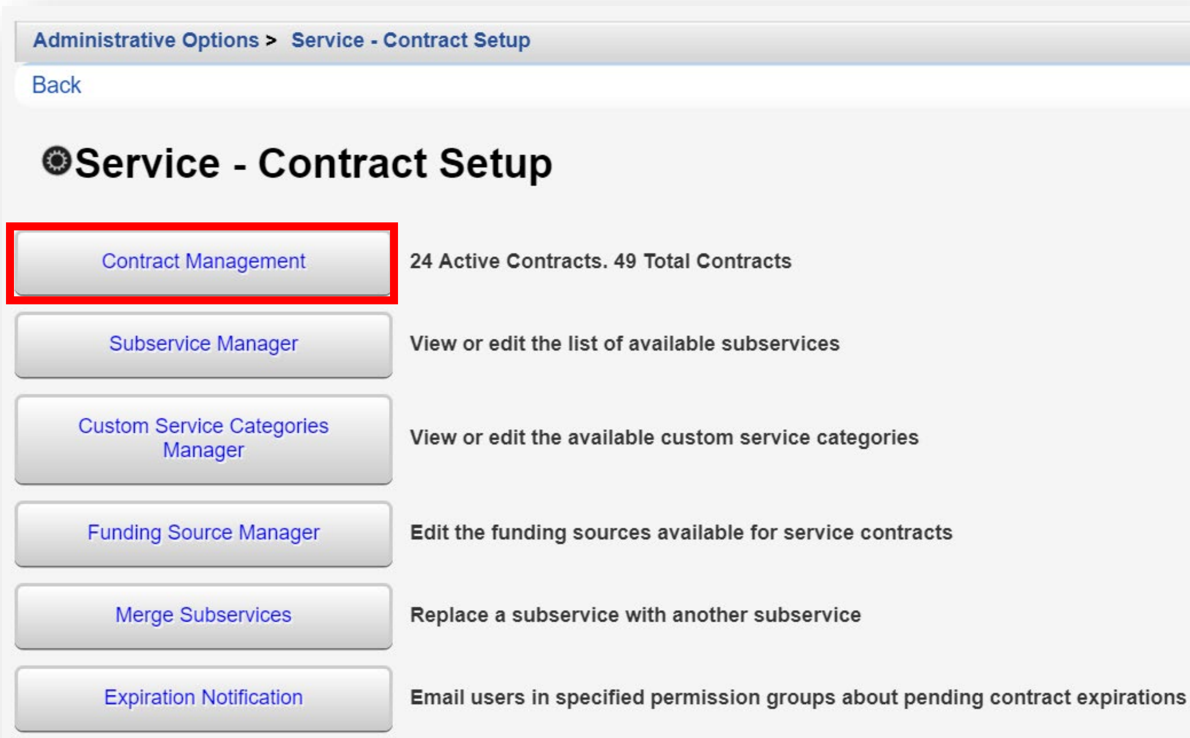
Contract Item	Subservices	Budget	Allow data entry past budget	Primary Health Care Services	Service Category
Early Intervention Services	1	$10,000.00			Early Intervention Services
Medical Case Management	2	$15,000.00			Medical Case Management
Outpatient/Ambulatory Health Services	2	$20,000.00		X	Outpatient/Ambulatory Health

Copying Contracts

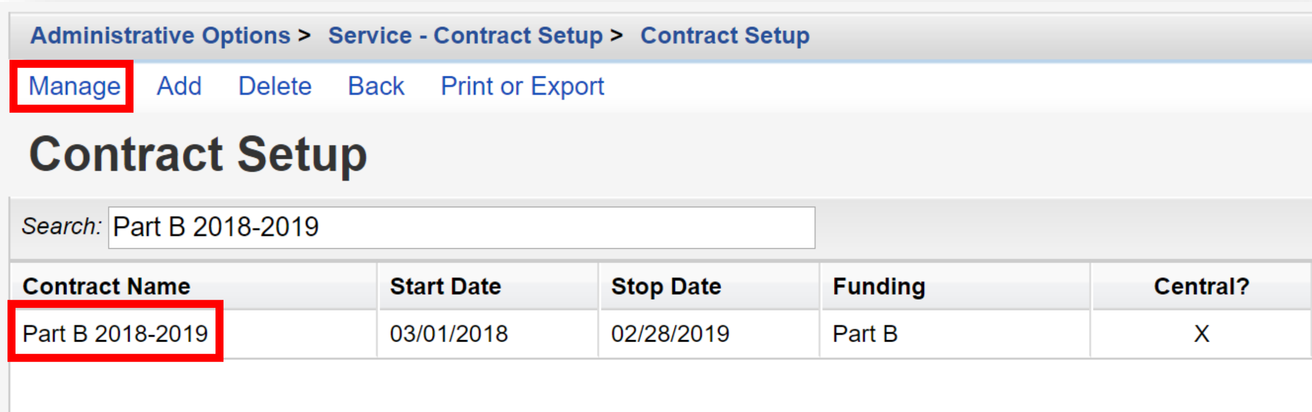
For programs where agency contracts differ widely from year-to-year, the “Copy Contract” feature can be very useful. Note, that many contracts may stay the same from year to year or change only slightly. These contracts don’t need to be copied.

To assist in the management of contracts from year to year, provider contracts can be copied in CAREWare, including funding source, contract items, and subservices. The **Copy Contract** feature is only available under the Central Administration domain.

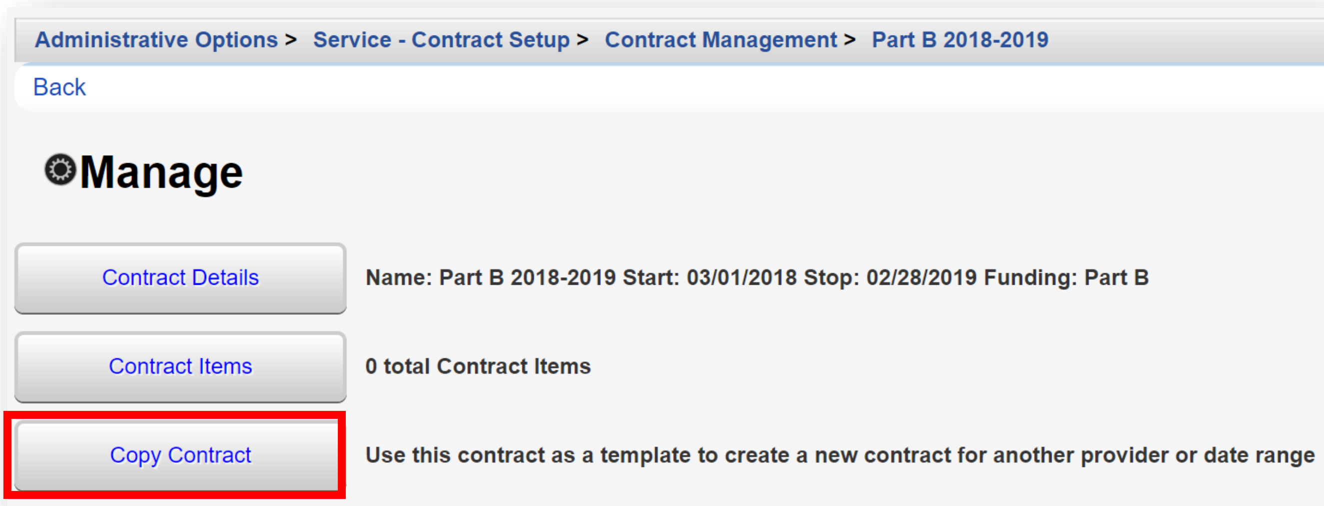
1. From the **Service - Contract Setup** menu, select **Contract Management**.



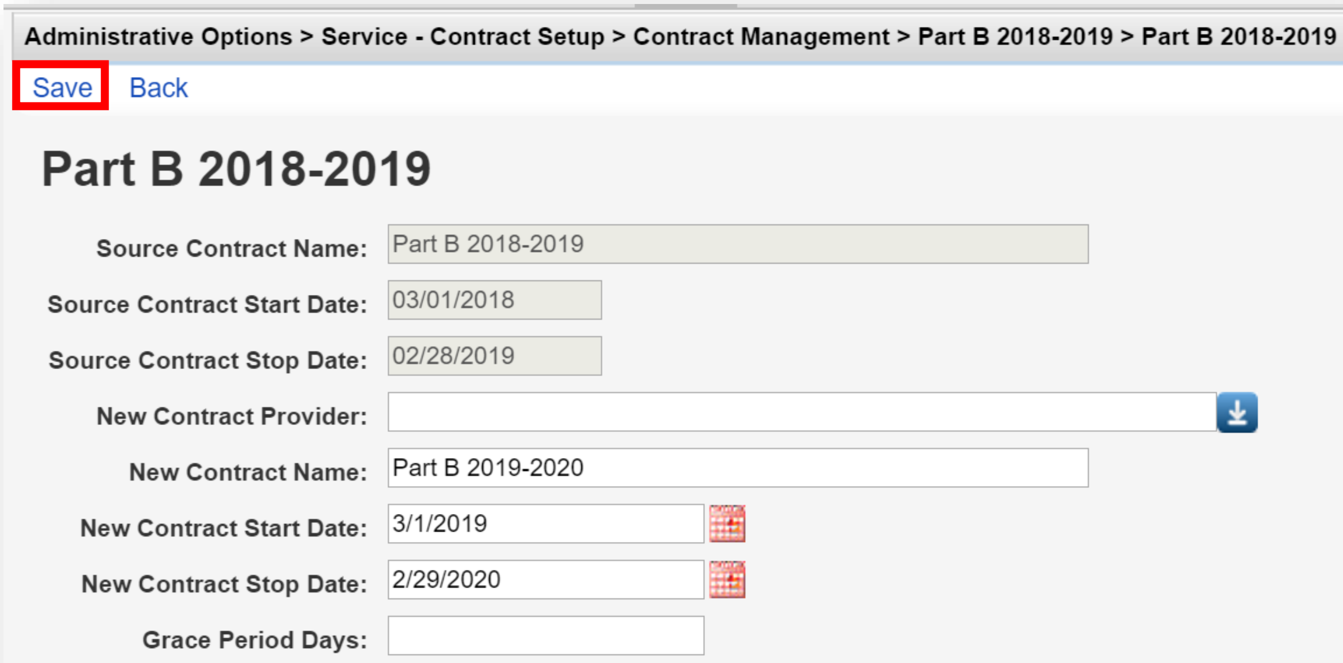
4. From the **Contract Setup** menu, select the desired contract to copy under the Contract Name column and click **Manage**.



5. From the **Manage** menu, select **Copy Contract**.



6. Source Contract Name, Source Contract Start Date, and Source Contract Stop Date will be prepopulated. Enter in the following information (as applicable).
    - **New Contract Provider** (can be the same provider or a different provider)
    - **New Contract Name** (must be different from existing contract name)
    - **New Contract Start Date**
    - **New Contract Stop Date**
    - **Grace Period Days**



7. Once complete, click **Save** (see previous screenshot). You will now return to the **Manage** menu.

CAREWare 6

Section 3:

Adding Clients, Demographics, Services, and Annual Review Data

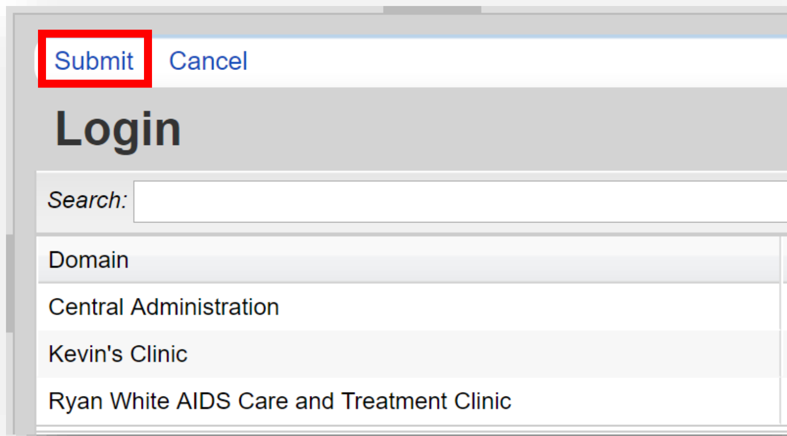
Adapted from HRSA Quick Start User Guides:
https://hab.hrsa.gov/program-grants-management/careware

PLEASE NOTE: The client data used in these manuals is purely fictional.

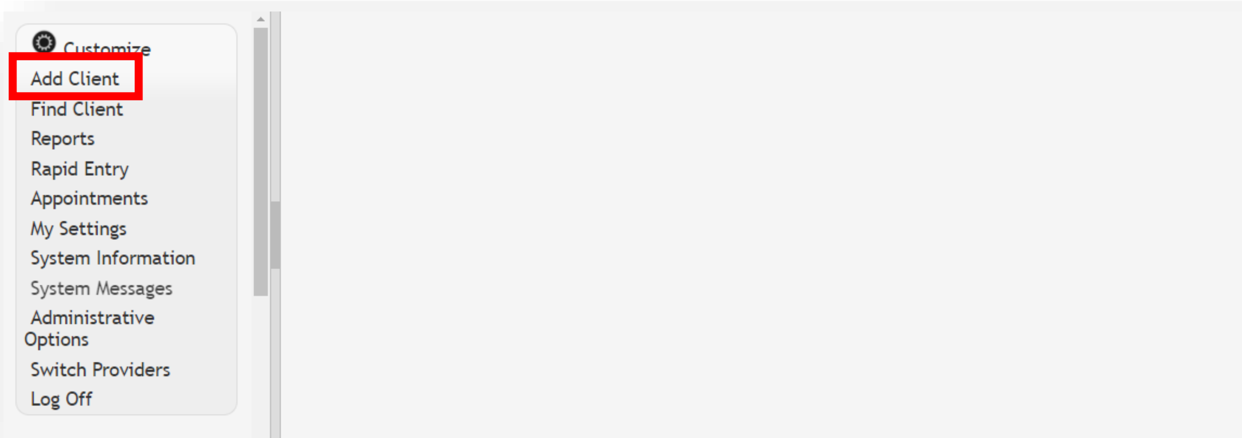
Adding Clients

1. Log in to CAREWare. If you have administrative privileges, you may see a list of several domains. If choosing between Central Administration ("Read-only") and Provider ("Default" until you change the name), log into a Provider domain.

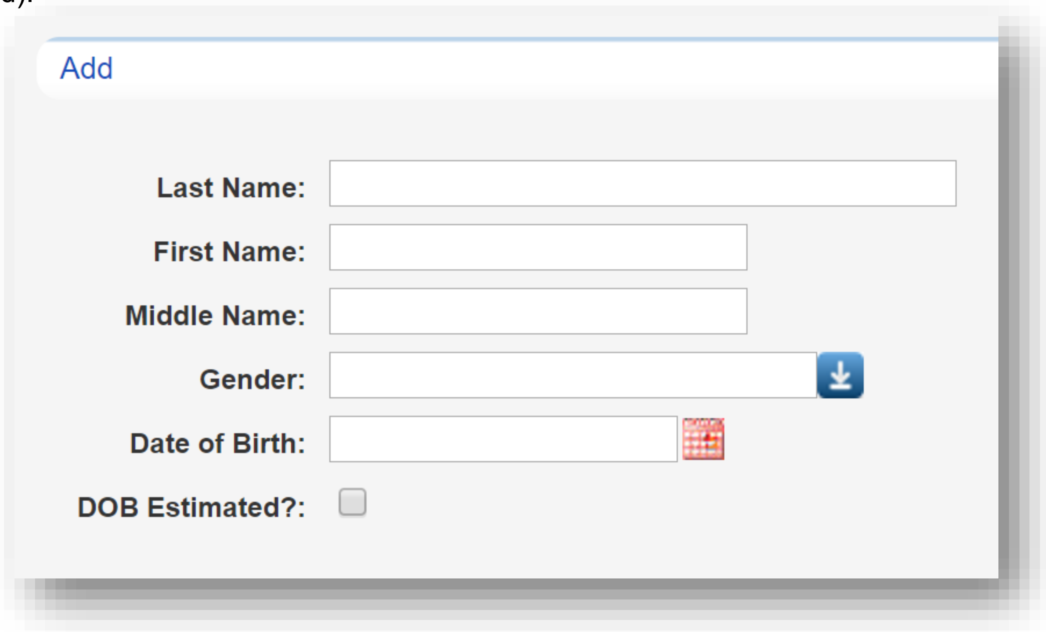
   Select a Provider domain, click **Submit** or double-click **Domain** name.



2. Select **Add Client** from the main menu and a new tab will open in your browser.



3. Enter the Last Name, First Name, Gender, and Date of Birth of the client. All fields are required, except Middle Name and the DOB Estimated checkbox (which is not advised to be used).

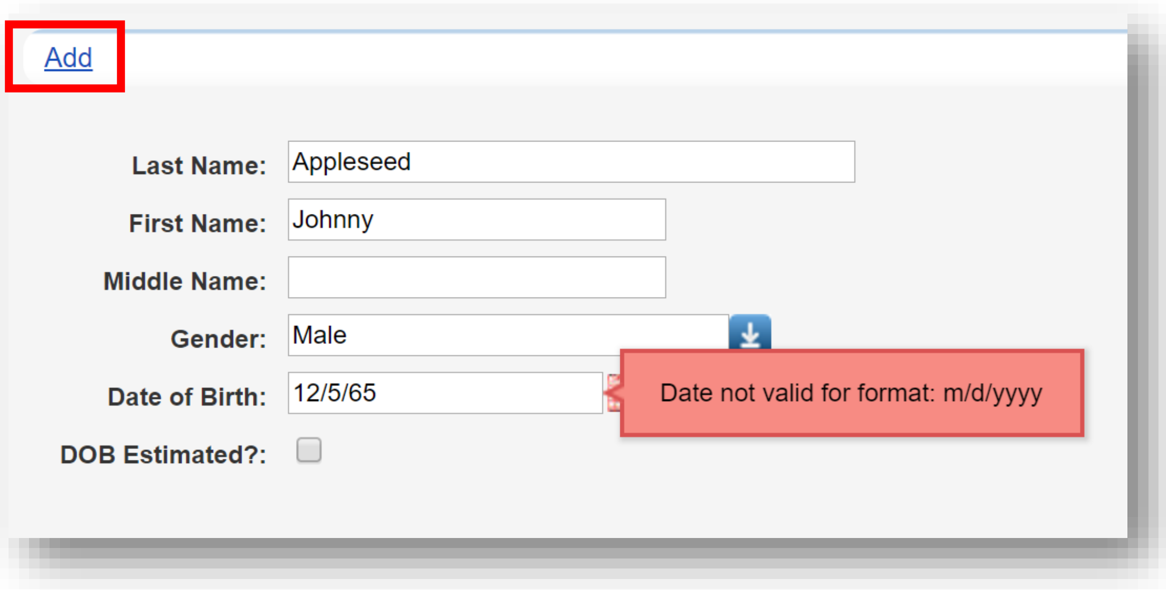


NOTE: This step is the number one source of duplicate clients and data entry errors in CAREWare. Please double check your entries here carefully before clicking the "Add Client" button!

Users should develop business rules/operating procedures outlining the method by which client names should be collected and recorded. For example:

- Enter the client's entire name as it normally appears on documentation such as a driver's license, birth certificate, passport, or Social Security card.
- Avoid using nicknames (e.g., do not use Becca if the client's first name is Rebecca).
- Avoid using initials

4. Click **Add**. If there are any invalid field formats, an alert message will appear.

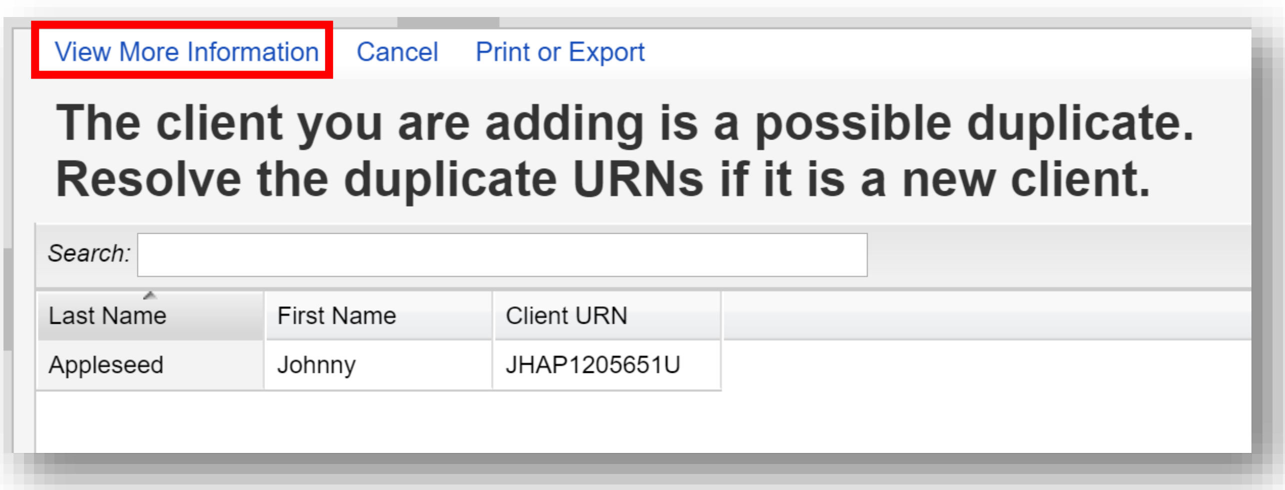


Possible Duplicate Clients

There are several scenarios where you may get a “duplicate client” message. The most common is when the client has already been entered into the system; however sometimes clients with common names may have the same birthday, so further research is needed before you proceed.

1. In the event of a conflict, after you click **Add**, you will see the message stating “The client you are adding is a possible duplicate. Resolve the duplicate URNs (Unique Record Numbers) if it is a new client.”

2. Select the client from the list and select **View More Information** to review additional client information.



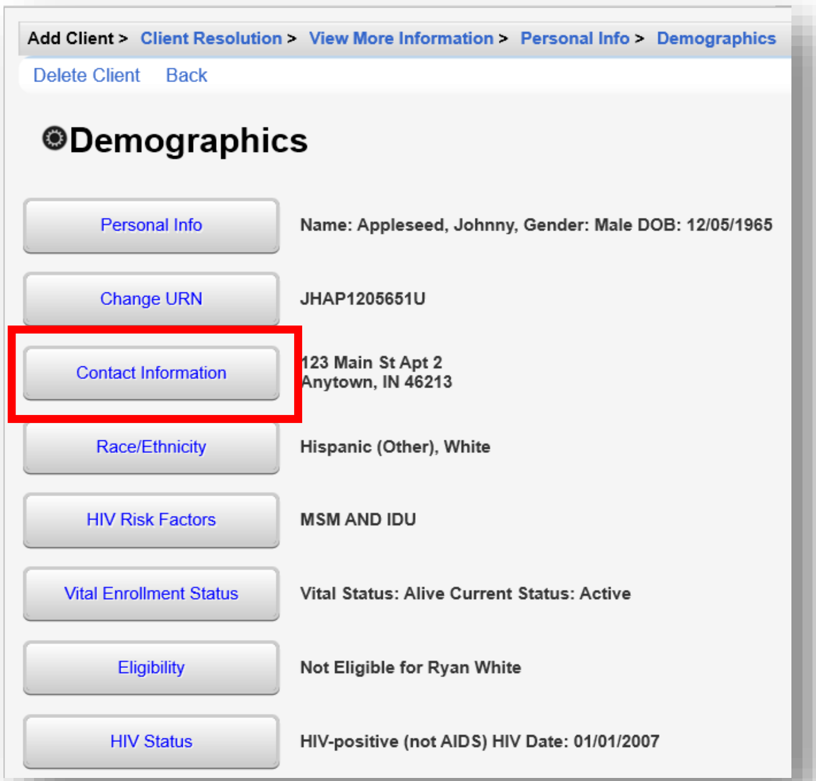
3. Compare client information to determine if this is the same client.

4. If it is the same person, click **This is the same client**. The existing client record will be displayed. If it's a new client, click **This is a new client**. Doing so will create a new client record. If the client matches multiple clients in the database, click **Back** and repeat step #2.

Entering Demographic Information

1. After you have created the client, the main Demographics screen will appear. Current client demographic values will be previewed in the Link Summary next to each section.

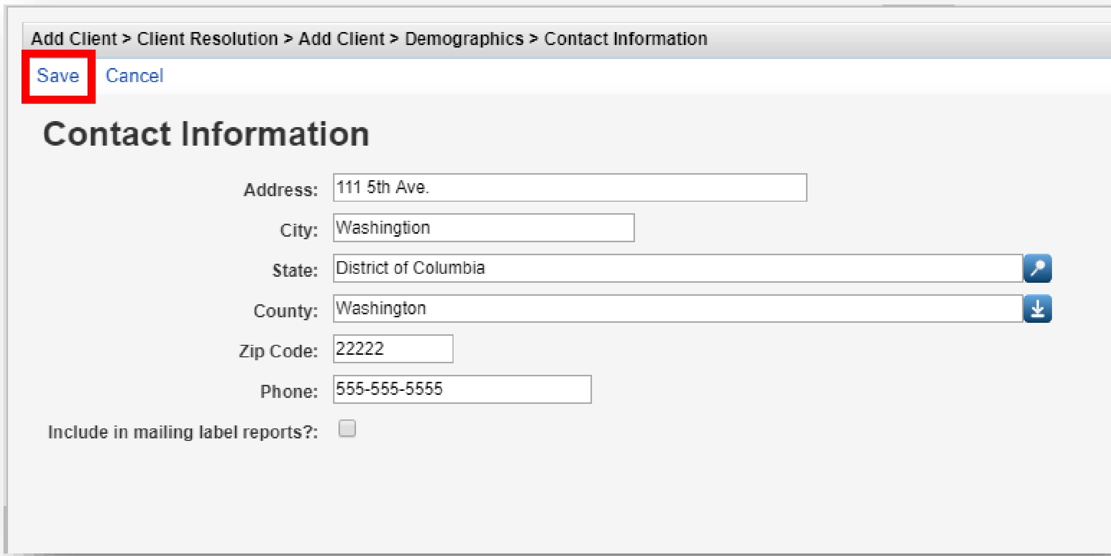
2. From the main Demographics screen, you can view and edit various demographic information, such as **Personal Info**, **Race/Ethnicity**, **HIV Risk Factors**, and **HIV Status**. To view/edit any of this information, click the blue link of the category you wish to view/edit. For example, to edit a client's contact information, click **Contact Information**.



!

If you are in a network and a client was previously entered by another clinic, you are still able to edit demographics with adequate permissions. CAREWare considers last updated data to be the most reliable.

3. The Contact Information screen now appears. Once all relevant information has been entered, click **Save**.



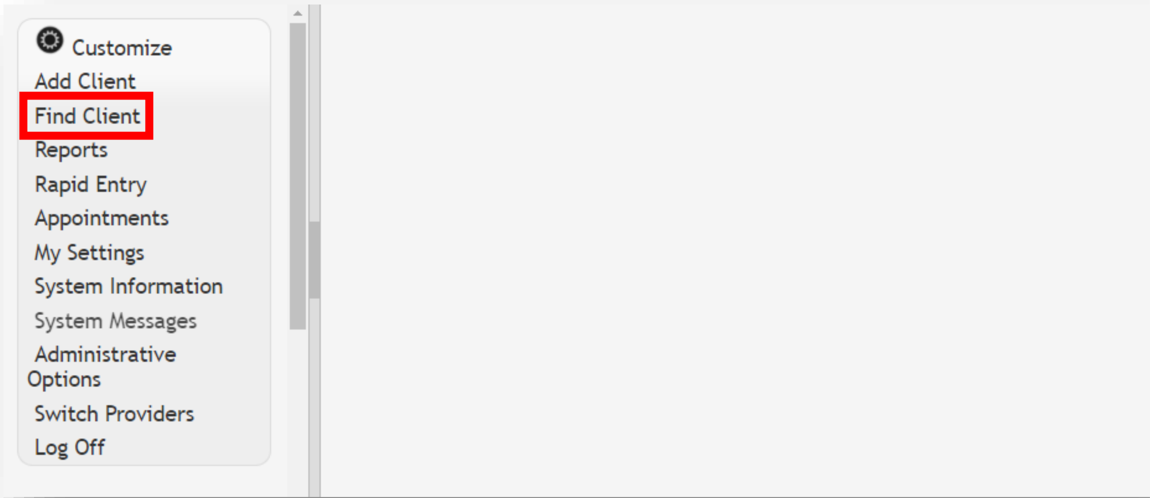
TIP: Keep in mind that updated client demographics will assist other agencies on the network and many client demographic fields are required to be reported on the RSR.

Entering Service Utilization

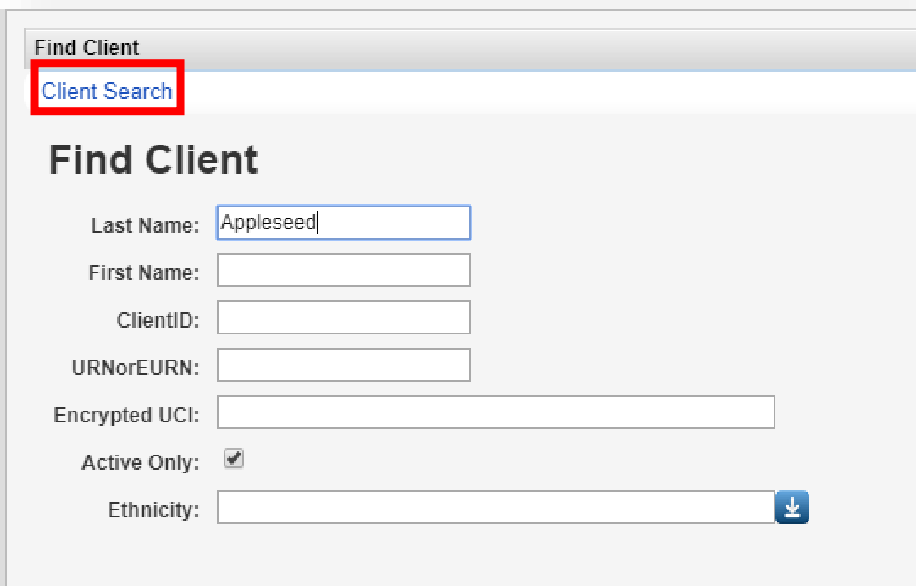
If you are entering a new client, you will be in the client screen already; skip to step 4. If you are entering services for an existing client, perform the following actions.

NOTE: You can't enter services until you've set up your contracts. Please see the Quick Start guide, "Setting up Contracts and Subservices" for more information.

1. Log into CAREWare and select **Find Client** from the main menu on the left side of the screen.

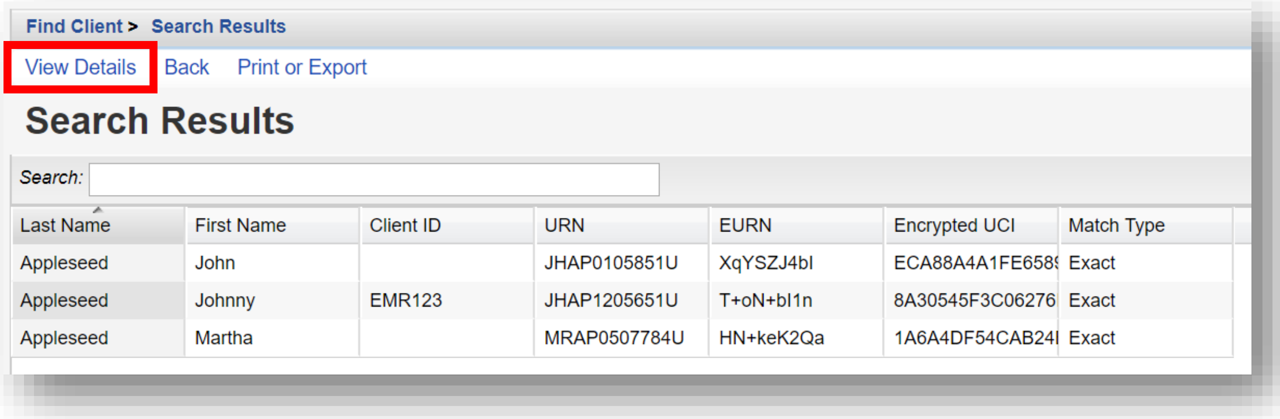


2. Search by any of the available fields; in this case we'll use the last name. Click **Client Search**.

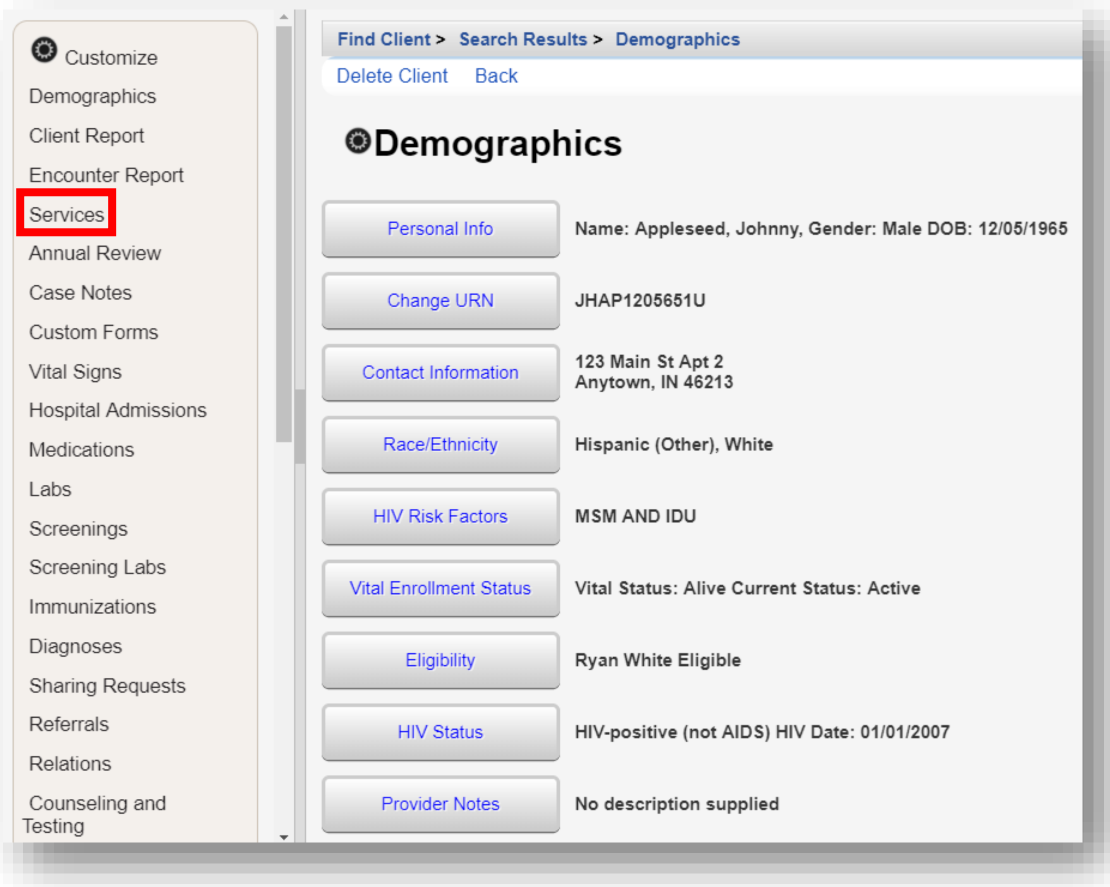


NOTE: The default is set to View Active Clients Only. Uncheck this box if you wish to search for ALL clients.

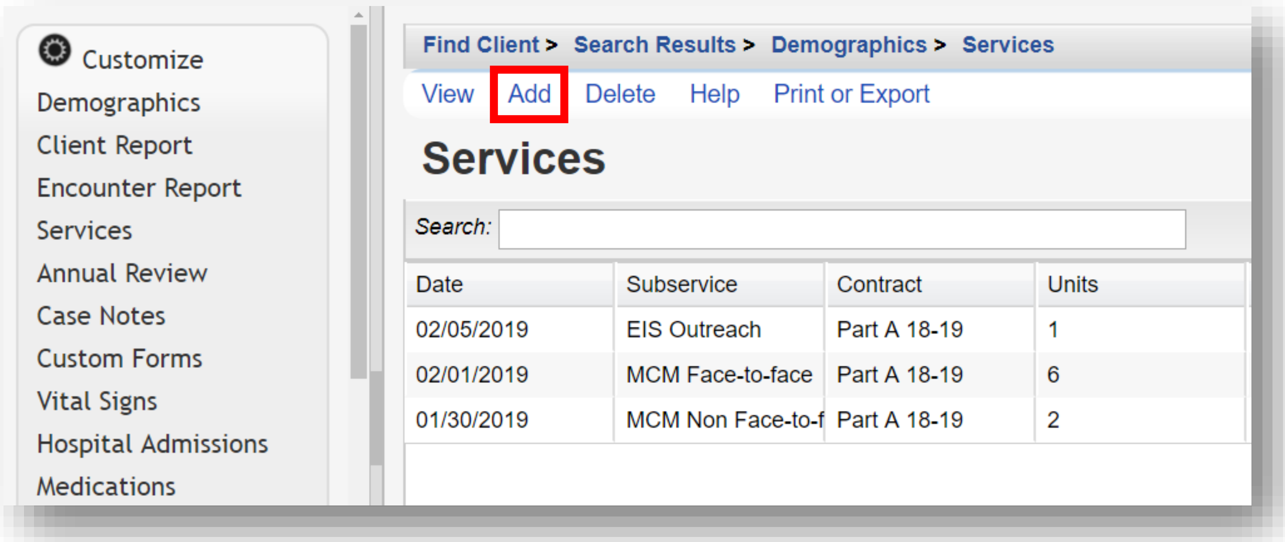
3. A list of matches to your search appears. Select the correct name from the list and click **View Details**.



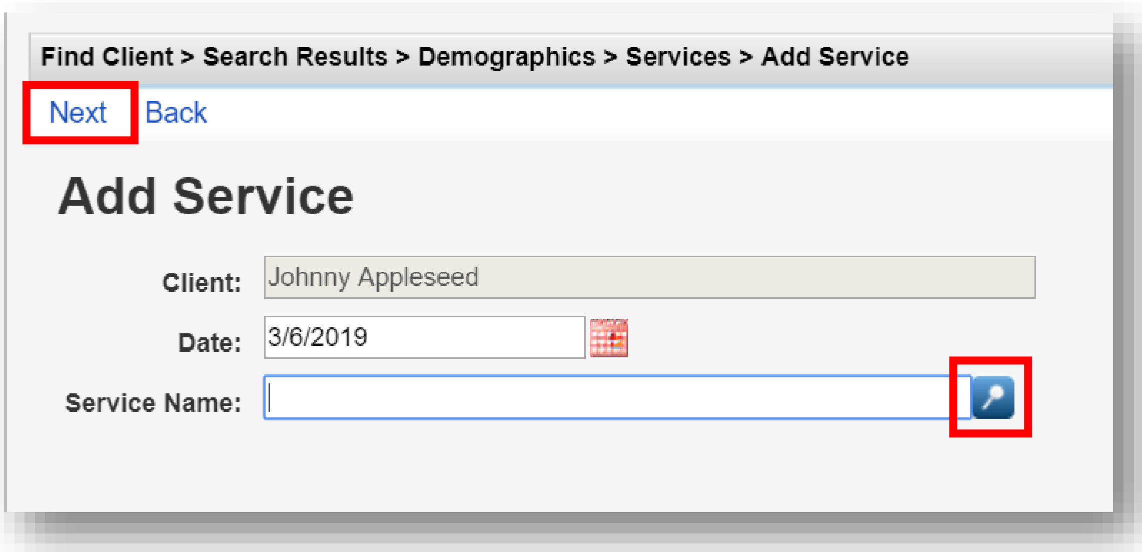
4. After clicking **View Details**, the **Demographics** screen will appear. Click **Services** from the Menu of Links.



5. The Services screen will now be displayed. Click **Add**.



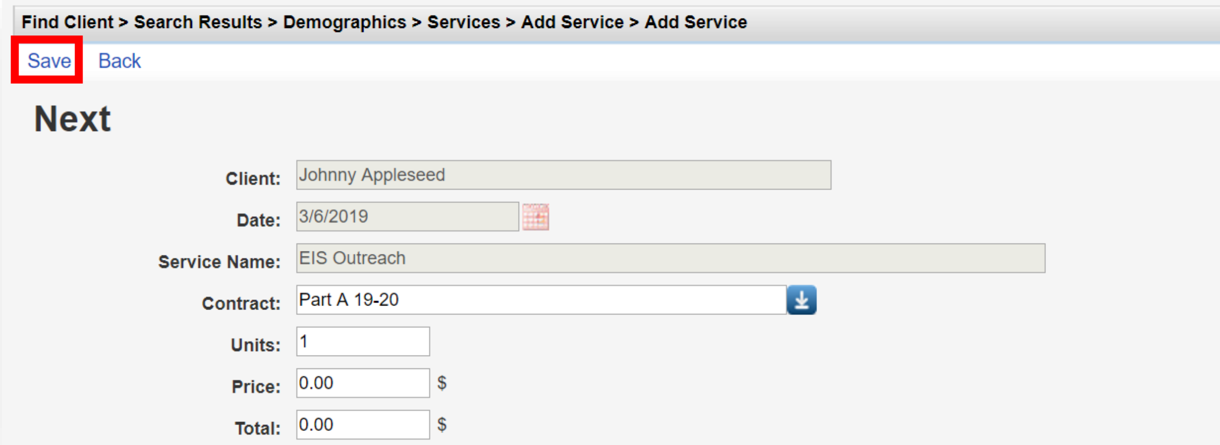
6. Select **Service Name** from the Subservice drop-down list, previously setup in CAREWare for each funded provider. Select the desired service and click **Next**.



NOTE: Only services under active contracts will be listed!

If you are looking for a service that you know is in the system but does not appear on your dropdown list, the contract may have reached its end date, or you may not have added that subservice to this specific contract. See the Quick Start Guide, “Creating Contracts and Services” for further information.

7. Enter the **Contract** for this service, and any other necessary information, such as **Units**, **Price**, and **Total**. Once complete, click **Save**.



Entering Annual Review Information

Annually, CAREWare users are required to review and update two annual review fields and one screening for all RWHAP eligible clients. These fields are:

- Housing Arrangement (found within the Annual Screenings tab)
- Insurance Assessments
- Poverty Level Assessments

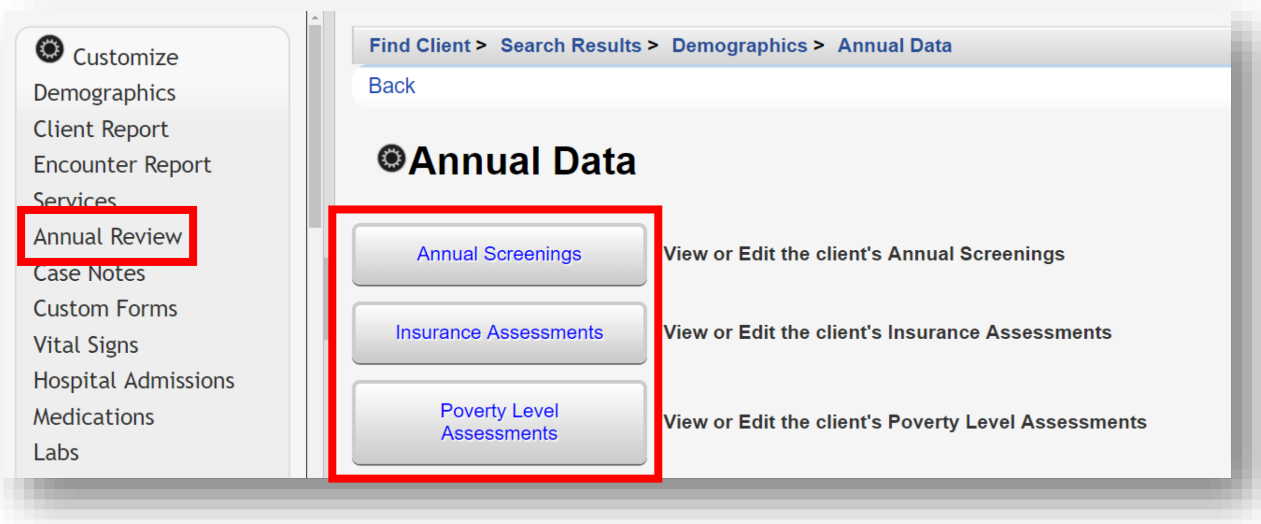
These three fields are RSR-required data elements for clients that received **ANY** service in the reporting year.

There are also three additional annual screenings (as of the 2019 RSR, these screenings are **no longer** RSR-required data elements):

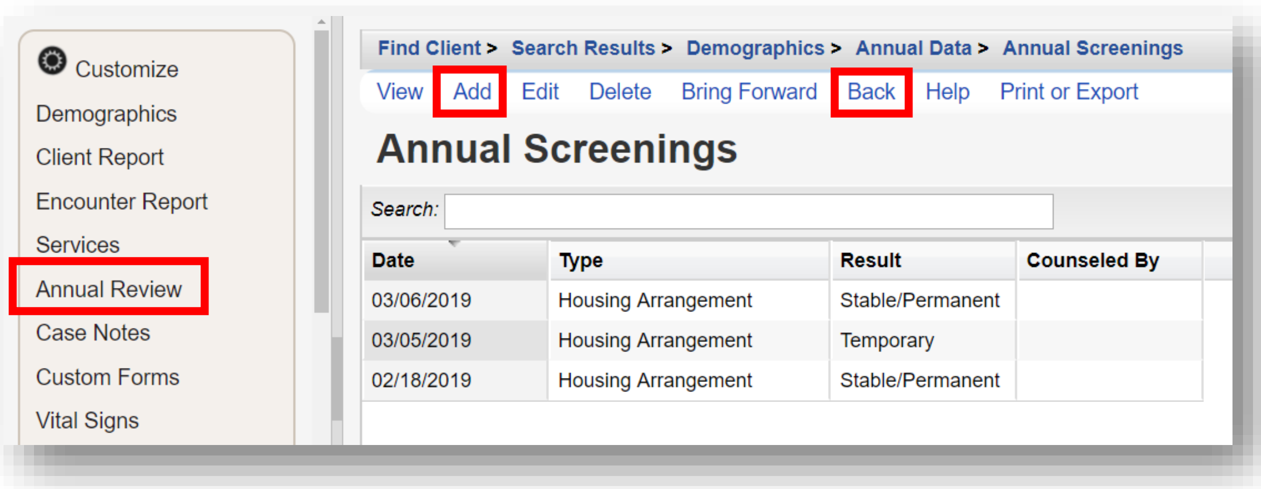
- HIV Risk Reduction Counseling
- Mental Health
- Substance Abuse

To enter the annual review data:

1. Select **Annual Review** from the menu on the left side of the screen. Select either **Annual Screenings**, **Insurance Assessments**, or **Poverty Level Assessments**.



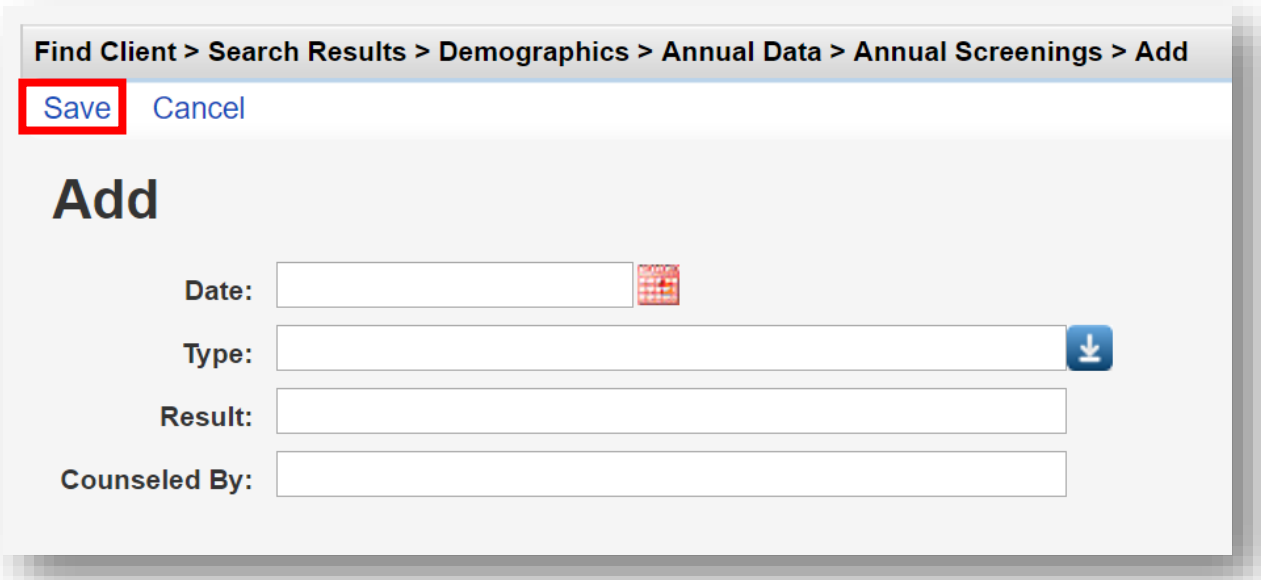
2. On the next page, click **Add**.



3. To navigate back to the Annual Data menu, click **Back** or **Annual Review** on the left side of the screen (see previous screenshot).

Annual Screenings

1. Enter **Date** and select **Type**, **Result**, and **Counseled By** (if applicable) from the drop-down lists. Once all information is entered, click **Save**.



The following **Types** are available in the drop-down list. Refer to the guidance below regarding the **Result** field:

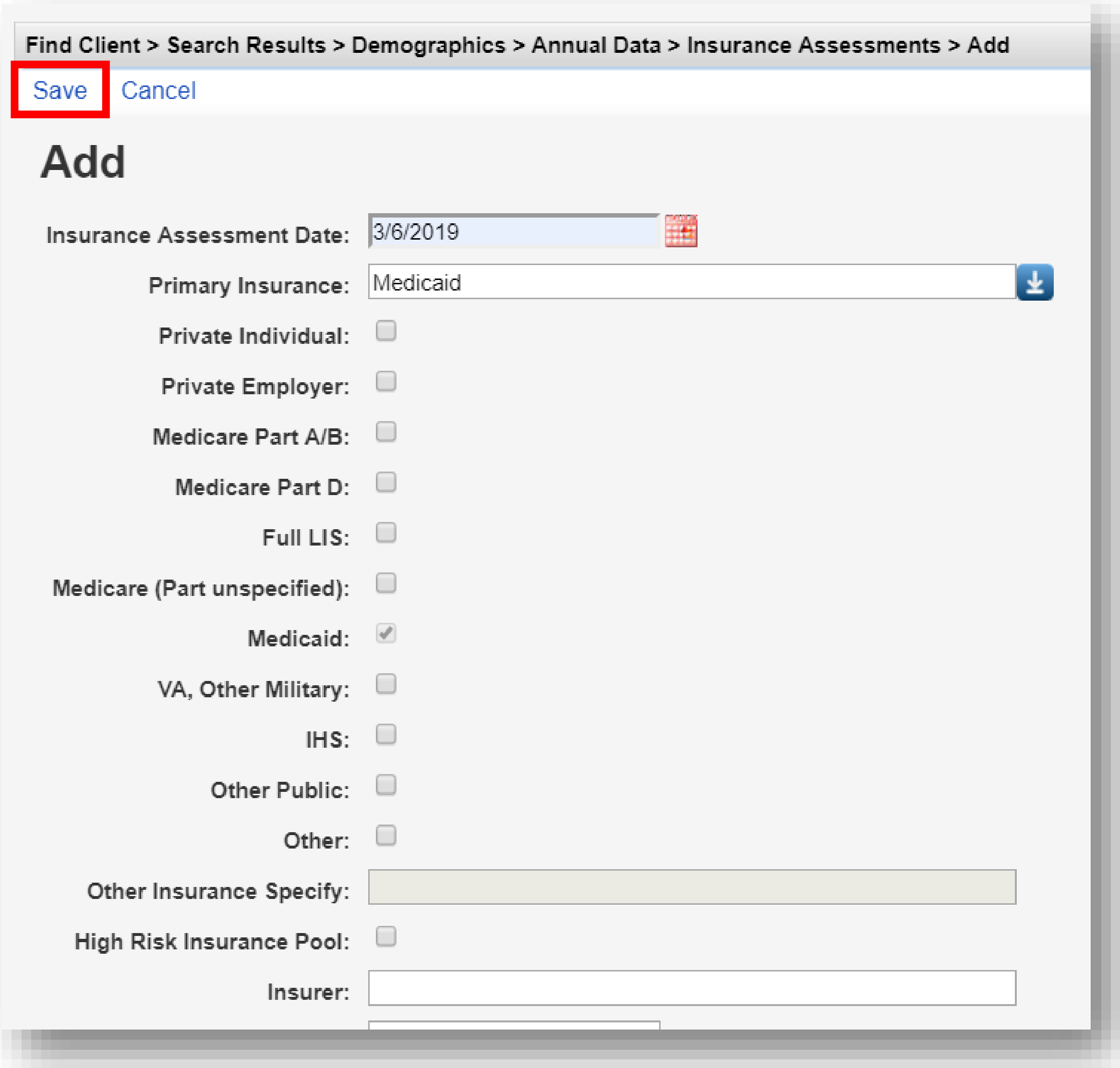
- **HIV Risk Reduction Counseling** – If the counseling has been provided, select the appropriate authorized counselor who performed it.
- **Housing Arrangement** - Please refer to HRSA guidelines to determine the difference between stable/permanent, temporary, and unstable.
- **Mental Health** – Select Yes, No, or Not Medically Indicated, if applicable.
- **Substance Abuse** – Select Yes, No, or Not Medically Indicated, if applicable.
- **HIV Primary Care** – Enter the location where the client receives their primary HIV medical care.

NOTE: Refer to the **RSR Instruction Manual** for a complete list of RSR-required data elements.

Insurance Assessments

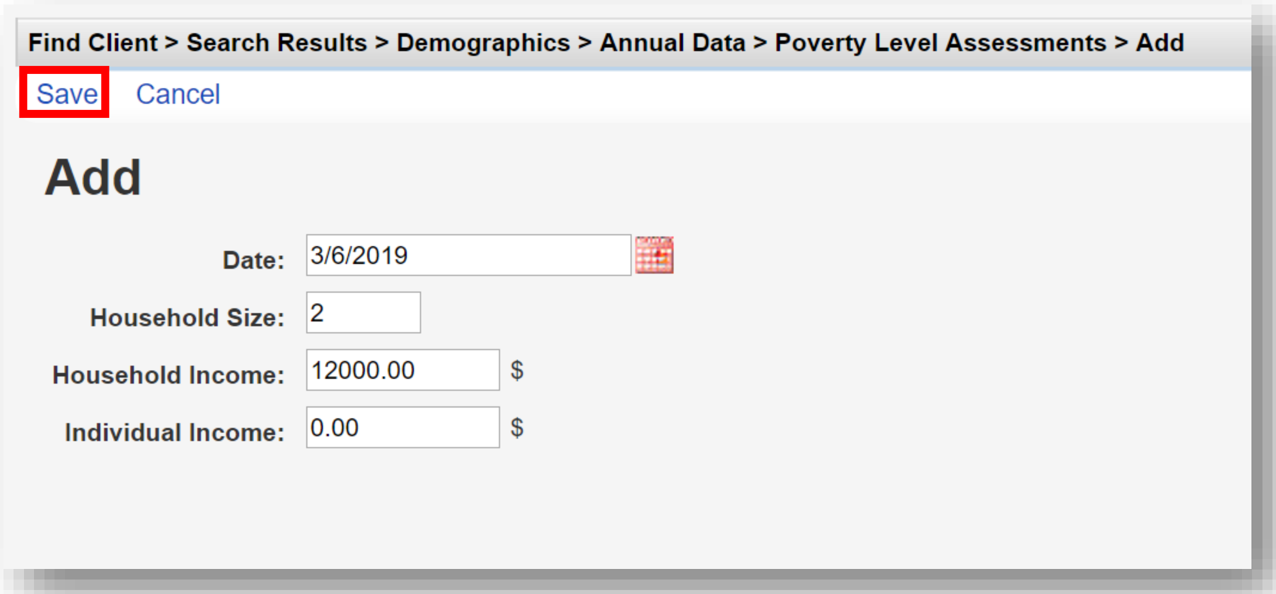
1. Enter **Insurance Assessment Date**, then select the client's **Primary Insurance** from the drop-down list. Once the value is selected from the drop-down list for primary insurance, the value will automatically be checked in the list below.

2. Select secondary insurance/other insurance using the checkboxes, as applicable. Click **Save**.



Poverty Level Assessments

1. Enter **Date, Household Size,** and **Household Income.** Note: Entry of **Individual Income** is optional. It is used in the *Cap on Charges* feature. Click **Save.**



NOTE: The Federal Poverty Level (FPL) will be calculated automatically based on Household Size and Household Income values. Figures to calculate the FPL are updated in the first quarter of each year. This will require administrators to upgrade when it becomes available, typically in mid-February or March.

CAREWare 6

Section 4:

Customizing Tabs and Fields

Adapted from HRSA Quick Start User Guides:
https://hab.hrsa.gov/program-grants-management/careware

PLEASE NOTE: The client data used in these manuals is purely fictional.

First Things First

Getting Started

You should have at least one client entered in the system so you can see how your custom tabs and fields will look.

You should think about the organization of the custom information you want to add. For instance, you may want to create a “Food Bank” custom tab, with fields relevant to food bank services such as whether a client is diabetic, how many visits a month they are approved for, etc. Note, fields that are longitudinal in nature and updated each visit will need to go on a custom subform.

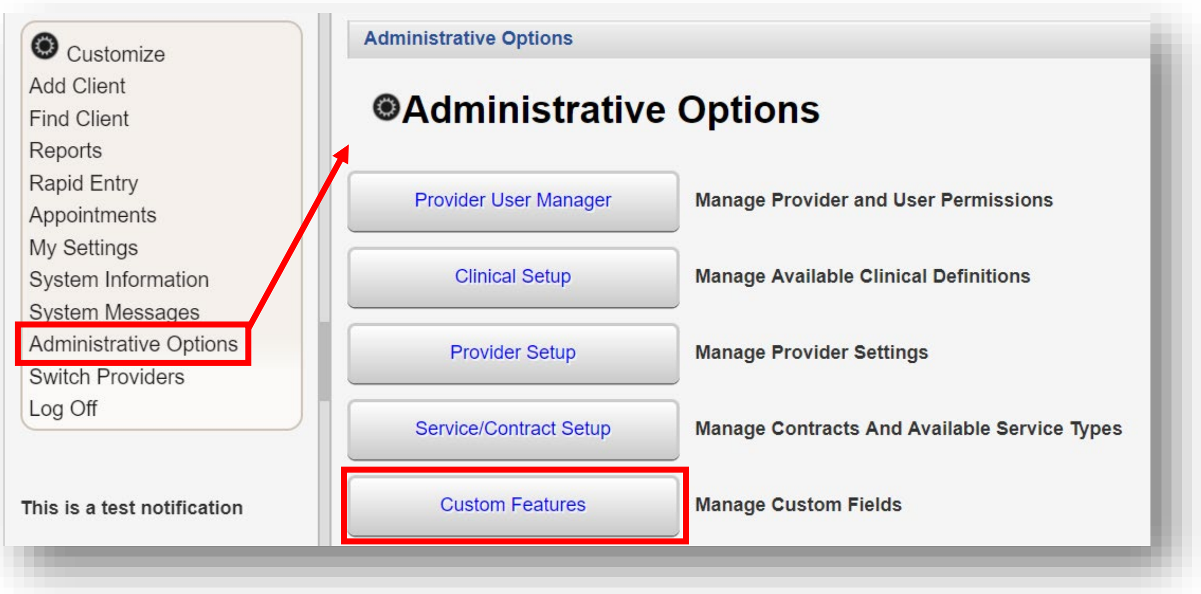
Custom tabs and fields can be made available to multiple providers. For instance, if you create a field where you can specify that a client is diabetic, that information can be made available to all providers who have access to this client’s record and activate the relevant field on a custom tab. (This would not apply to a custom service field as service data is provider specific.)

Customizing Custom Tabs

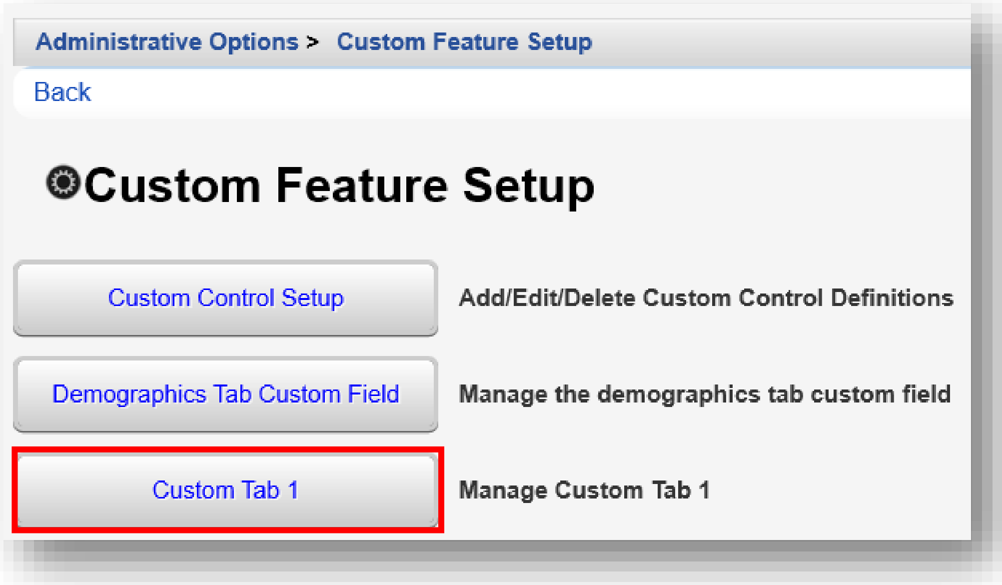
CAREWare offers a variety of custom tabs you can use to expand the range of client data you collect and report. In our examples below, we’ll set up a tab to collect information we can use to run a food bank program. All custom fields can be used in custom reports.

1. Log into CAREWare. For more details on how to do so, please refer to **Quick Start Guide #1**. If you have administrative privileges and are asked to choose between Central Administration and Provider (“Default” until you change the name). Log into a Provider domain to complete the following steps.

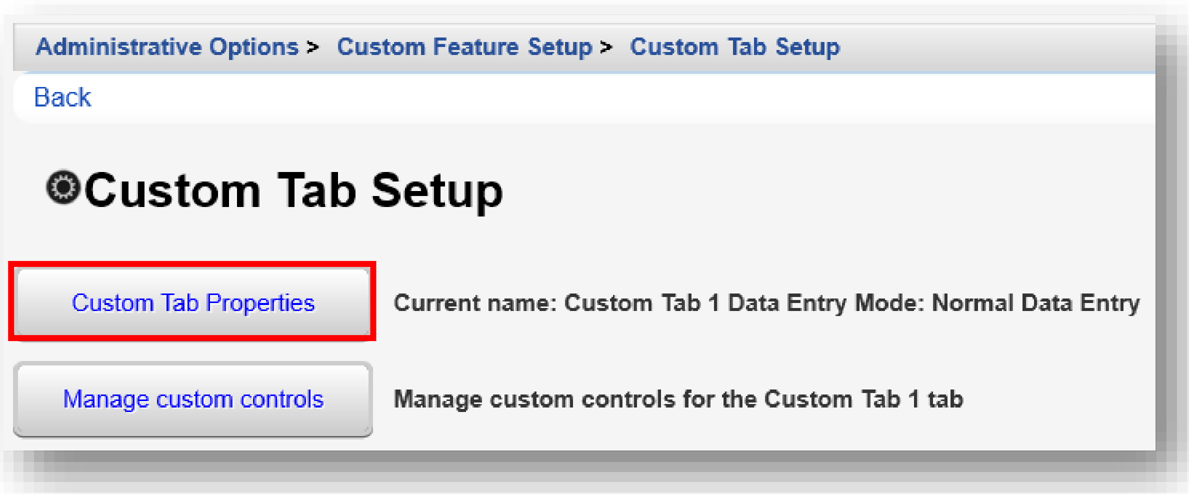
2. Select **Administrative Options** from the **Menu of Links** and then **Custom Features**.



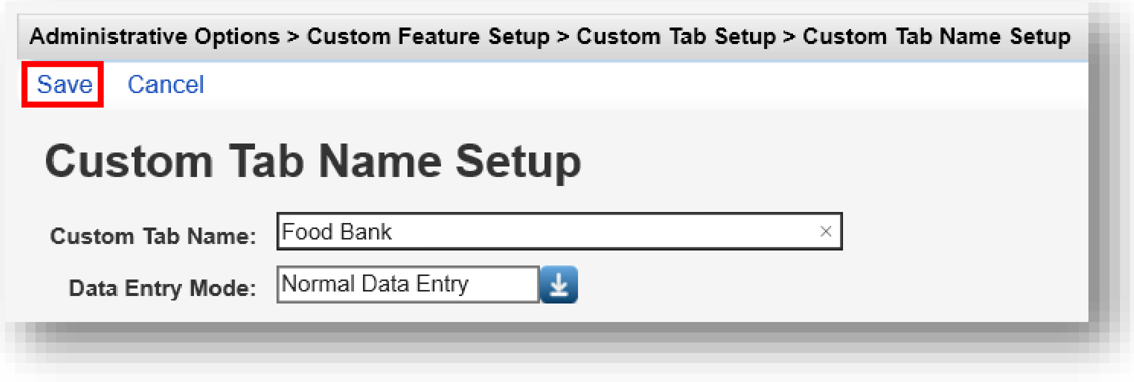
3. The Custom Feature Setup menu will appear. Select **Custom Tab 1**



4. Click **Custom Tab Properties**. From this menu link you can rename the selected custom tab.



5. Rename the tab name from “Custom Tab 1” to your desired tab name. In this example, we are renaming it “Food Bank”. Click **Save**, then click **Back** (will appear after clicking Save).



TIP: In many cases, you’ll want to create “drop down” box selections for data entry. This is best used in cases where you want to standardize data entry from multiple users (i.e., how many food bags a month a client can receive).

You may also need to create “free-form” text data entry fields for cases where data entry can vary (e.g., you may not be able to predict all the possible food allergies a person may have, and may need to add them manually). We’ll cover both of these, starting with the free form option.

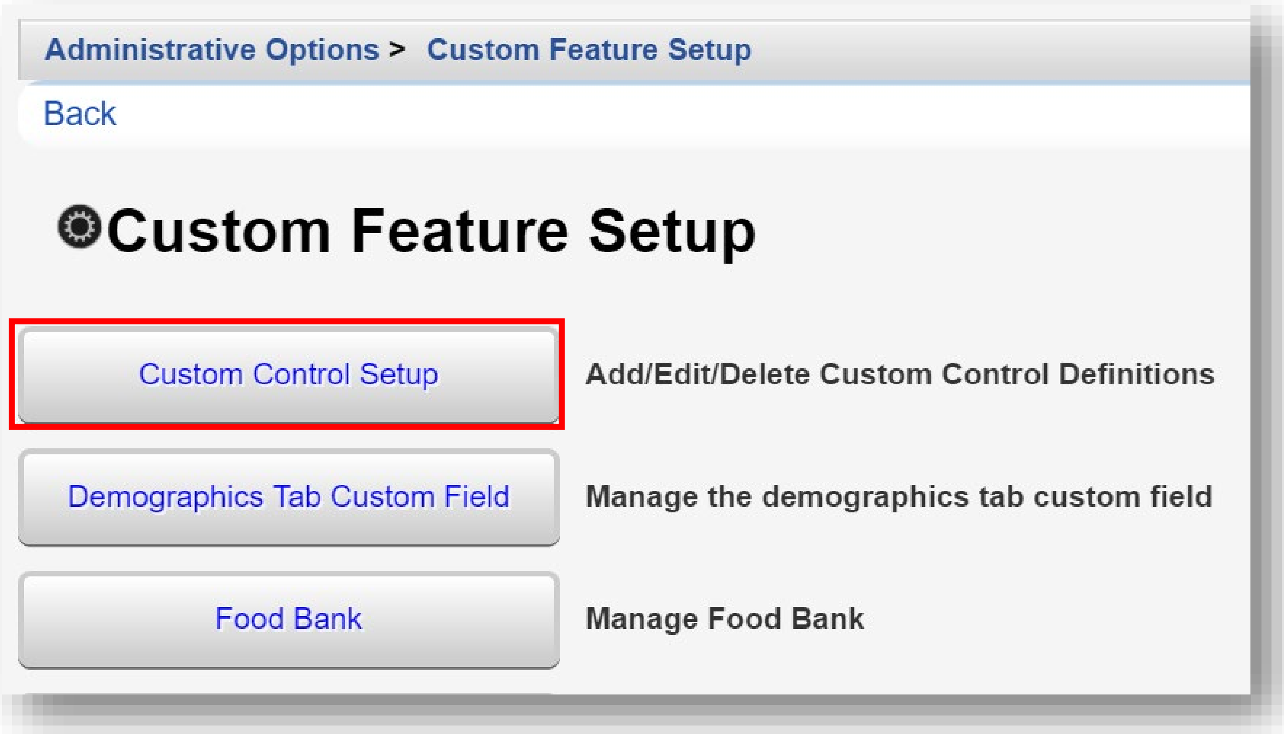
Custom fields have different available parameters, depending on the type of Control that is created. Now we are ready to Add/Edit/Delete Custom Controls, which is the technical name for custom fields.

The following are available **Control Type** options:

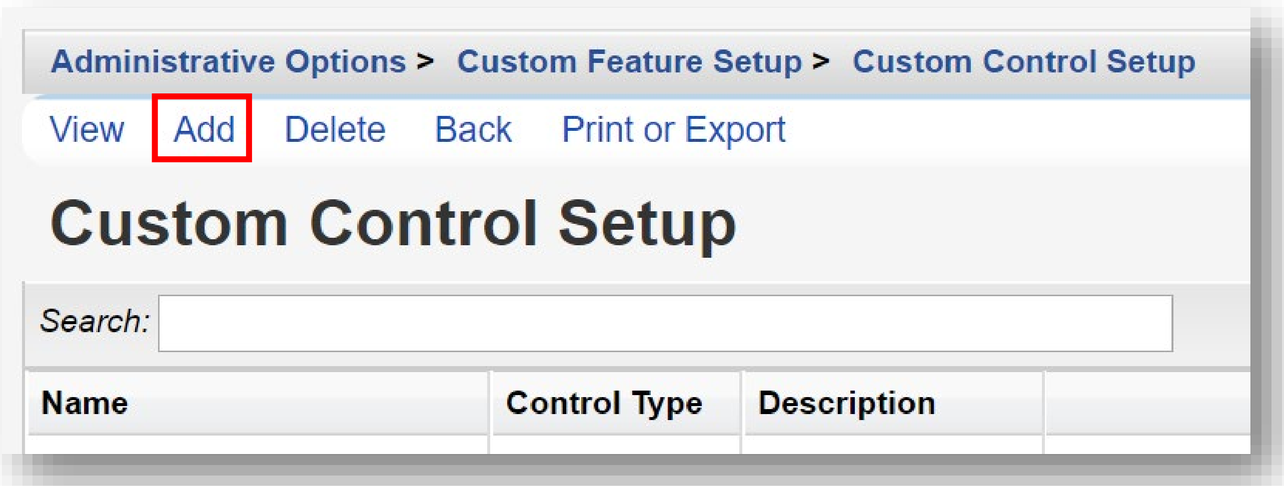
- **TextBox** – allows free-form data entry of any text, up to the configured character length
- **ComboBox** – allows for a drop-down menu of preset selections to be created.
- **CheckBox** – allows for selection of Yes or No.
- **DatePicker** – will limit data entry to a Date only, in the MM/DD/YYYY format.
- **Attachment** – allows documents to be uploaded to client records, (such as copies of intake forms, client eligibility, etc.).
- **Hyperlink** – allows a direct link to a webpage or website, such as, HIV treatment guidelines or the HRSA CAREWare website.
- **Memo** – allows for a large amount of free-form text to be entered

Creating a TextBox Custom Control

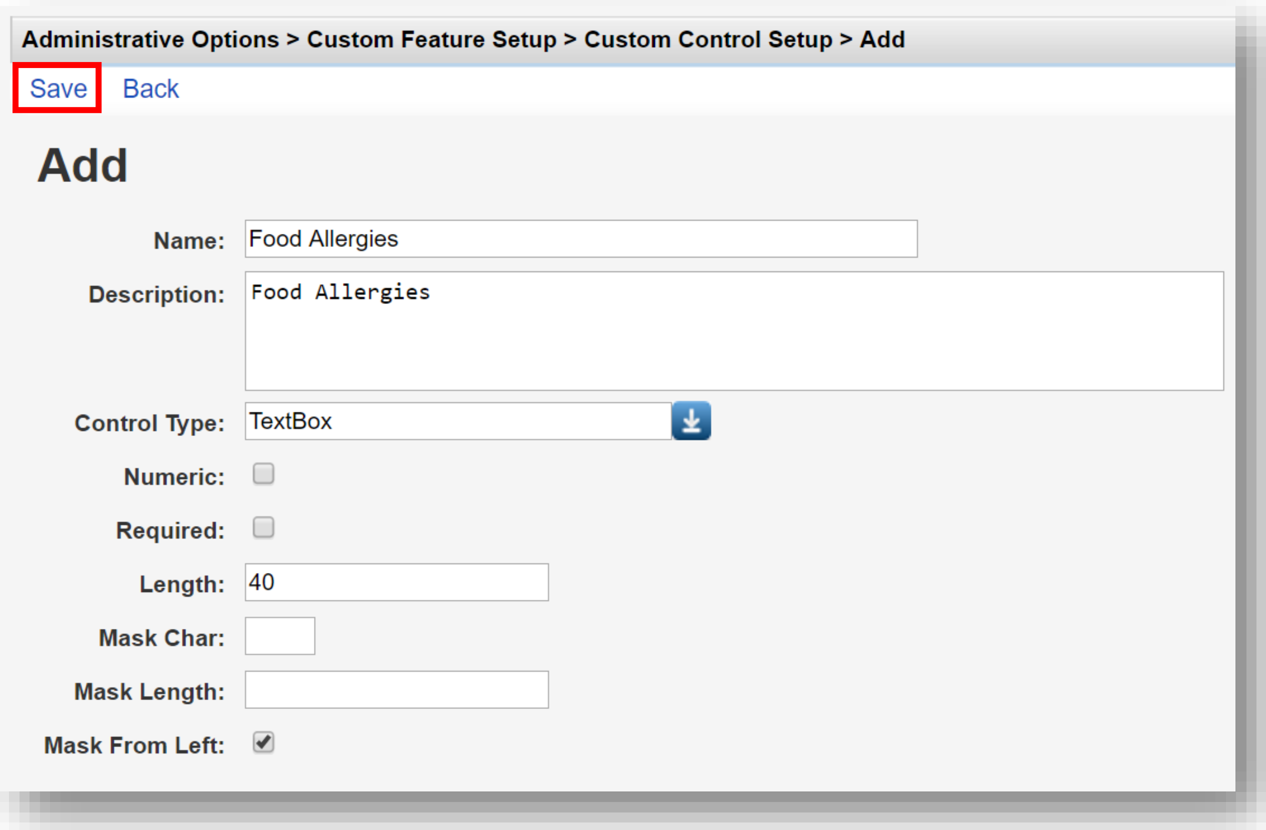
1. From the Custom Feature Setup menu, click **Custom Control Setup**.



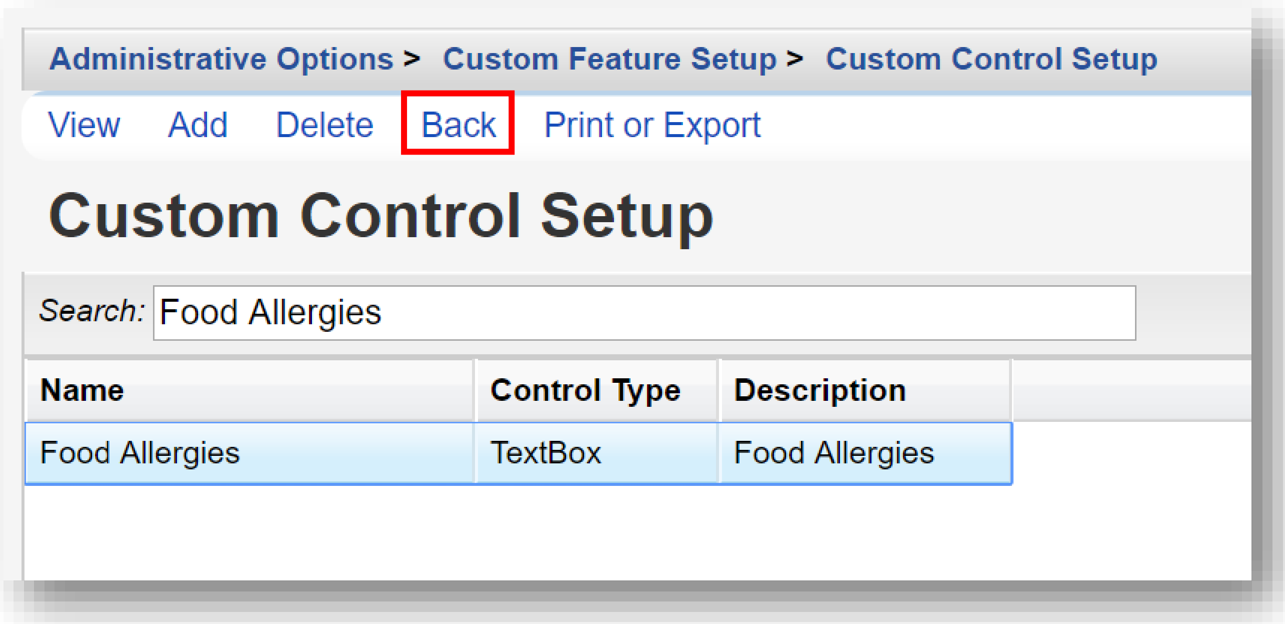
2. Click **Add**.



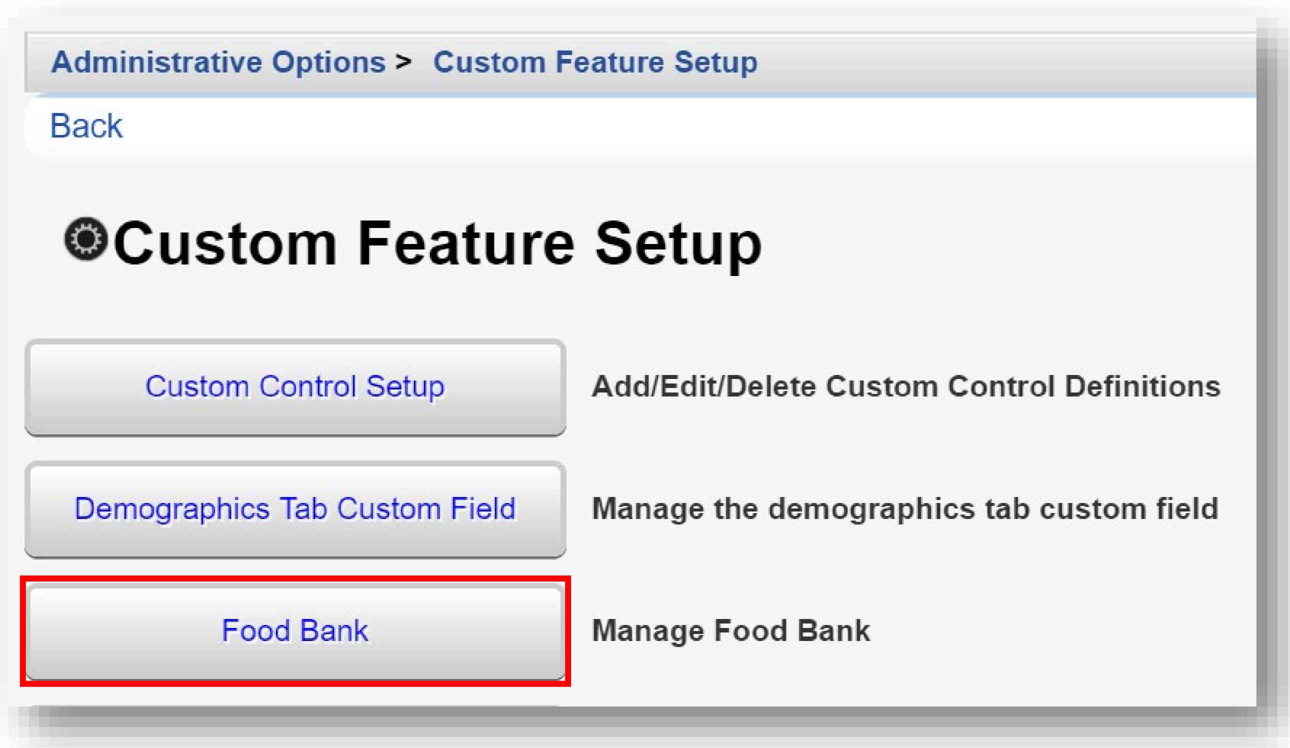
3. Enter in the following information. When complete, click **Save**.
   - **Name** – control name or custom field name
   - **Description**
   - **Control Type** – select TextBox
   - **Numeric** (checkbox) – will limit data-entry to Numbers only
   - **Required** (checkbox) – allows you to specify that, once the user clicks this custom field, a value *must* be entered
   - **Length** – limits the allowable number of field characters
   - **Mask Char** (optional) – the character that will replace masked values
   - **Mask Length** (optional) – the number of characters that will be masked
   - **Mask From Left** (check box) (optional) – the mask direction



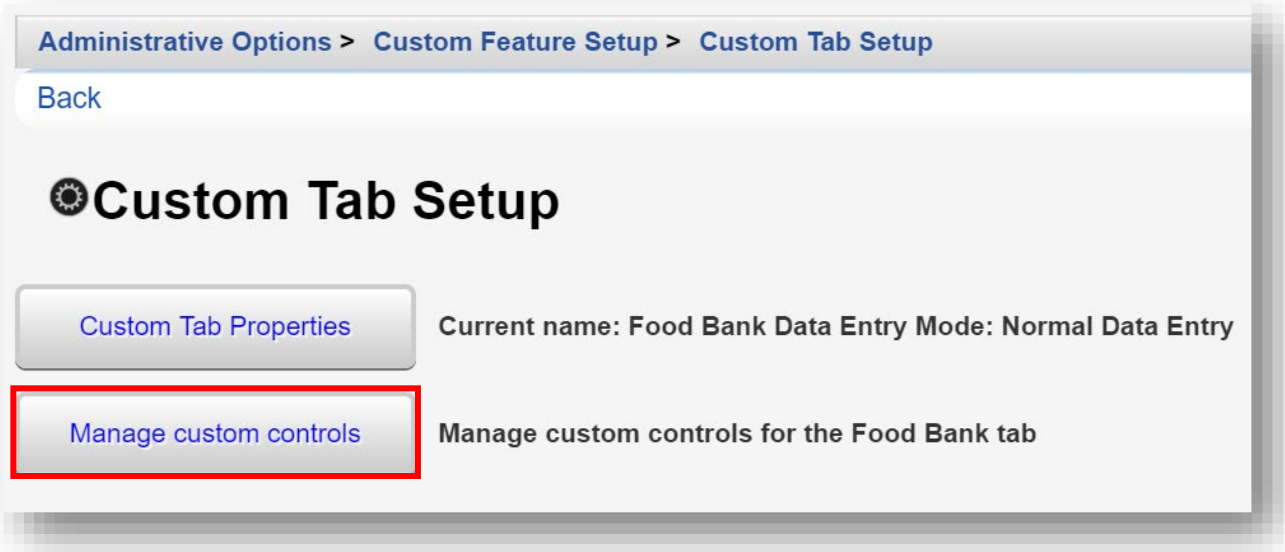
4. A custom field has now been added (in this example, Food Allergies). Click **Back**.



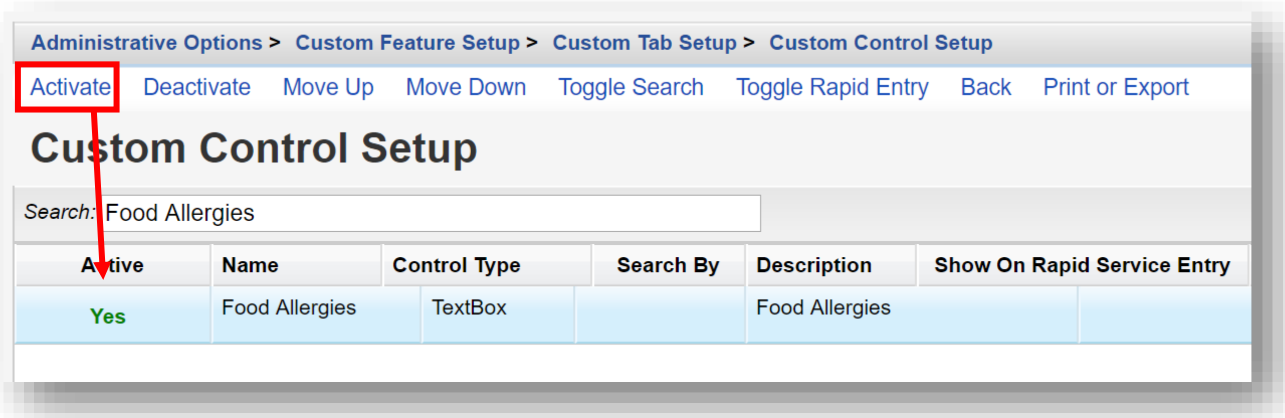
5. Click on **Food Bank** (the tab name changed in the previous section).



6. Click on **Manage custom controls**



7. Notice the newly created Food Allergies TextBox control is not Active (use the *Search* bar to filter). Only controls that are "Active" will show under the custom tab(s). To activate a desired custom control, select it, and click **Activate**. The text "YES" appears in the Active column, indicating that the custom control field will be visible, under the custom tab, Food Bank.

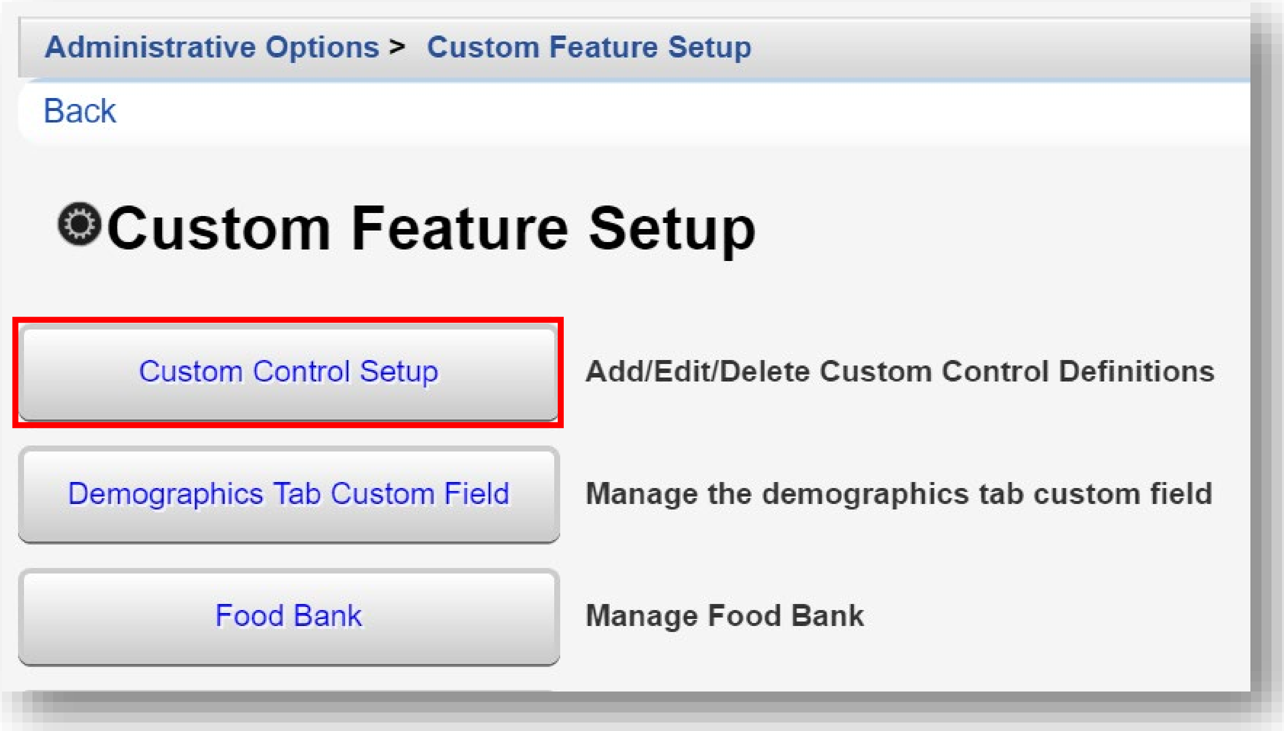


Use the same process to Activate or Deactivate other custom controls, under each custom tab. Deactivating a custom control will not affect previously entered data.

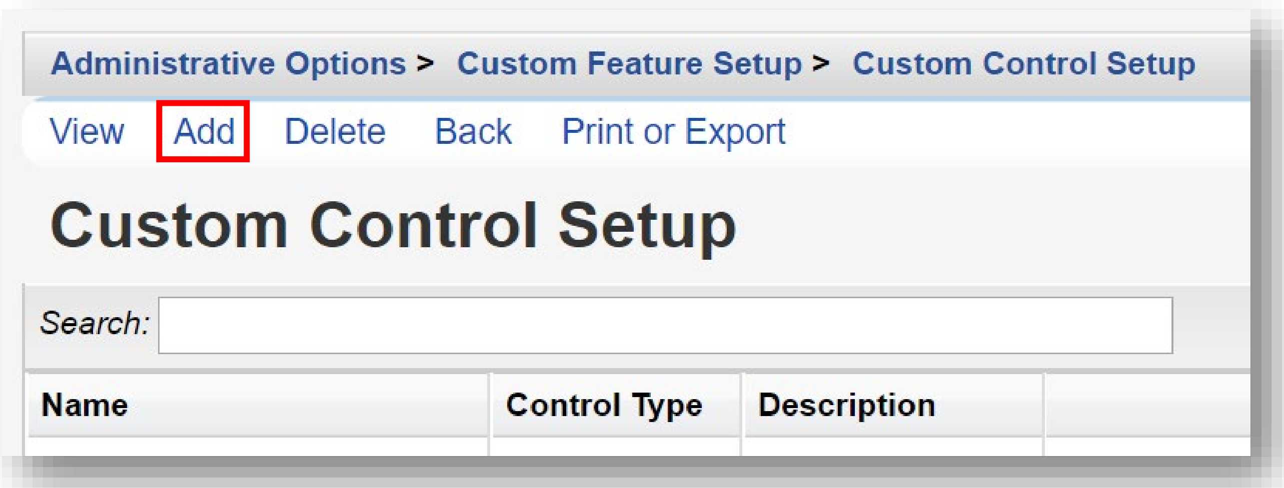
WARNING: Deleting a custom control will also delete ALL data previously entered in the control field, so it should be used with extreme caution.

Creating a Combo Box Custom Control

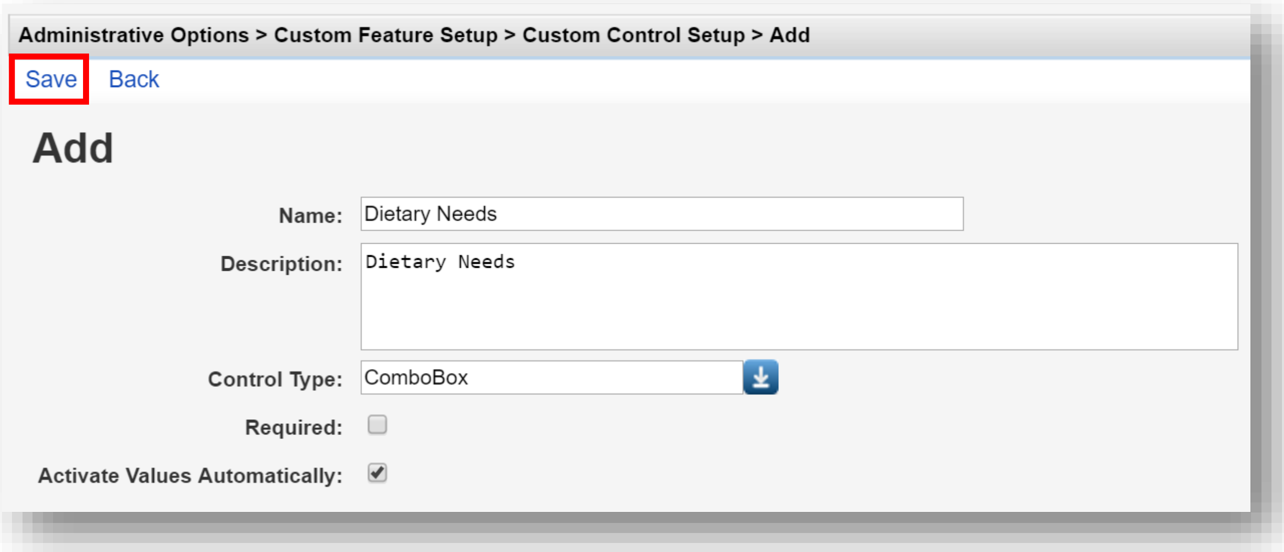
1. From the Custom Feature Setup menu, click **Custom Control Setup**.



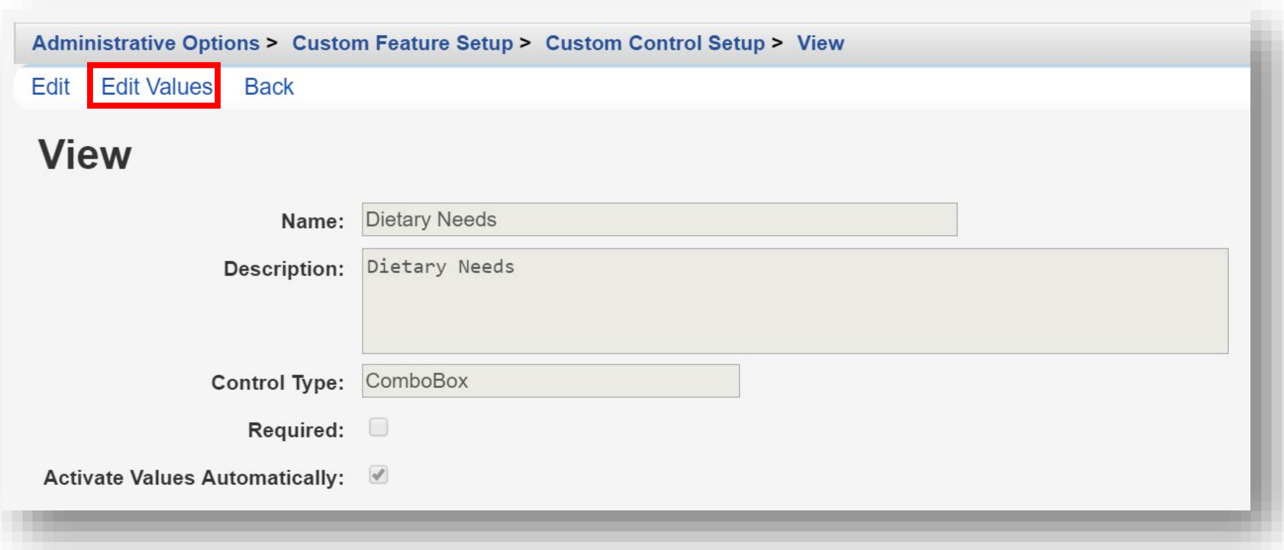
2. Click **Add**.



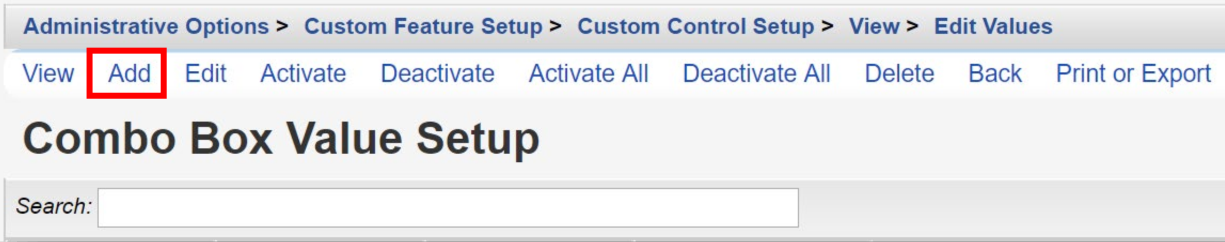
3. Enter in the following information (in this example, we are creating a custom control name, “Dietary Needs”). When complete, click **Save**.
   - **Name** – control name or custom field name
   - **Description**
   - **Control Type** – select ComboBox
   - **Required** (checkbox) – allows you to specify that, once the user clicks this custom field, a value *must* be entered
   - **Activate Values Automatically** (checkbox) – leave checked (default value)



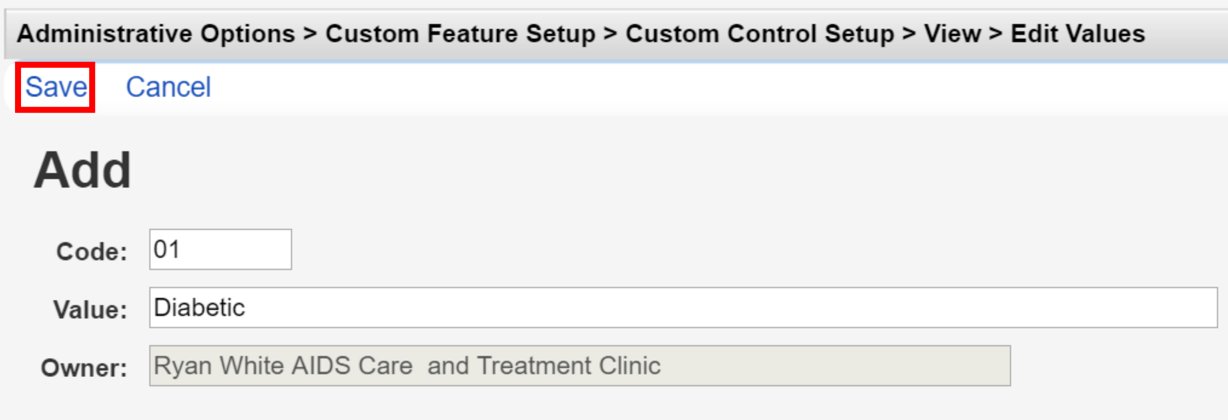
4. Select **Edit Values**.



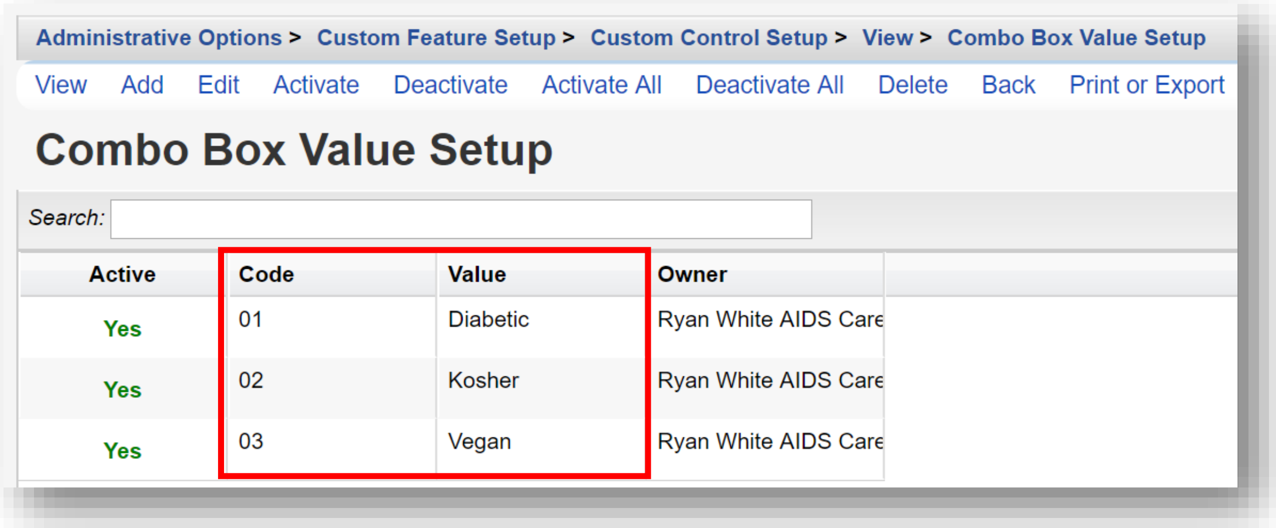
5. Click **Add**.



6. Enter in the following information (in this example, we are creating a value name, "Diabetic"). When complete, click **Save**.
   - **Code** (required)
   - **Value** (required)

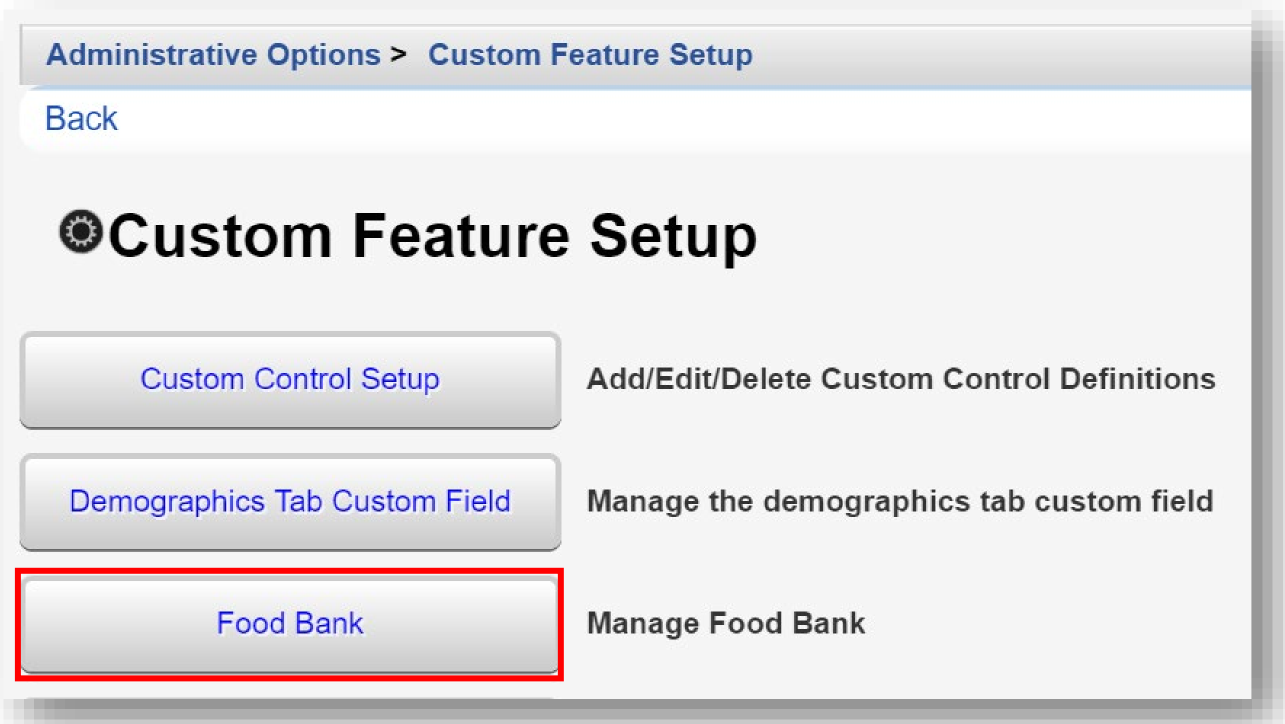


7. Repeat steps 5 and 6, as necessary. When complete, the Combo Box Value Setup menu will display all added values.

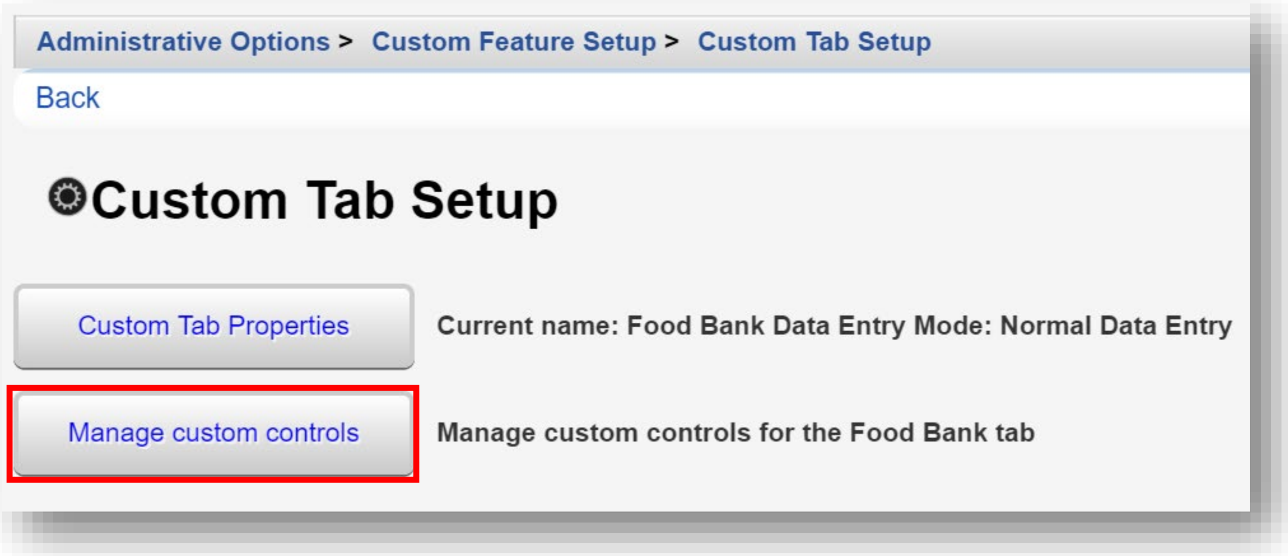


8. Return to the Custom Feature Setup menu by clicking **Custom Feature Setup** within the breadcrumb links (see previous screenshot). The menu is also accessible by clicking **Back** multiple times.

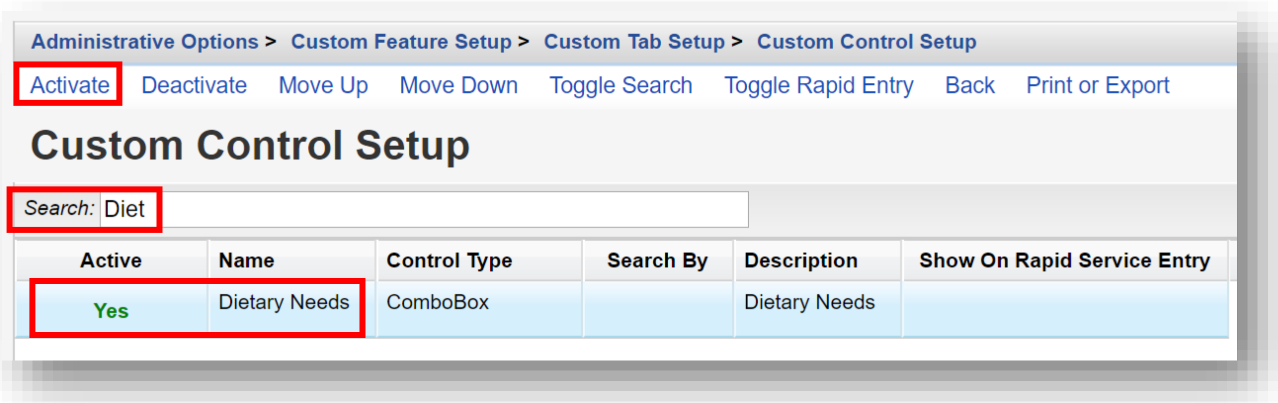
9. Click **Food Bank**.



10. Click **Manage custom controls**.



11. Use the *Search* box to filter the custom control list. Select the desired custom control. Click **Activate**. A "Yes" appears in the Active column, indicating that this custom control field will be visible, under the custom tab.



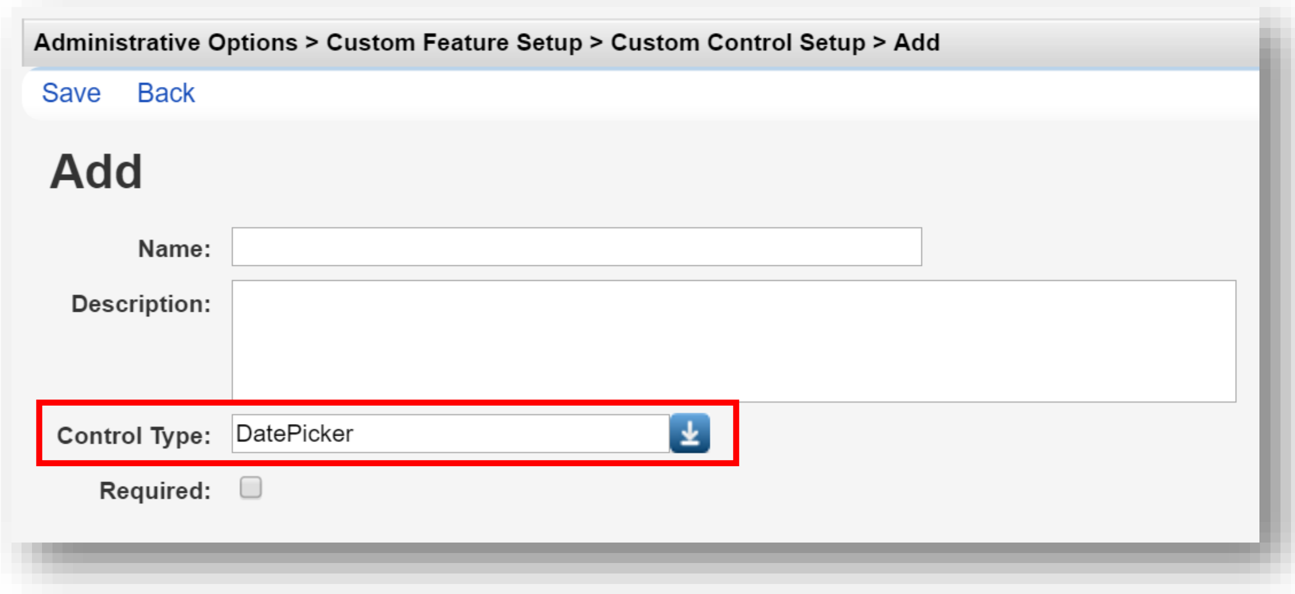
When made "Active," custom control fields are ready for data-entry into client records.

TIP: Combo boxes can also be used to identify staff, such as a case manager, for a service provided. Combo box values can be customized to list agency staff and would be provider-specific.

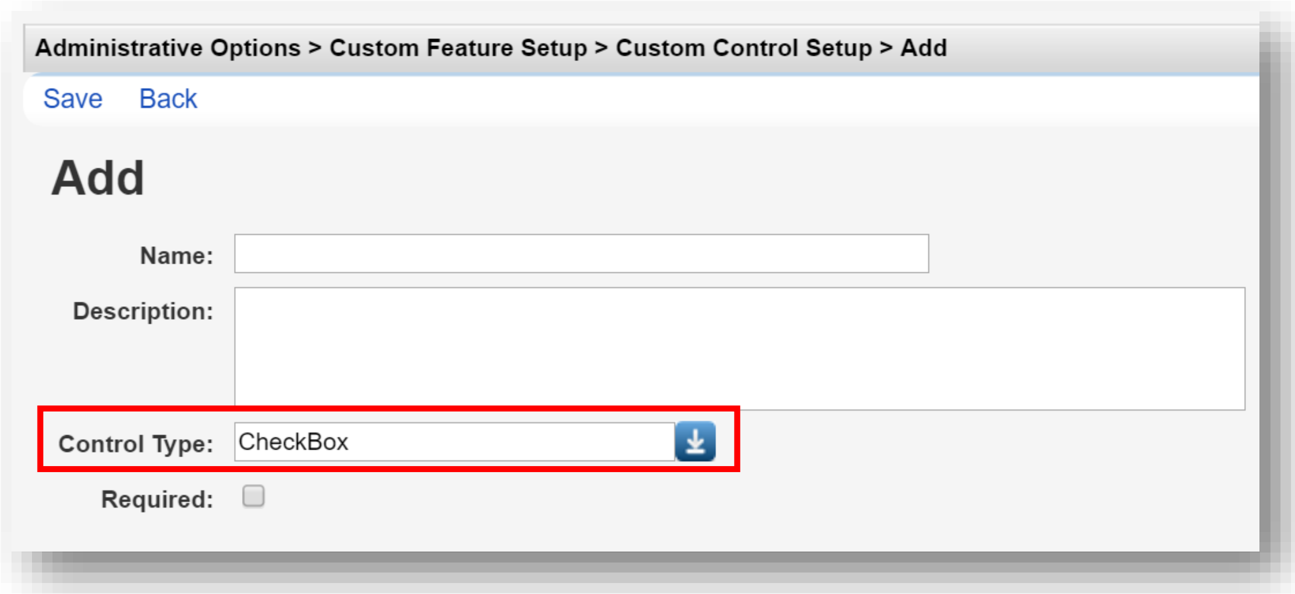
Creating a Date Picker and Yes/No Box Custom Controls

The procedure for creating these types is similar to the procedure for creating custom TextBox and ComboBox fields.

Selecting control type, **DatePicker,** will allow manual entry of a date or selection of one from the drop-down calendar.

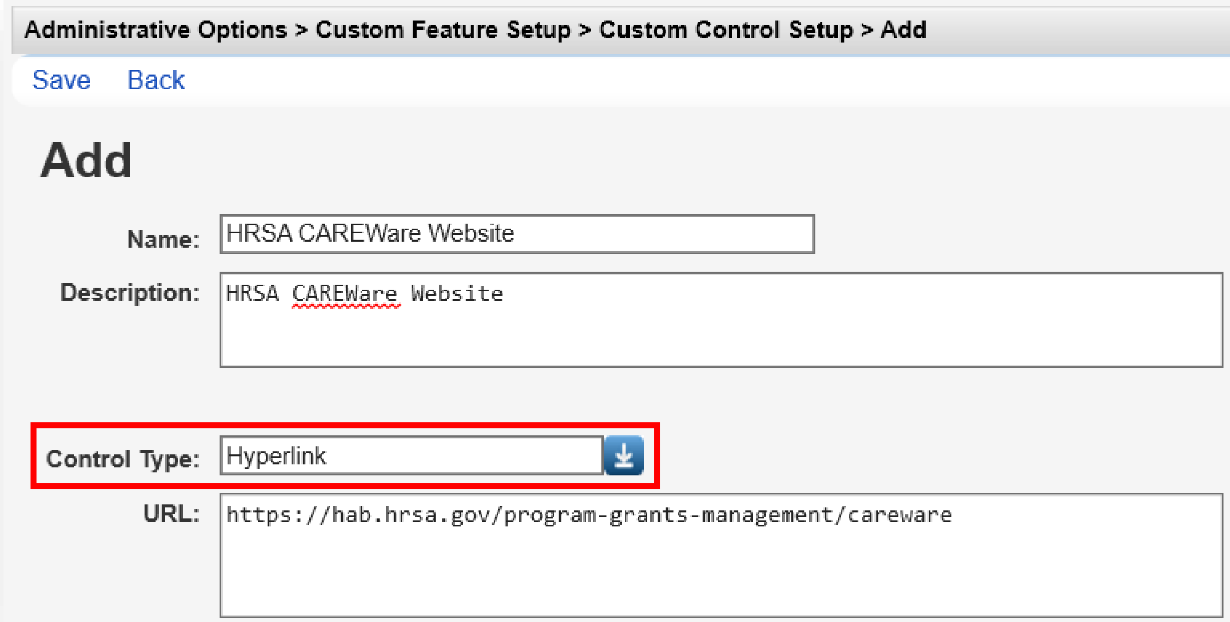


When selecting control type, selecting **CheckBox,** will allow selection of whether the box is **Checked (Yes)** by default.



Creating Hyperlink Custom Controls

You can also create custom hyperlinks to link directly to websites you refer to often, such as CAREWare.

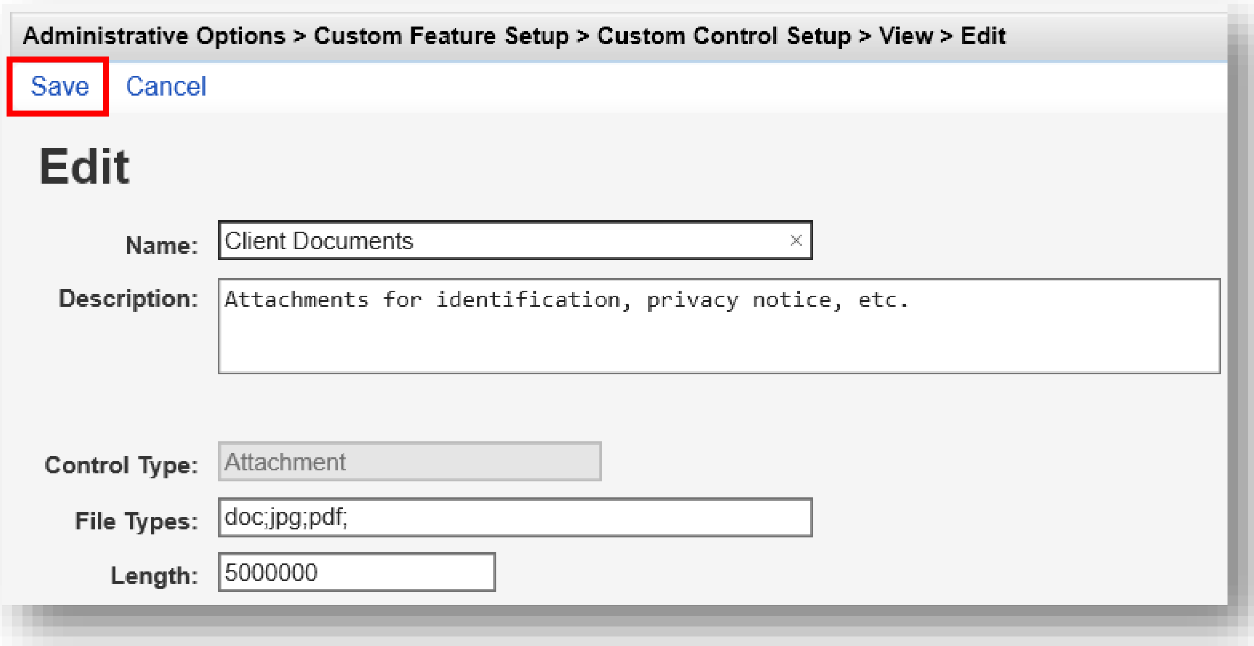


Creating Attachment Custom Controls

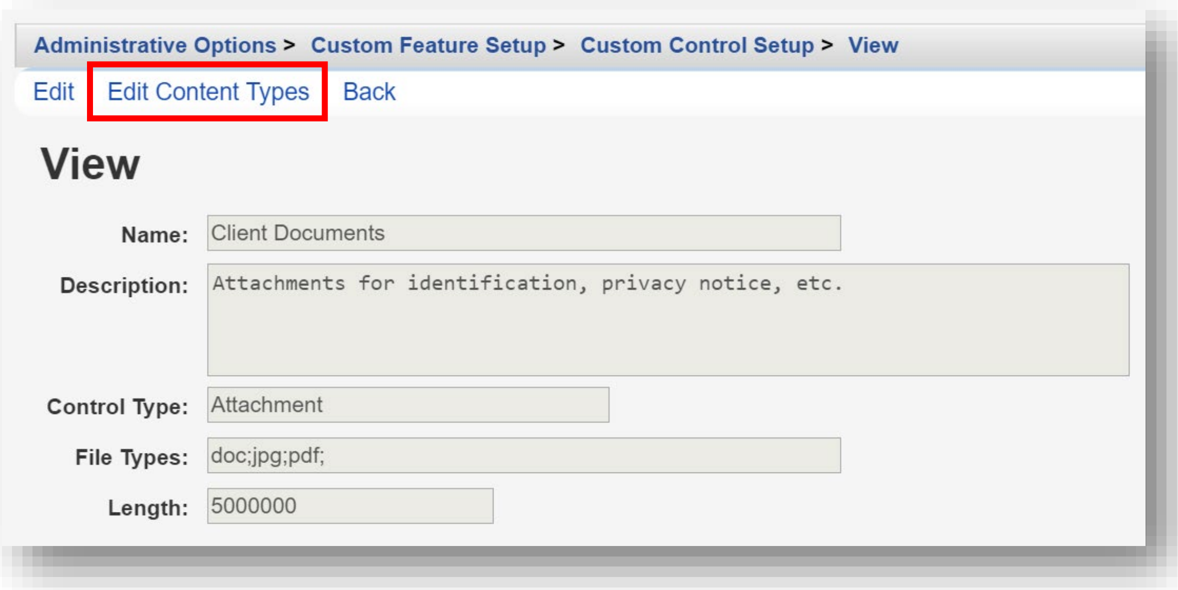
You can create attachment custom controls for a variety of file formats (Word, PDF, JPG, etc). By doing so, it will be possible to attach specific documents to an individual client record, such as a scanned HIPAA privacy notice, client ID, or an enrollment form.

TIP: To prevent the CAREWare database from becoming overloaded with client record attachments, they can be stored in a separate system folder. Storage of “attachments” should be managed by your CAREWare system administrator.

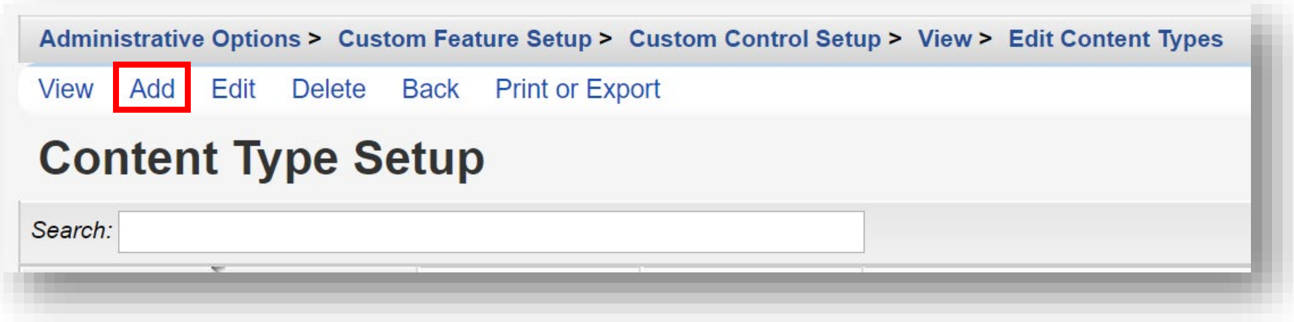
1. Enter in the following information. When complete, click **Save**.
    - **Name** (required)
    - **Description** (required)
    - **File Types** – allow upload of specific file format(s). Separate file formats with a semicolon.
    - **Length** – automatically set (5000000 default value), refers to maximum size of upload file. This value should be managed by your CAREWare system administrator.



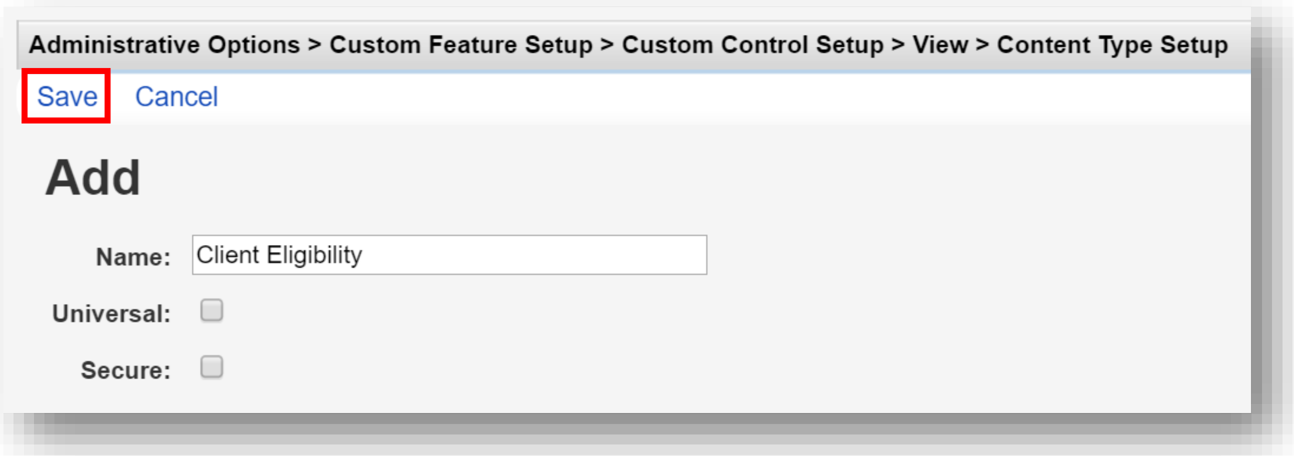
2. Select **Edit Content Types**.



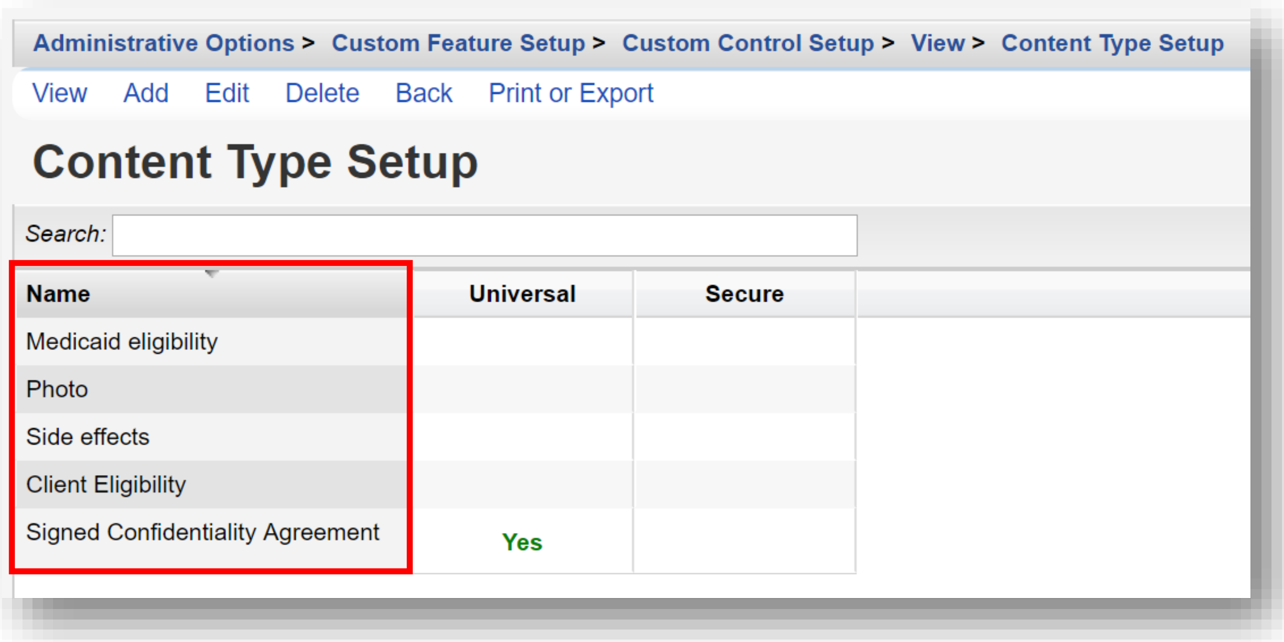
3. Click **Add**.



4. Enter in the following information. When complete, click **Save**.
   - **Name** (required)
   - **Universal** (optional) – checking this option makes content type available to all providers within the same CW system.
   - **Secure** (optional) – checking this option will require an extra user permission be granted for users to view certain uploaded files.

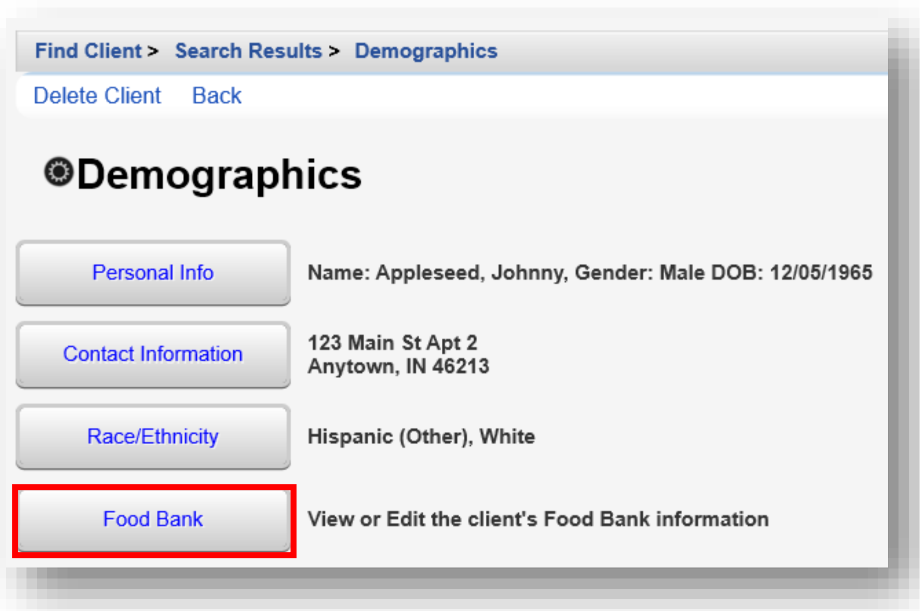


5. Repeat steps 3 and 4, as necessary. When complete, the Content Type Setup menu will display all added values.

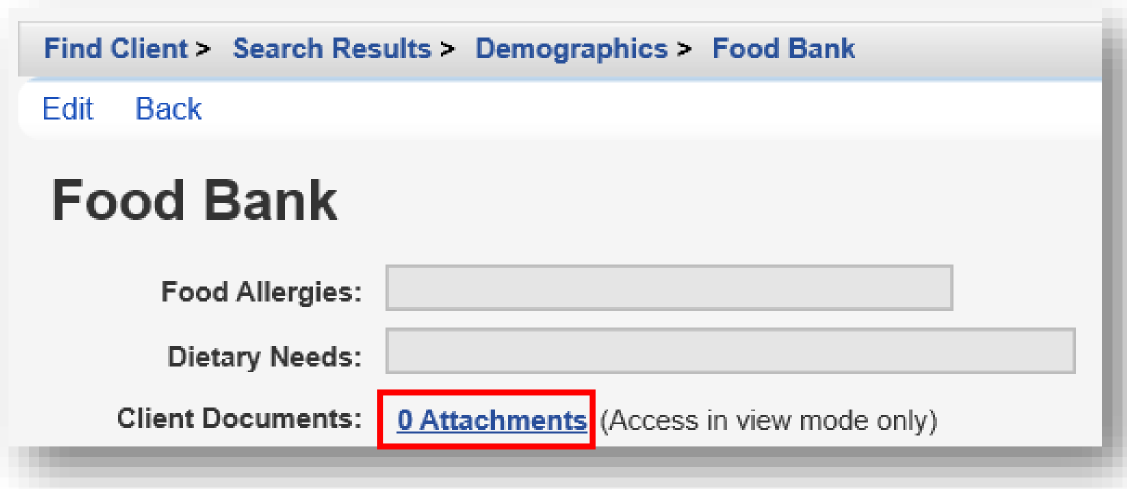


Now we're ready to go to a specific client and attach documents to their record. For more details on how to find and open client records, please refer to *Quick Start Guide #3: Adding Clients, Demographics, Services, and Annual Review Data*.

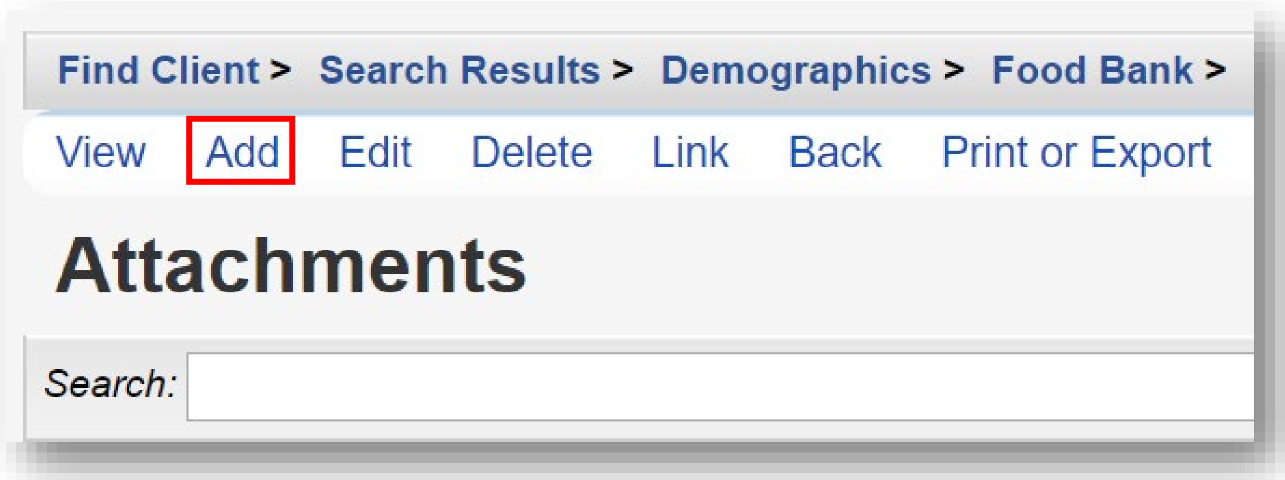
6. **Find** and **Select** an existing client record. Click on the "Food Bank" tab created previously.



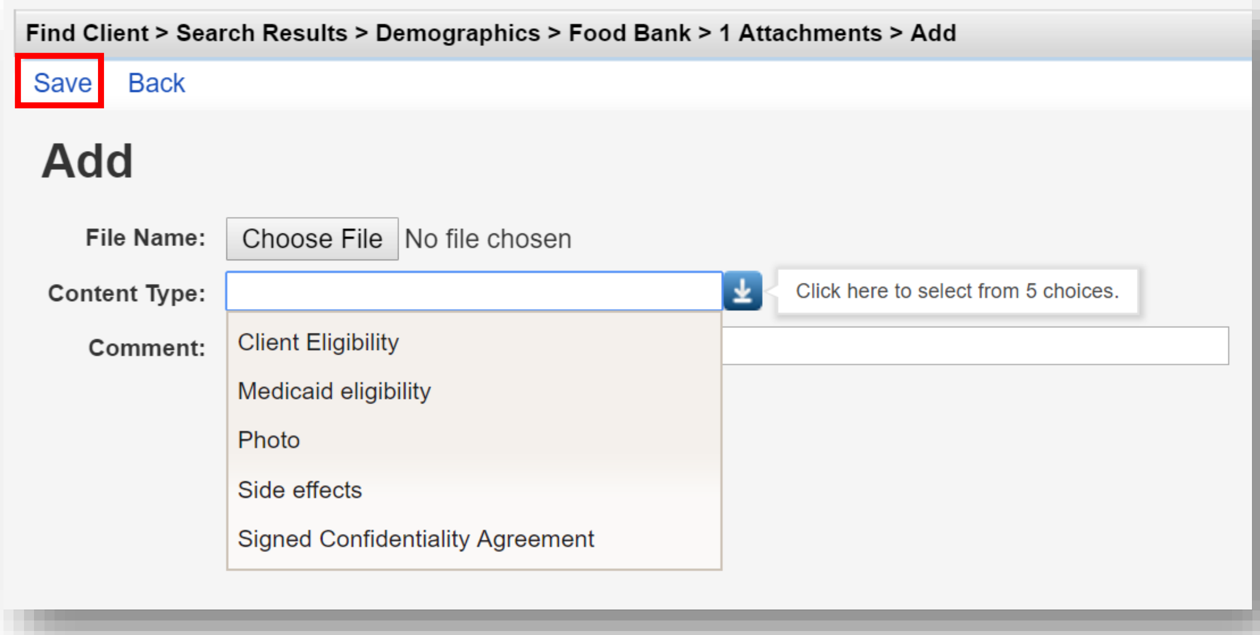
7. Select the **0 Attachments** link.



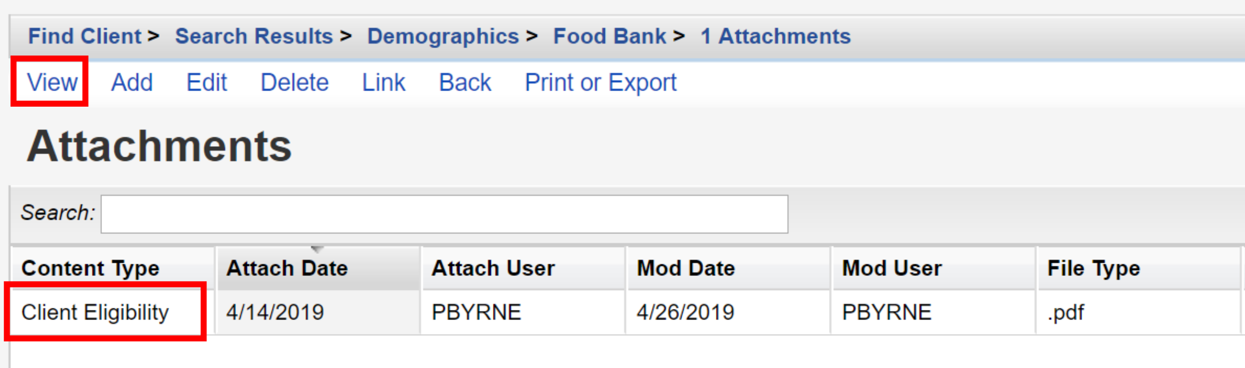
8. Click **Add**.



9. Enter in the following information. When complete, click **Save**.
   - **File Name –** browse to the client document to be uploaded.
   - **Content Type** – choose from the drop-down menu
   - **Comment** (optional)



10. The file has been successfully uploaded to the client record as an Attachment. To view the uploaded document, select the desired File Name and click **View**.

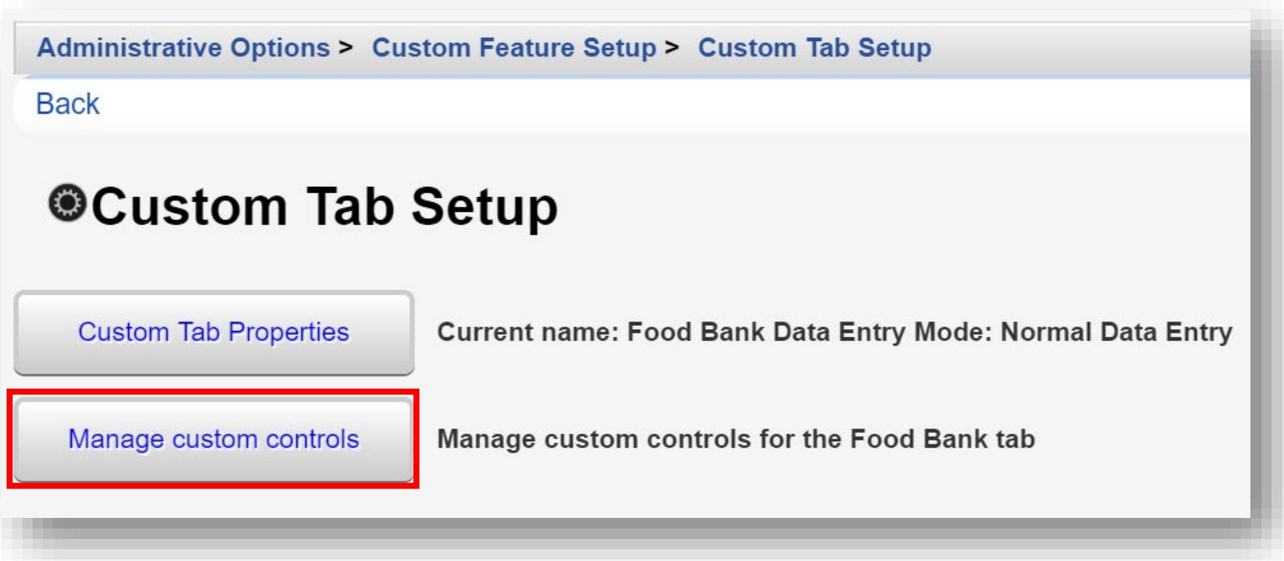


TIP: For multiple provider CAREWare networks - it is recommended to configure "attachment" permissions to allow users to delete ONLY documents they have uploaded. While being able to View other attachments uploaded for their clients.

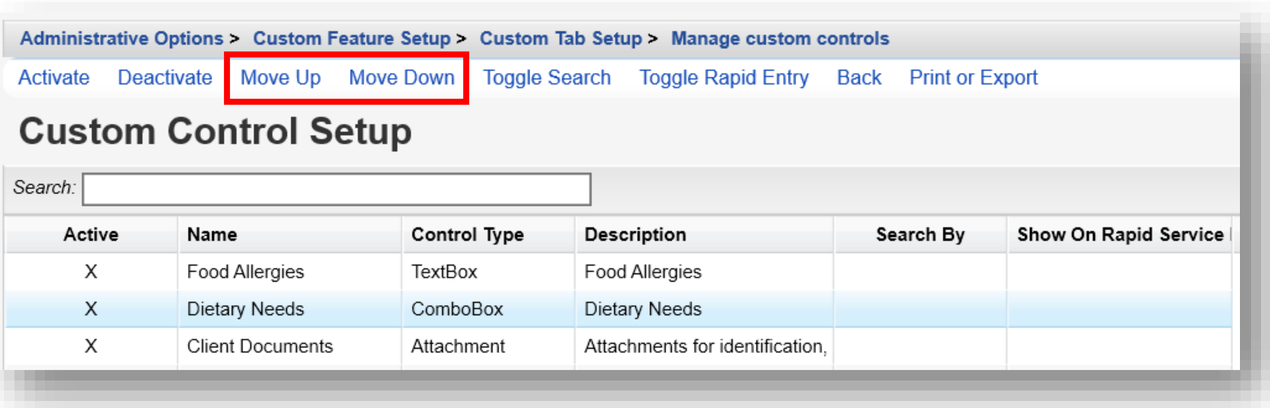
Setting Custom Field Order

The order of the fields in the Control Manager is the order in which they'll appear horizontally on the data entry screen. You can move fields around on the custom tab using the Field Order functions.

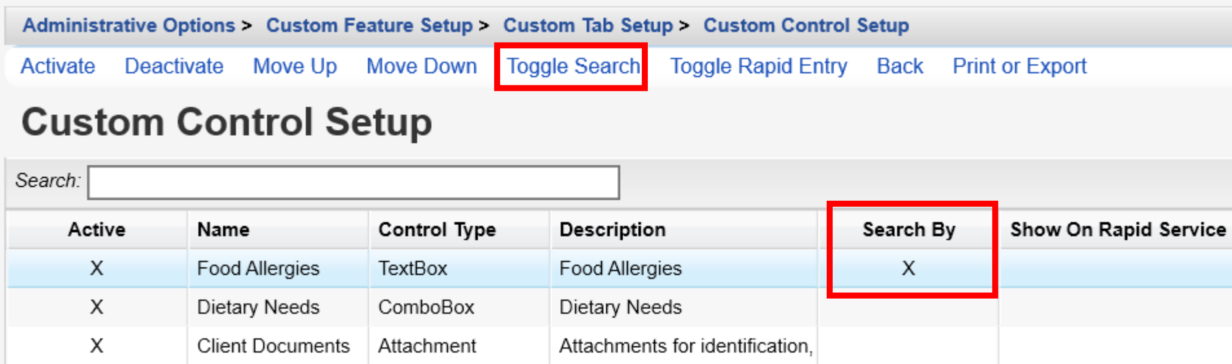
1. From the Custom Tab Setup menu, select **Manage custom controls**.



2. Select a custom control under the Name column. Click **Move Up** or **Move Down**. This will change the order of the custom control in the list. Note: a custom control must be "Active" to change the field order.



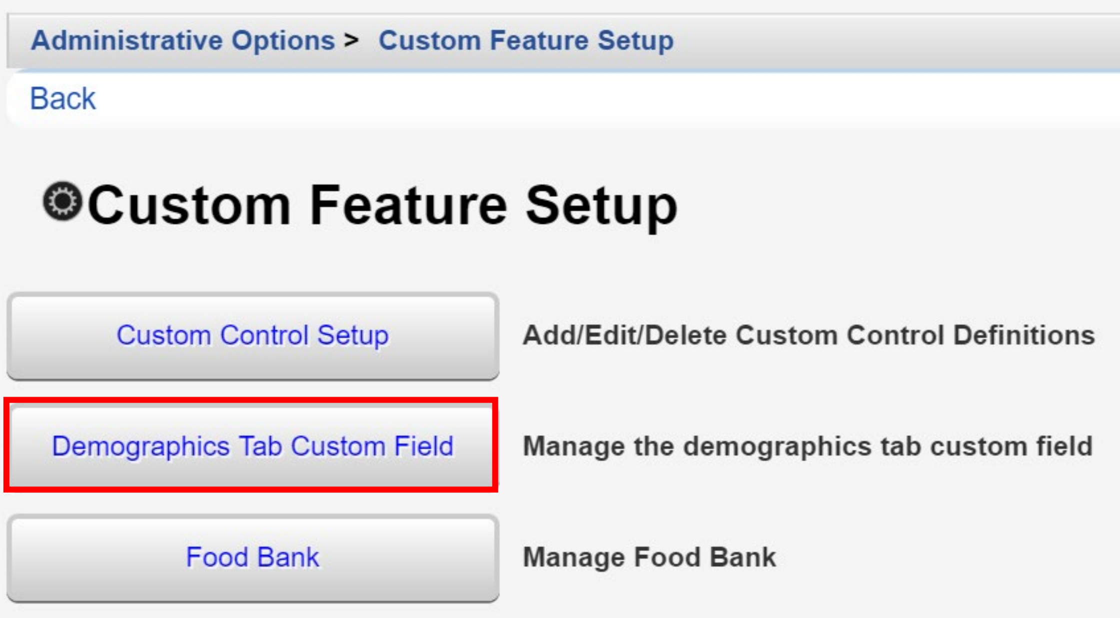
3. The **Toggle Search** property allows you to add one or more of your custom fields on the Find Client screen, making the custom control values “searchable” when finding an existing client record. To do so, select the desired custom control and select **Toggle Search**. An “X” appears under the **Search By** column. This indicates that this custom control field will show on the **Find Client** screen.



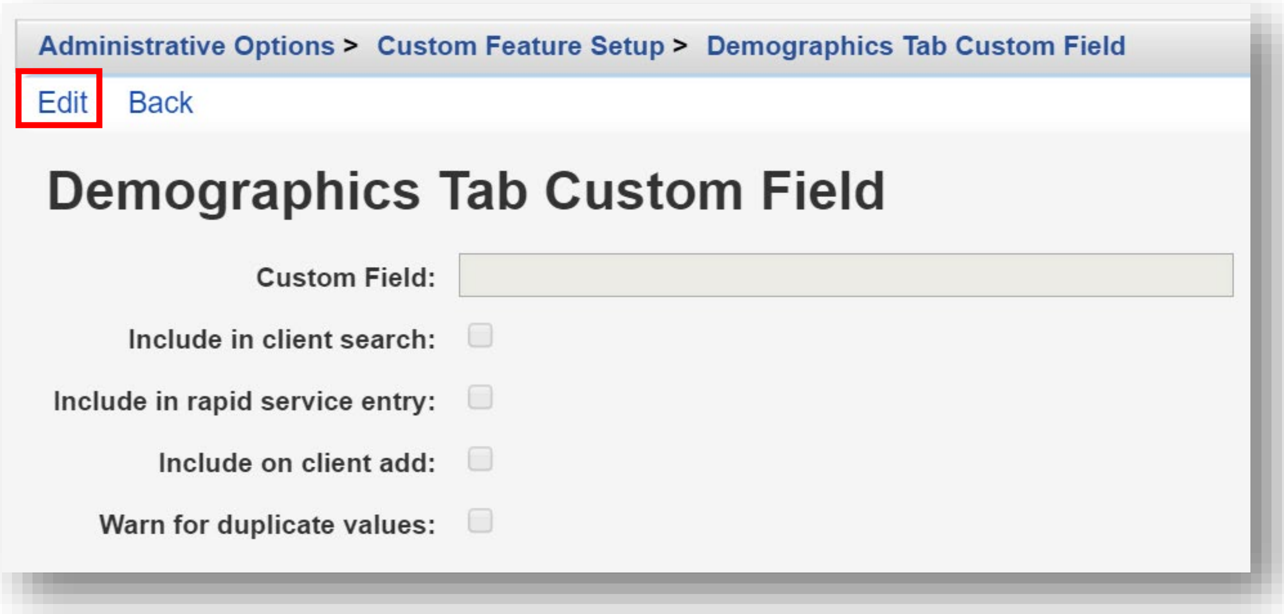
Creating Demographics Tab Custom Field

You may select a custom control field for use in the **Personal Info** section of the client **Demographics** menu link. Note: only “ComboBox” or “TextBox” control types are allowed on the **Demographics Tab Custom Field**.

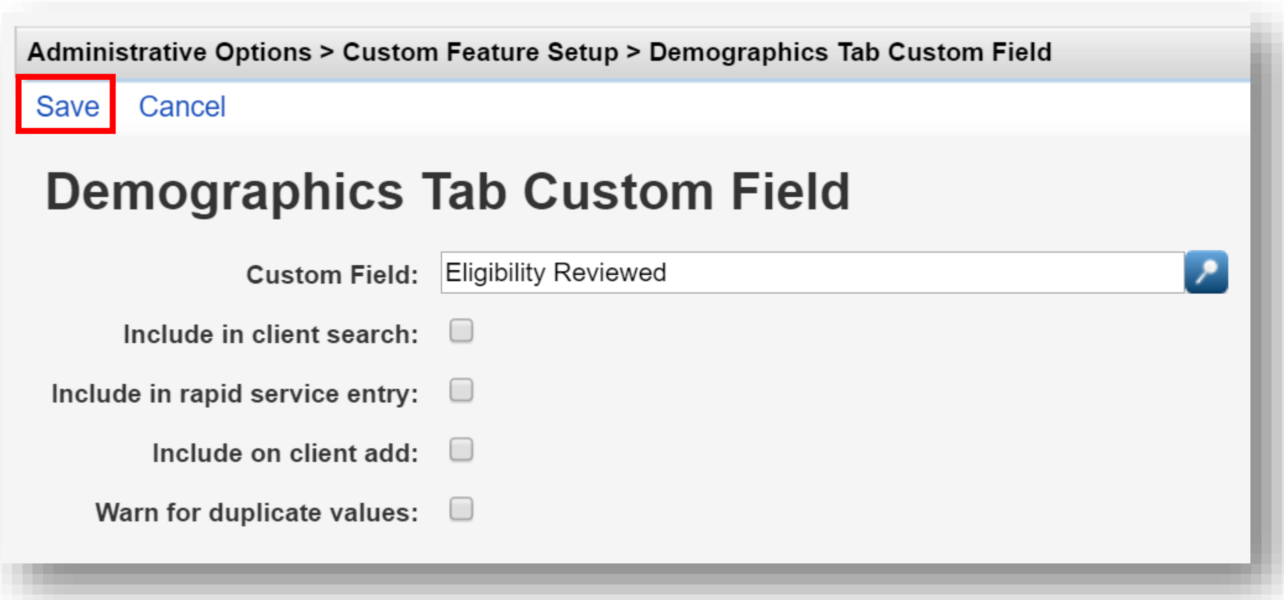
1. From the Custom Features Setup menu, select **Demographics Tab Custom Field**.



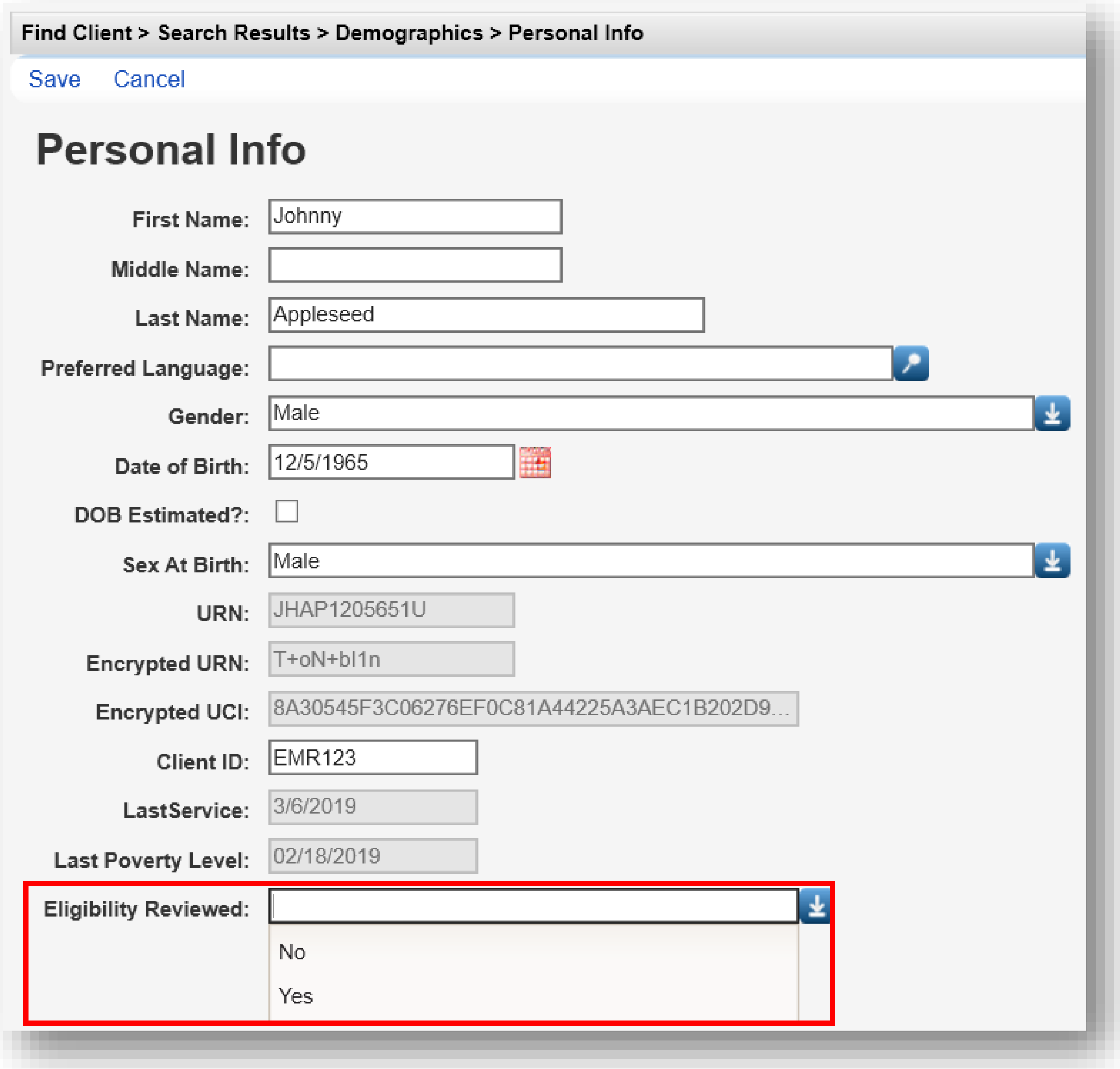
2. Select **Edit**.



3. Enter in the following information. When complete, click **Save**.
   - **Custom Field –** search by clicking the Magnifying-Glass icon.
   - **Include in client search** (checkbox)
   - **Include in rapid service entry** (checkbox)
   - **Include on client add** (checkbox)
   - **Warn for duplicate values** (checkbox)



4. In this example. the custom control field, “Eligibility Reviewed” (ComboBox), now appears on the **Personal Info** link within client demographics and is available for use.

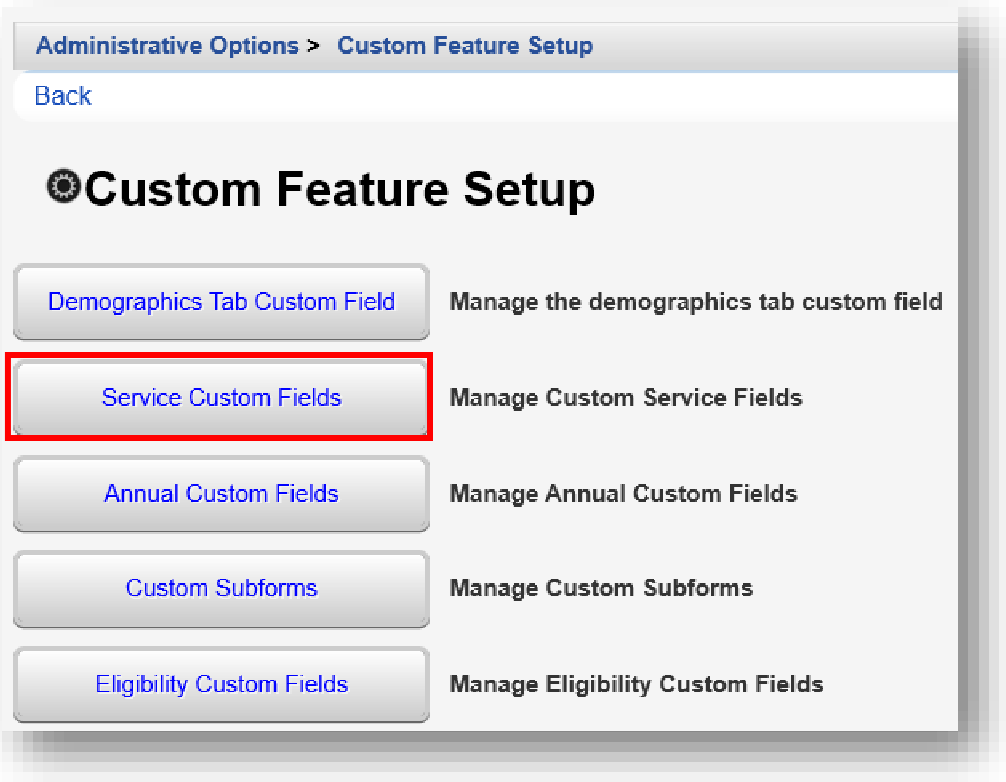


TIP: In the same manner, custom controls can be designated for use in other links in CAREWare, including Service Custom Fields, Annual Custom Fields, Eligibility Custom Fields, etc.

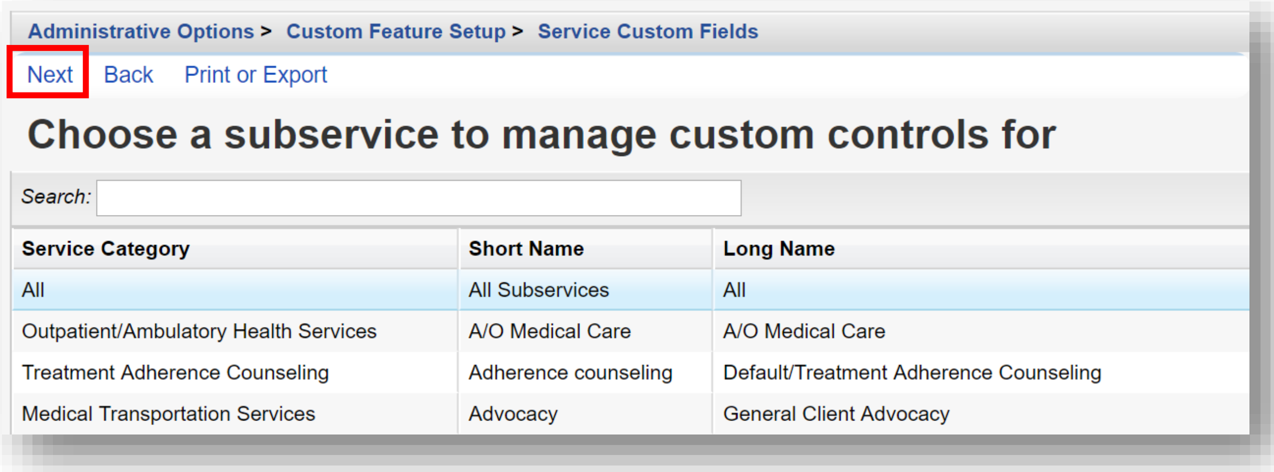
Creating Service Custom Controls

You can extend the range of information you capture for each service visit using service custom control fields. This may include listing the case manager or employee who saw the client or procedures your agency may require on a certain type of service.

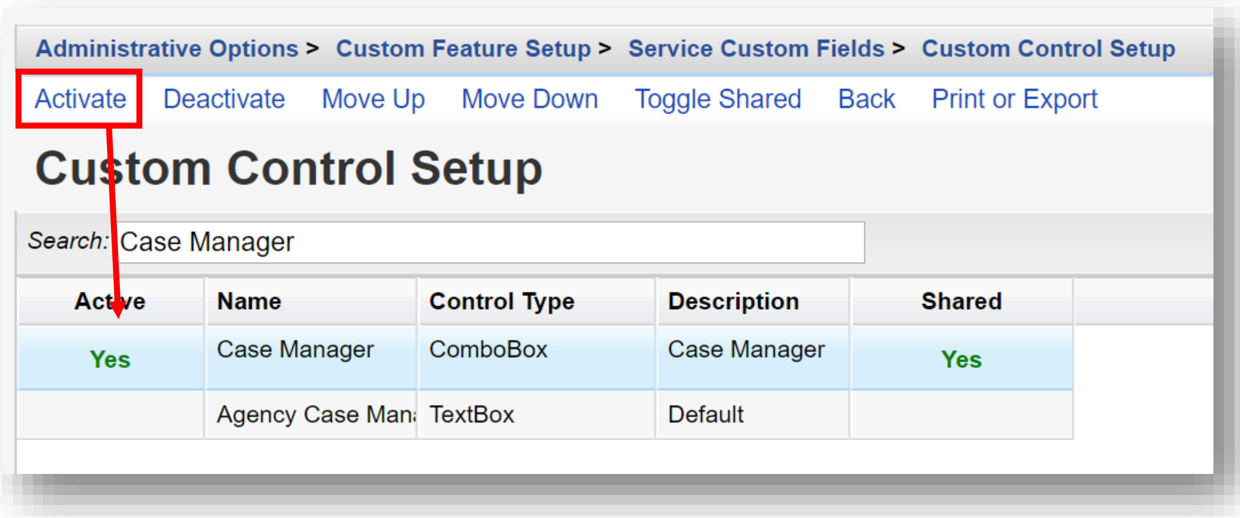
1. Select **Service Custom Fields** from the Custom Feature Setup menu.



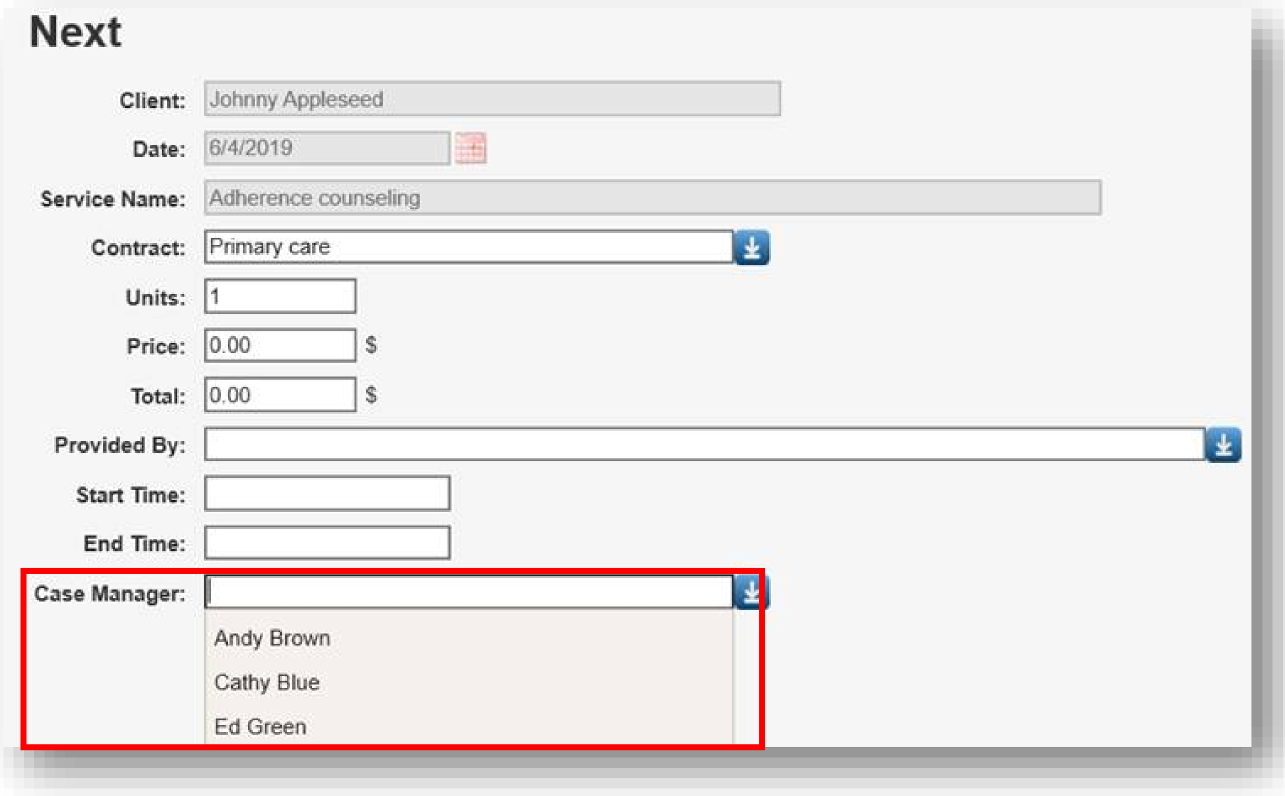
2. Choose a subservice to manage custom controls. In this example we have selected “All”. This will allow the service custom control we choose to be used when any client service is entered. Click **Next**.



3. Choose a custom control field. In this example, we have selected “Case Manager”. Click **Activate** (the custom control must be “Active” to use when adding client services).

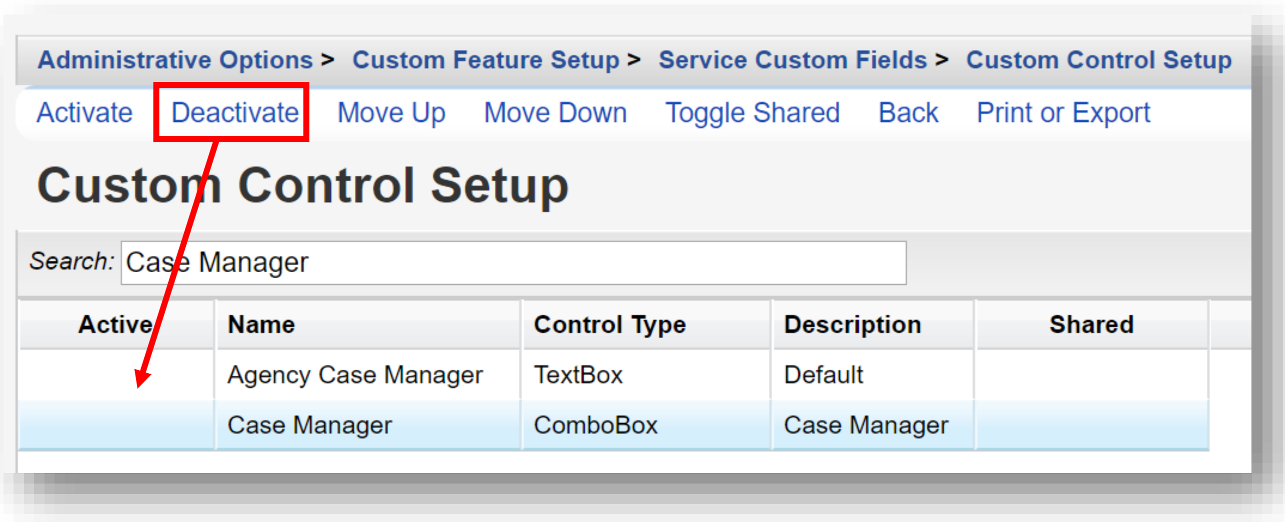


4. The custom control field, “Case Manager” (ComboBox), now appears on the **Add Service** link and is available for use.



Deactivating Fields

To deactivate a custom control field(s) you don’t wish to appear on a link, select the custom control field(s) and select **Deactivate**. The data previously entered will remain in the system, but no additional data can be entered unless the field is reactivated.



WARNING: Deleting a custom control will also delete ALL data previously entered in the control field, so it should be used with extreme caution.

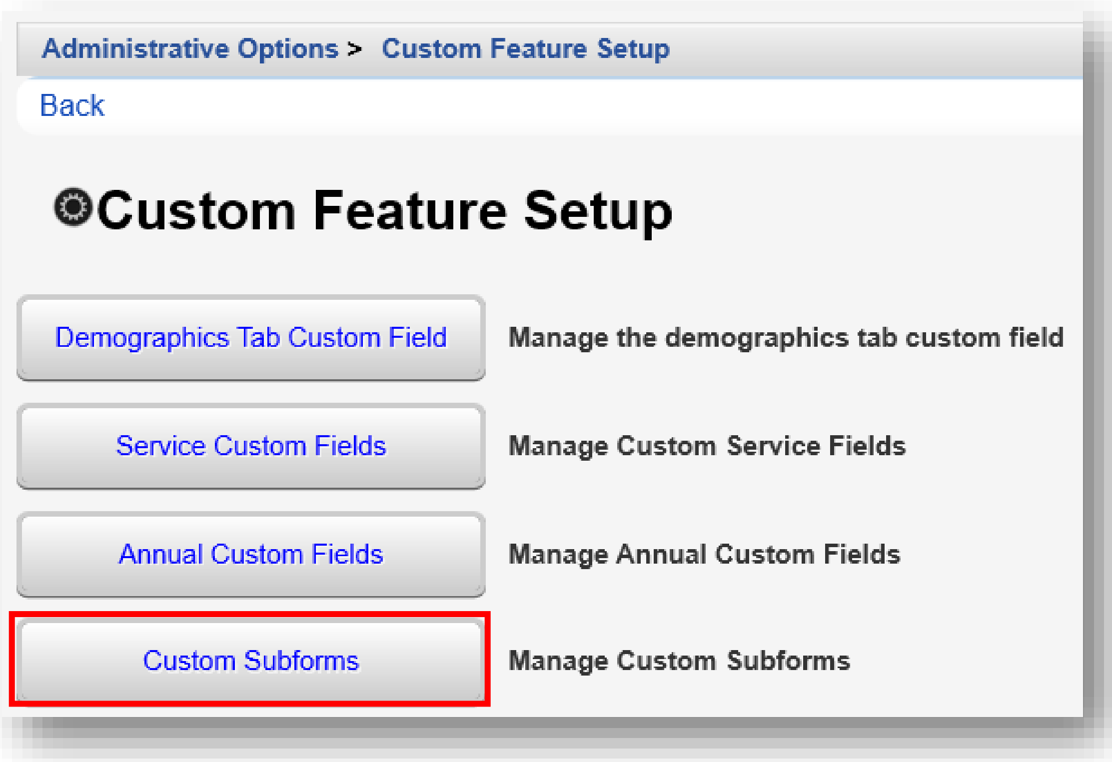
Using Custom Subforms

Custom subforms allow collection of information that may not be reported elsewhere in CAREWare, such as treatment adherence or client progress. Like service visit data, information on the custom subform will have a date associated with each record.

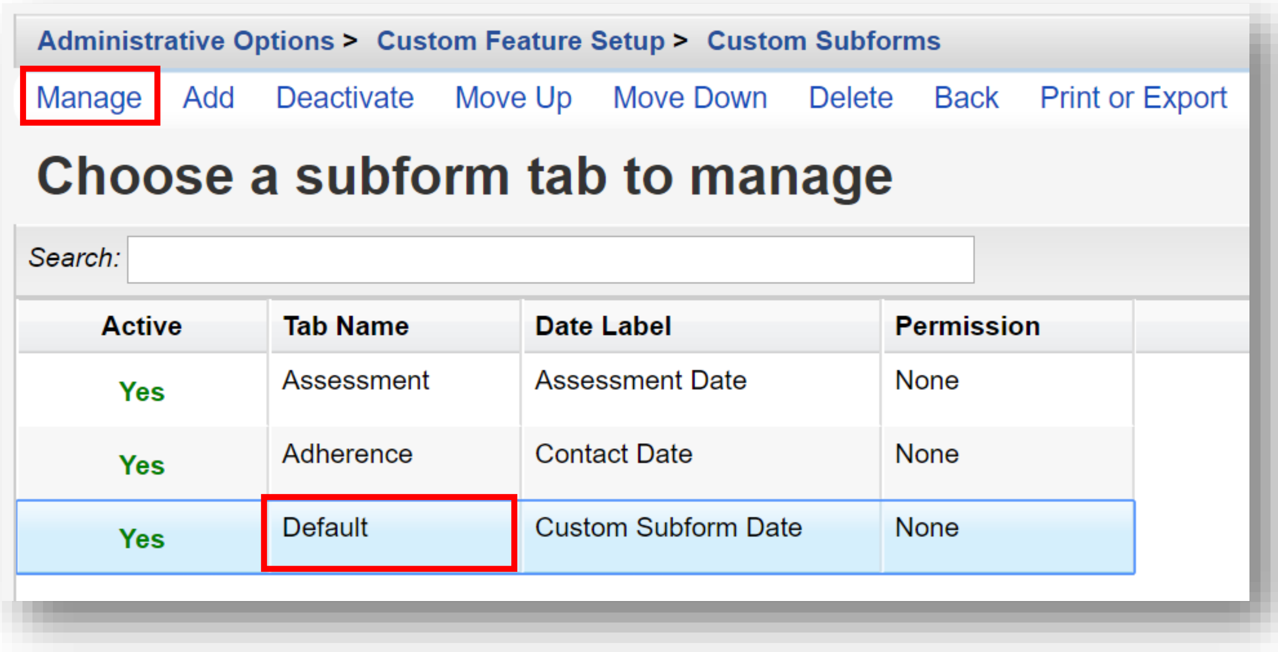
Be aware, that data entered in Custom Subforms are not reflected or counted on the RSR or other service reports in CAREWare.

Note: The **Custom Subform Tab** is listed on the **Menu of Links,** same as the **Demographics**, **Services**, and **Annual Review** sections of CAREWare.

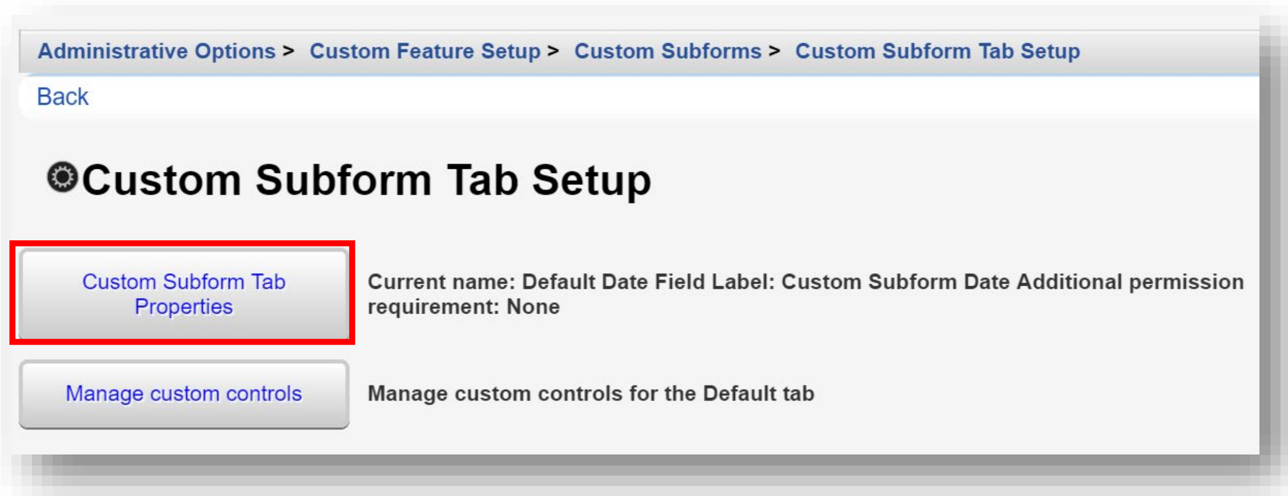
1. Select **Custom Subforms** from the Custom Feature Setup menu.



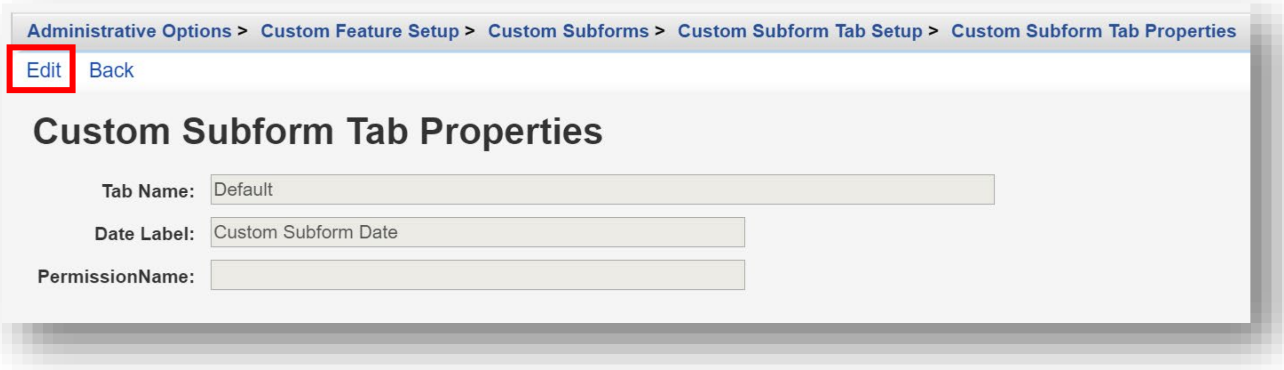
2. Select the desired **Tab Name**. Click **Manage.**



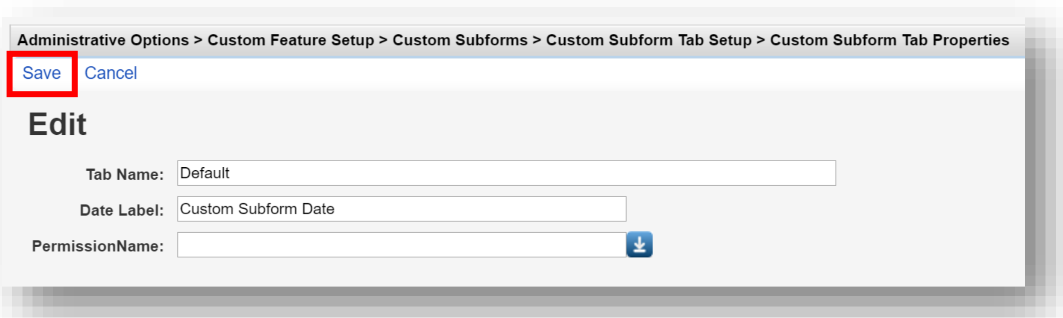
3. Select **Custom Subform Tab Properties.**



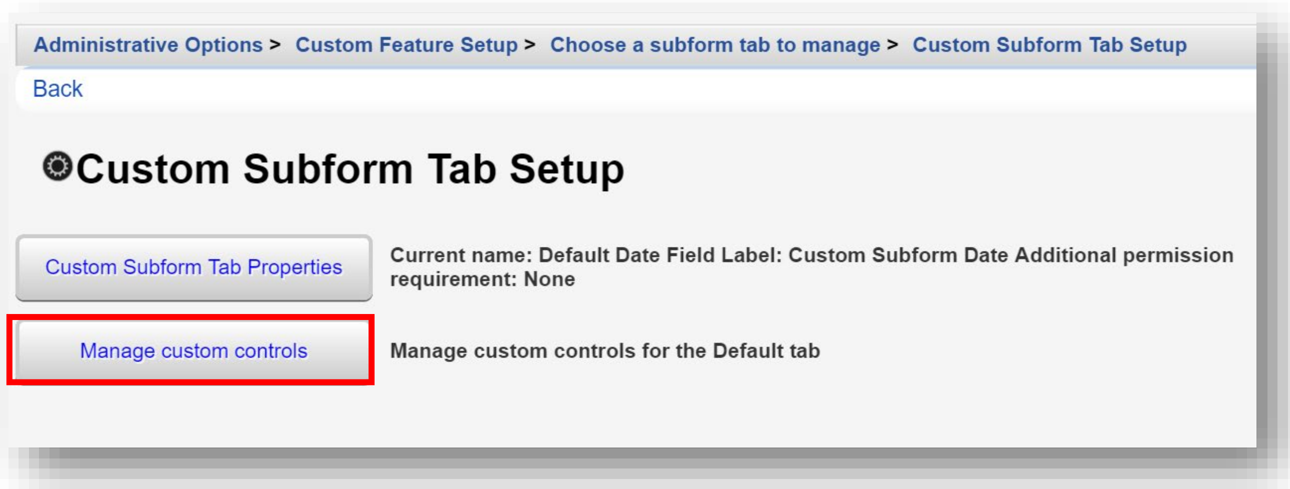
4. Click **Edit.**



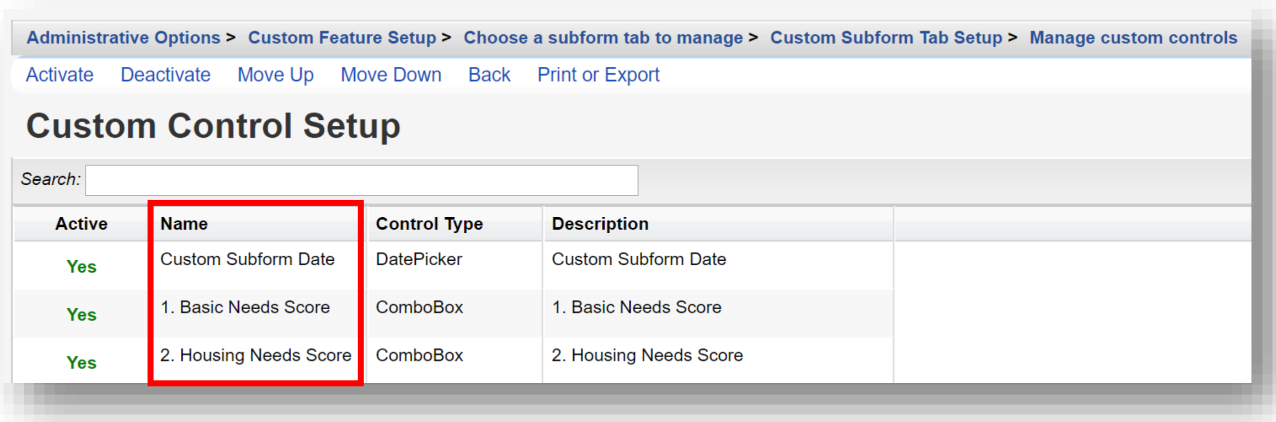
5. Enter in the following information. When complete, click **Save**.
   - Tab Name
   - Date Label
   - PermissionName (drop-down)



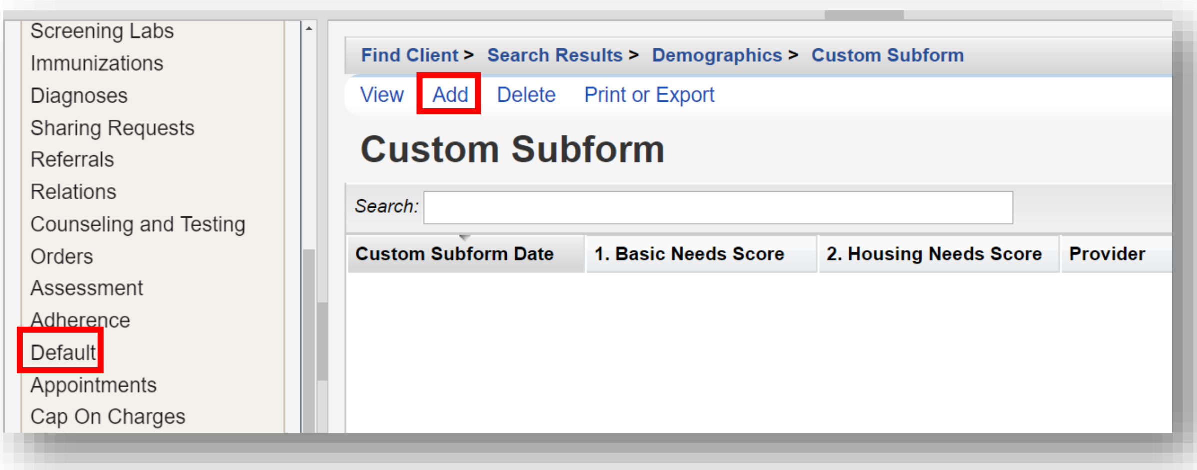
6. From the Custom Subform Tab Setup menu (return to this menu by clicking Back or using the breadcrumb links) select **Manage custom controls**.



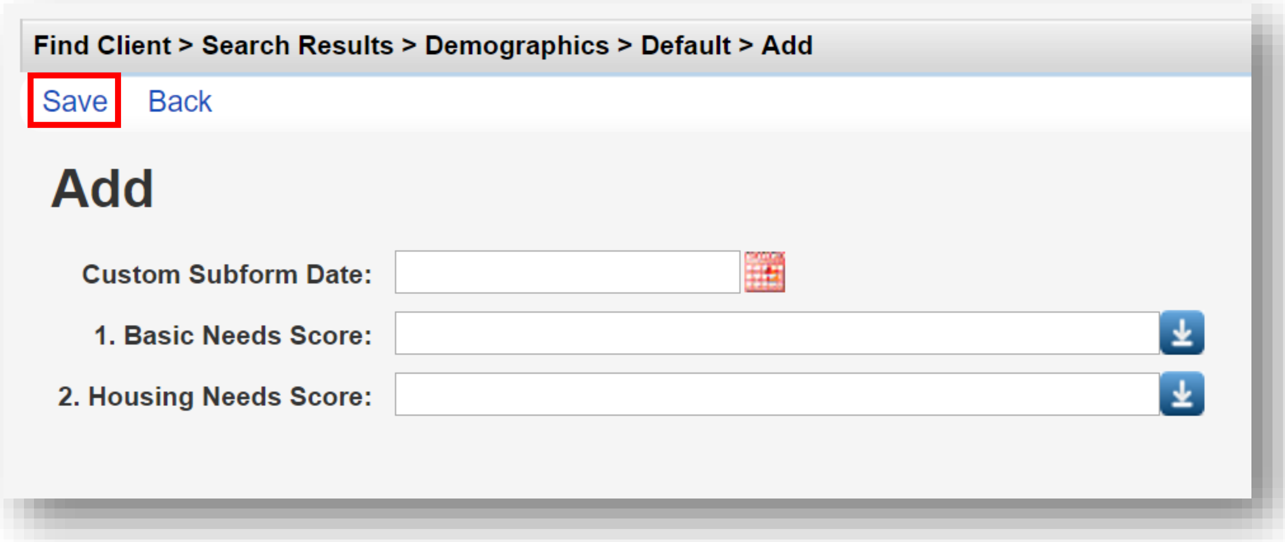
As an example, the following custom control fields have been created and activated for the **Custom Subform Tab**, named “Default”: Custom Subform Date, 1. Basic Needs Score, and 2. Housing Needs Score.



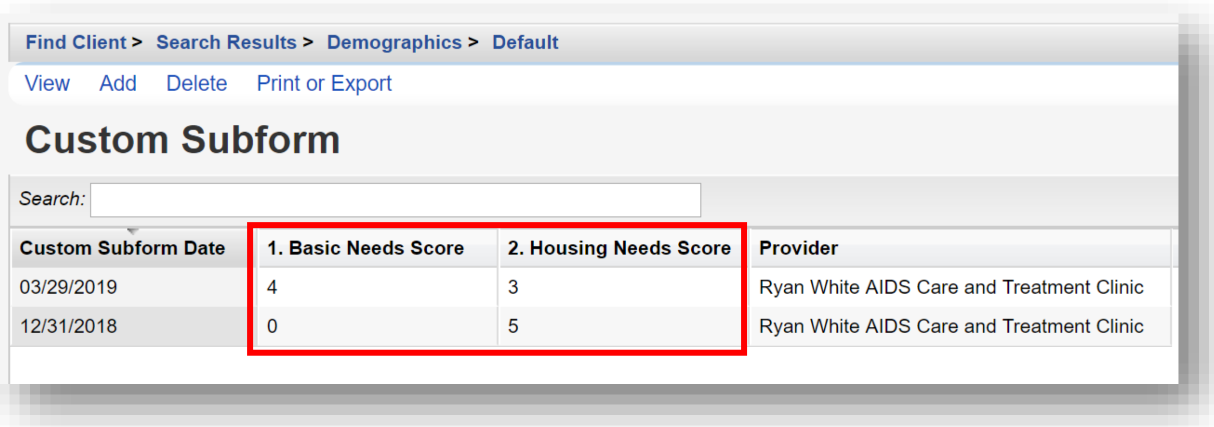
7. **Find** and **Select** an existing client record (for more details on how to find and open client records, please refer to *Quick Start Guide #3: Adding Clients, Demographics, Services, and Annual Review Data*). Click the menu link **Default** and then click **Add**.



8. Upon completion of data entry for the custom subform, click **Save**.



9. Previous custom subform values will be listed by **Custom Subform Date** for easy viewing and comparison.



CAREWare 6

Section 5:

Clinical Setup and Medical Data Entry

Adapted from HRSA Quick Start User Guides:
https://hab.hrsa.gov/program-grants-management/careware

PLEASE NOTE: The client data used in these manuals is purely fictional.

First Things First

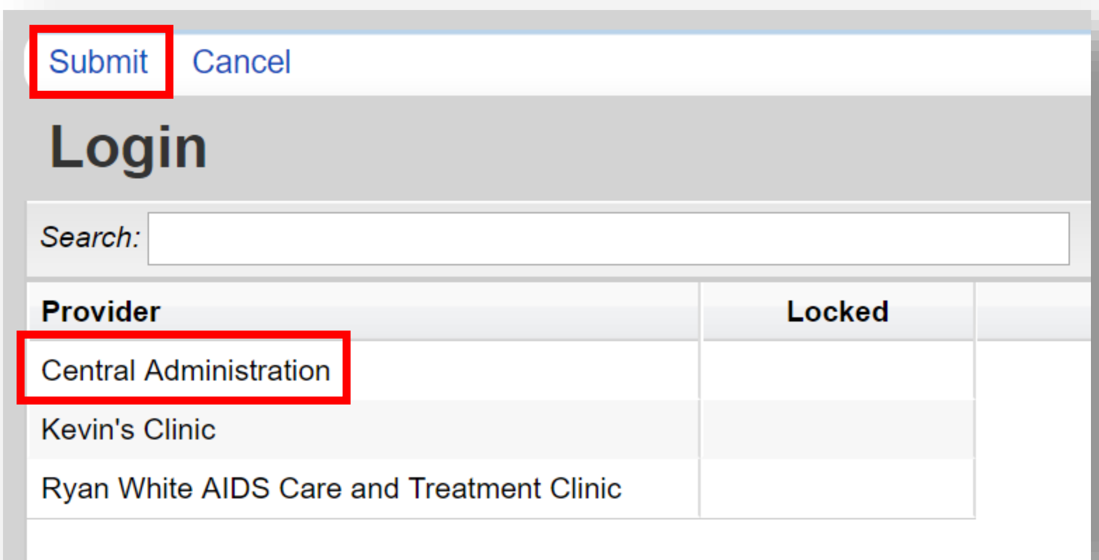
Getting Started

- You must have the appropriate user privileges to run reports.
- You should have at least one client entered in the system so you can see how your clinical data will look.

Clinical Setup

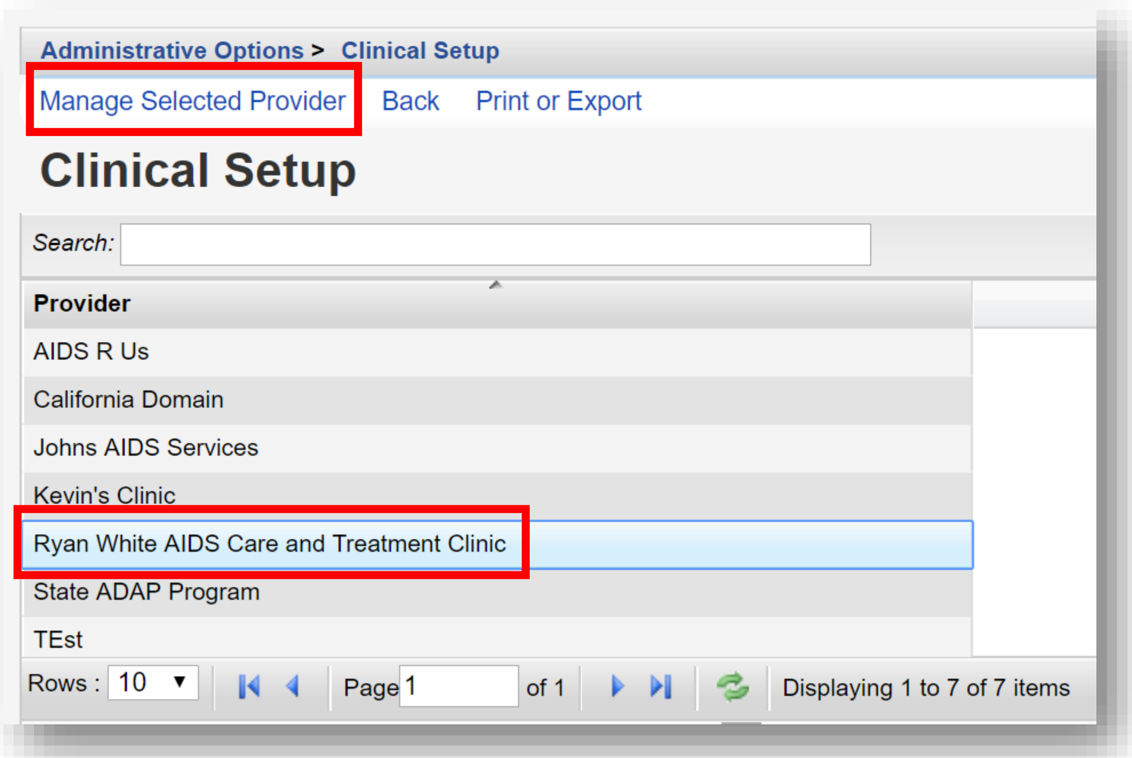
CAREWare comes prepackaged with the RSR-required, HIV-related tests, screenings, immunizations, and medications. However, it is easy to create additional custom clinical tests and screenings.

1. Log into CAREWare. For more details on how to do so, please refer to the **Navigating CAREWare Version 6.0 Guide**. If you are part of a CAREWare network, with multiple providers connected to one, central database, it is recommended that you manage Clinical Setup from the **Central Administration** domain. This will help ensure greater consistency in custom field coding and naming conventions.



2. Select **Administrative Options** from the **Menu of Links** and then **Clinical Setup** from the administrative options.

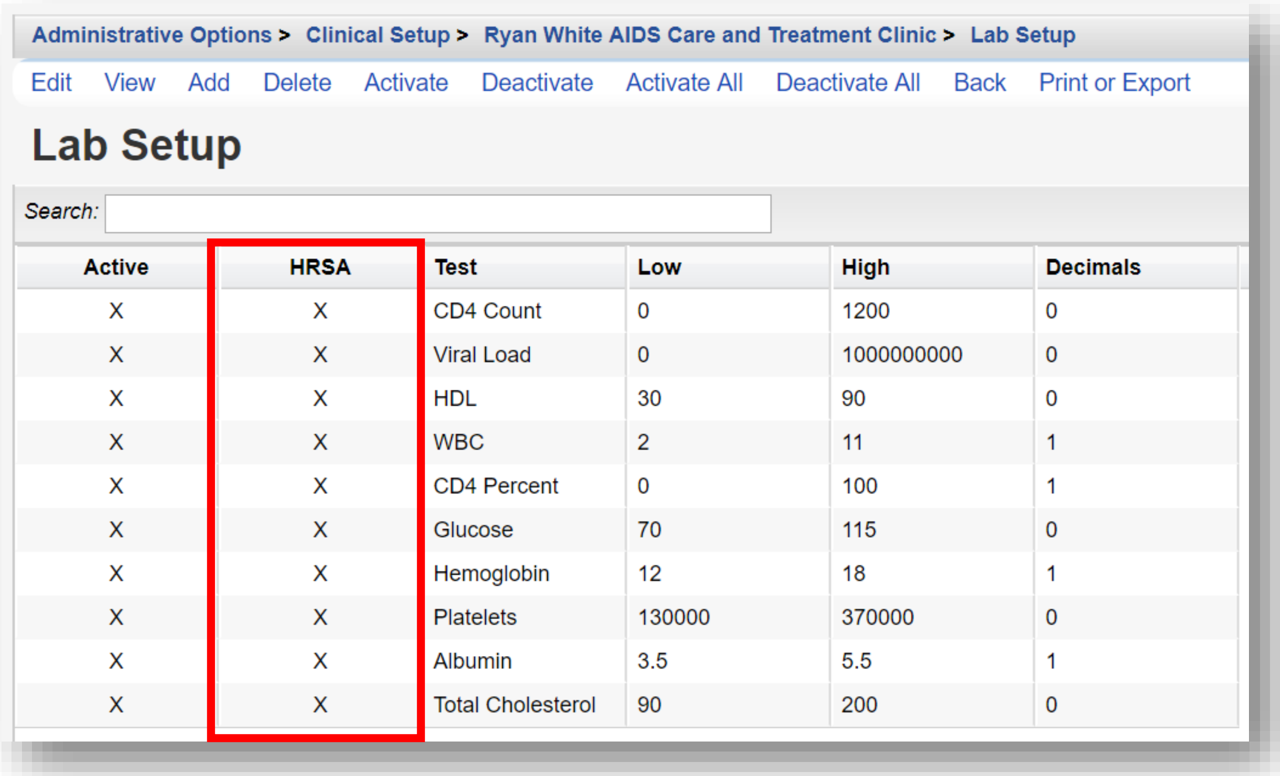
3. From the **Clinical Setup** screen, select a **Provider** and then select **Manage Selected Provider**.



Lab Setup

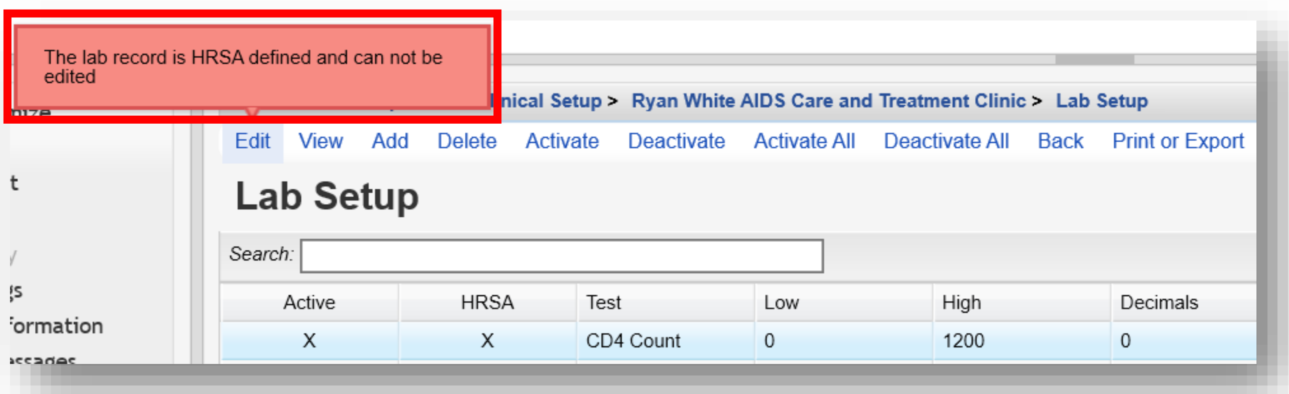
1. From the **Manage Selected Provider** screen, select **Lab Setup.**

2. HRSA Defined labs are clearly listed with an X under the HRSA column. In this example, ten (10) lab tests are listed.



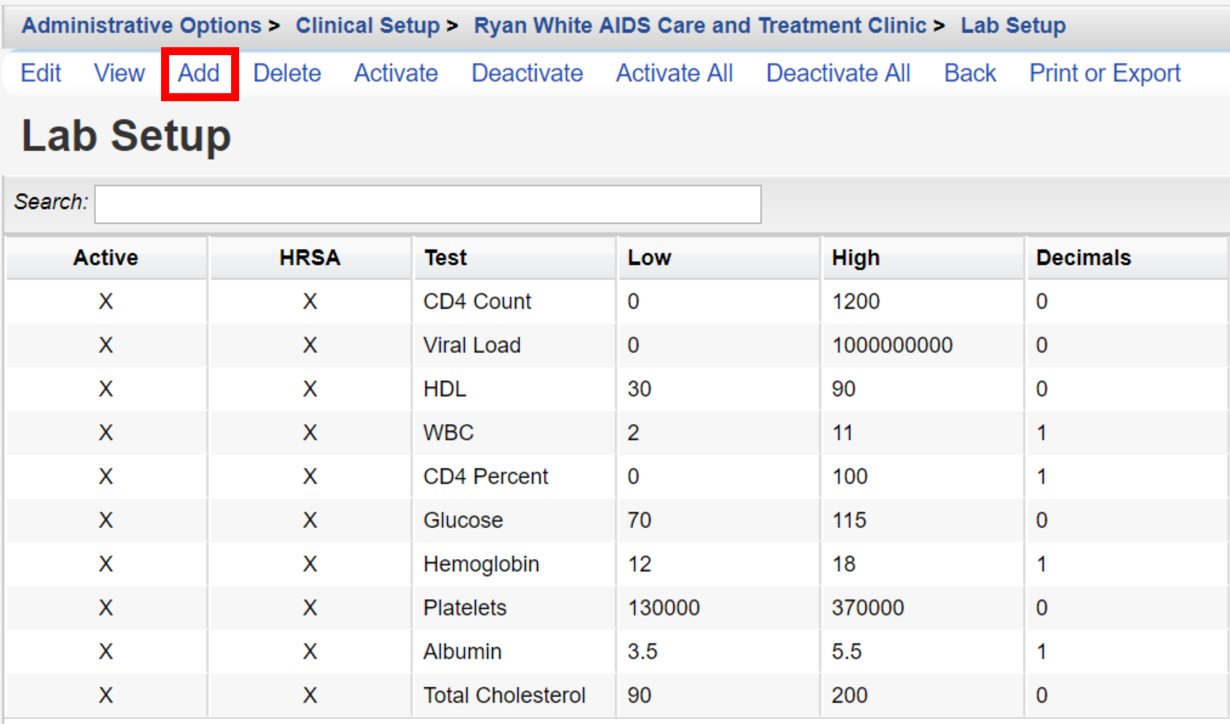
Active	HRSA	Test	Low	High	Decimals
X	X	CD4 Count	0	1200	0
X	X	Viral Load	0	1000000000	0
X	X	HDL	30	90	0
X	X	WBC	2	11	1
X	X	CD4 Percent	0	100	1
X	X	Glucose	70	115	0
X	X	Hemoglobin	12	18	1
X	X	Platelets	130000	370000	0
X	X	Albumin	3.5	5.5	1
X	X	Total Cholesterol	90	200	0

3. A system warning will appear upon any attempt to **Edit** a HRSA Defined lab, screening lab, screening, or immunization record in CAREWare.



Active	HRSA	Test	Low	High	Decimals
X	X	CD4 Count	0	1200	0

4. To add a custom lab test, begin by clicking **Add** from the **Lab Setup** screen.


Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Lab Setup

Edit View Add Delete Activate Deactivate Activate All Deactivate All Back Print or Export

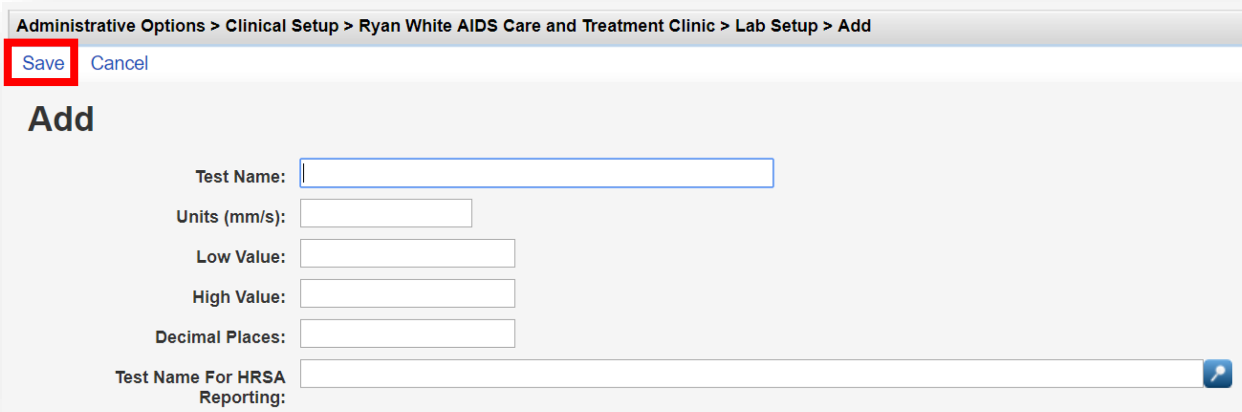
Lab Setup

Search:

Active	HRSA	Test	Low	High	Decimals
X	X	CD4 Count	0	1200	0
X	X	Viral Load	0	1000000000	0
X	X	HDL	30	90	0
X	X	WBC	2	11	1
X	X	CD4 Percent	0	100	1
X	X	Glucose	70	115	0
X	X	Hemoglobin	12	18	1
X	X	Platelets	130000	370000	0
X	X	Albumin	3.5	5.5	1
X	X	Total Cholesterol	90	200	0

5. Enter in the following information (as applicable) and click **Save.** Only the test name is required, but the other items should help to improve data quality.
   - **Test Name**
   - **Units (mm/s)**
   - **Low Value**
   - **High Value**
   - **Decimal Places**
   - **Test Name For HRSA Reporting**

Currently the only two lab tests that are reported in the RSR are the CD4 count and the viral load.

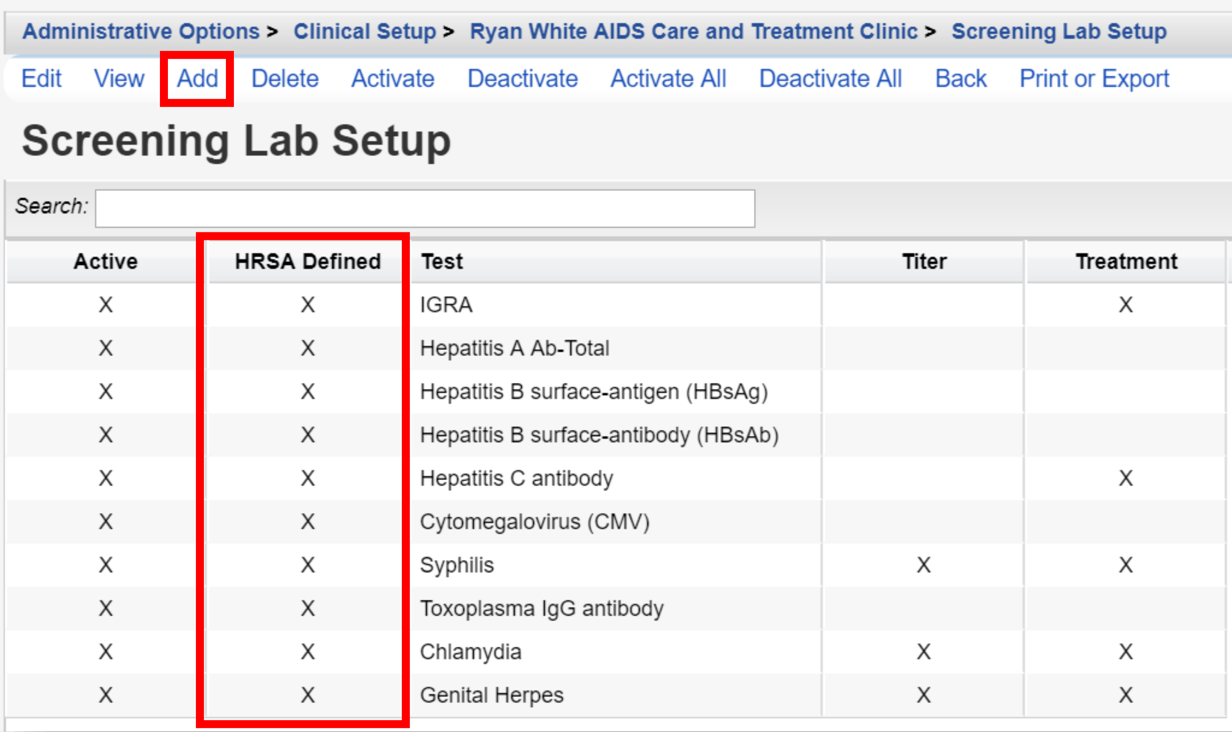


NOTE: A custom Lab test can also be linked to an existing HRSA Defined Lab using the **Test Name For HRSA Reporting** field box.

Screening Lab Setup

1. From the **Manage Selected Provider** screen, select **Screening Lab Setup.**

2. HRSA Defined Screening Labs are clearly listed with an X under the HRSA column. In this example, ten (10) screening lab tests are listed.


Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Screening Lab Setup

Edit View Add Delete Activate Deactivate Activate All Deactivate All Back Print or Export

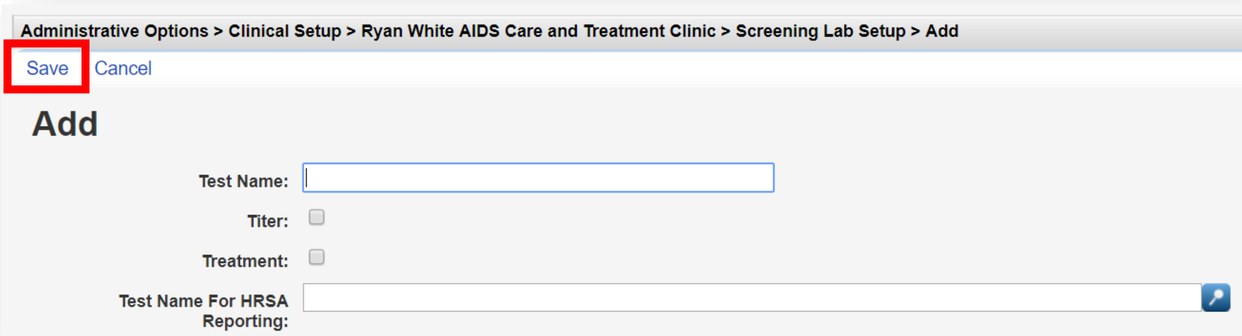
Screening Lab Setup

Search:

Active	HRSA Defined	Test	Titer	Treatment
X	X	IGRA		X
X	X	Hepatitis A Ab-Total		
X	X	Hepatitis B surface-antigen (HBsAg)		
X	X	Hepatitis B surface-antibody (HBsAb)		
X	X	Hepatitis C antibody		X
X	X	Cytomegalovirus (CMV)		
X	X	Syphilis	X	X
X	X	Toxoplasma IgG antibody		
X	X	Chlamydia	X	X
X	X	Genital Herpes	X	X

3. To add a custom screening lab test, begin by clicking **Add** from the **Screening Lab Setup** screen (see previous screenshot).

4. Enter the **Test Name** of the custom screening lab and use the check boxes to indicate whether a **Titer** needs to be entered, and whether to activate a **Treatment** (Yes/No option). Click **Save**.

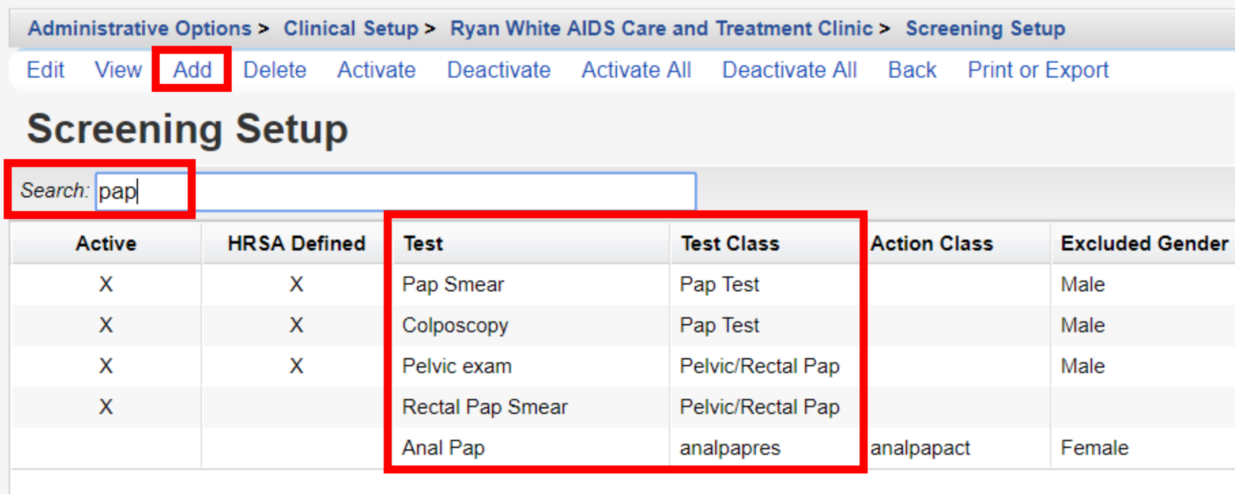


NOTE: A custom Lab test can also be linked to an existing HRSA Defined Screening Lab using the **Test Name For HRSA Reporting** field box.

Screening Setup

1. From the **Manage Selected Provider** screen, select **Screening Setup.**

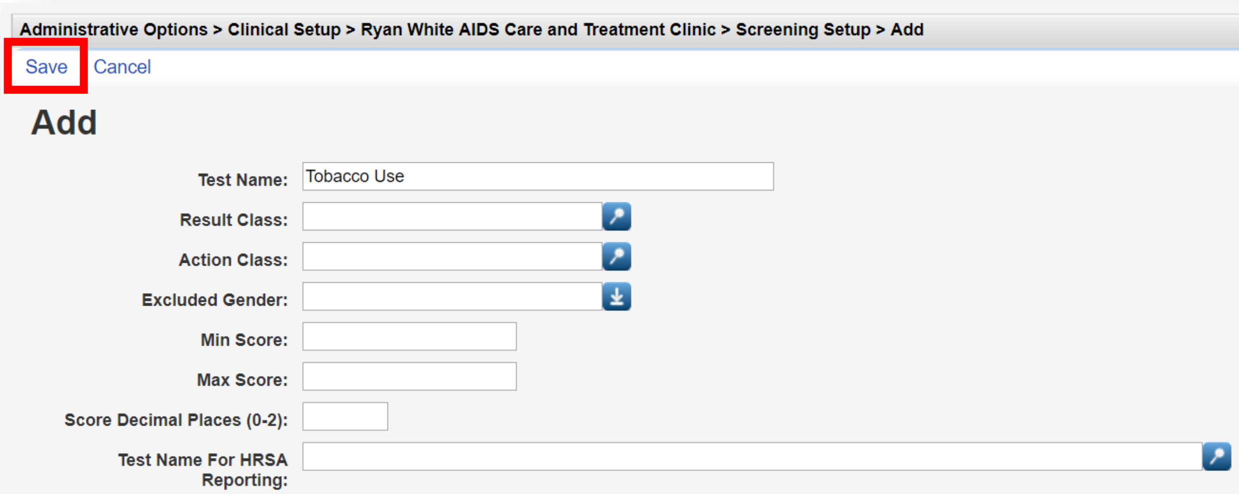
2. HRSA Defined Screenings are clearly listed with an X under the HRSA Defined column. The phrase *pap* was entered into the Search box to filter the screening results. In this example, five (5) screenings that include the phrase "pap" are listed.



Active	HRSA Defined	Test	Test Class	Action Class	Excluded Gender
X	X	Pap Smear	Pap Test		Male
X	X	Colposcopy	Pap Test		Male
X	X	Pelvic exam	Pelvic/Rectal Pap		Male
X		Rectal Pap Smear	Pelvic/Rectal Pap		
		Anal Pap	analpapres	analpapact	Female

3. To add a custom screening lab test, begin by clicking **Add** from the **Screening Setup** screen (see previous screenshot).

4. In this example, a custom screening test will be created for *Tobacco Use*.

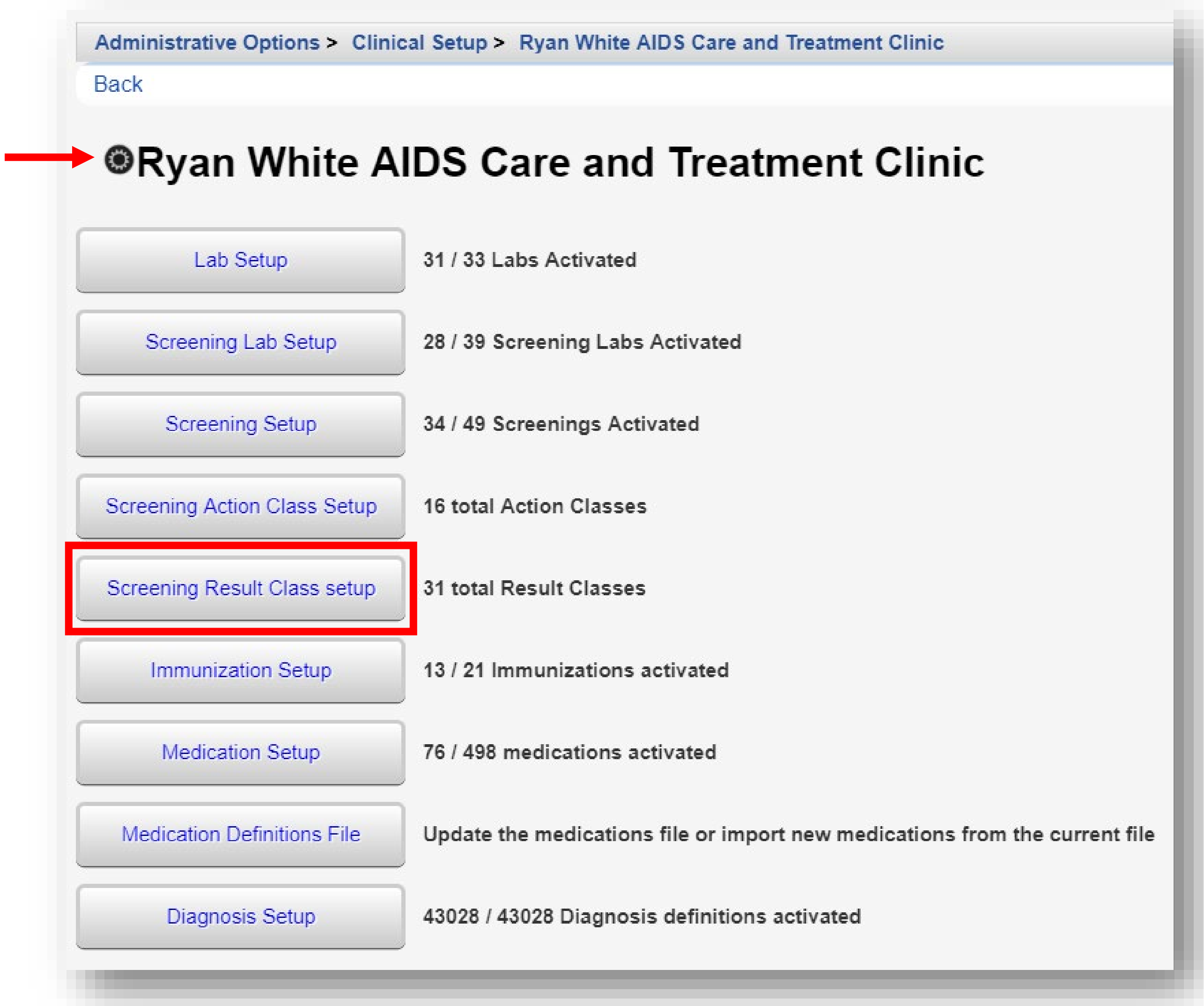


NOTE: A custom Lab test can also be linked to an existing HRSA Defined Screening using the **Test Name For HRSA Reporting** field box.

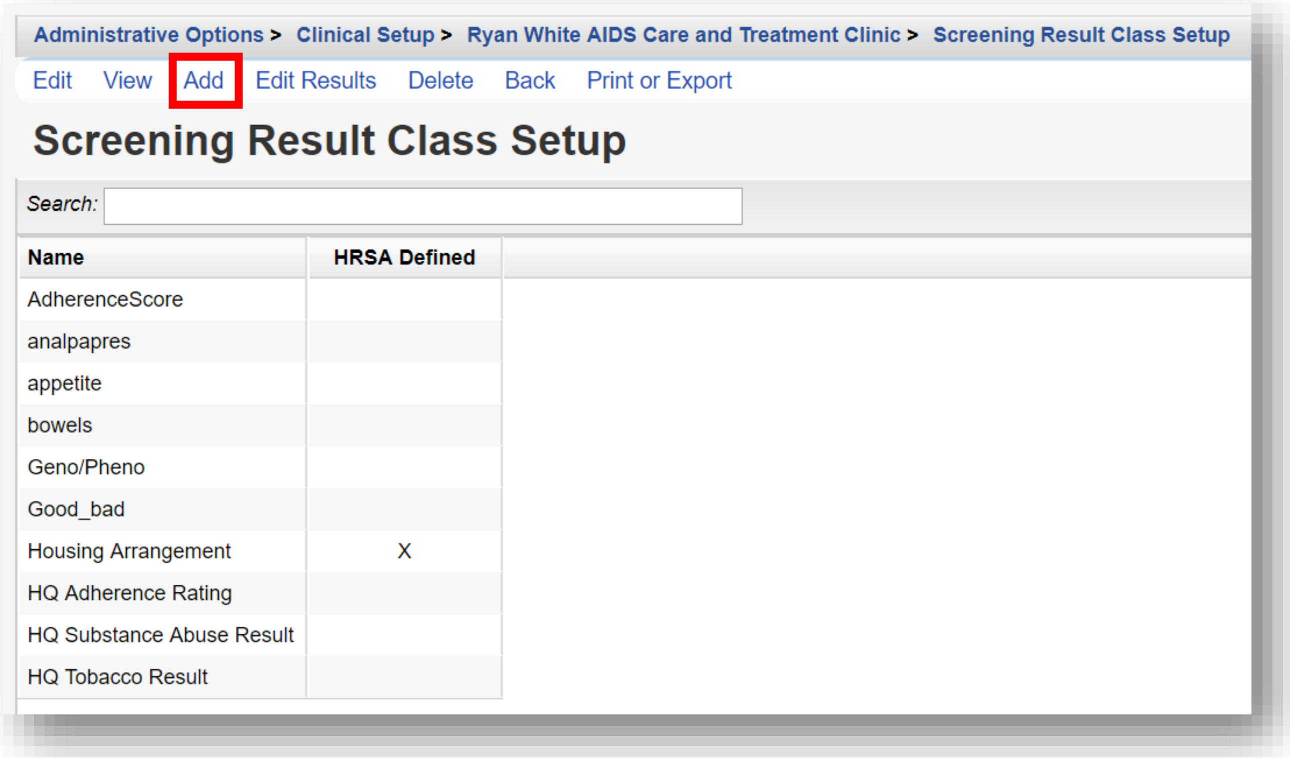
5. Enter in the following information (as applicable) and click Save (see previous screenshot).
   - **Test Name**
   - **Result Class**
   - **Action Class**
   - **Excluded Gender**
   - **Min Score**
   - **Max Score**
   - **Score Decimal Place (0-2)**
   - **Test Name For HRSA Reporting**

A **Result Class** allows you to create a drop-down list of possible results for a screening, and an **Action Class** allows you to create a drop-down list of possible actions taken due to a specific result. For the Tobacco Use screening, we'll create a new **Result Class** for *Method of intake* and a new **Action Class** for *Nicotine Patch*.

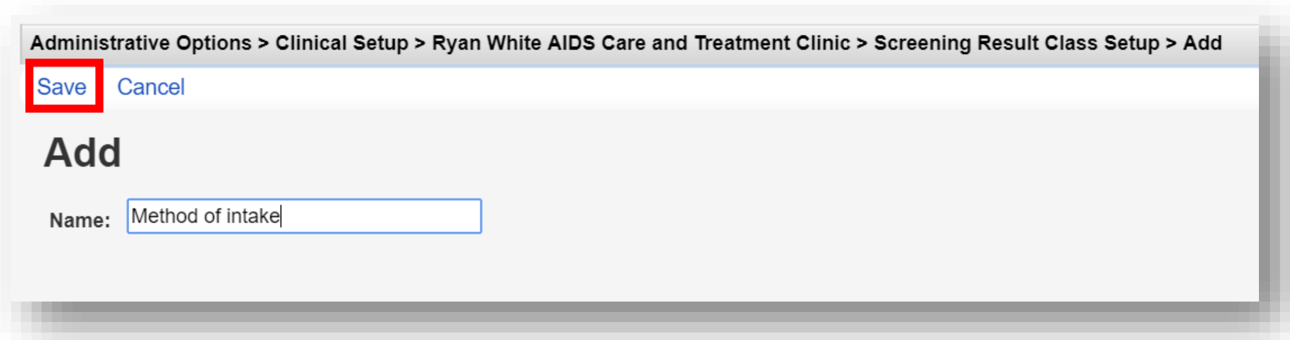
6. From the **Manage Selected Provider** screen, select **Screening Result Class setup**. If this option is not available, you may need to configure the Personal Menu Settings by clicking the gear icon next to the selected provider's name.



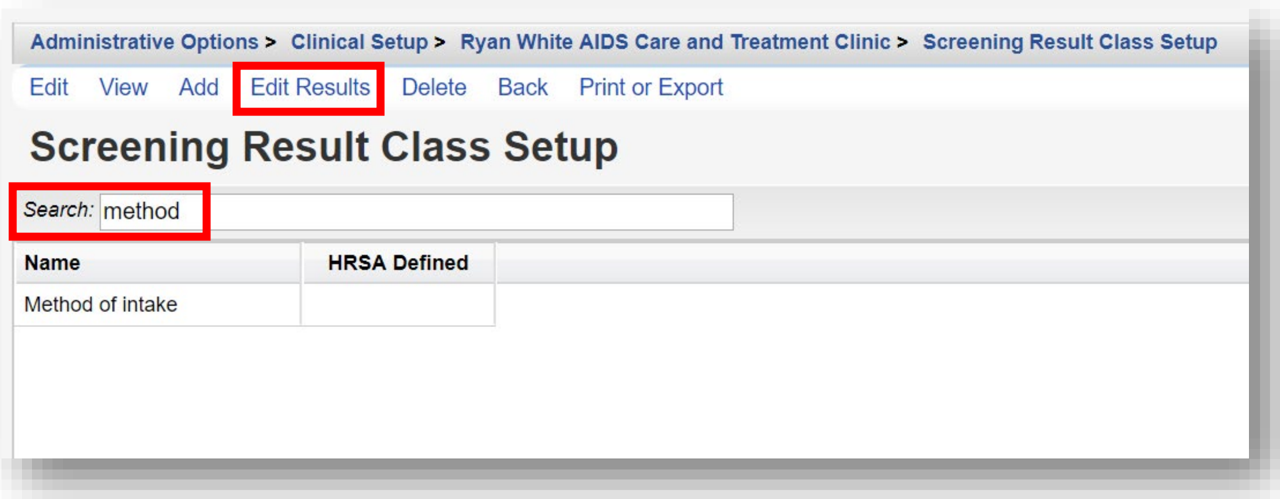
7. On the Screening Result Class Setup menu, select **Add**.



8. Enter the **Name** for the **Screening Result Class**. Click **Save**.

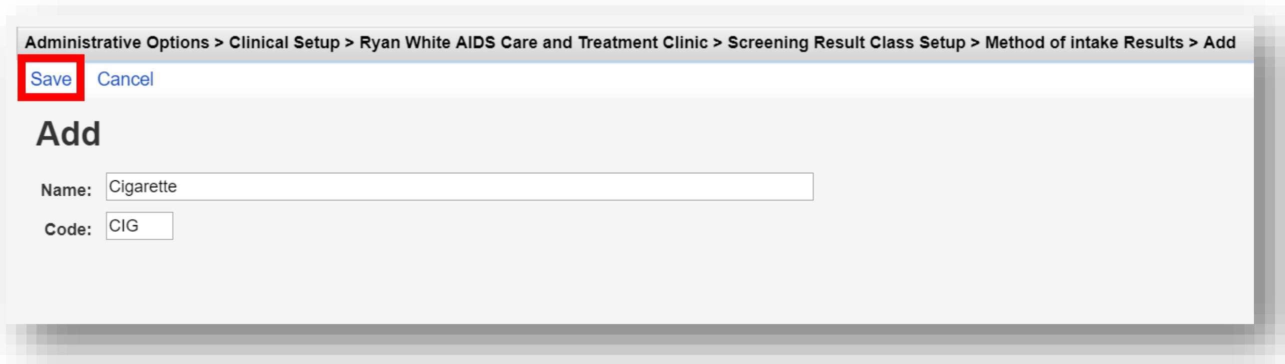


9. To add a Result for *Method of intake*, type “method” into the Search field on the **Screening Result Class Setup** menu. Once found, select it, and click **Edit Results**.

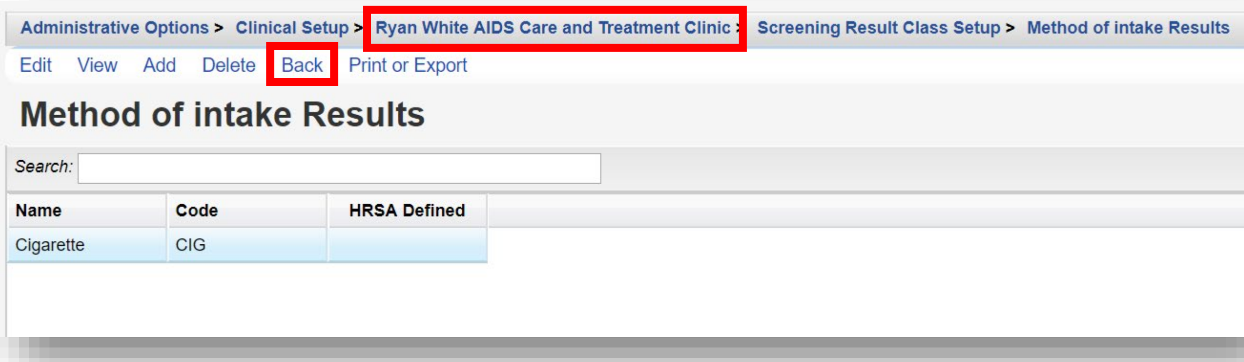


10. On the Method of intake Results screen, select **Add**.

11. Enter in the **Name** and **Code** (optional). For this example, we will create a result called *Cigarette (CIG)*. Click **Save**.

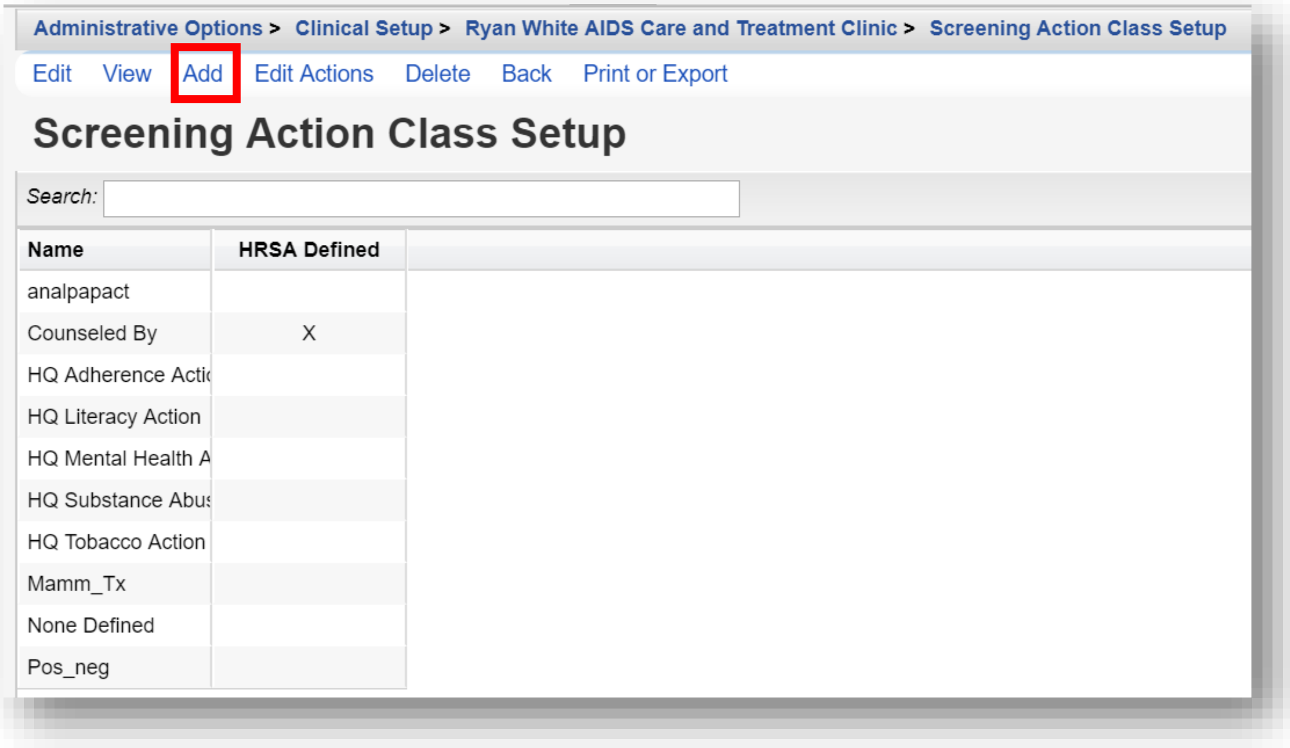


12. The new result now appears on the Method of intake Results screen. To return to the **Manage Selected Provider** screen, click the name of the provider in the **breadcrumb trail** or click **Back**.

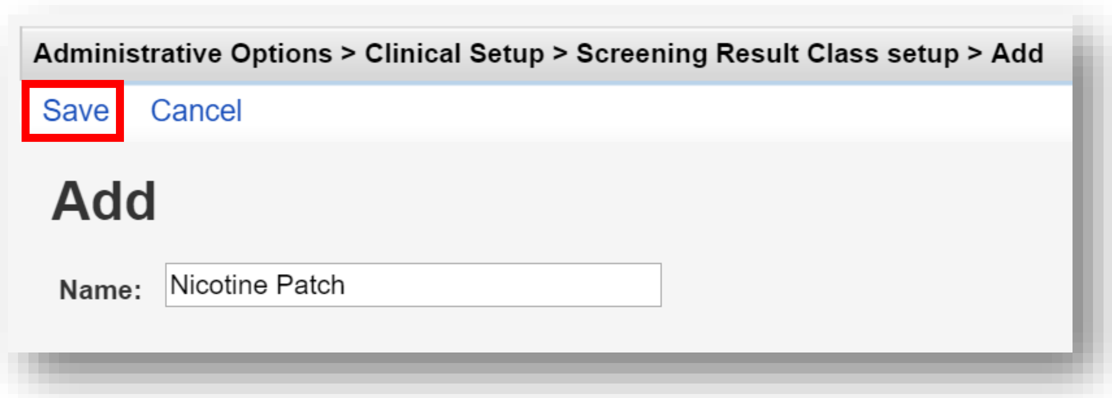


13. To add a new **Screening Action Class**, from the **Manage Selected Provider** screen, select **Screening Action Class setup**. If this option is not available, you may need to configure the Personal Menu Settings by clicking the gear icon next to the selected provider's name.

14. On the **Screening Action Class Setup** menu, select **Add**.



15. Enter the **Name** for the **Screening Action Class**. Click **Save**.

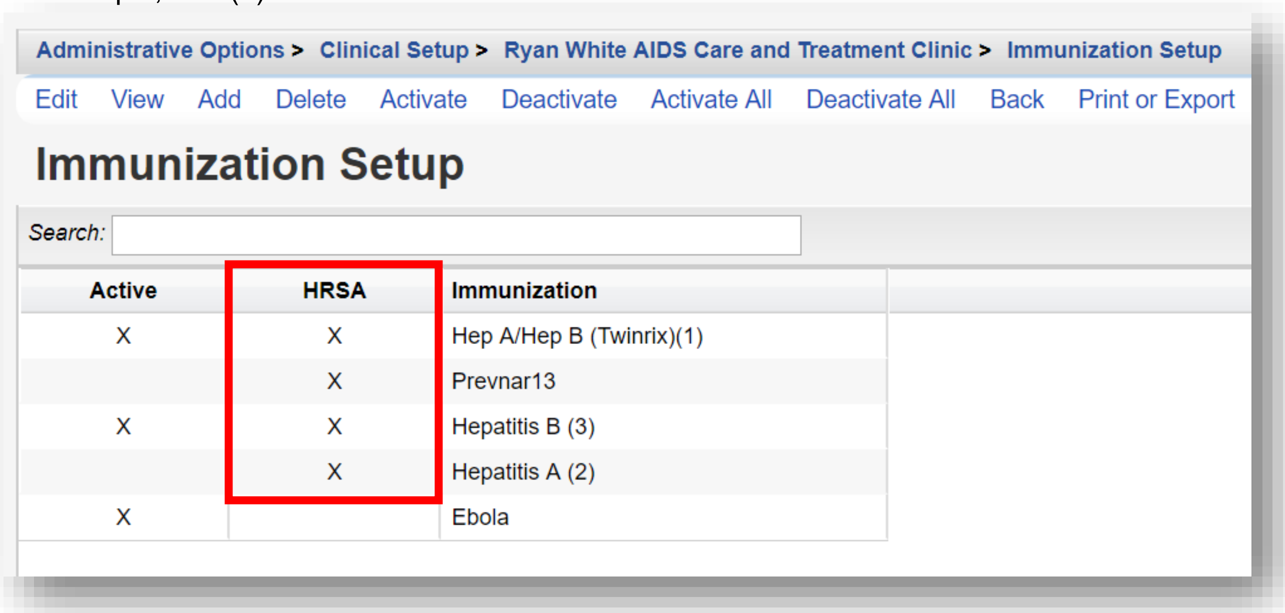


16. The newly created custom Screening test is now setup and ready for use.

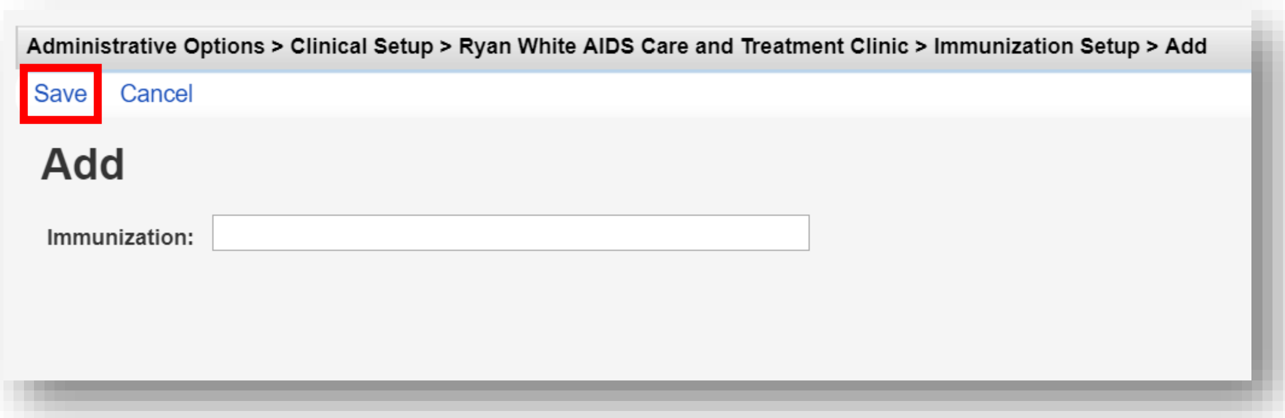
Immunization Setup

1. From the **Manage Selected Provider** screen, select **Immunization Setup.**

2. HRSA Defined Immunizations are clearly listed with an X under the HRSA column. In this example, four (4) immunizations are listed.



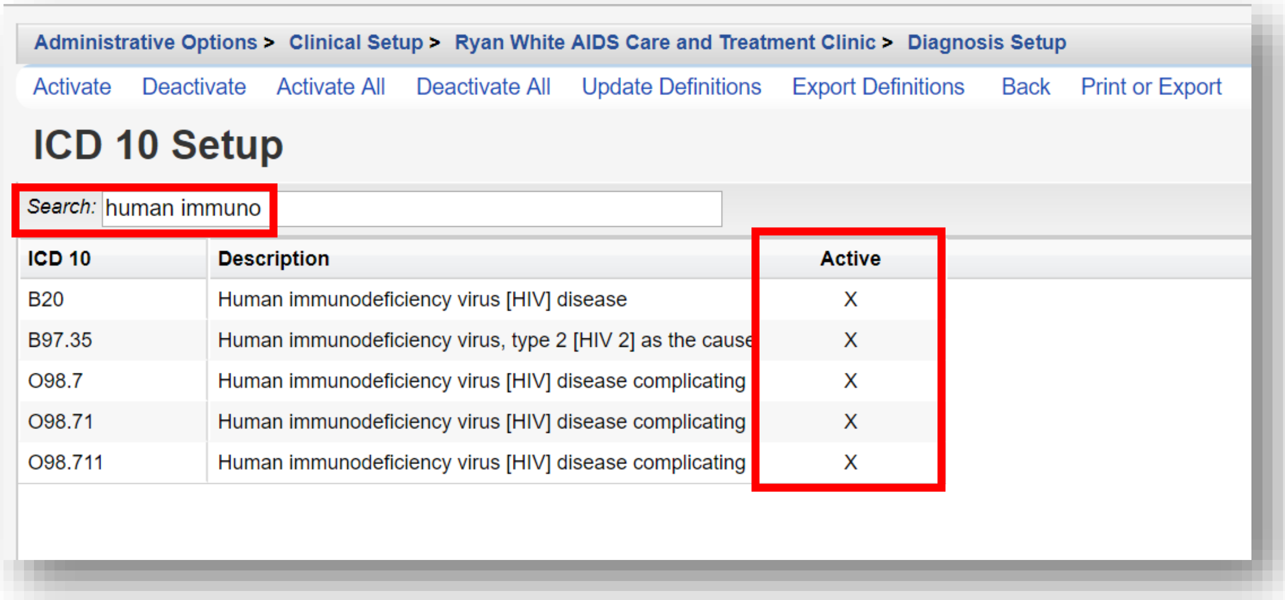
3. Enter the **Name** for the **Immunization**. Click **Save**.



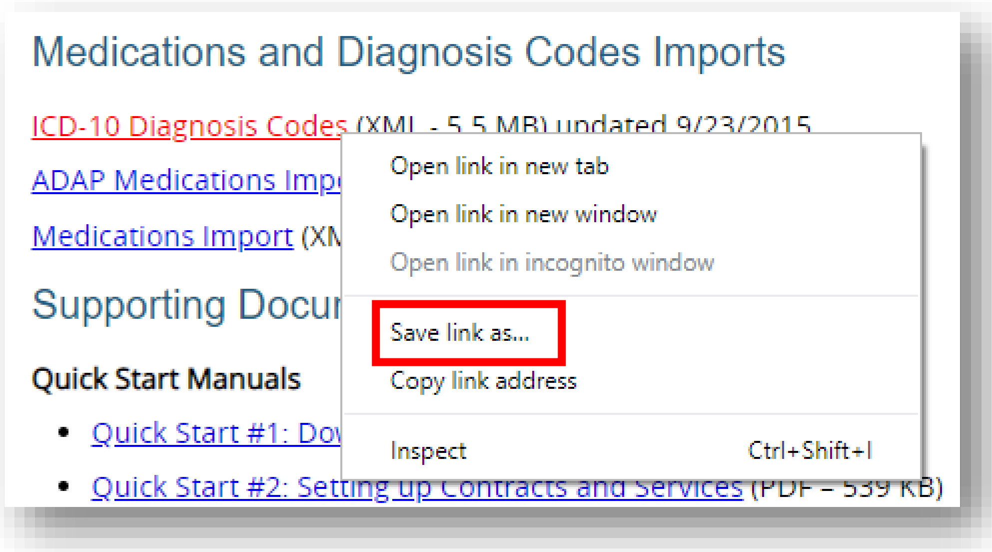
Diagnosis Setup

1. From the **Manage Selected Provider** screen, select **Diagnosis Setup.**

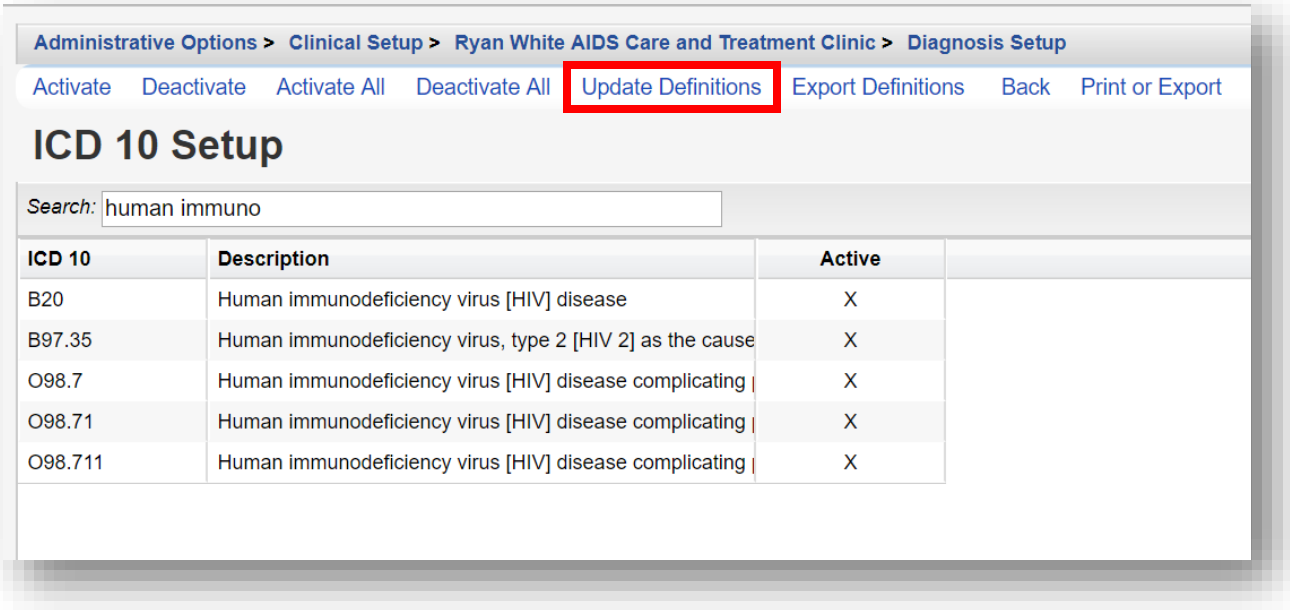
2. ICD-10 Diagnosis Codes and Descriptions are clearly listed with an X under the Active column. The phrase *human immuno* was entered into the Search box to filter the ICD-10 diagnosis results. In this example, five (5) diagnosis codes are listed.



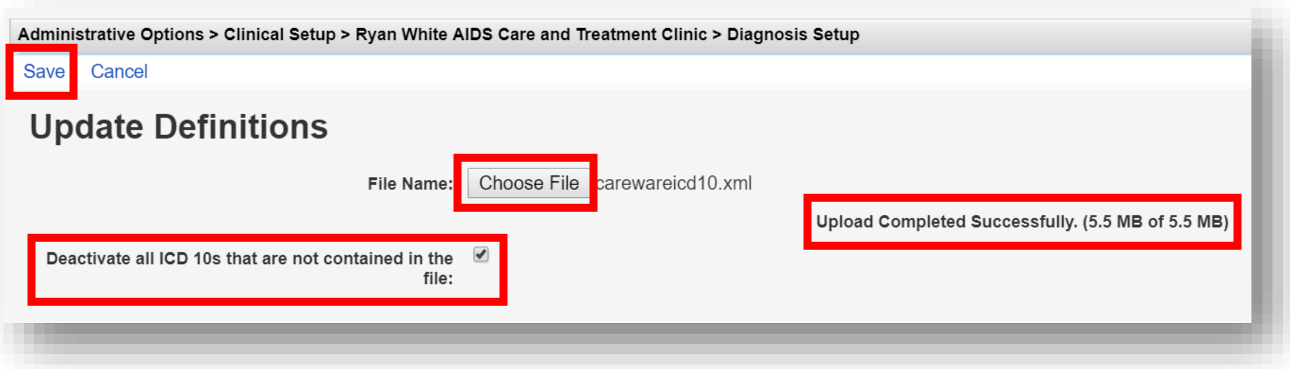
3. The current codes can be found on the HRSA CAREWare website: https://hab.hrsa.gov/program-grants-management/careware. On the website, find the ICD-10 Diagnosis Codes XML download link and **right click** on it. Select *Save target as…* or *Save link as…* and save the XML file somewhere on your local computer (a "CAREWare" user folder is recommended).



4. On the **ICD 10 Setup** screen, click **Update Definitions**.



5. Click **Choose File** from the **Update Definitions** screen and browse to the saved location of the **carewareicd10.xml** file. Once you receive the Upload Completed Successfully message, click **Save**.

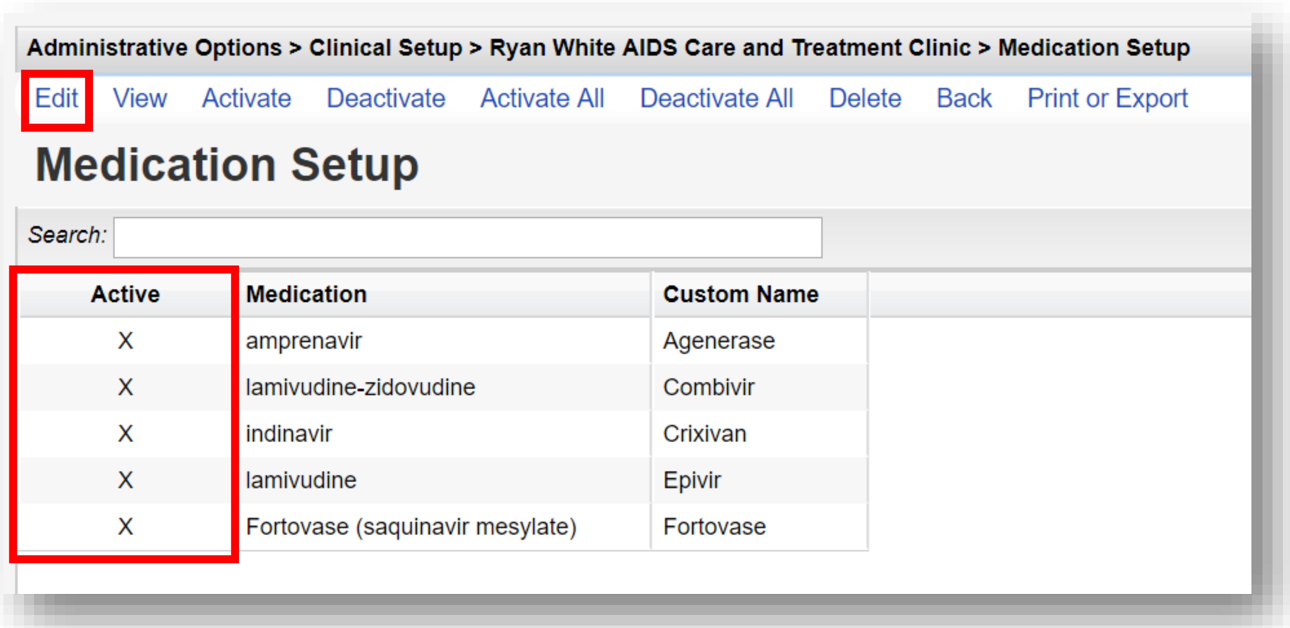


Diagnoses must be designated as active to be used. When "*Deactivate all ICD 10s that are not contained in the file*" is checked, any diagnosis that are not in the Updated Definitions file will automatically be deactivated. They will not be deleted but would need to be manually activated to be used.

Medication Setup

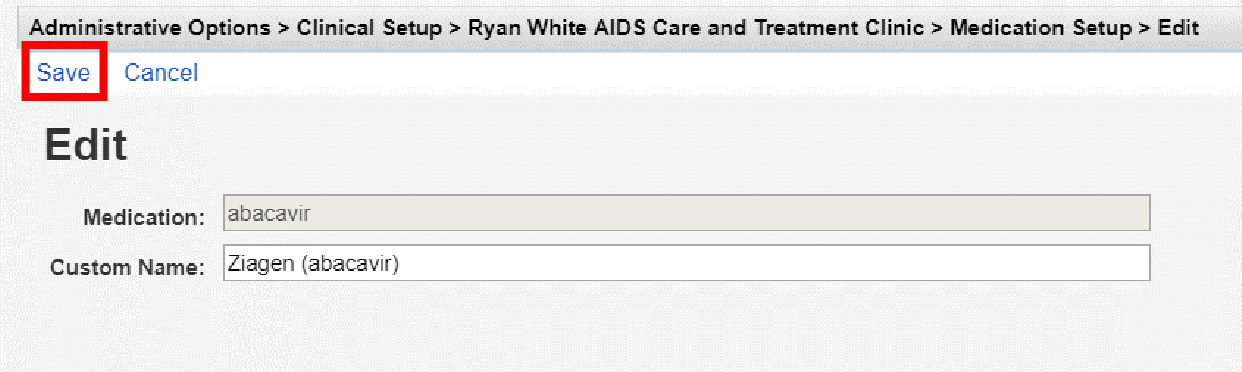
1. From the **Manage Selected Provider** screen, select **Medication Setup.**

2. Medications are clearly listed with an X under the Active column. In this example, five (5) medications are listed. Medications are listed by ingredient or generic name(s).



3. To add a Custom or Brand name to an active Medication name, click **Edit** (see previous screenshot).

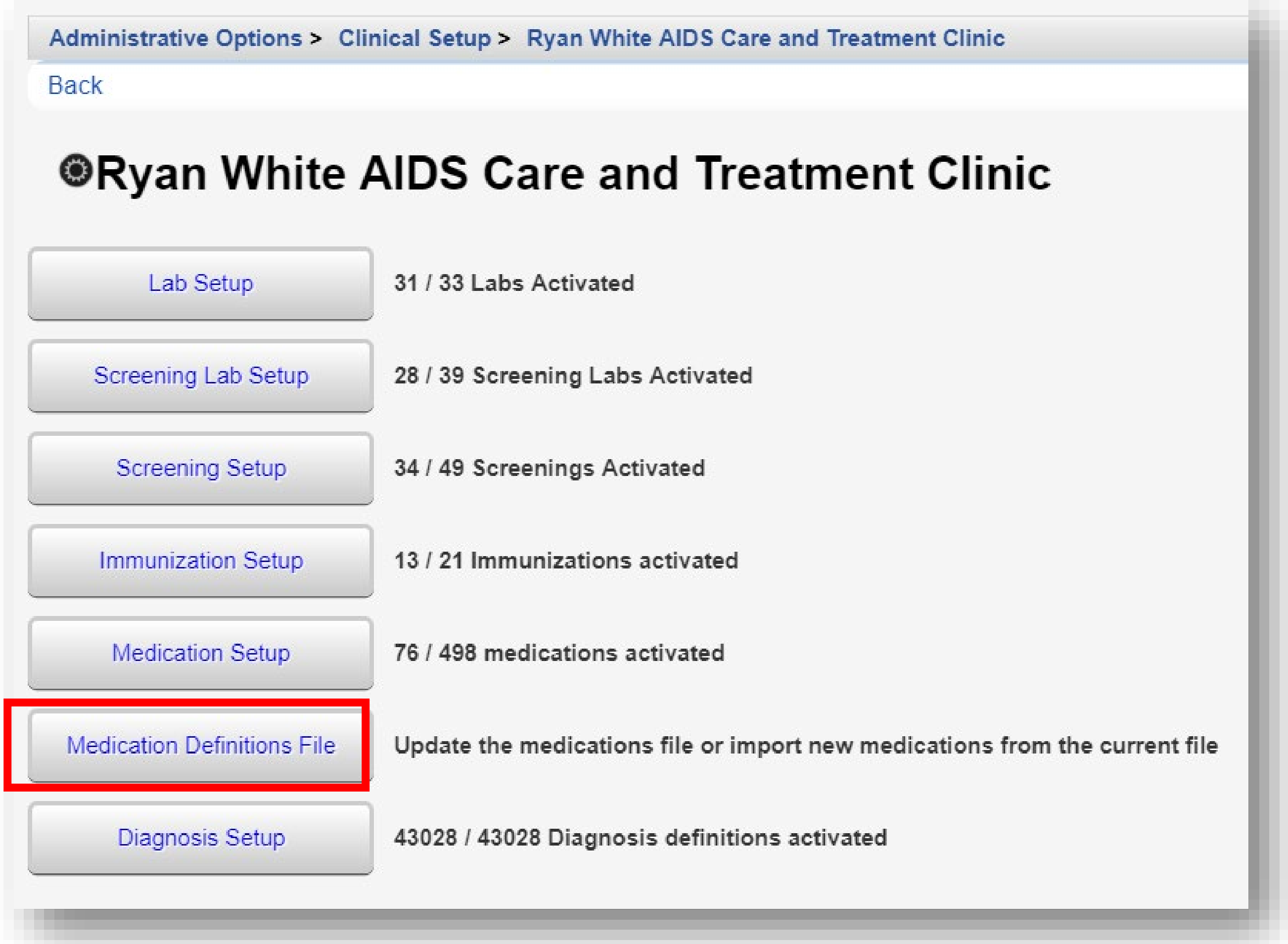
4. Enter a Custom Name. In this example we entered *Ziagen*. Select **Save**.



NOTE: It is recommended to include the medication name (ingredient or generic) after the custom name.

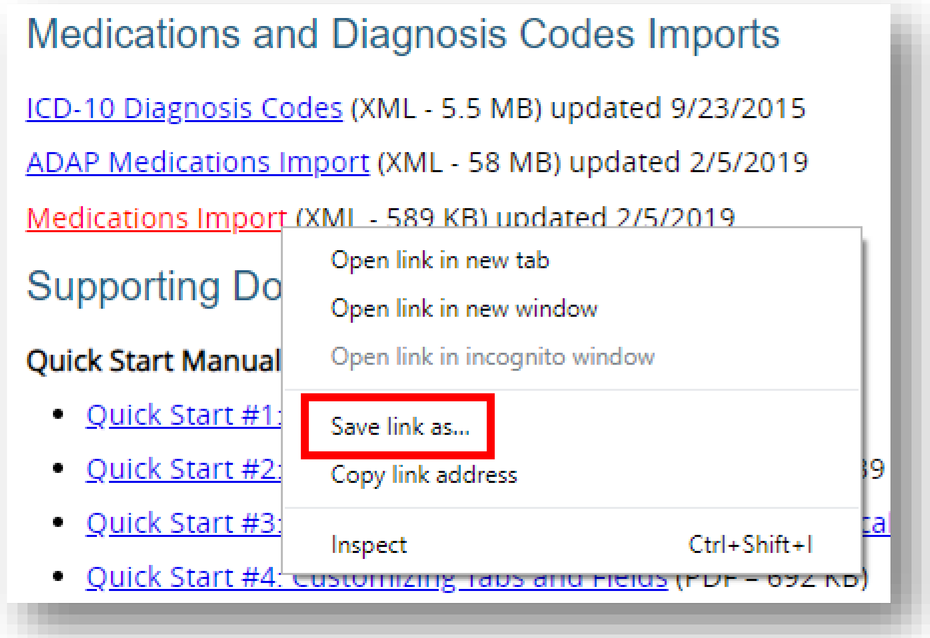
Medication Definitions File

1. From the **Manage Selected Provider** screen, select **Medication Definitions File.**

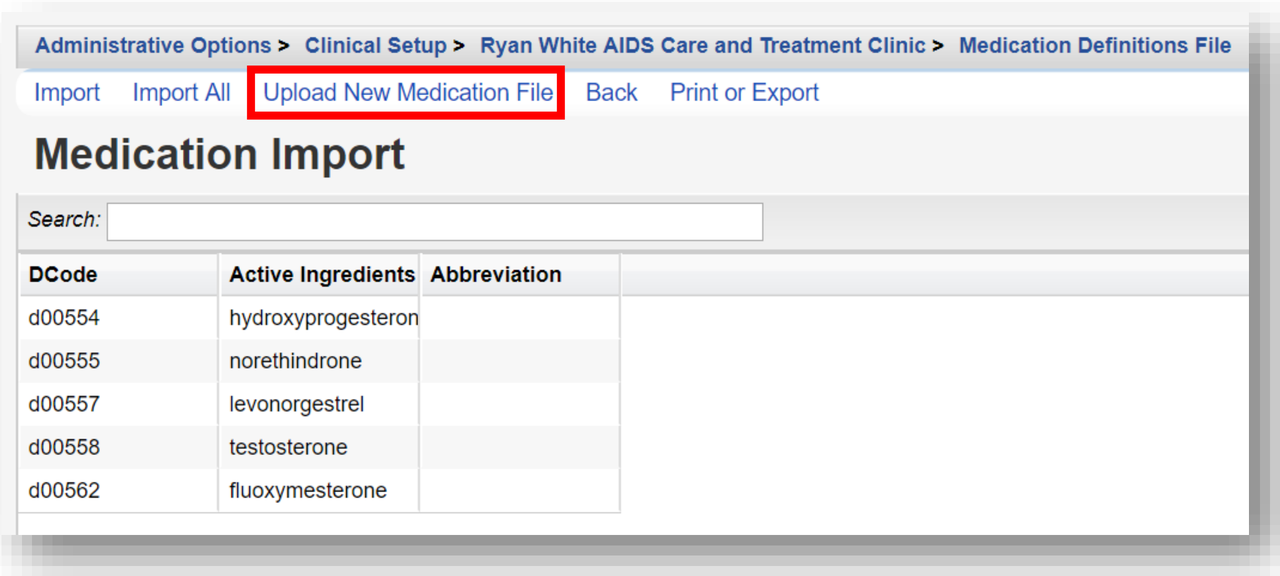


2. Current Medications should be imported into CAREWare on a regular basis. The current medications can be found on the HRSA CAREWare website: https://hab.hrsa.gov/program-grants-management/careware

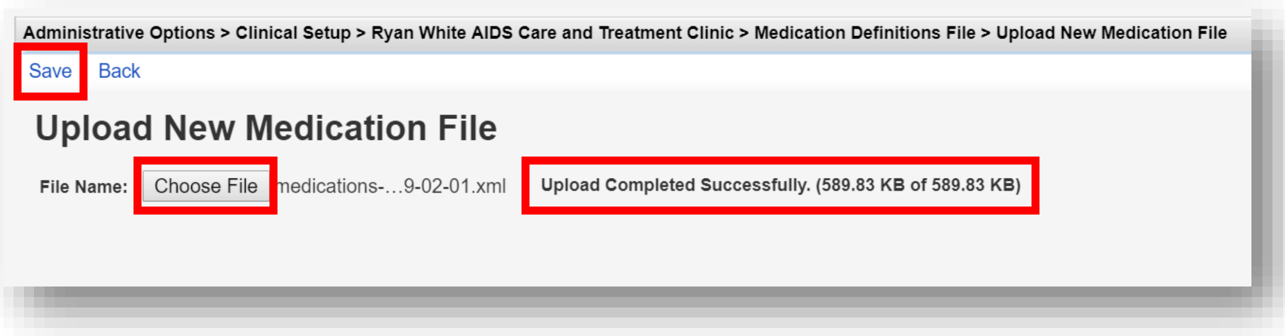
3. On the website, find the Medications Import XML download link and **right click** on it. Select *Save target as…* or *Save link as…* and save the XML file somewhere on your local computer (a “CAREWare” user folder is recommended).



4. On the Medication Import screen, click **Upload New Medication File**.



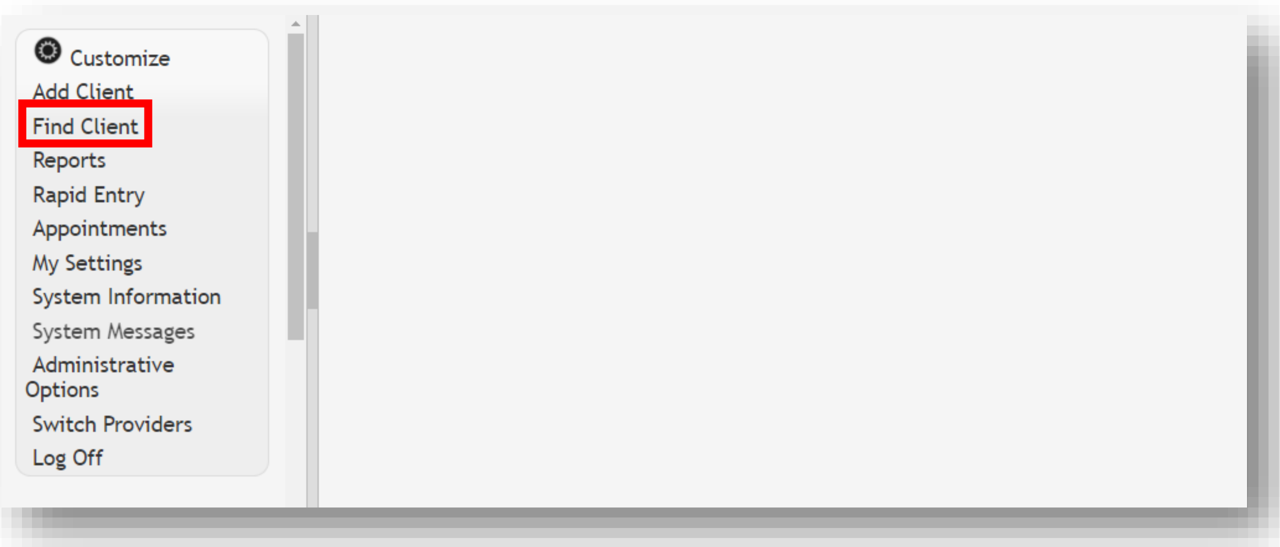
5. Click **Choose File** and browse to the saved location of the **medications-(year-month-day).xml** file. Once you receive the Upload Completed Successfully message, click **Save**.



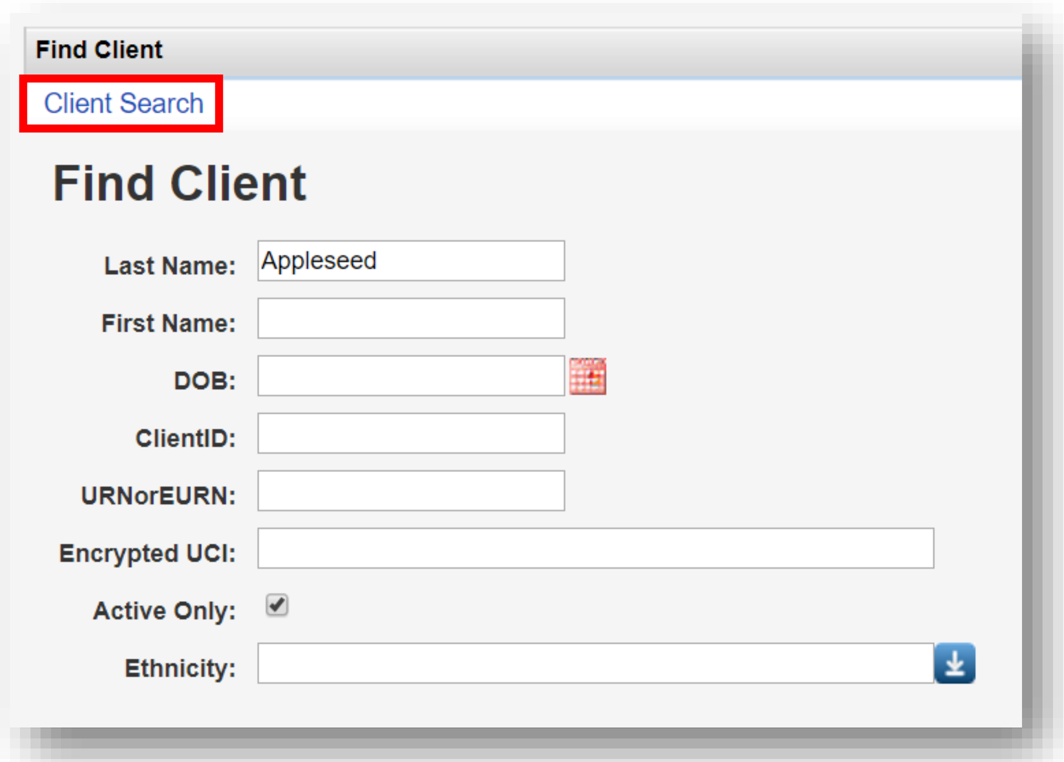
Entering Clinical Data

After setup of the Clinical Module is completed, clinical data entry can begin.

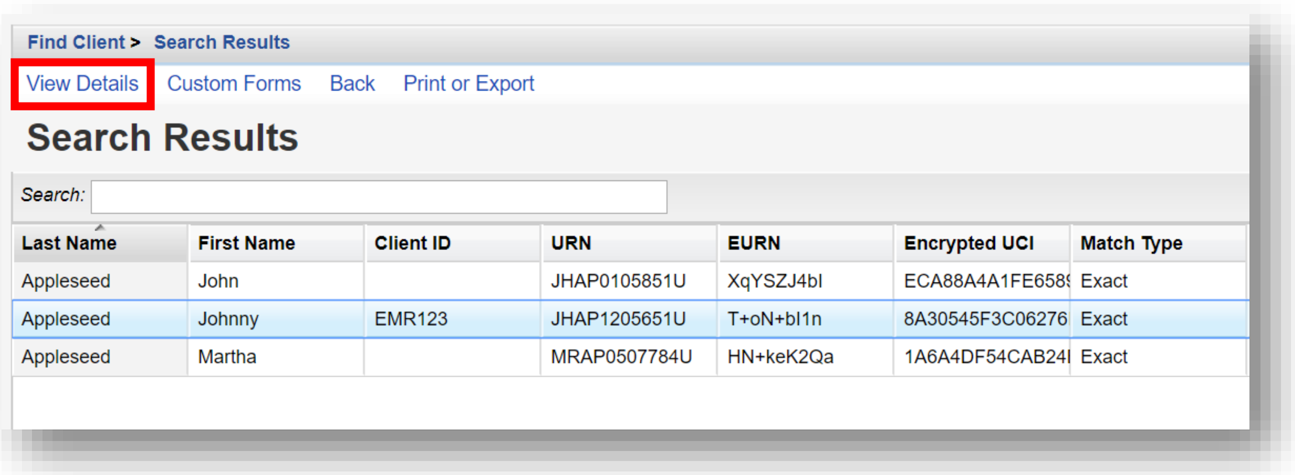
1. Select **Find Client** from the **Menu of Links** of a provider domain. Note: All data-entry must be entered in a Provider domain.



2. Search by any of the available fields; in this case we'll use the last name. Click **Client Search**.

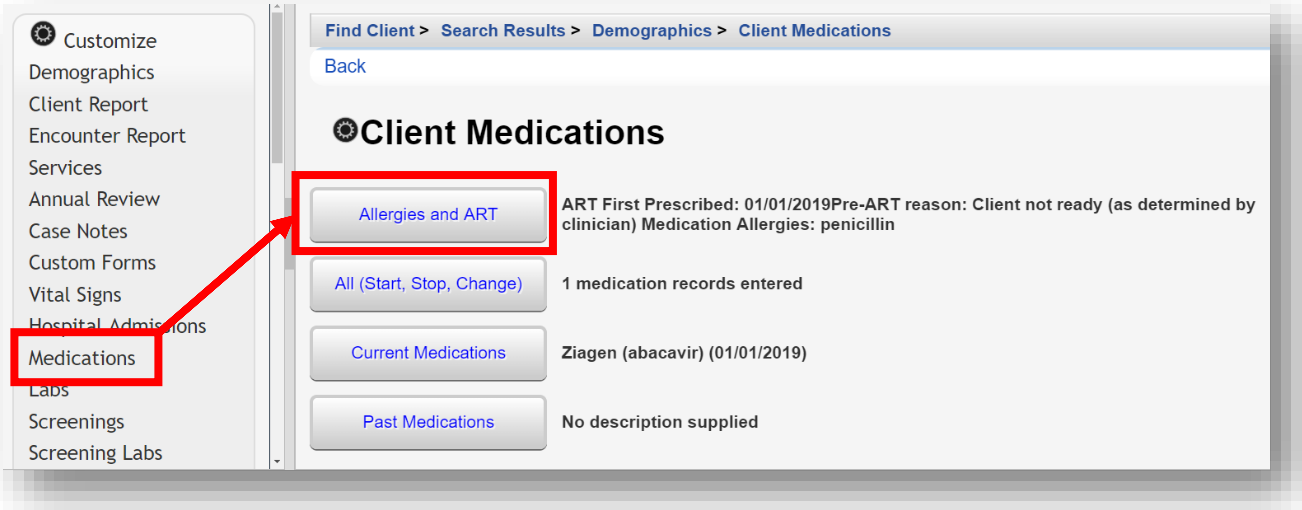


3. A list of matches to your search appears. Select the correct name from the list and click **View Details**. The client Demographics information window appears.

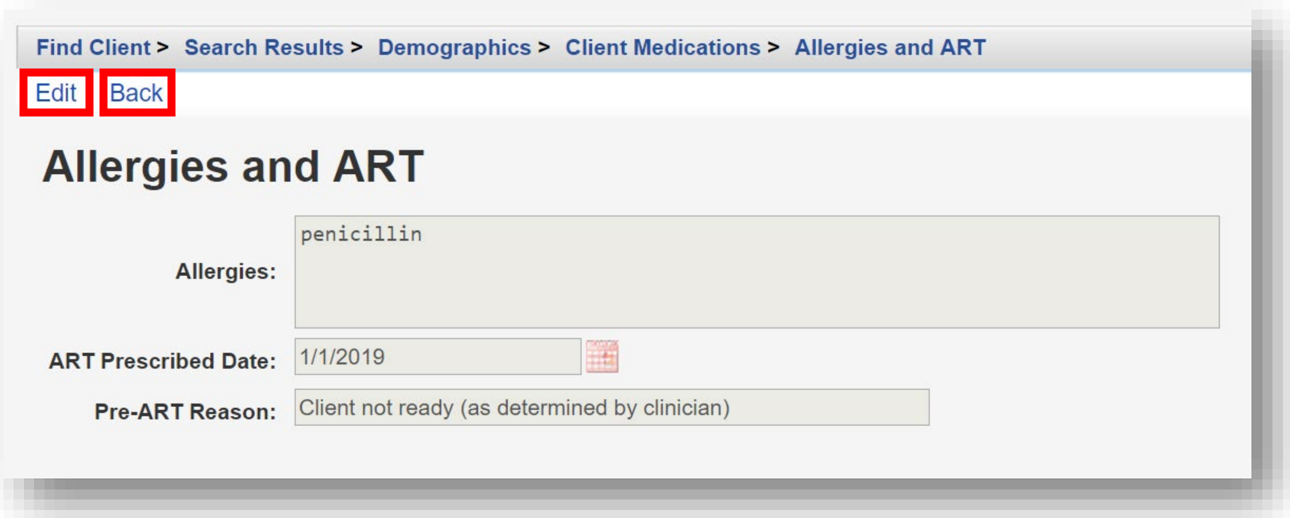


Medications

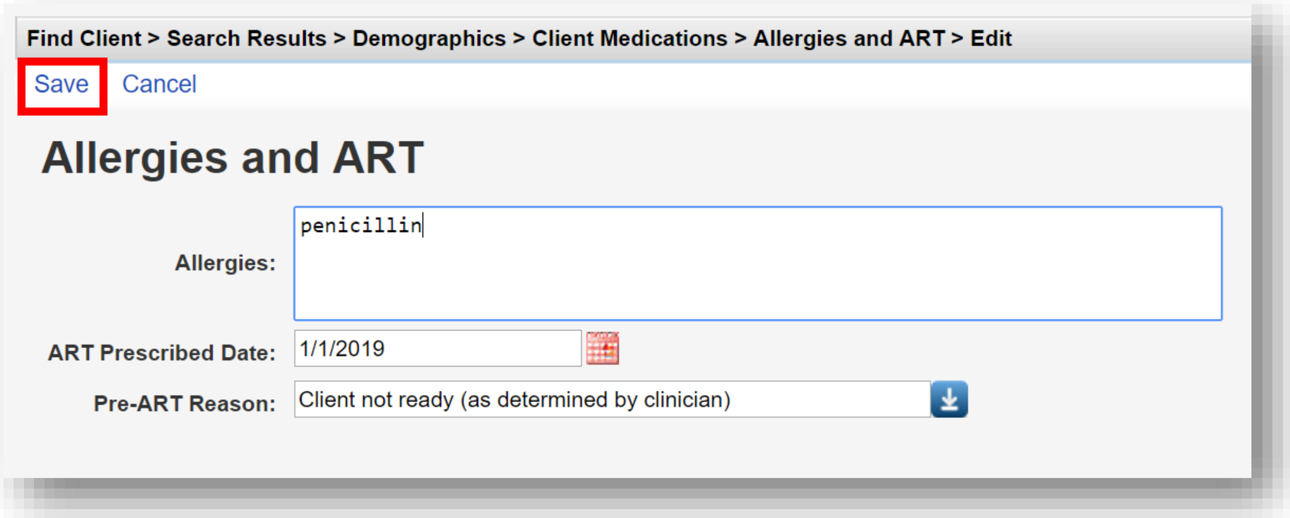
1. From the Demographics screen, select **Medications** from the **Menu of Links**.
2. Select **Allergies and ART.**



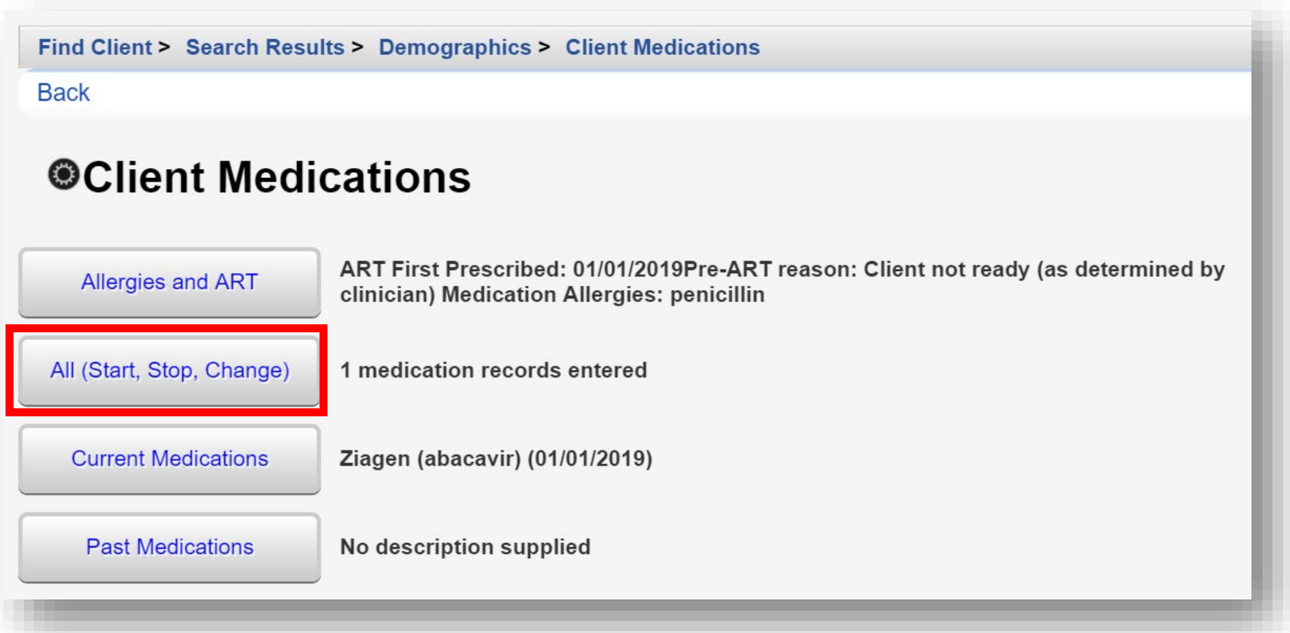
3. Select **Edit** to enter allergies and ART information.



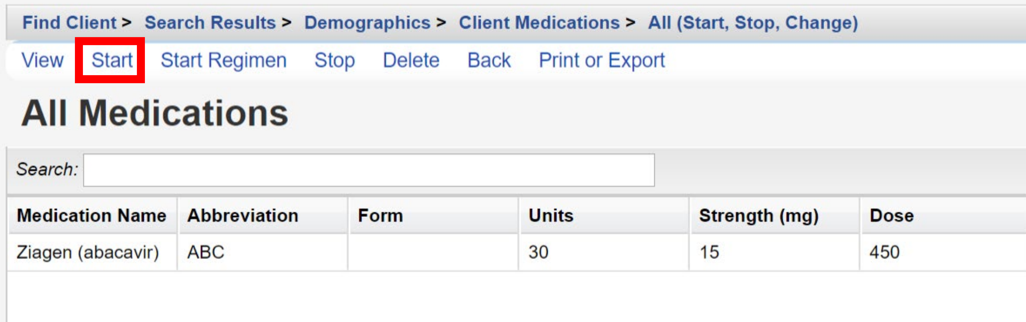
4. After making the desired edits, click **Save** and then **Back** (see previous screenshot) to return to the **Client Medications** screen.



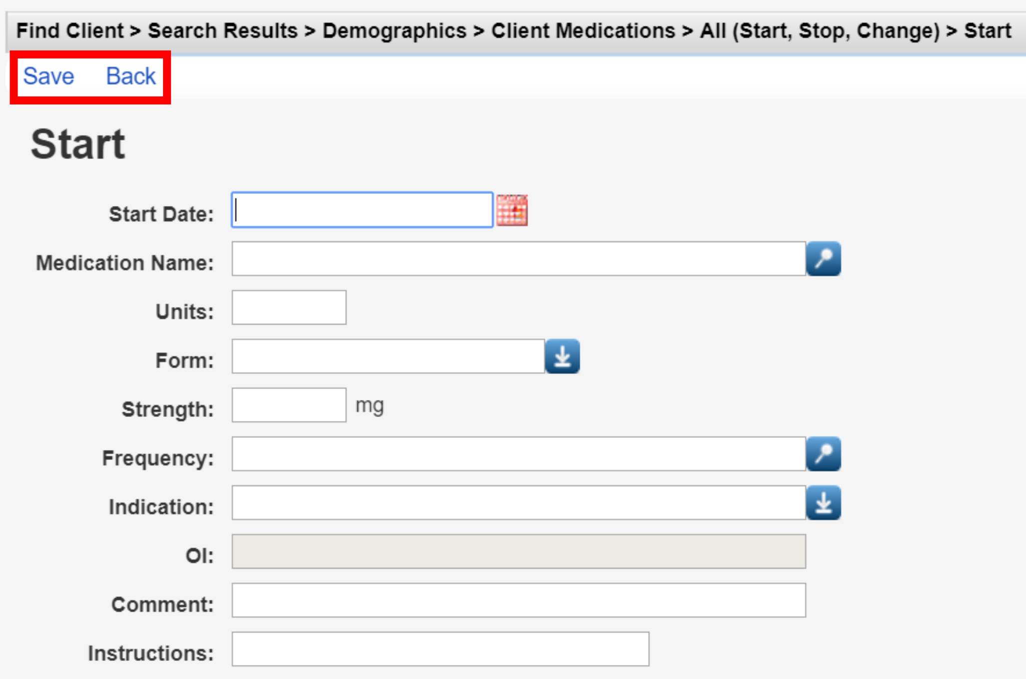
5. From the **Client Medications** screen, select **All (Start, Stop, Change).**



6. Select **Start** to enter a new client medication.



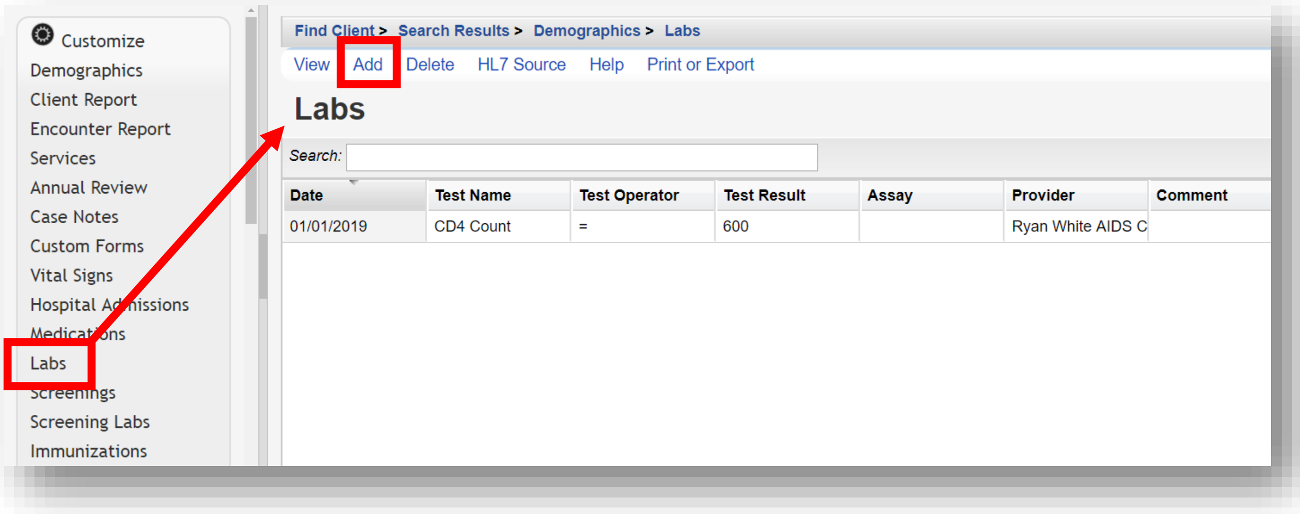
7. Enter the following information (as applicable):
   - **Start Date**
   - **Medication Name** – enter the first few letters of the medication to filter results
   - **Units** – number of days of the prescription, (30-day or 90-day)
   - **Form** – type, capsule, tablet, etc. (optional)
   - **Strength** – in milligrams
   - **Frequency** – once a day, twice a day, etc.
   - **Indication** – reason the medication is prescribed. The default indication is ART (Anti-retroviral Therapy)
   - **OI** – opportunistic infection (as applicable)
   - **Comment** – optional
   - **Instructions** – optional



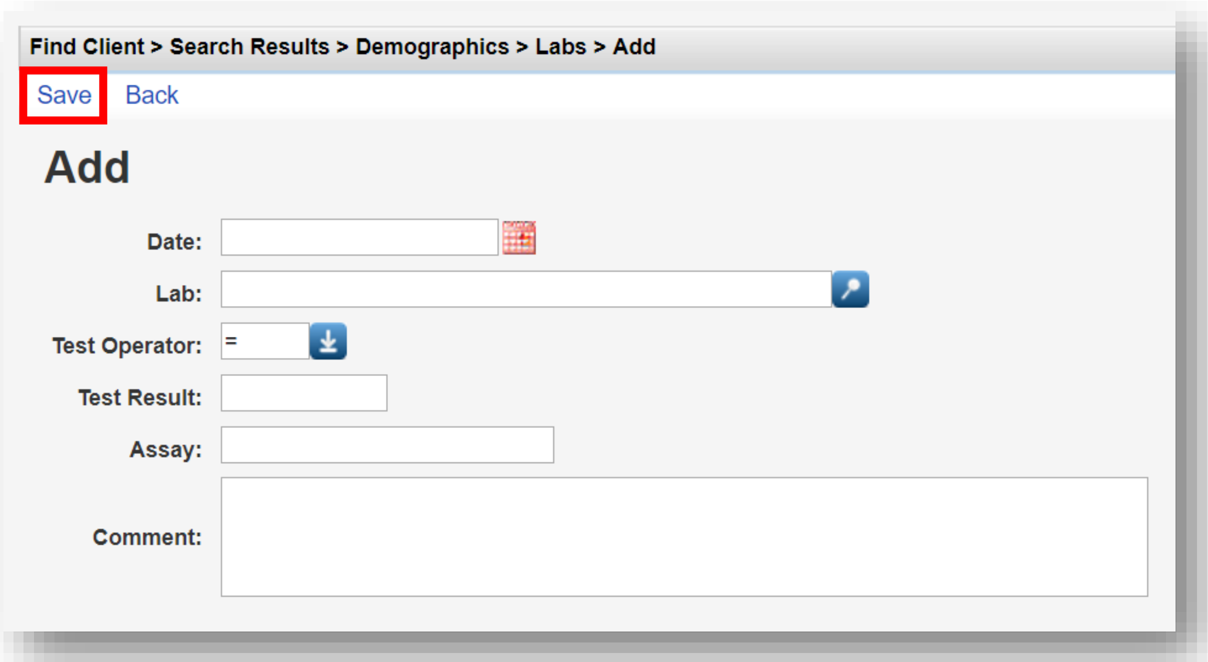
8. Click **Save,** then **Back.**

Labs

1. From the Demographics screen, select **Labs** from the **Menu of Links**. On the **Labs** screen, click **Add**.

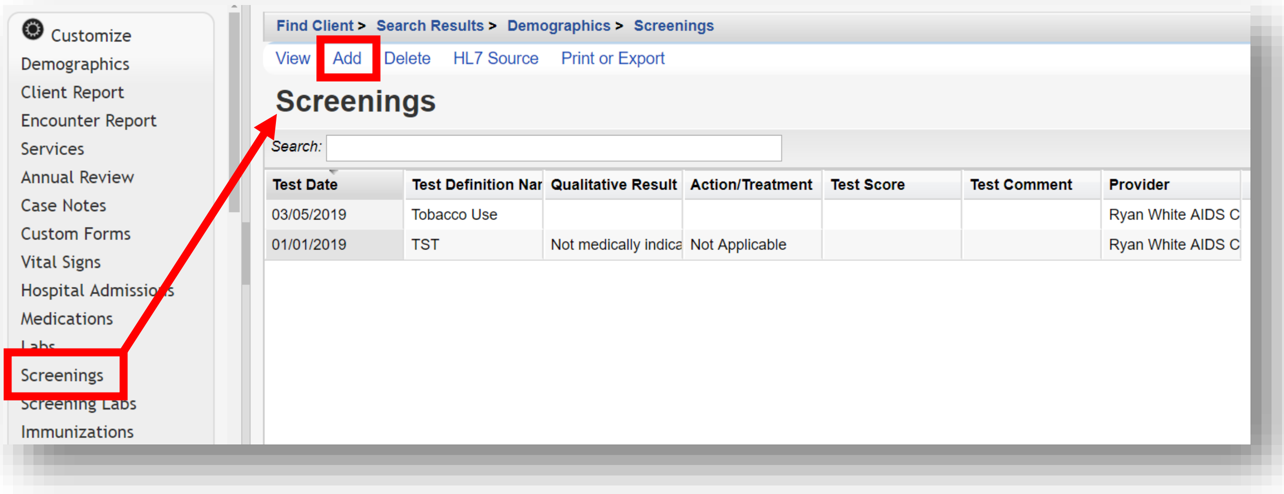


2. Enter the following information (as applicable) and then click **Save**.
   - **Date**
   - **Lab**
   - **Test Operator**
   - **Test Result**
   - **Assay**
   - **Comment**

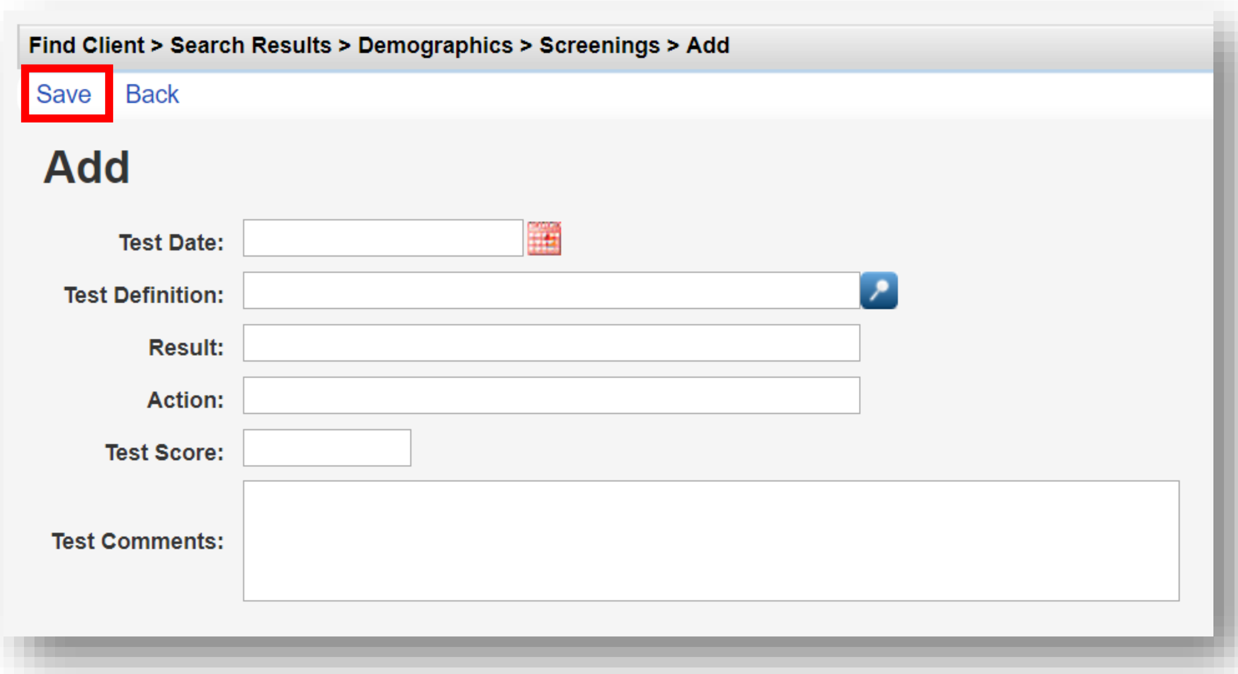


Screenings

1. From the Demographics screen, select **Screenings** from the **Menu of Links**. On the **Screenings** screen, click **Add**.

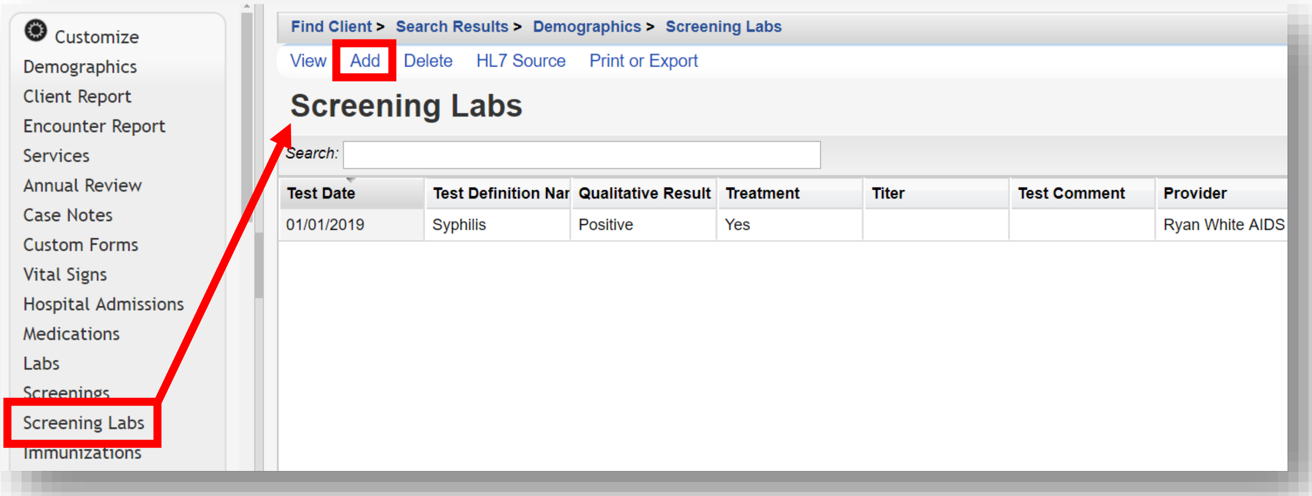


2. Enter the following information (as applicable) and then click **Save**.
   - **Test Date**
   - **Test Definition,** (TST - TB skin test)
   - **Result**
   - **Action**
   - **Test Score**
   - **Test Comments**

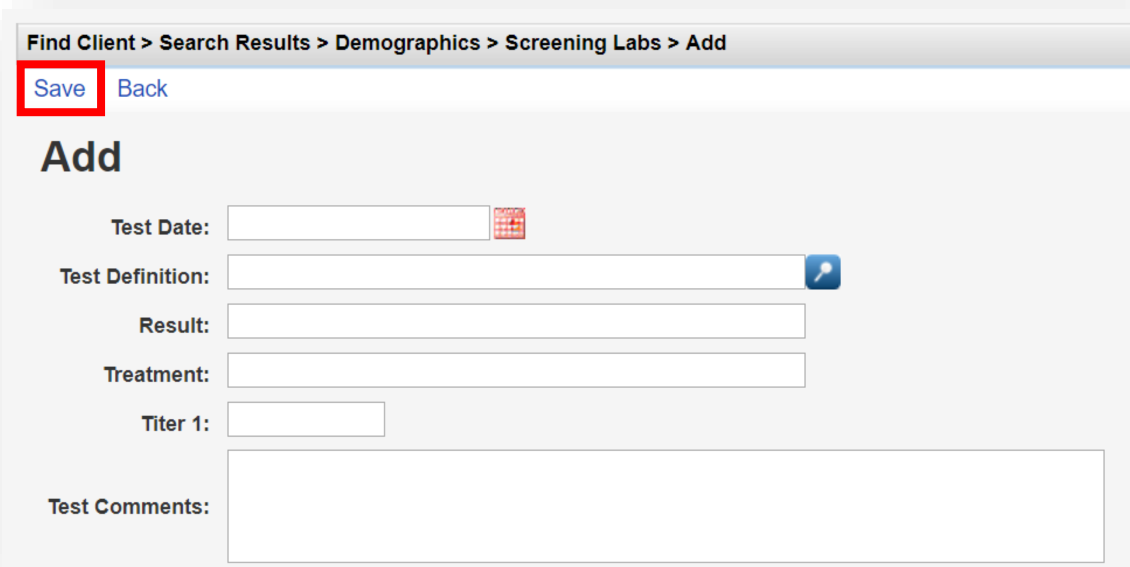


Screening Lab

1. From the Demographics screen, select **Screening Labs** from the **Menu of Links**. On the **Screening Labs** screen, click **Add**.



2. Enter the following information (as applicable) and then click **Save**.
    - **Test Date**
    - **Test Definition**
    - **Result**
    - **Treatment**
    - **Titer 1**
    - **Test Comments**

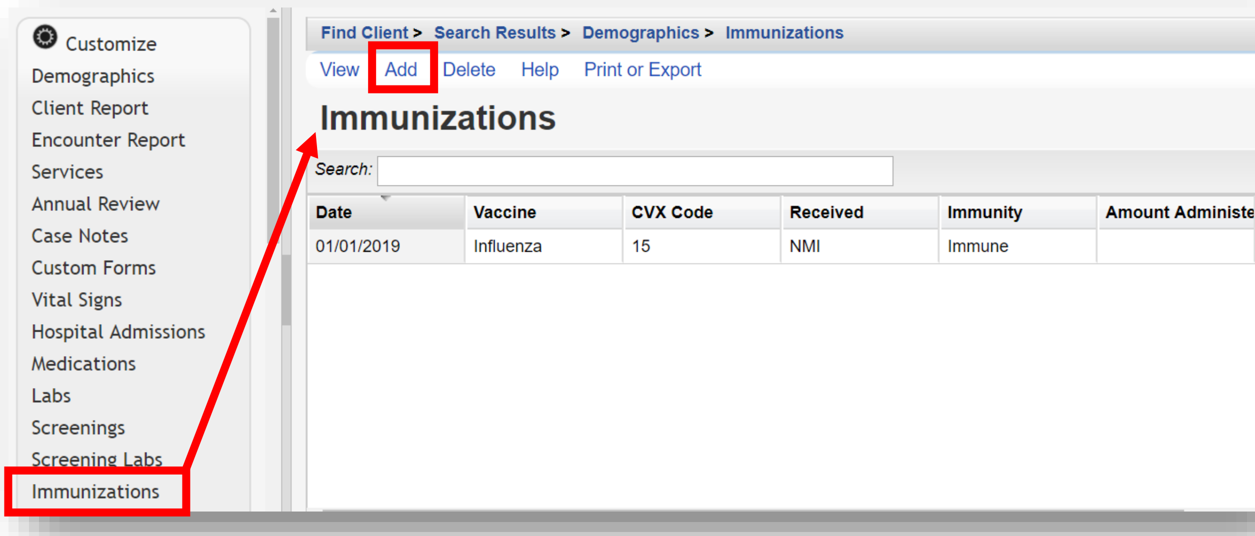


NOTE: The **Titer 1** field will be displayed for tests where titer is indicated (e.g. syphilis). The viral titer is the lowest concentration of a virus that still infects cells.

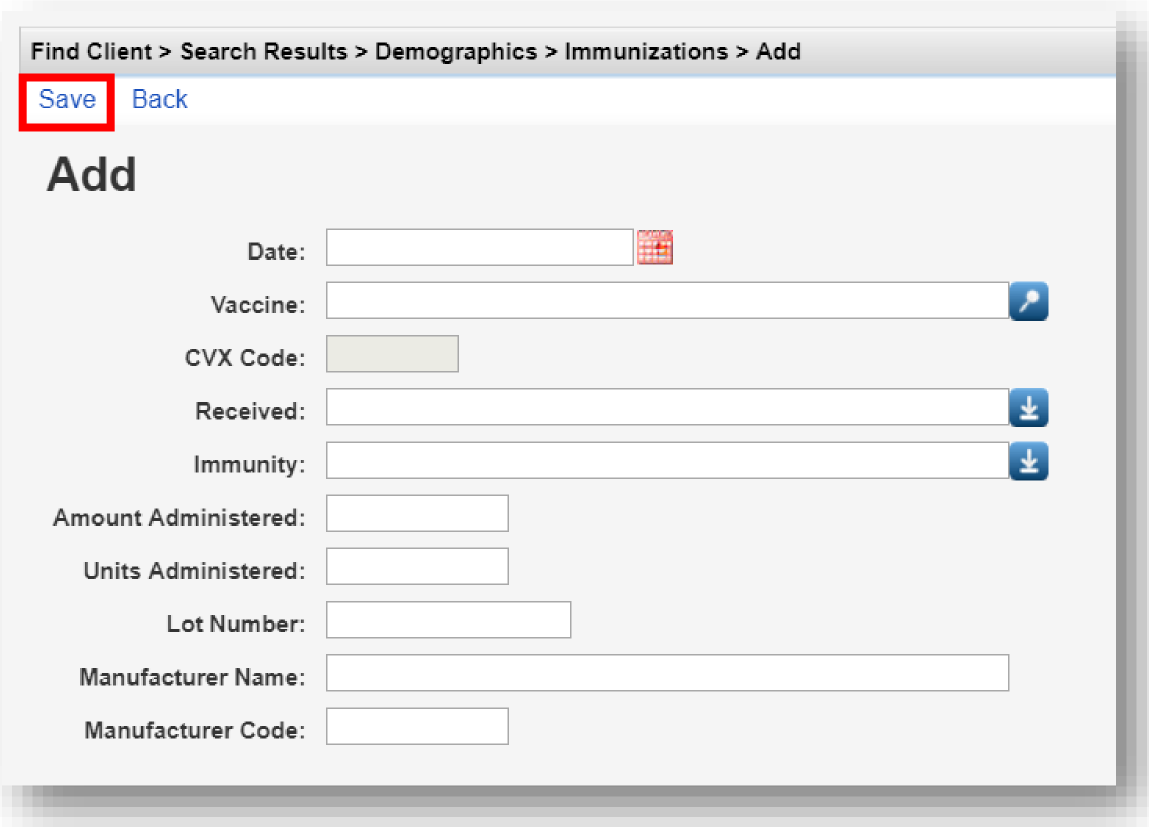
For the **Result** field, Not Medically Indicated (NMI) is often selected from the drop-down menu for hepatitis tests to show that the client has already been exposed to the virus; this prevents your reports from counting these clients as not having been tested for hepatitis.

Immunizations

1. From the Demographics screen, select **Immunizations** from the **Menu of Links**. On the **Immunizations** screen, click **Add**.



2. Enter the following information (as applicable) and then click **Save**.
   - **Date**
   - **Vaccine**
   - **Received**
   - **Immunity**
   - **Amount Administered**
   - **Units Administered**
   - **Lot Number**
   - **Manufacturer Name**
   - **Manufacturer Code**



There are often cases where a client has either been vaccinated prior to entering your care (hepatitis, pneumovax) or has already been exposed and requires no vaccination. In these cases you would select “NMI” under **Received** and “History of immunization” or “History of vaccination” under **Immunity**.

Note: Additional clinical information, including, **Vital Signs**, **Hospital Admissions**, and **Orders** (clinical appointments), can be collected in CAREWare. They are entered the same way as Medications, Labs, Screenings, Screening Labs, and Immunizations.

However, this information is not required for the RSR Report or HAB Performance Measures, so it is optional and will not be detailed here.

CAREWare 6

Section 6:

Working with Prebuilt Reports (Including the RSR and ADR)

Adapted from HRSA Quick Start User Guides:
https://hab.hrsa.gov/program-grants-management/careware

PLEASE NOTE: The client data used in these manuals is purely fictional.

First Things First

Getting Started

- You must have the appropriate user privileges to run reports.
- You should have a number of clients entered in the system so you can see how your reports will look.

Running "Prebuilt" reports

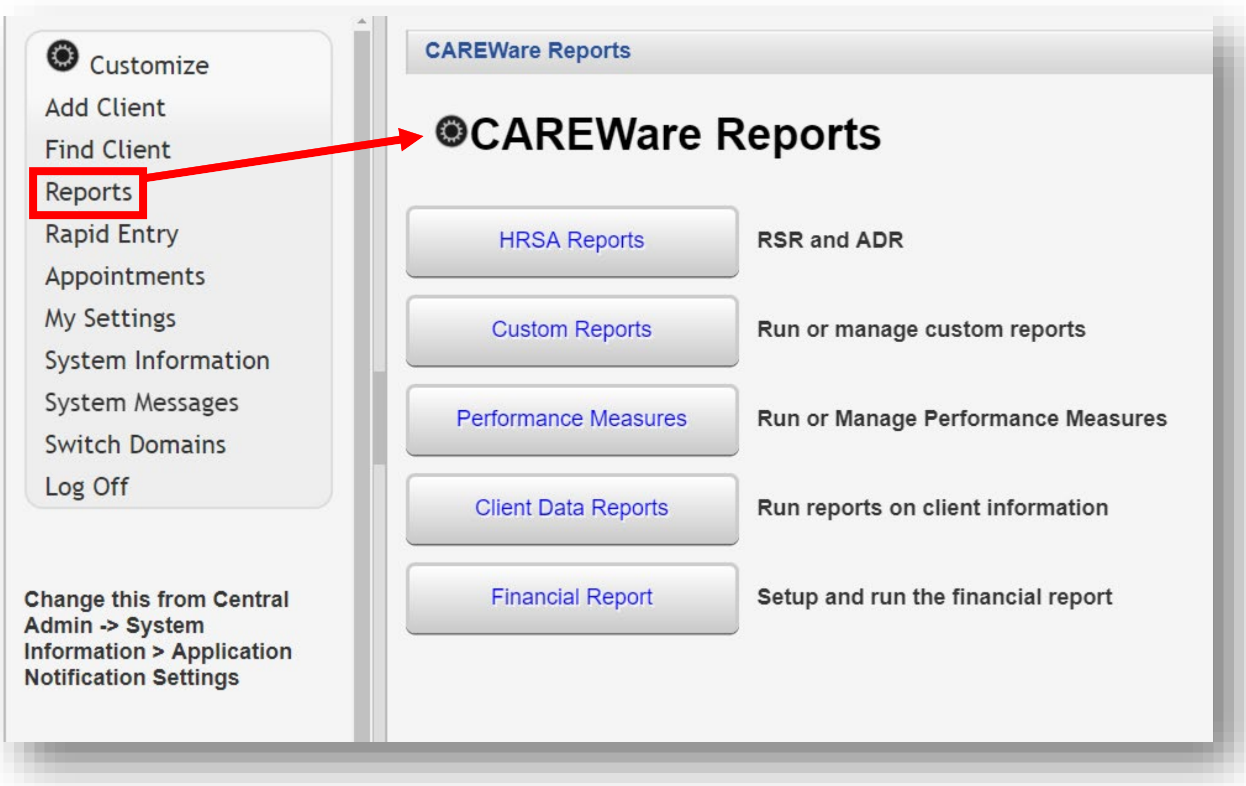
CAREWare comes prepackaged with several summary and service reports. We'll cover a few of them here, and then look at running the RSR for both reporting and quality assurance purposes.

Custom reports are covered in Quick Start Guides #7 and #8.

1. Log into CAREWare. For more details on how to do so, please refer to the **Quick Start Guide #1**.

> **NOTE:** Some pre-built reports can only be run from the Central Admin and vice-versa. i.e. WICY report (Central); Mailing Labels (Provider).

2. Select **Reports** from the **Menu of Links**. The various report categories will appear.

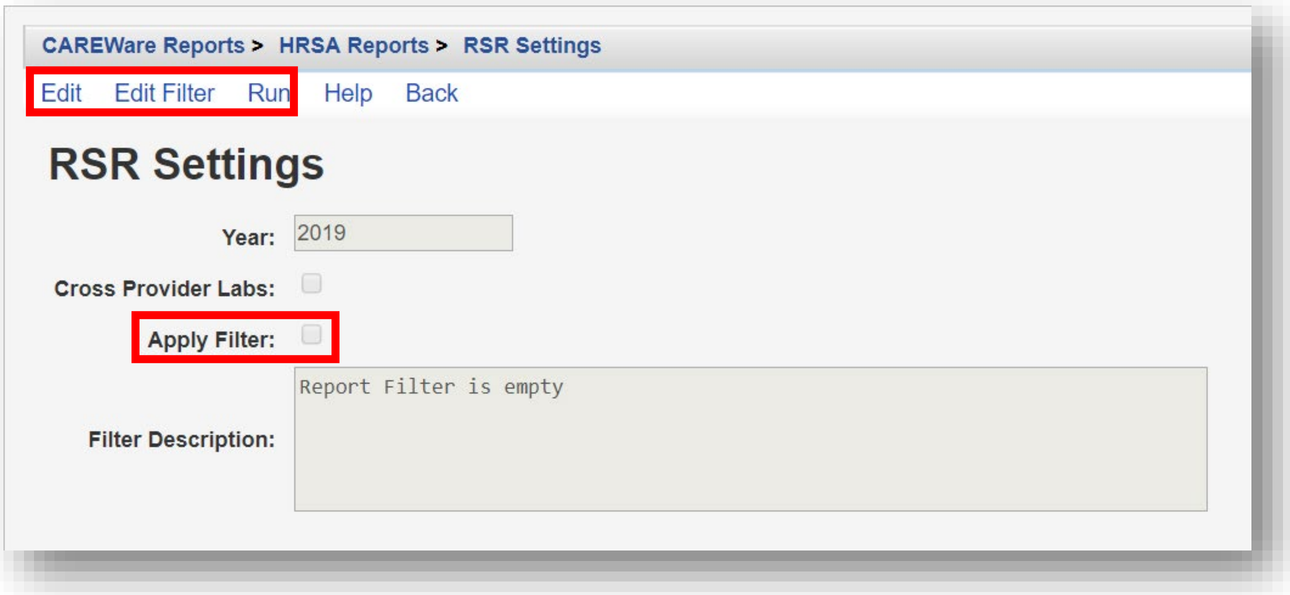


Running HRSA Reports

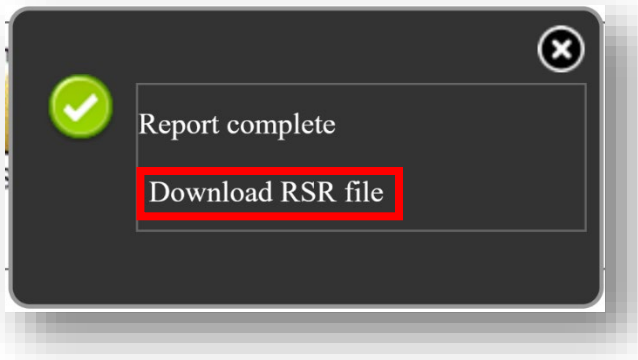
1. From the CAREWare Reports screen, click **HRSA Reports**.

2. Select **RSR Client Report**. (From the Provider domain, select **Export Menu**, then **RSR Export**.)

3. If necessary, change the **Report Year** by clicking **Edit**. To edit Filters, click **Edit Filter** and then check **Apply Filter**. Once complete, click **Run**.

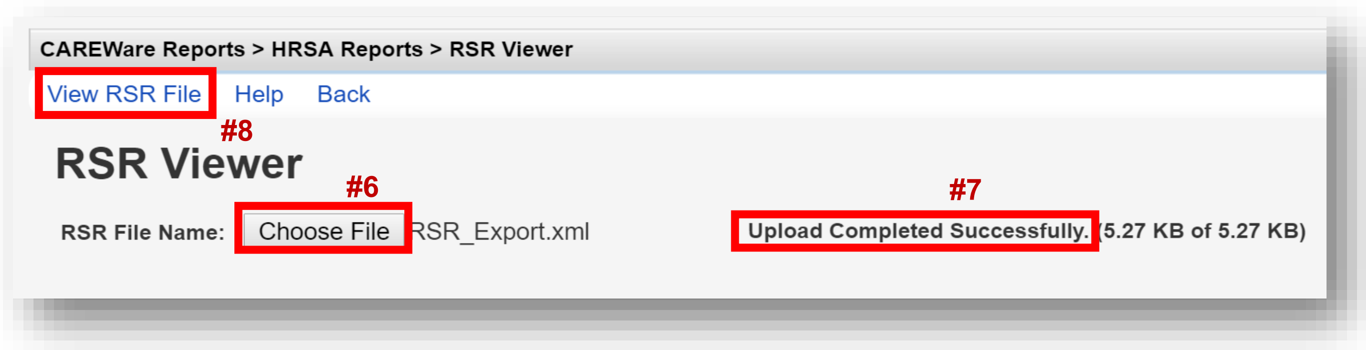


4. Click **Download RSR file**. Select a location on your local computer to save the *RSR_Export.xml* file. Note: It is recommended to save the RSR file to the computer Desktop for easy retrieval, as it is used in the next step.



5. Return to the CAREWare Reports screen and click **HRSA Reports**, and then click **RSR Viewer**.

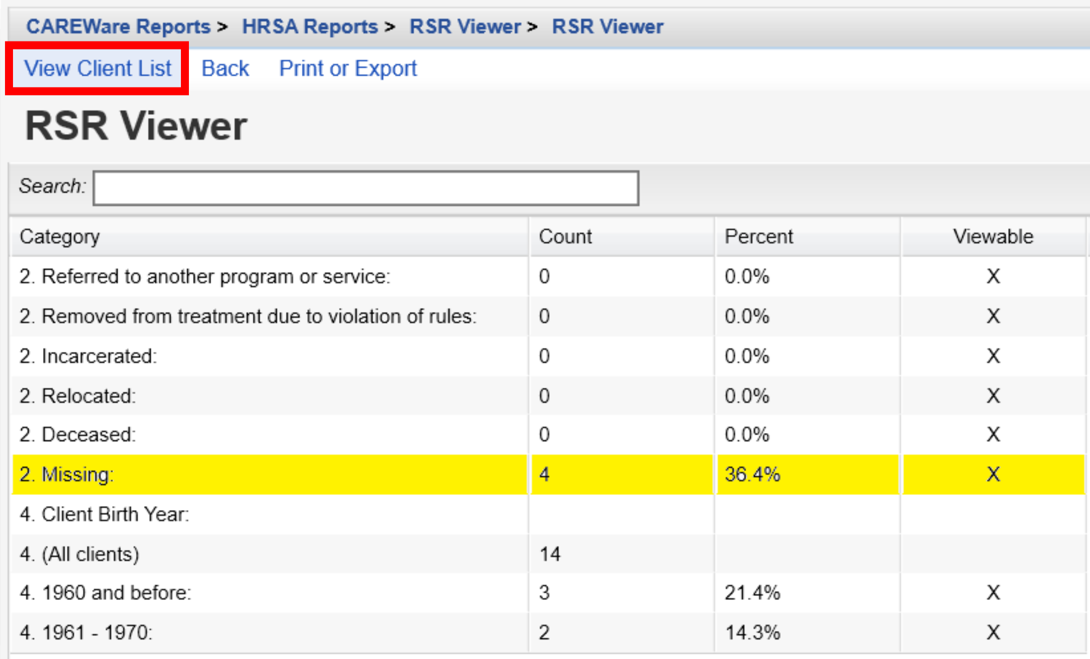
6. Click on **Choose File**.
7. Select the *RSR_Export.xml* file saved on your local computer in step #4. Once chosen, the message **Upload Completed Successfully** should appear.
8. Select **View RSR File**.



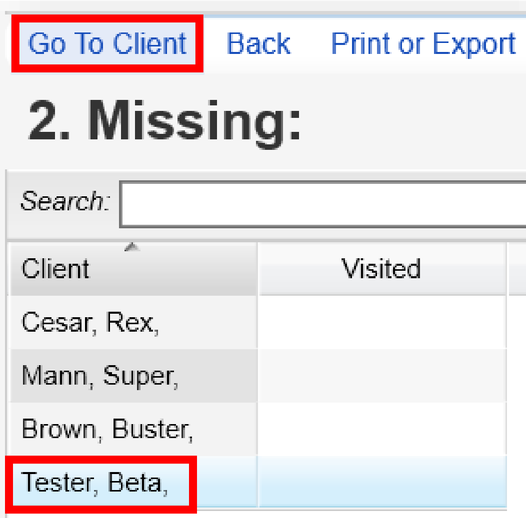
The RSR Report is displayed, with *Category*, *Count*, *Percent*, and *Viewable* columns. The *Category* column contains each HRSA RSR data field with a number listed to the left, which corresponds to the HRSA RSR required client-level data element.

TIP: The RSR Report should also be used throughout the year, to identify and correct client data fields that are Missing, Unknown, or Out of Compliance with HRSA RSR data requirements.

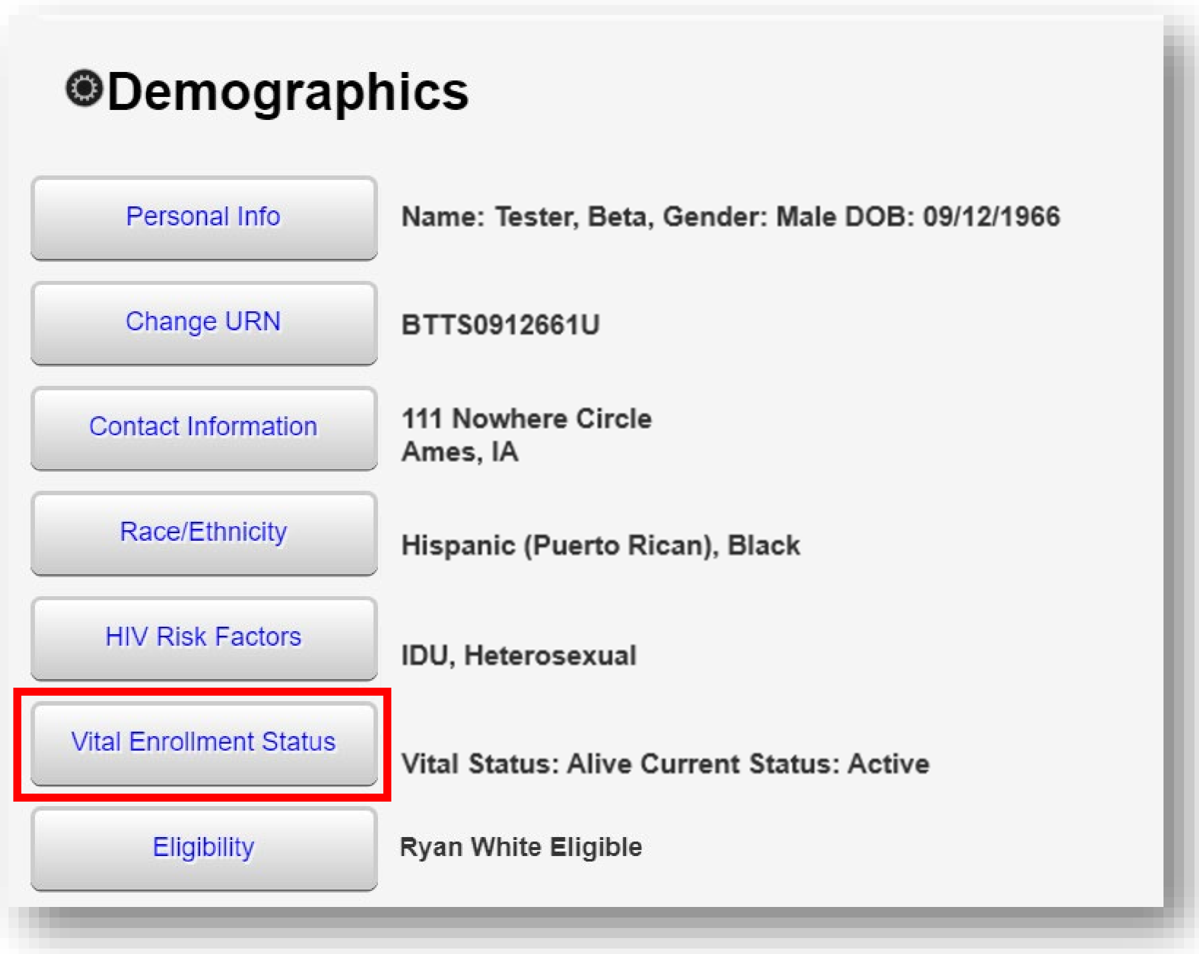
9. In this example, on page 2 of the RSR Viewer, for the Category **2. Missing**, the Count shows 4. This indicates there are four (4) clients that are missing **#2 – Enrollment Status**. Select the 2. Missing row by clicking on it, and then click **View Client List**.



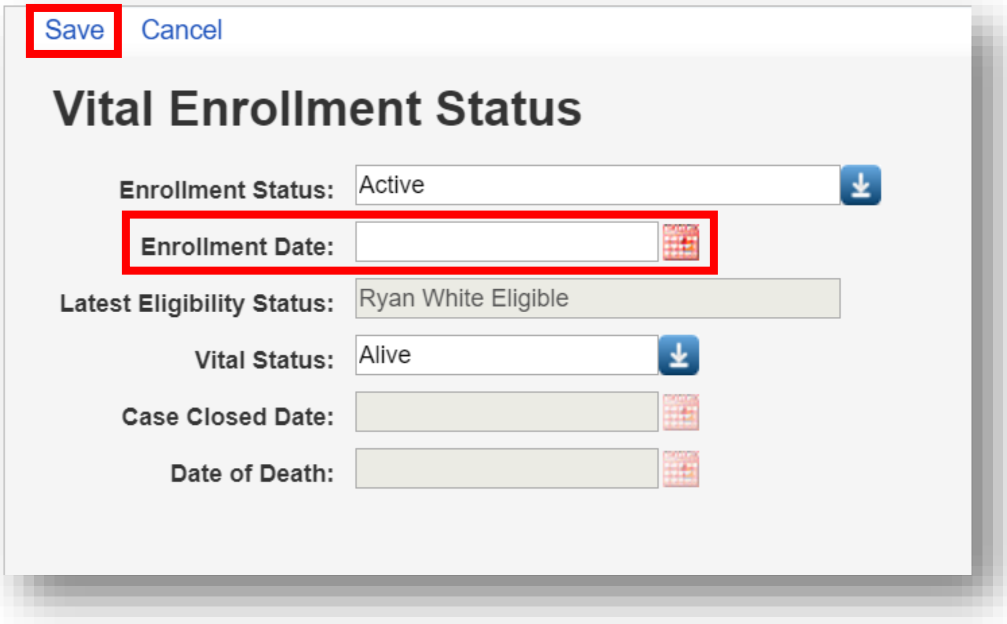
10. The four clients missing Enrollment Status are listed. Select a client by clicking on their name and click **Go To Client** or double-click the client's name. CAREWare performs a real-client lookup and opens the client record with the missing data automatically.



11. A new tab will open and the client's Demographic screen will appear. For this example, client "Tester, Beta" was selected. Click on **Vital Enrollment Status** from the Demographics Menu List.



12. The Enrollment Date field is null (blank). A valid enrollment date needs to be entered to correct the missing data field. Once complete, click **Save**.



Check all the remaining RSR Report Categories and Columns for Missing, Unknown, and Out of Compliance data values, including, Demographic and Clinical information. Review all Categories to check program data accuracy.

NOTE: Remember to rerun the RSR Client Report to include any changes made to the client record(s) in CAREWare.

Running Client Data Reports

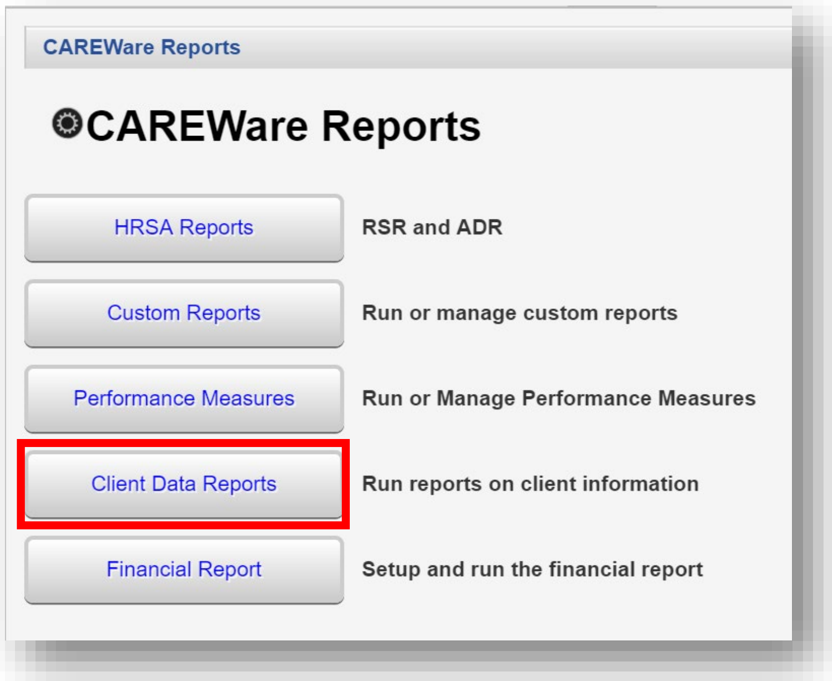
The following Client Data Reports are available to you within CAREWare 6:

- Clinical Encounter Reports – Run clinical encounter reports
  - ***Clients with no encounter in X days*** – Clients who have not had an encounter in the last specified number of days
  - ***No Service in X days Report*** – List clients who have not received a service in a specified category or a particular subservice within the specified number of days
  - ***Clients with no test in X days*** – Clients who have not had the specified screening test in the specified number of days
  - ***Clients with last selected lab result*** – Clients whose last selected lab result was less than or greater than the specified result
  - ***ARV Ingredient Report*** – Displays ARV ingredient counts for active HIV-positive clients on the specified date
  - ***Clients with no Hepatitis vaccinations*** – Clients who have not had a vaccination for a specified hepatitis virus
  - ***Clients ever diagnosed with Hepatitis*** – Clients ever diagnosed with Hepatitis
  - ***Clients with no Pneumovax in X months*** – Clients who have not had a Pneumovax immunization in a specified number of months
- ***Clinical Encounter Preprints*** – Run clinical encounter preprints for selected clients
- ***Multiple Client Case Note Report*** – Run case note report on multiple clients
- ***Service Detail Report*** – List details of services provided to clients within a specified range of dates
- ***Referrals Report*** – List details of referrals provided to clients

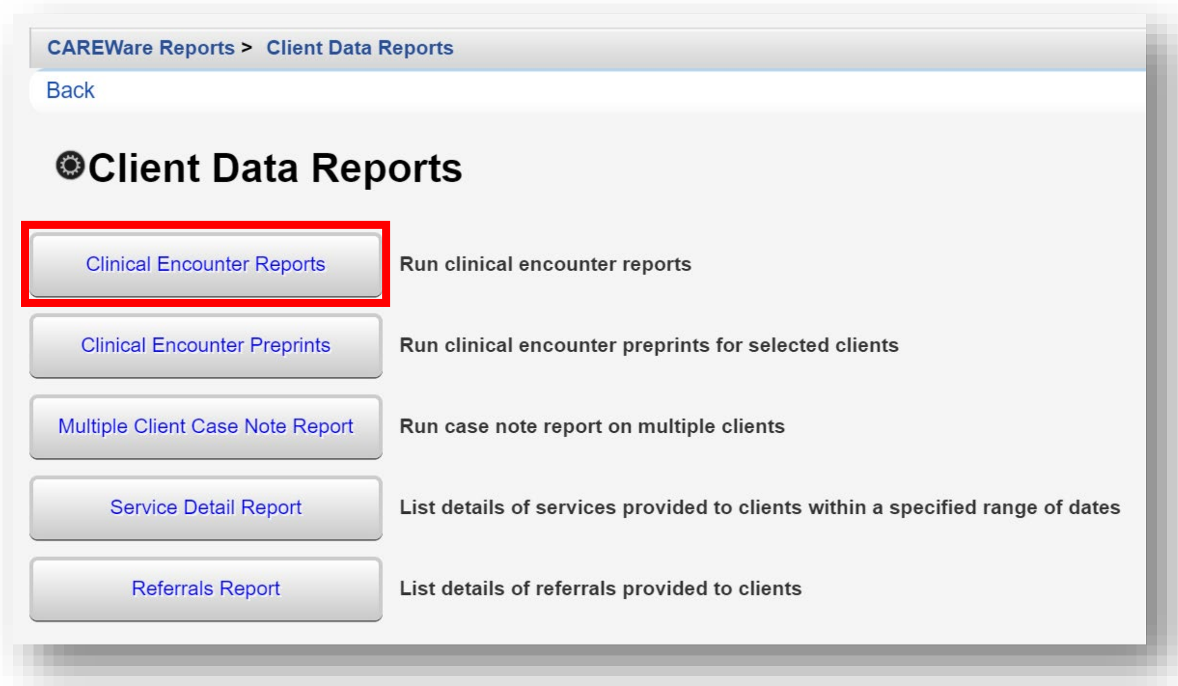
Running the No Services in X Days Report

This report can assist in identifying clients who are overdue receiving services or may be Out of Care. Generally, clients who have not received services in six months or greater are considered to be "out of care." (Note: that this report only includes clients with Enrollment Status of Active or Unknown.)

1. From the CAREWare Reports menu, click **Client Data Reports**.



2. On the next menu, select **Clinical Encounter Reports**.

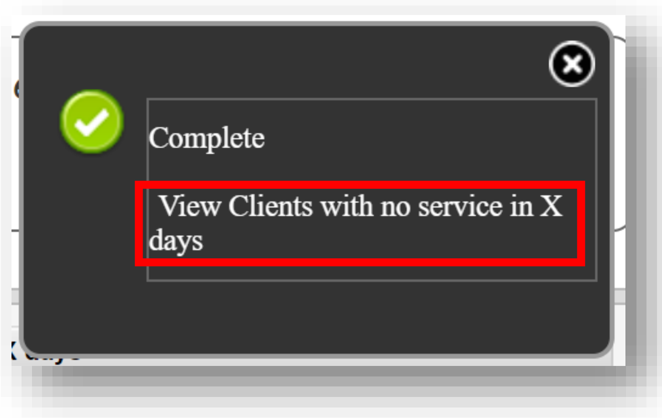


3. Select the **No Service in X Days Report**.

4. Select the **Service Category**, **Subservice Type**, and **Number of Days**. Check **Apply Custom Filter**, **Hide Personally Identifying Information**, and/or **Include shared services entered by other providers**, as applicable.

5. Click **Run** to open the report in a new tab. Click **PDF** to open the report as a PDF.

6. Once you click **Run**, a report confirmation message will open in the upper right corner of the screen. Select **View Clients with no service in X days**. Your report will be displayed in a new tab.



NOTE: Blank service date records indicate that a client record was created, but no service was entered. This could be either a data entry issue, where service information needs to be entered, or an indication that clients made an appointment but did not return for service.

This report can be used as a tool to perform chart review and monitoring, or to determine the cause of client record(s) without services.

Running Financial Reports

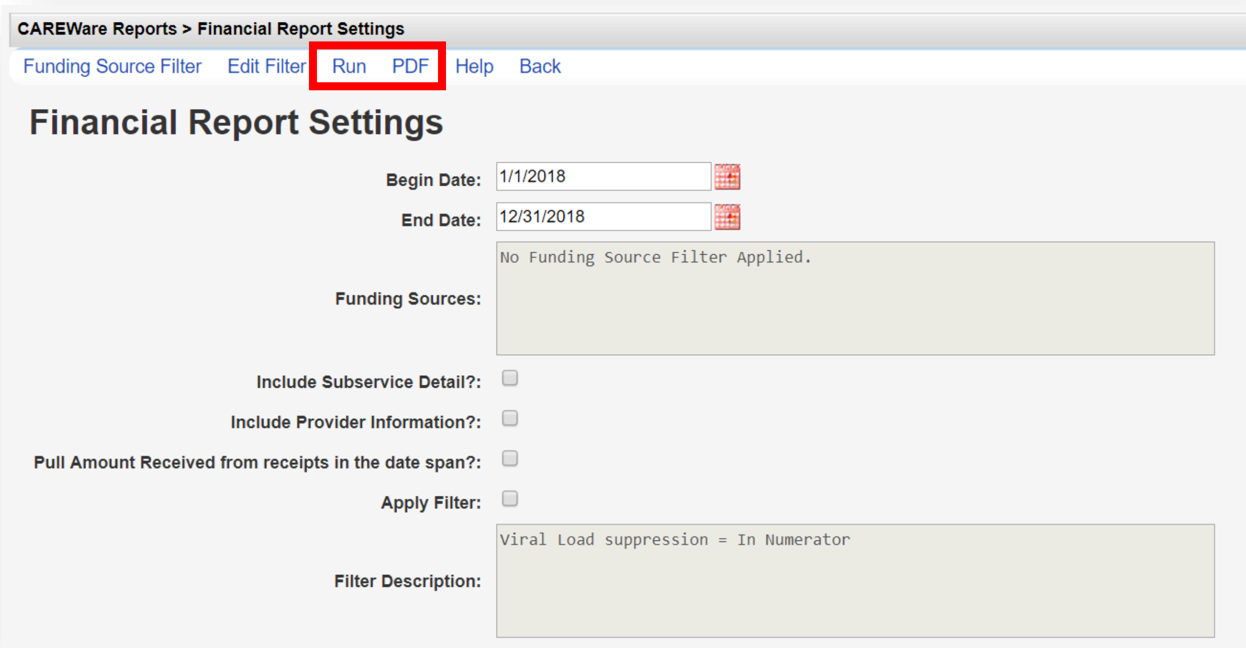
The Financial Report can be run to determine how much you've expended in a specific time frame for any or all service categories and subservices, if you have specified a service cost when you set up your contracts and services.

Even if you aren't tracking cost information, the Financial Report is an easy way to get a quick summary of unduplicated clients served within a specific date span, as well as a distribution of the number of clients for each HRSA Service Category.

The Financial Summary report can also display client totals and services for a single or multiple Funding Source(s).

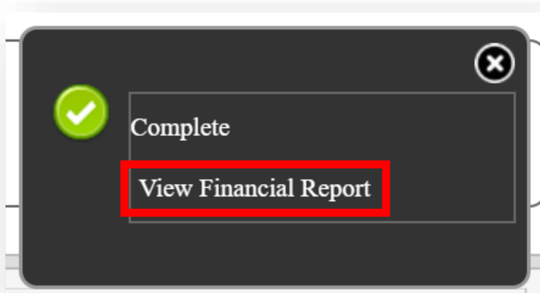
1. From the **Reports** menu, select the **Financial Report**.

2. Make your selections as detailed below:
   - Begin Date
   - End Date
   - **Funding Sources** can be edited under the Funding Source Filter link
   - Check **Include Subservice Detail** if you wish to see service category information broken down to the subservice level.
   - **Include Provider Information** is only relevant when you run a report on one provider; it includes provider address and phone number
   - Check **Pull Amount Received from receipts in the date span** if you wish to see the amount received from receipts between the begin and end date
   - You can **Apply Filter(s)** to use a custom report filter on your data to get more granular results. Click the **Edit Filter** link to *Manage*, *Add*, *Delete*, etc. filters.



3. Click **Run** to open the report in a new tab. Click **PDF** to open the report as a PDF.

4. Once you click **Run**, a report confirmation message will open in the upper right corner of the screen. Select **View Financial Report**. Your report will be display in a new tab.



CAREWare 6

Section 7:

Creating Basic Custom Reports

Adapted from HRSA Quick Start User Guides:
https://hab.hrsa.gov/program-grants-management/careware

PLEASE NOTE: The client data used in these manuals is purely fictional.

First Things First

Getting Started

- You must have the appropriate user privileges to create and run reports.
- You should have enough client data entered to see how report filtering works in practice.

Best practices

Check if there are pre-built reports that provide the desired information. Decide what the purpose of a custom report is. “I need a list of my clients with a break-out by race and gender,” for instance.

Diagram your report by selecting the fields you’ll need - in this case, client name, race, and gender.

You may need to add fields, at least temporarily, that confirm your reports are running as intended. For example, you create a filter for active clients only, so to make sure it’s working, you might add the “Enrollment status” field to your report. If the report runs correctly, and only Active results return in that column, you can delete that field from the report, if not needed in the results.

Demographic reports run differently than other reports:

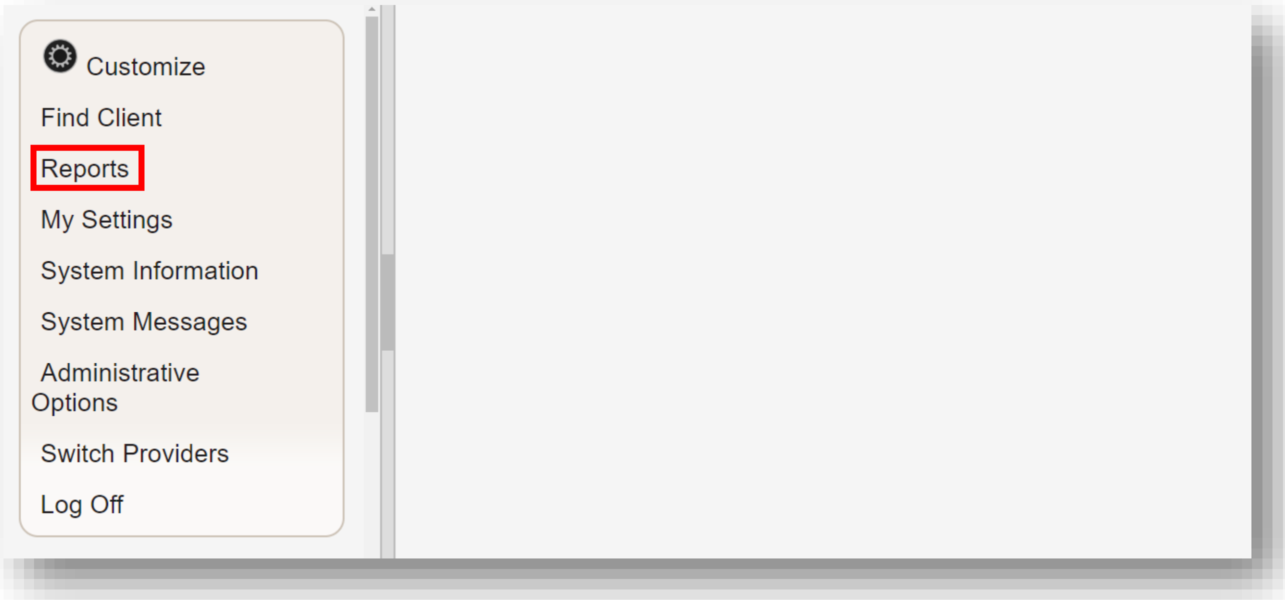
- Demographic reports display results per client. This can be useful in determining the number of clients in a given date span. With the use of calculated objects, demographic reports can be a powerful tool for data analysis (see Quick Start guide 8 - Advanced Reports).
- Other report types; such as services and labs display results ‘per service visit or lab date.’ This often results in several lines for each client, providing a detailed summary.

Creating Custom Reports

In addition to the prebuilt reports in CAREWare, you can use custom reports to view data sets tailored to your needs. It helps if you have some familiarity with SQL databases before you use custom reports, but if not, the report builder feature will help you design queries without prior database experience.

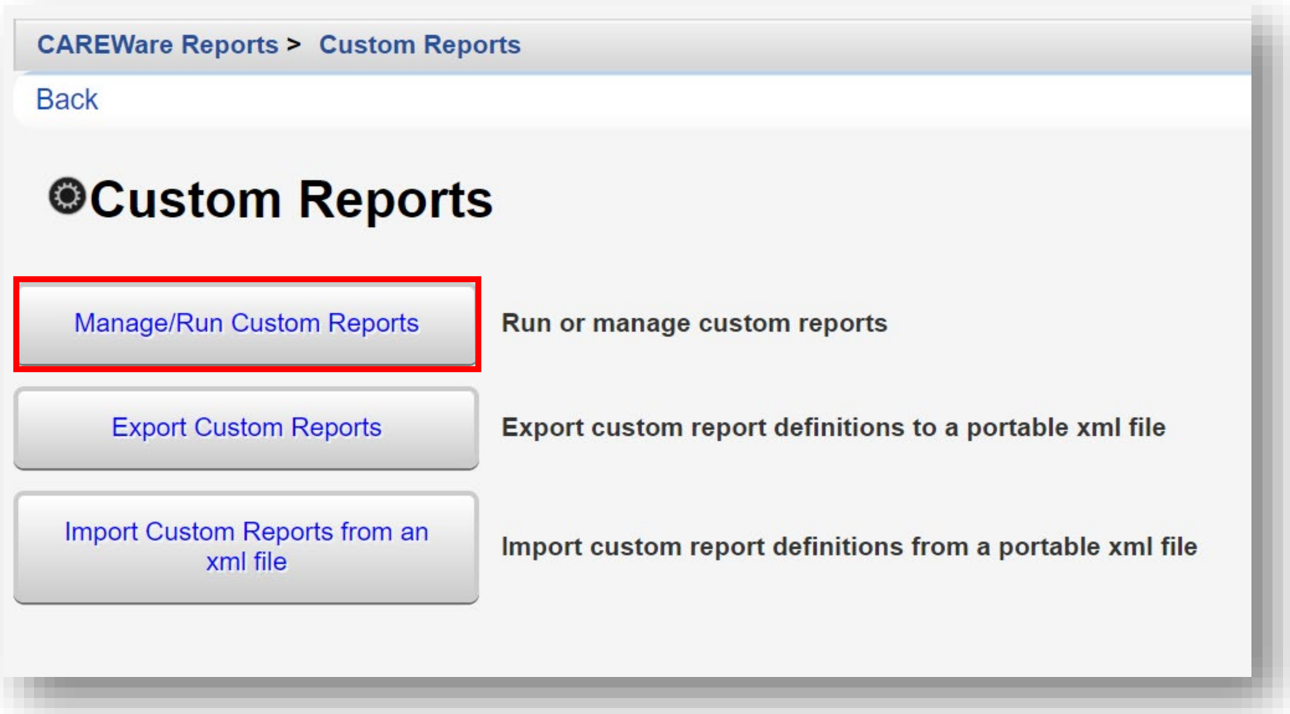
1. Log into CAREWare. For more details on how to do so, please refer to the **Navigating CAREWare Version 6.0 Guide**. If you have administrative privileges and are asked to choose between Central Administration and Provider (“Default” until you change the name) domain, you can log into either a Provider or the Central Administration domain. To run reports for multiple agencies within a provider network, log in to the Central Administration domain.

2. Select **Reports** from the **Main Menu**.

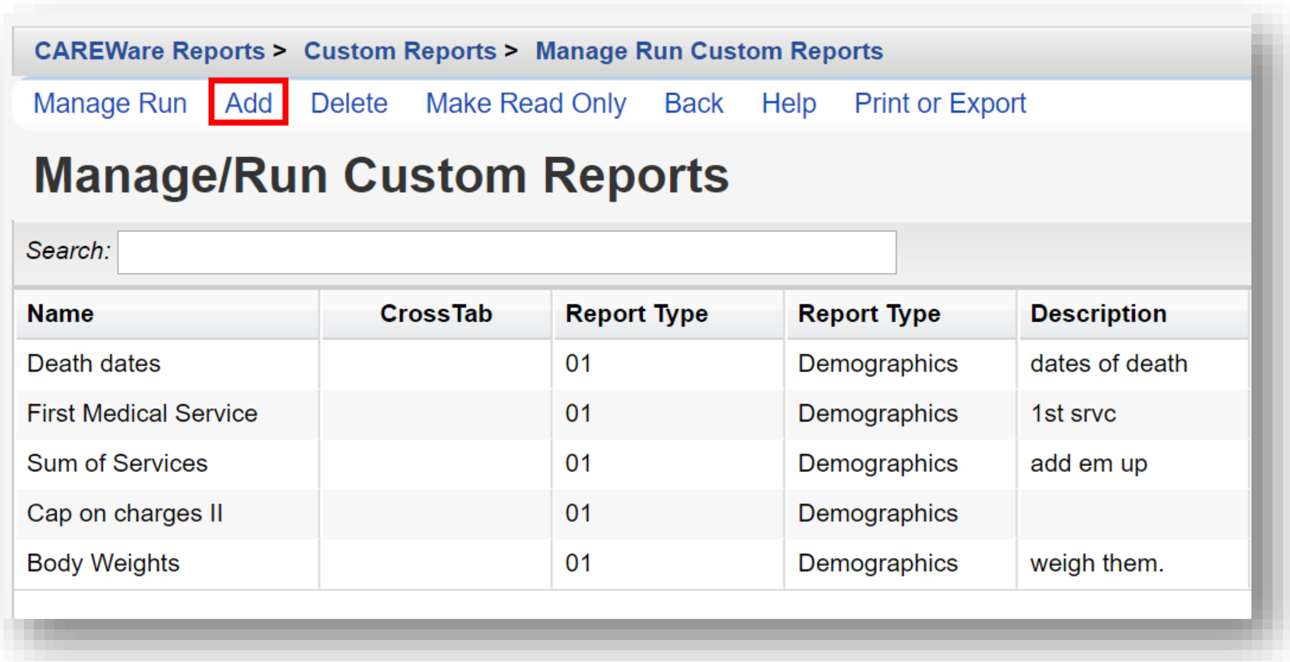


3. Select **Custom Reports** from the link menu.

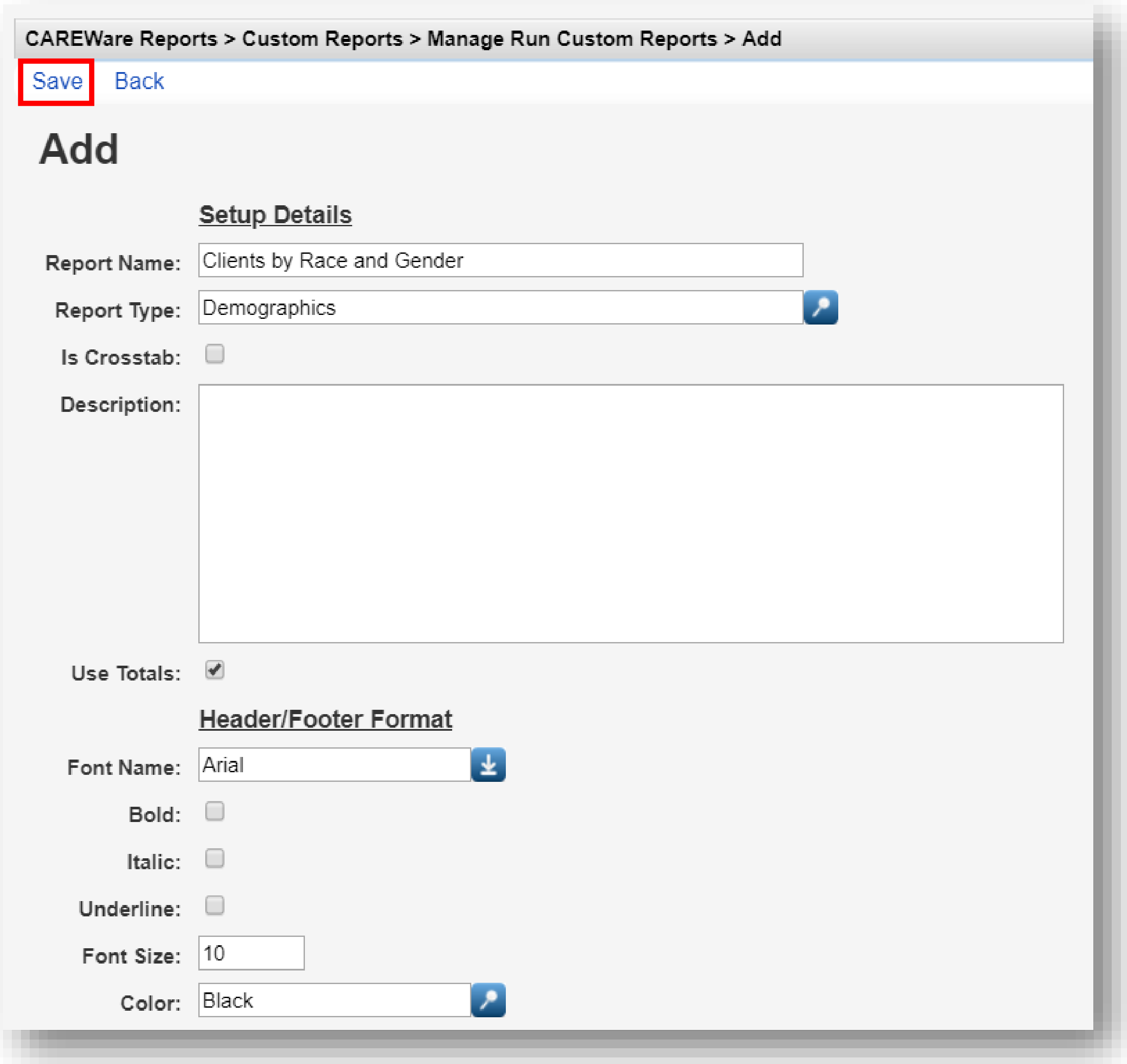
4. Select **Manage/Run Custom Reports** from the link menu.



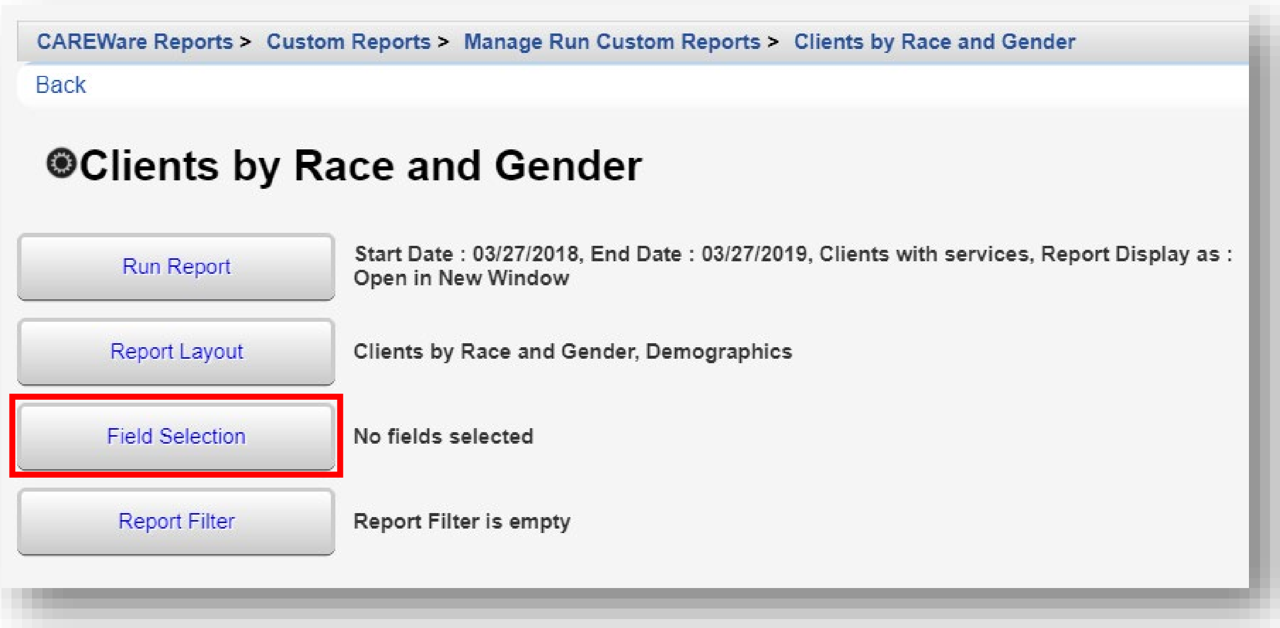
5. Select **Add**.



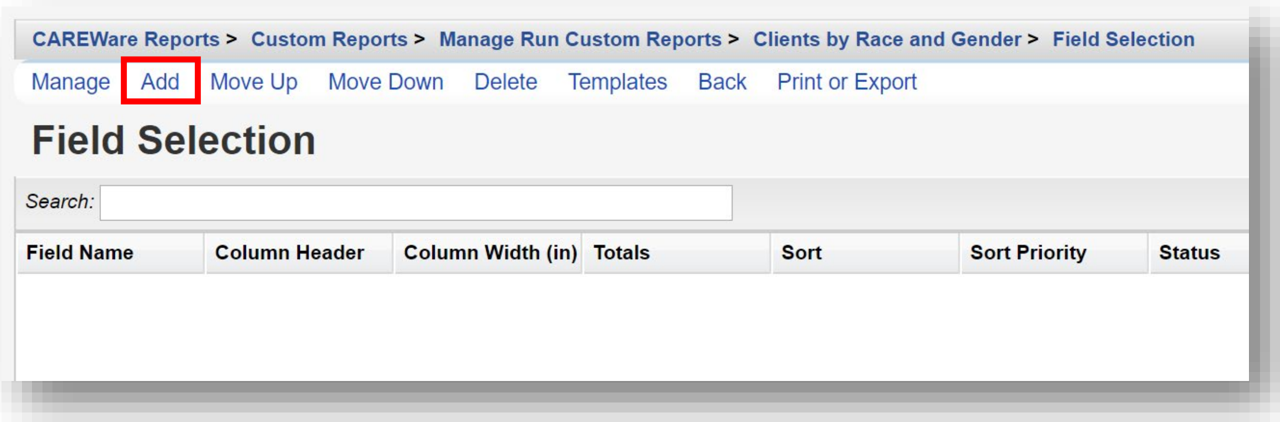
6. Enter in the following information (as applicable) and click **Save.**
    - Report Name
    - Report Type
    - Is Crosstab (checkbox)
    - Description (optional)
    - Use Totals (checkbox – will automatically sum total fields in the report)
    - Header/Footer Format (optional)



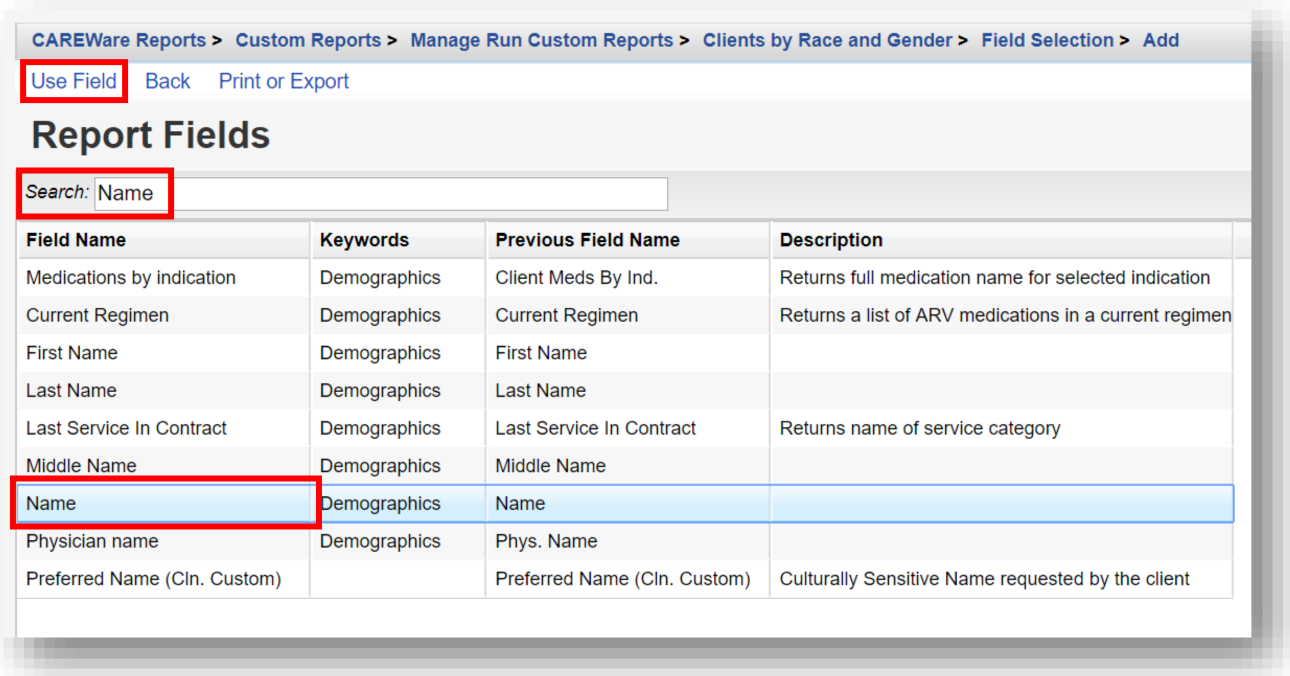
7. After clicking save, you will be on the custom report's menu. Select **Field Selection**.



8. Select **Add**.

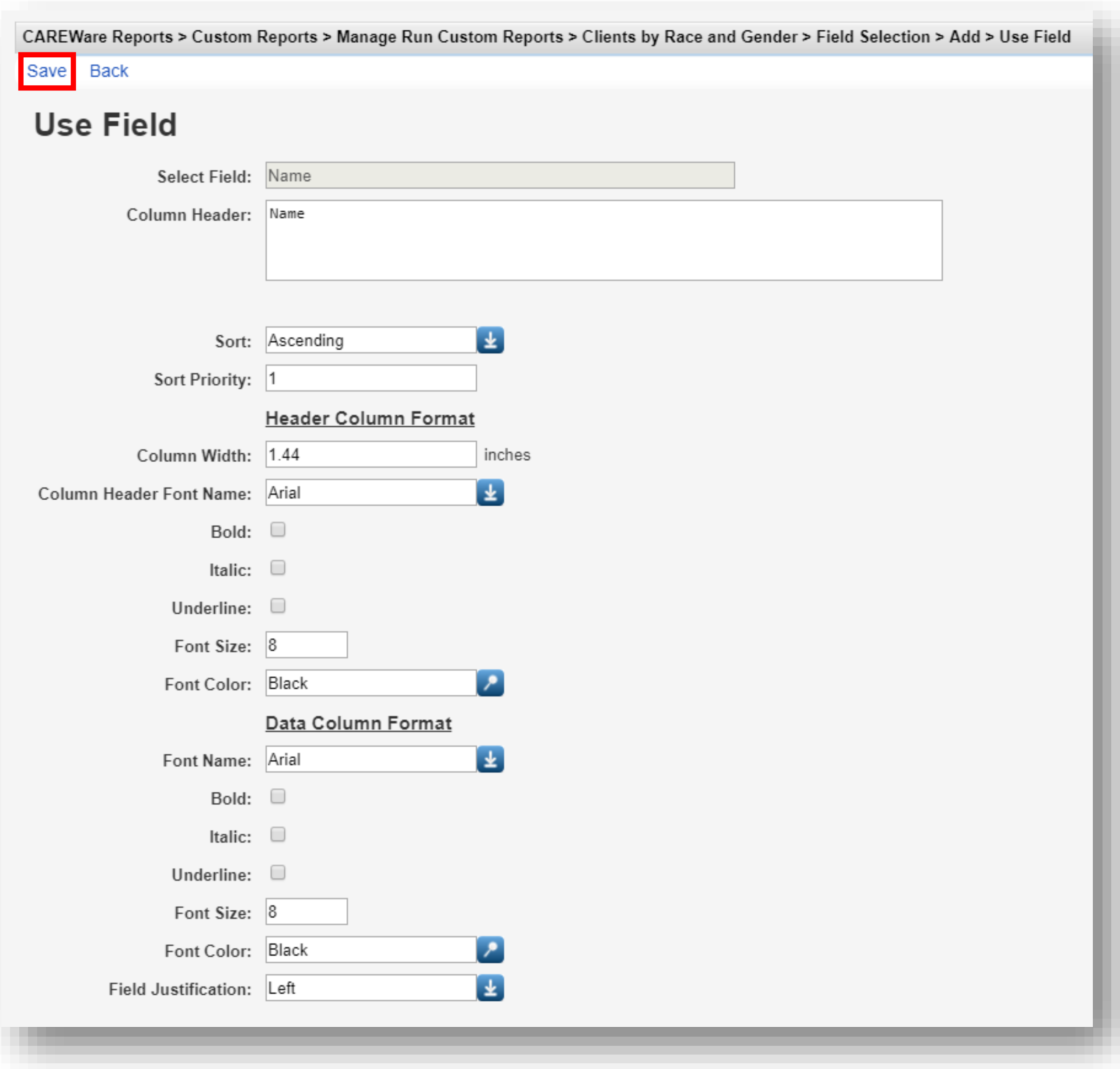


9. Use the *Search* box to find the fields to display in the report. In this example, “Name” was entered. Since the complete client name is desired for the report, the Name field has been selected. Click **Use Field**.



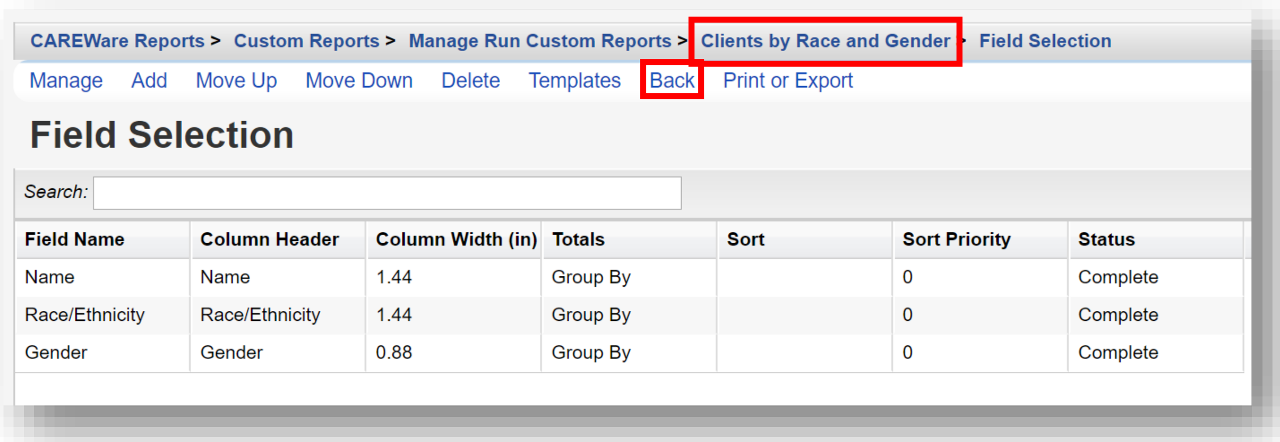
10. You will now be on the Use Field menu. Enter in the following information (as applicable) and click **Save.**

- **Column Header**
- **Sort**
- **Sort Priority**
- **Header Column Format**
- **Data Column Format**

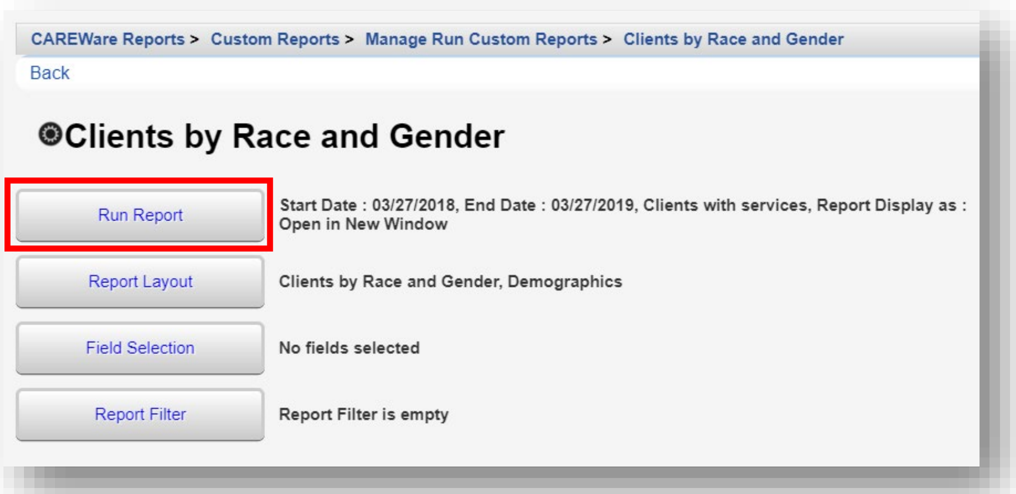


11. After clicking save, you will be on the selected field's menu. Return to the Field Selection menu by clicking **Field Selection** within the breadcrumb trail. Repeat steps 8 through 10 to add additional Report Field selections (such as *Race/Ethnicity* and *Gender*).

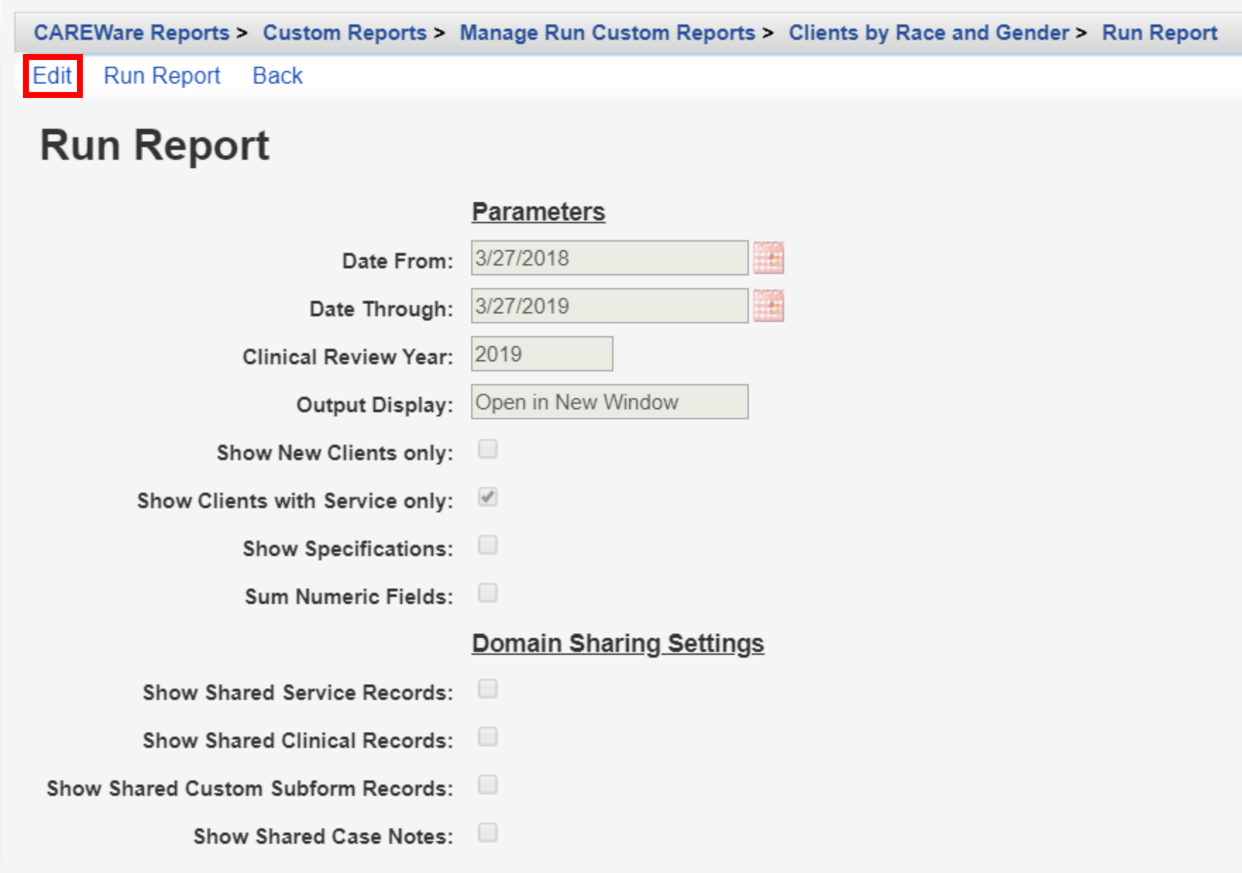
12. To Return to the custom report's menu, click the name of the custom report in the breadcrumb trail (in this example, "Clients by Race and Gender") or click **Back** from the Field Selection menu.



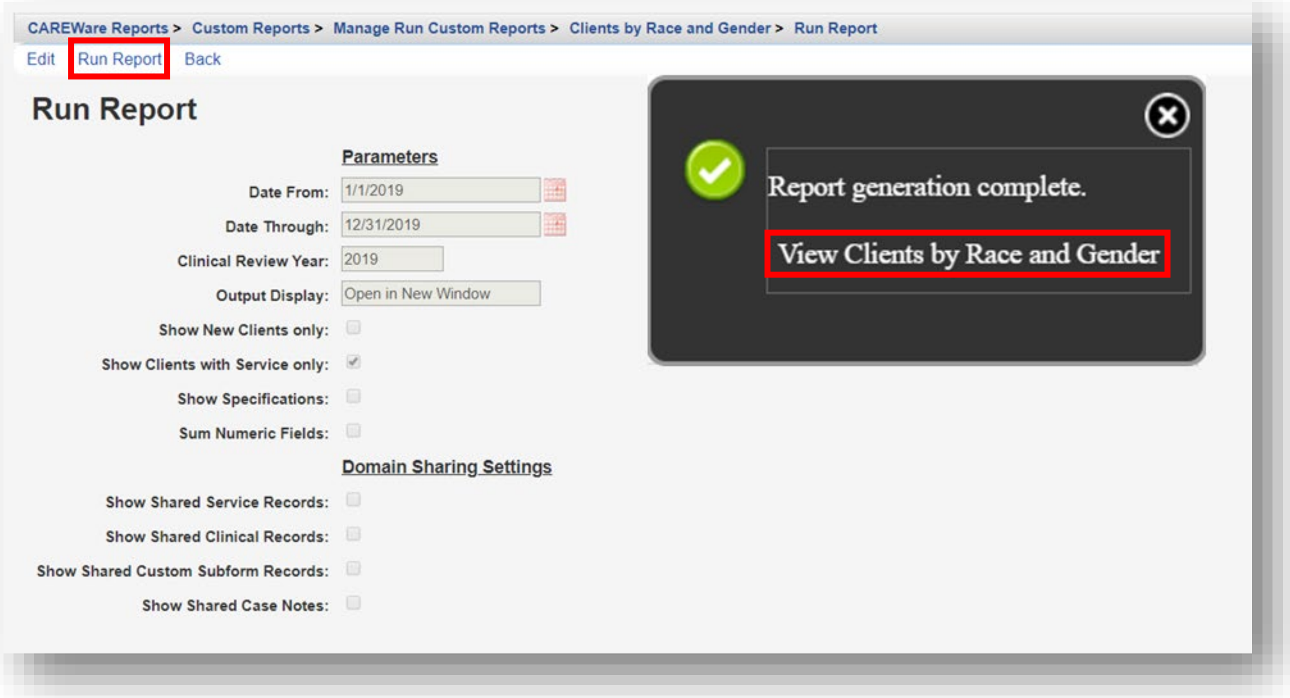
13. Click **Run Report**

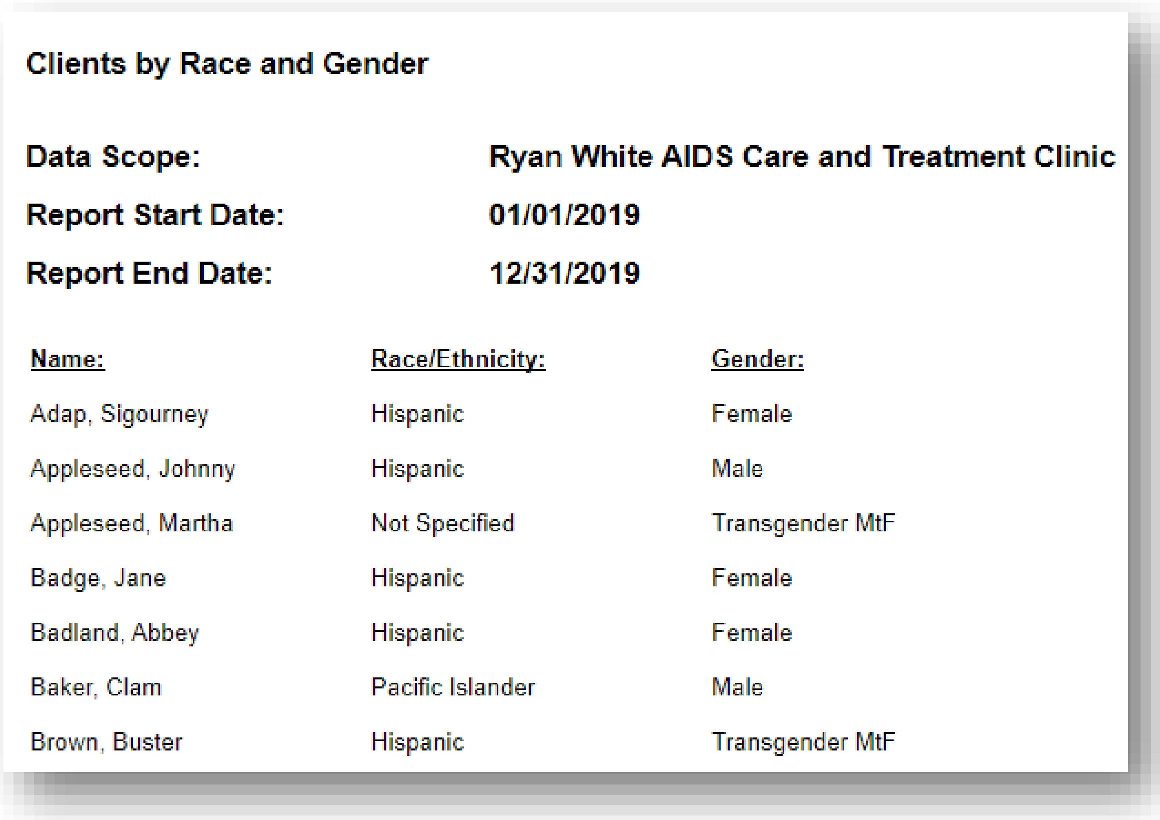


14. Click **Edit**. Select the following report parameters and click **Save** (will be visible after clicking **Edit**).
    - **Date From**
    - **Date Through**
    - **Clinical Review Year** (optional – typically matches the reporting year)
    - **Output Display**
      - Download as CSV
      - Open in New Window
      - Open as PDF
    - **Show New Client only** (check box)
    - **Show Clients with Service only** (check box – will only list clients with services within date span)
    - **Show Specifications** (check box – to list report criteria)
    - **Sum Numeric Fields** (check box)
    - **Domain Sharing Settings** (default value)



15. Click **Run Report** and then click **View [name of report]** (in this example, View Clients by Race and Gender). The report will appear in a new tab within your browser.





Clients by Race and Gender

Data Scope: **Ryan White AIDS Care and Treatment Clinic**

Report Start Date: **01/01/2019**

Report End Date: **12/31/2019**

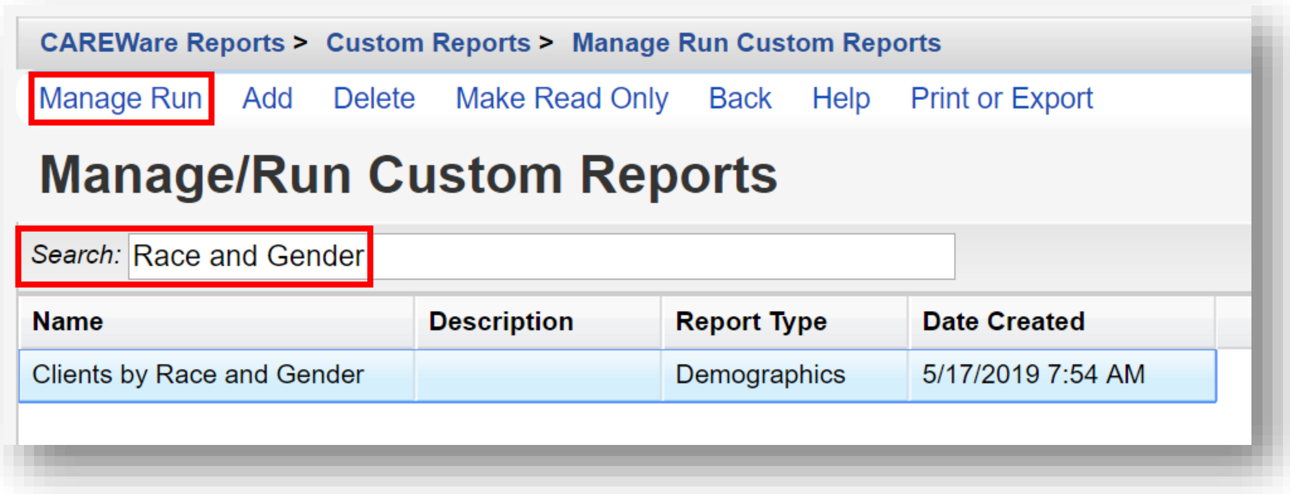
Name:	Race/Ethnicity:	Gender:
Adap, Sigourney	Hispanic	Female
Appleseed, Johnny	Hispanic	Male
Appleseed, Martha	Not Specified	Transgender MtF
Badge, Jane	Hispanic	Female
Badland, Abbey	Hispanic	Female
Baker, Clam	Pacific Islander	Male
Brown, Buster	Hispanic	Transgender MtF

Add Report Filters to "Clients by Race and Gender"

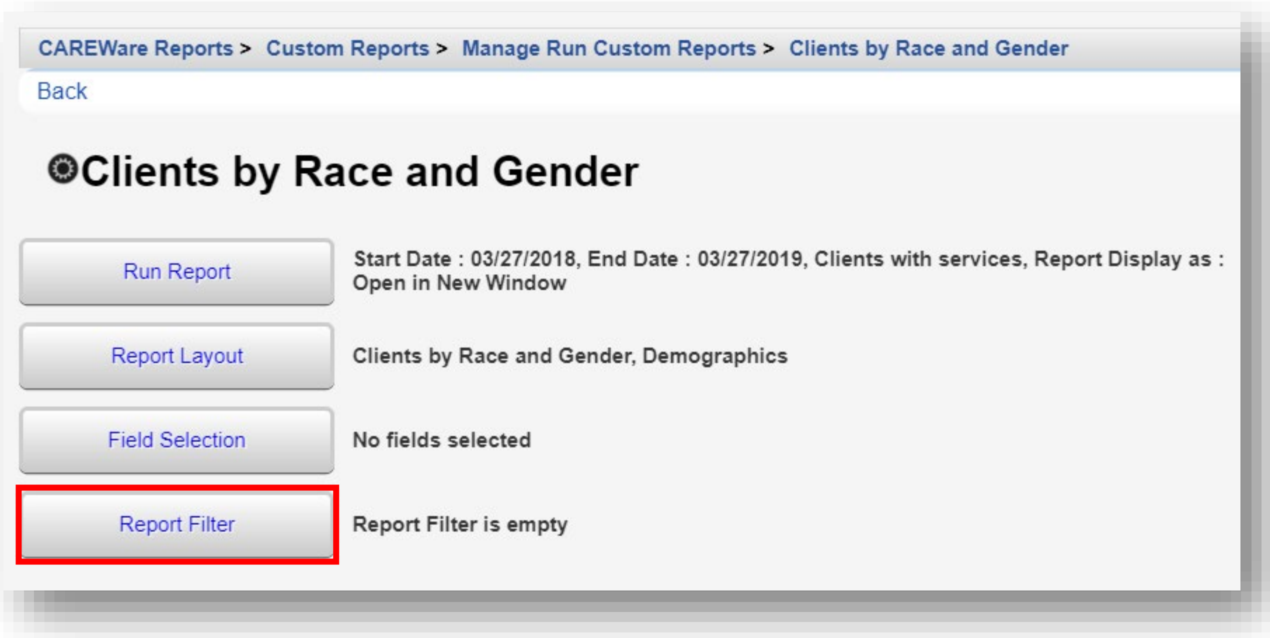
Use the **Report Filter** to choose how to sort your data. (It is a good idea to include Field Selections that will verify your filters are working as intended.) For example: if you filter your report for Females only, you would want to include the 'Gender' column among your Field Selections in the report.

You can add a filter at the same time you create your field selections, before saving your report. However, you may first want to run a report without filters to make sure you're getting data, and then add the filters.

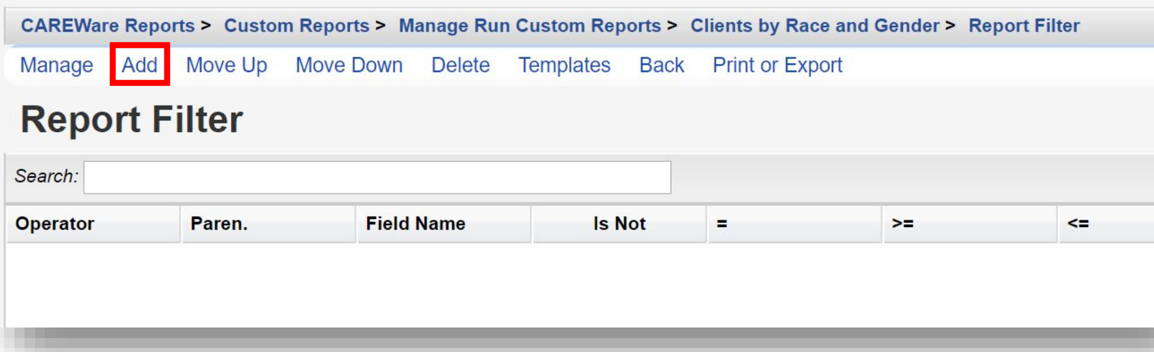
1. From the Manage/Run Custom Reports menu (see pages 2 through 3), use the *Search* box to find the relevant report. We will be using the custom report: "Clients by Race and Gender." Select the report and click **Manage Run**.



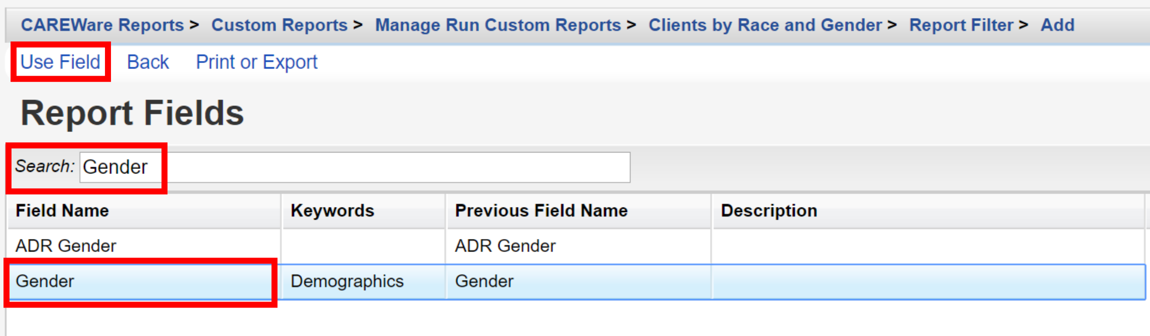
2. Click **Report Filter**.



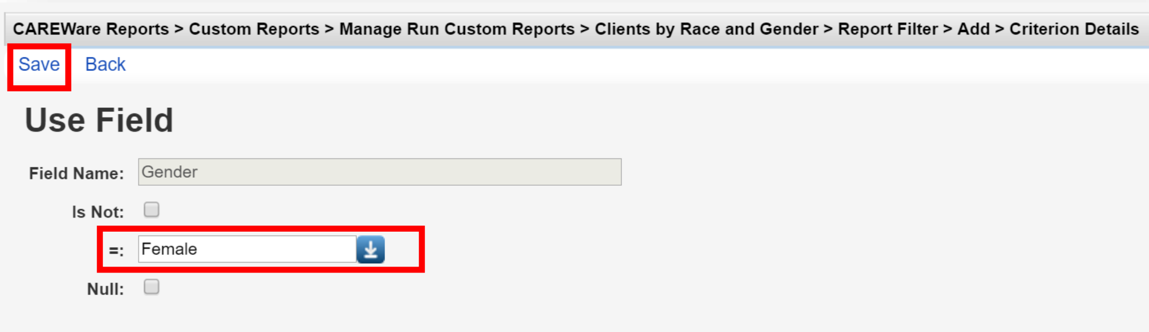
3. Click **Add**.



4. Enter "Gender" in the *Search* box to limit available Field Names. Chose the appropriate Field Name and select **Use Field**.



5. Select Female from drop-down box. Click **Save**.



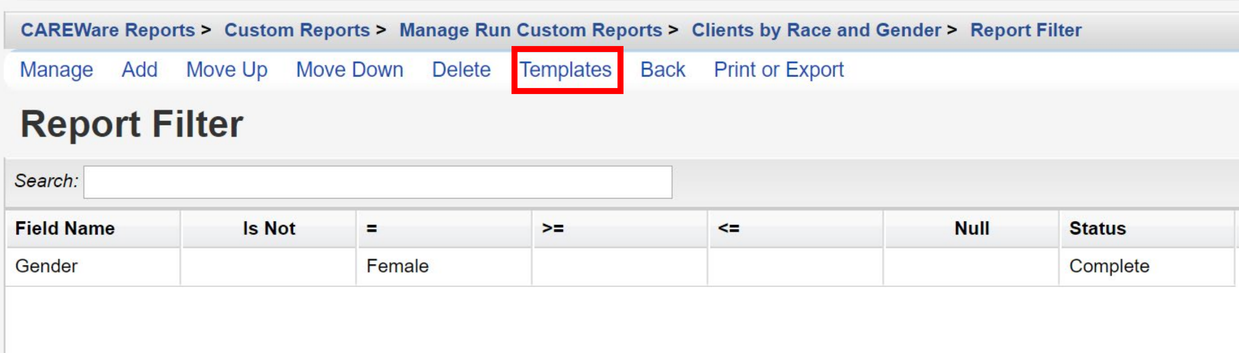
!

NOTE: The default value for Use Field is equal to "=". Checking the **Is Not** box will return all values unlike the one selected. For example, if you selected Gender IS NOT Female, the report would return Male, Transgender, Refused to Report, and Unknown values. Checking the **Null** box would return any values where the Gender field was missing.

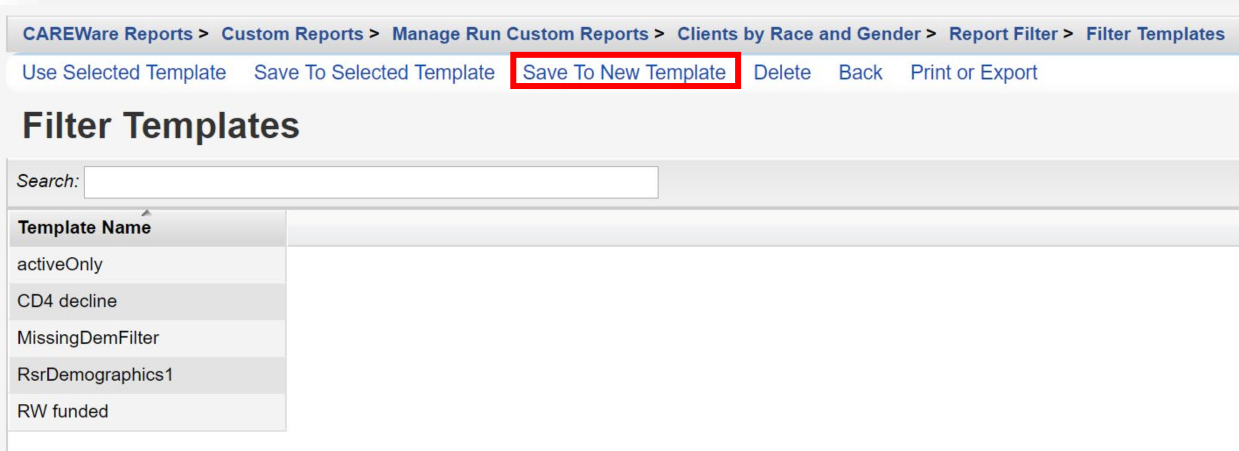
Saving Filters as Templates

After selecting your filter field(s), you may also save this field selection as a template. Saving as a template lets you apply the filter you've created to any report type.

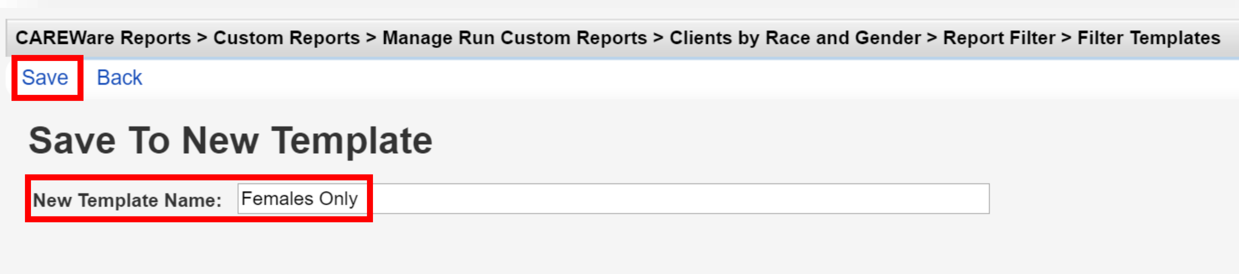
1. From the Report Filter menu, select **Templates**.



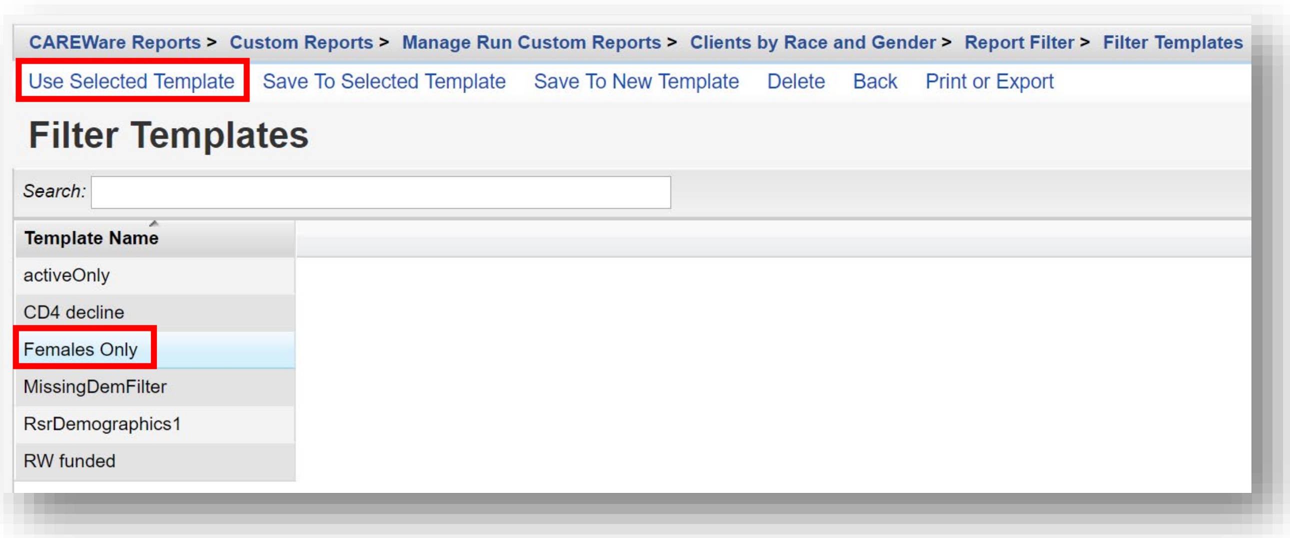
2. Select **Save to New Template**.



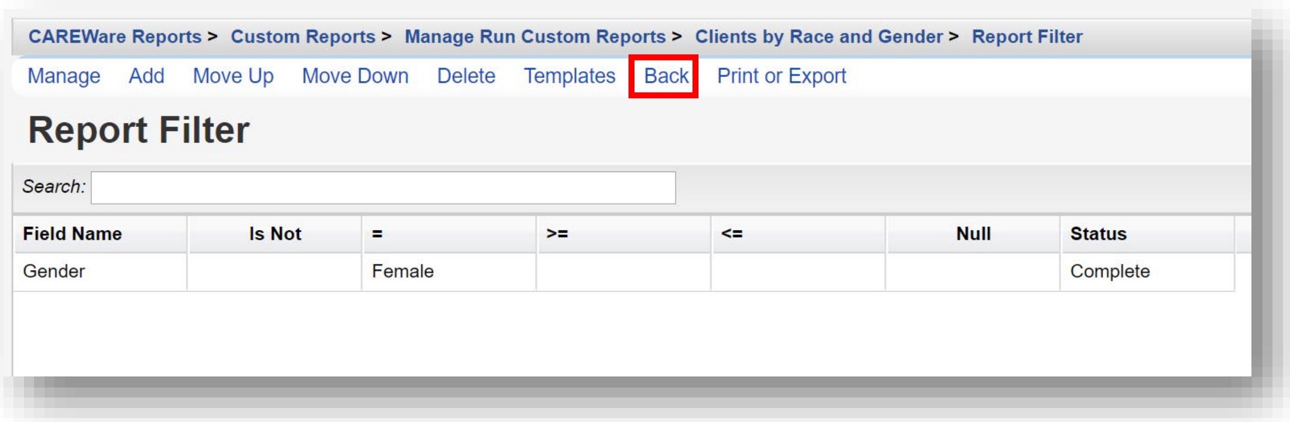
3. Enter the **New Template Name** and then click **Save**.



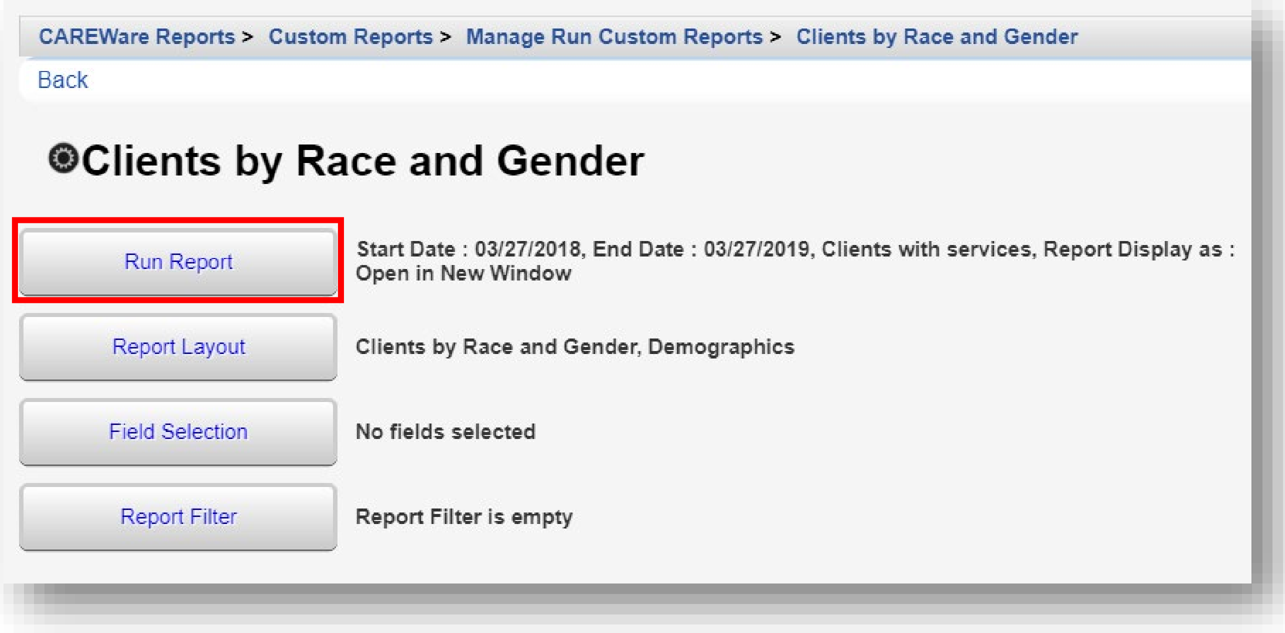
4. The filter template will appear on the Template Name list. In the future you can go to the Templates window and select a template to use as a filter or set of filters. Just select the filter and click **Use Selected Template**.



5. Select **Back**



6. Click **Run Report**. Follow steps 14 and 15 on page 9-10.



Crosstab Reports

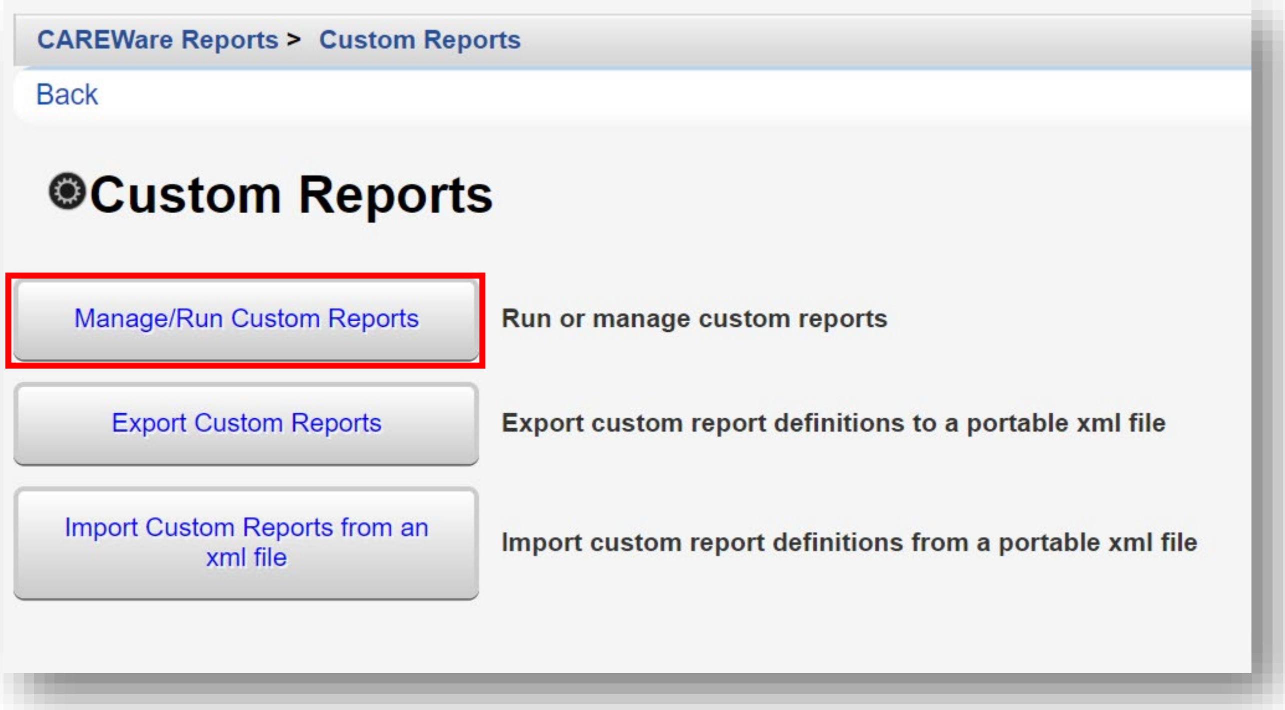
In the example above, we produced a report that listed each client separately. This is especially helpful when you need a list in order to identify specific clients requiring follow up (e.g. needing a vaccine, or who haven't had an office visit for more than 3 months).

In addition, custom reports can be very useful in assessing data quality, for example, by listing all the clients who have missing or out-of-range information for a certain field(s).

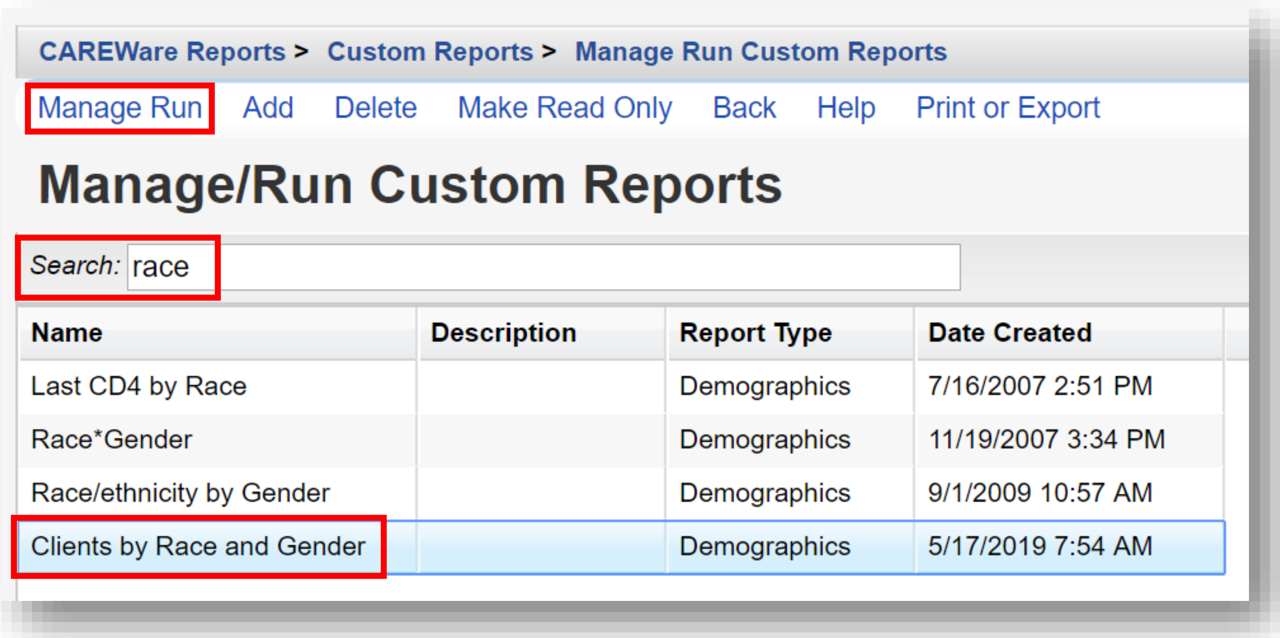
Crosstab Reports, however, allow you to quickly obtain the *counts* of clients for specific criteria. For example, you may need to report the number of clients you are serving cross-classified by race/ethnicity and gender, or by HIV status and CD4 group. The crosstab wizard allows you to generate client counts.

Crosstabs have a row, column, and, if specified, a strata field. We will use the custom report created in the previous step and change the report type to a Crosstab.

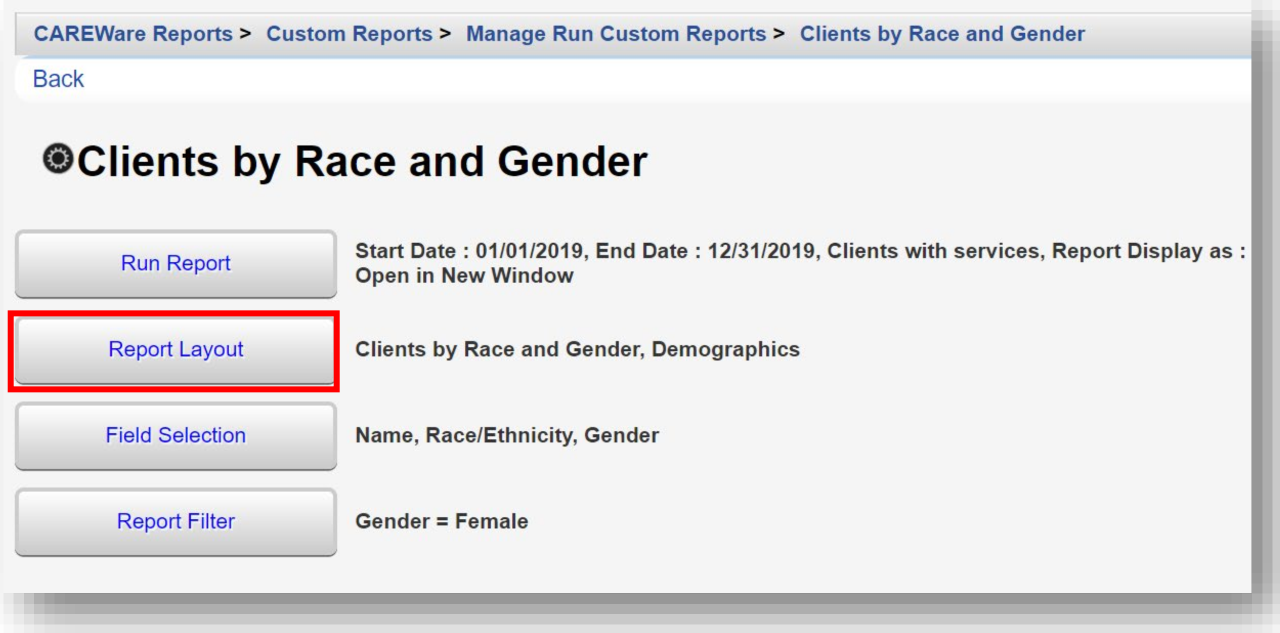
1. From the Custom Reports menu, click **Manage/Run Custom Reports**.



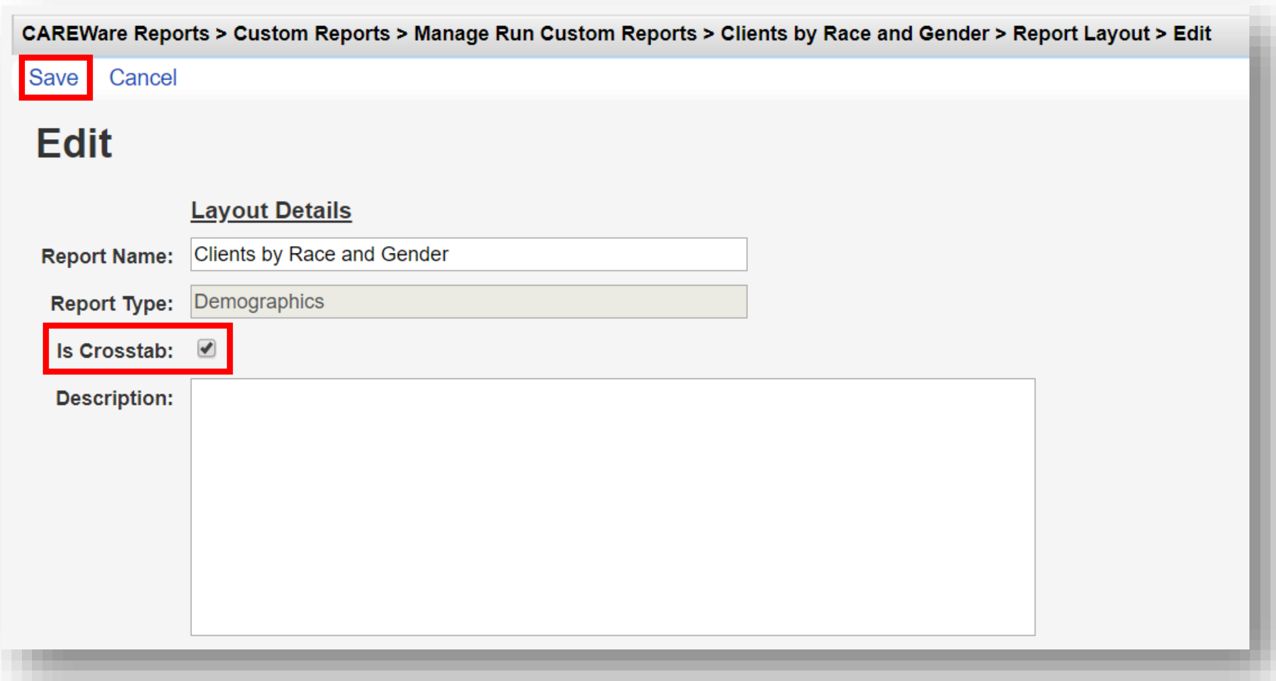
2. Use the *Search* box to filter the existing custom reports. Select the report **Name** and click **Manage / Run**.



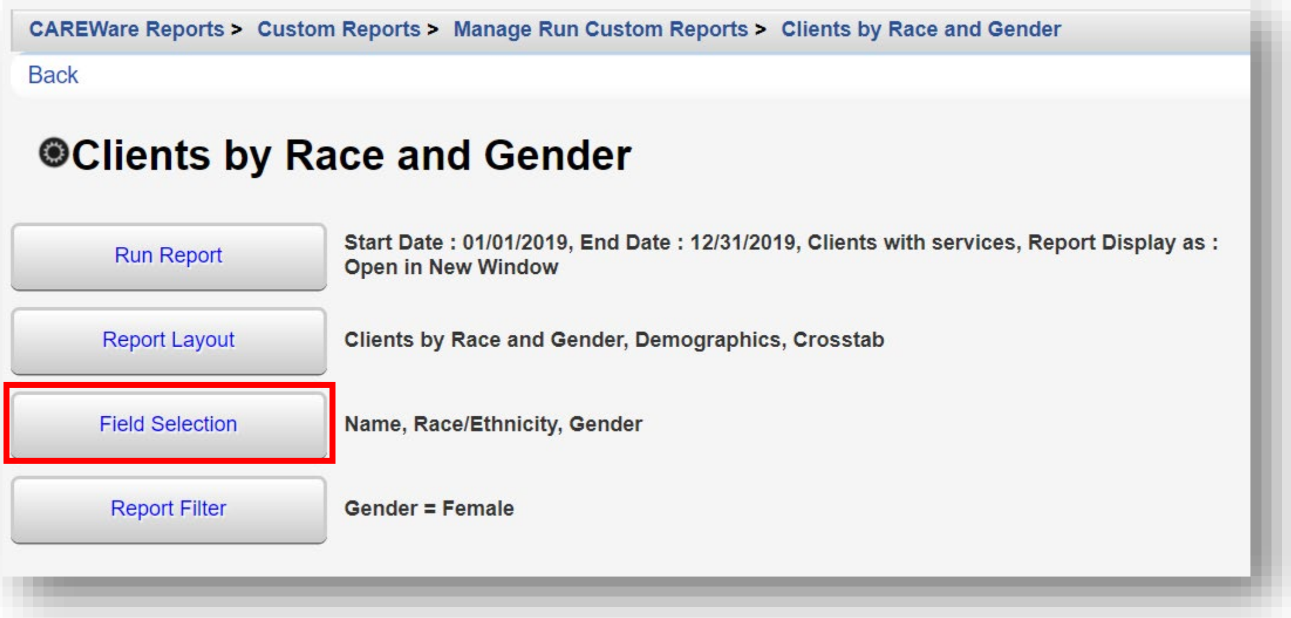
3. Select **Report Layout.**



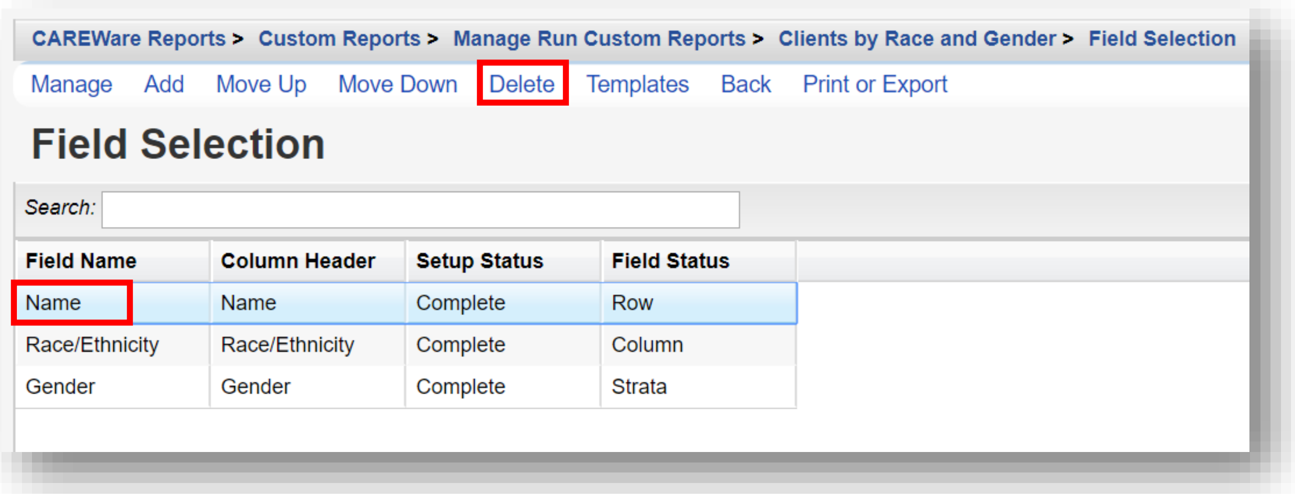
4. Select **Edit** (located where Save is in the screenshot below). Select the **Is Crosstab** checkbox. Click **Save**.



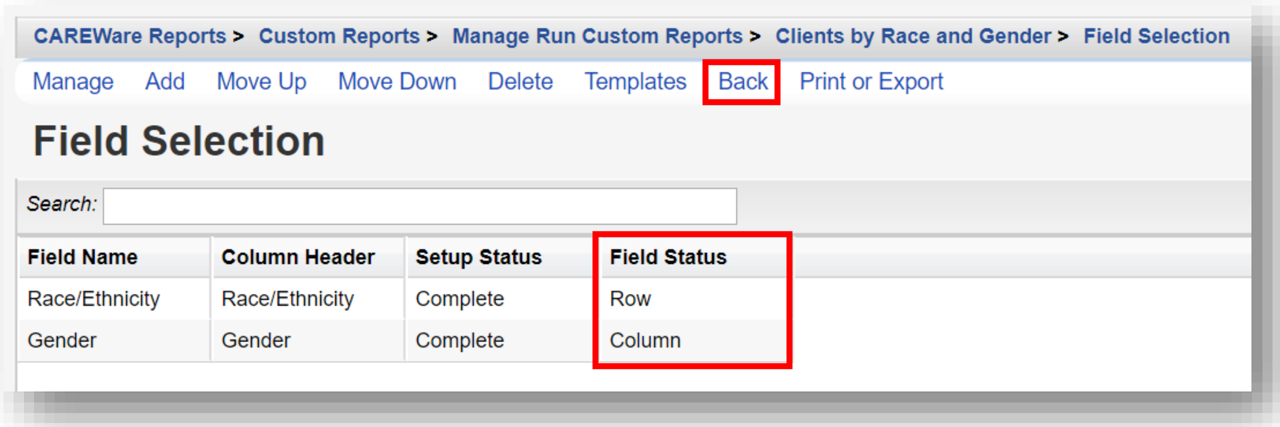
5. After clicking save, click **Field Selection** from the menu.



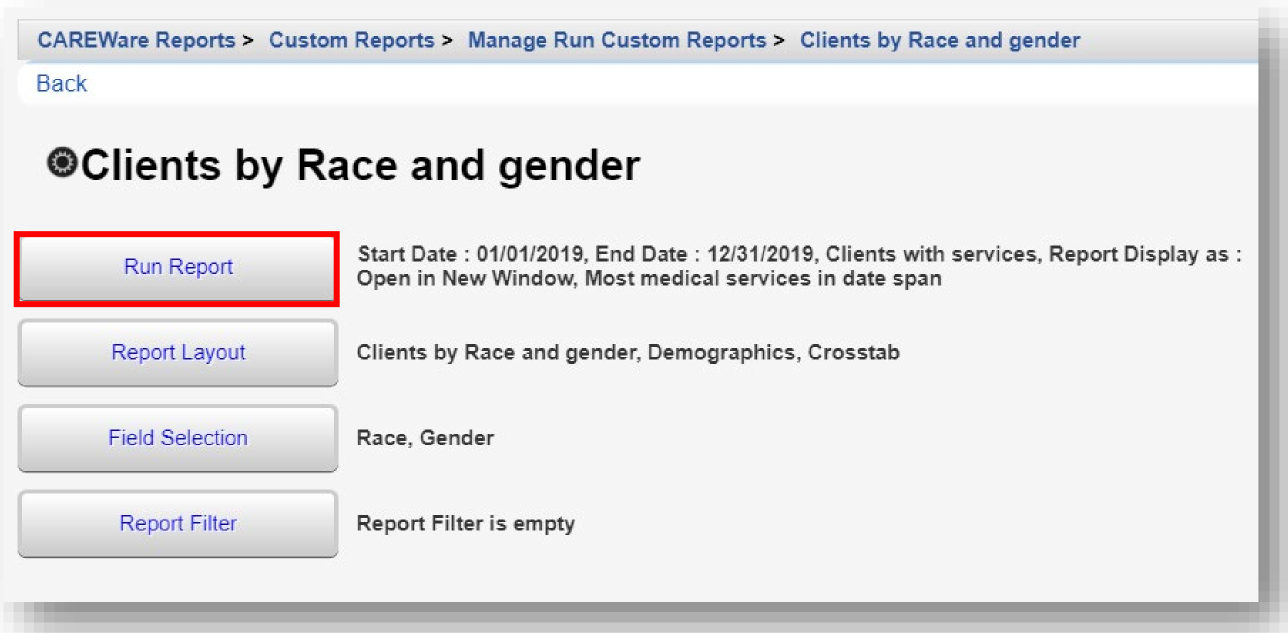
6. Confirm the Field Names are correct. To remove a Field, select it and click **Delete**. In this example, we are deleting the "Name" field.



7. Race/Ethnicity will be the **Row** and Gender will be the **Column** of the Crosstab Report. Click **Back**.



8. Select Run Report.



9. A sample Crosstab report of Race/Ethnicity by Gender is provided below.

Clients by Race and Gender (Race/Ethnicity by Gender)

Data Scope: Ryan White AIDS Care

Race/Ethnicity by Gender

Race/Ethnicity:	Total:	Col. %:	Female:	Male:	Transgender FtM:	Transgender MtF:
Asian	6	8.0	1 (16.7%)	5 (83.3%)	0	0
Black or African-American	20	26.7	11 (55.0%)	8 (40.0%)	0	1 (5.0%)
Hispanic	24	32.0	6 (25.0%)	14 (58.3%)	1 (4.2%)	3 (12.5%)
More than one race	5	6.7	1 (20.0%)	3 (60.0%)	0	1 (20.0%)
Not Specified	3	4.0	0	3 (100.0%)	0	0
Pacific Islander	1	1.3	0	1 (100.0%)	0	0
White (non-Hispanic)	16	21.3	5 (31.3%)	11 (68.8%)	0	0
Total:	75	100.0	24 (32.0%)	45 (60.0%)	1 (1.3%)	5 (6.7%)

Number of Records: 8

- **Total** column: lists the number of clients by race.
- **Col. %** column: lists the percent distribution of clients by Race.
- **Female, Male, Transgender FtM, and Transgender MtF** columns: show the gender distribution for each race category.

In the example above, Hispanic clients are 25% female and about 60% male clients, whereas about 70% of white clients are male.

Crosstab Report (Adding a Strata field)

To see the race and gender distribution of clients by HIV risk, you can add **HIV Risk Factor** as a third Field Selection or **Strata** field.

1. From the Field Selection menu (see page 19), click **Add**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Field Selection

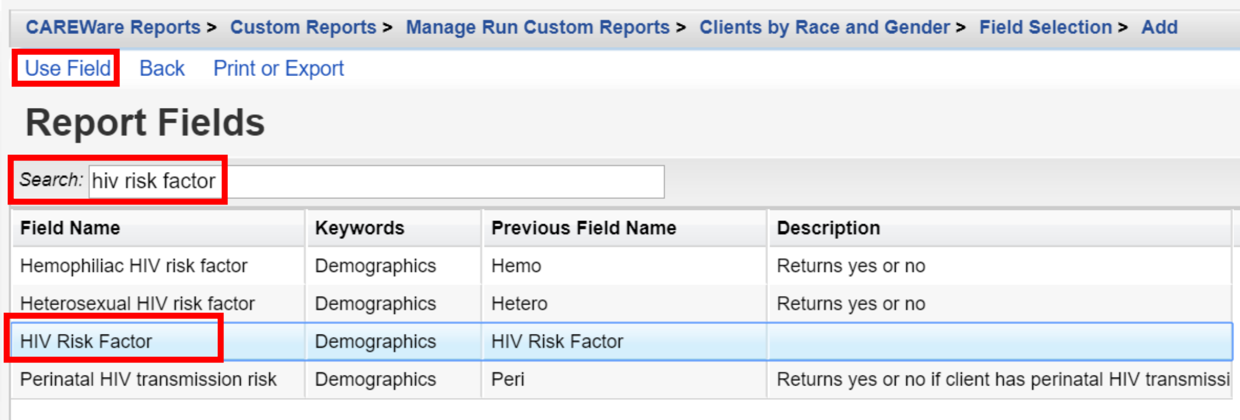
Manage Add Move Up Move Down Delete Templates Back Print or Export

Field Selection

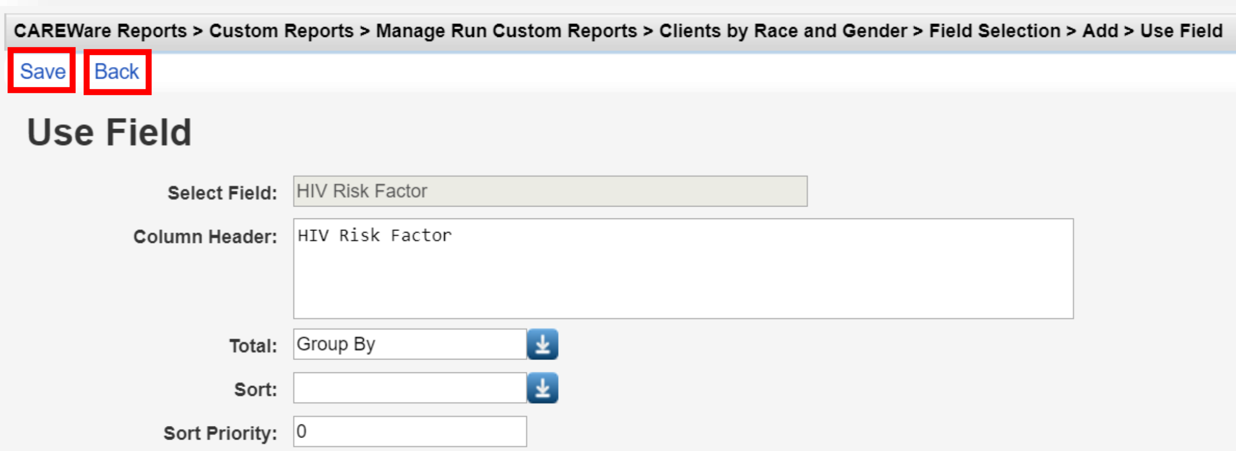
Search:

Field Name	Column Header	Setup Status	Field Status
Race/Ethnicity	Race/Ethnicity	Complete	Row
Gender	Gender	Complete	Column

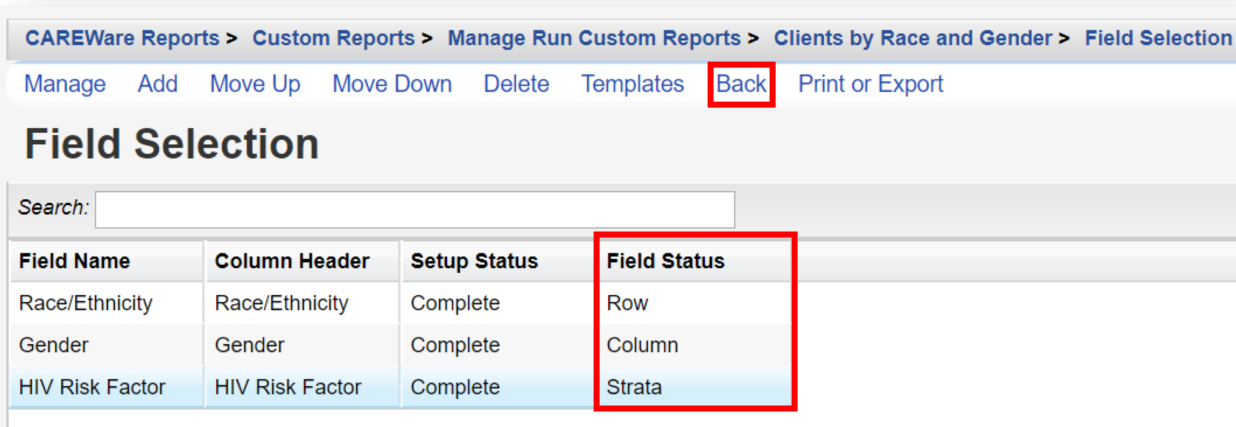
2. Use the *Search* box to find the desired Field Name. Choose the appropriate Field Name (in this example we are adding HIV Risk Factor) and select **Use Field**.



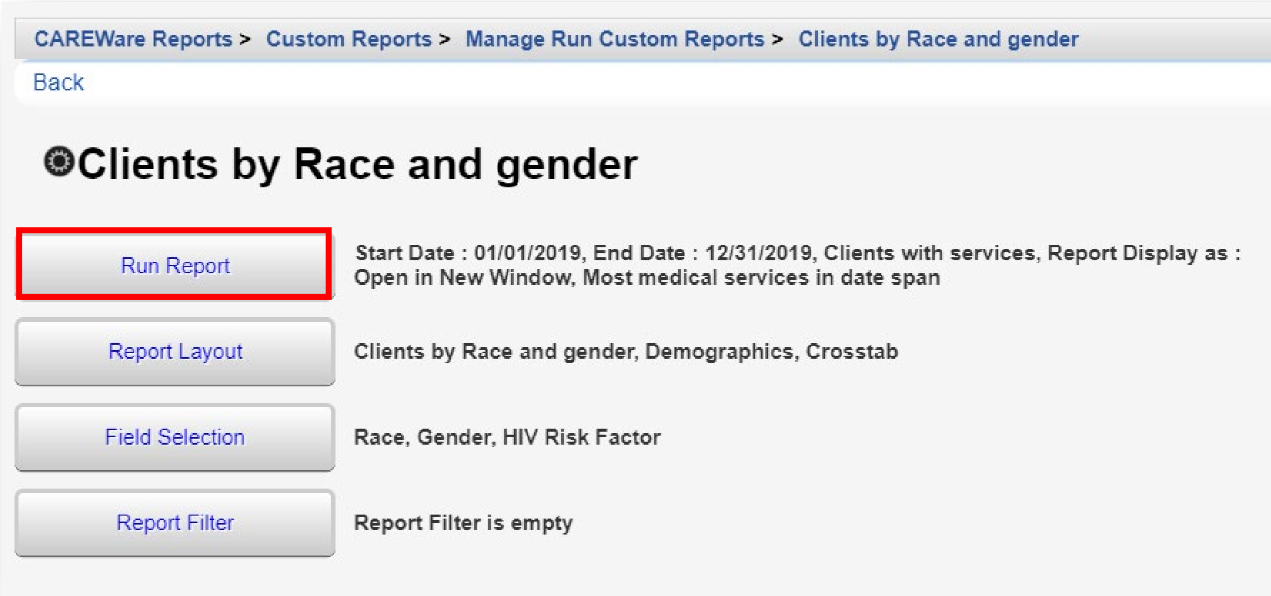
3. Click **Save**, then **Back**.



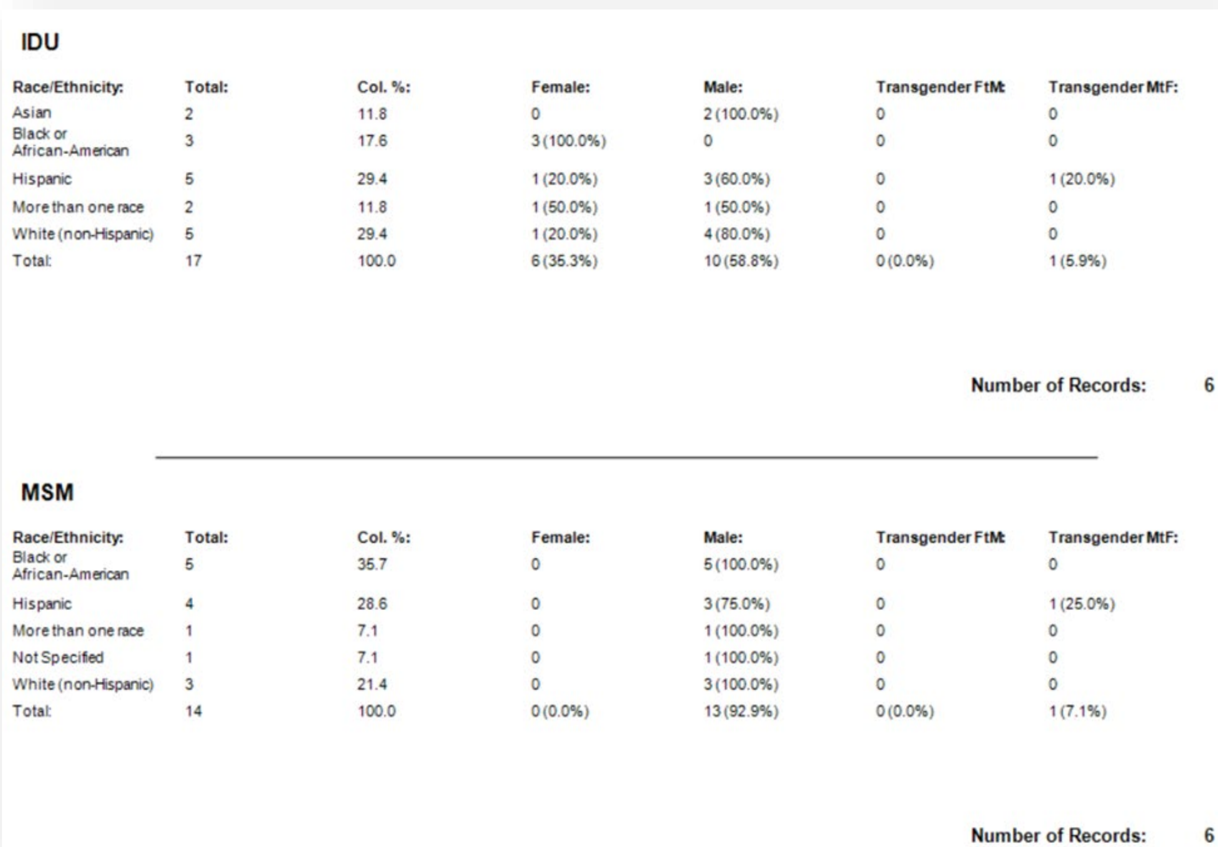
4. Race/Ethnicity will be the **Row**, Gender will be the **Column**, and HIV Risk Factor will be the **Strata** of the Crosstab Report. Click **Back**.



5. Select **Run Report**.



6. A sample (excerpt) Crosstab report of Race/Ethnicity by Gender and HIV Risk Factor is provided below.



IDU

Race/Ethnicity:	Total:	Col. %:	Female:	Male:	Transgender FtM:	Transgender MtF:
Asian	2	11.8	0	2 (100.0%)	0	0
Black or African-American	3	17.6	3 (100.0%)	0	0	0
Hispanic	5	29.4	1 (20.0%)	3 (60.0%)	0	1 (20.0%)
More than one race	2	11.8	1 (50.0%)	1 (50.0%)	0	0
White (non-Hispanic)	5	29.4	1 (20.0%)	4 (80.0%)	0	0
Total:	17	100.0	6 (35.3%)	10 (58.8%)	0 (0.0%)	1 (5.9%)

Number of Records: 6

MSM

Race/Ethnicity:	Total:	Col. %:	Female:	Male:	Transgender FtM:	Transgender MtF:
Black or African-American	5	35.7	0	5 (100.0%)	0	0
Hispanic	4	28.6	0	3 (75.0%)	0	1 (25.0%)
More than one race	1	7.1	0	1 (100.0%)	0	0
Not Specified	1	7.1	0	1 (100.0%)	0	0
White (non-Hispanic)	3	21.4	0	3 (100.0%)	0	0
Total:	14	100.0	0 (0.0%)	13 (92.9%)	0 (0.0%)	1 (7.1%)

Number of Records: 6

CAREWare 6

Section 8:

Advanced Custom Reports

Adapted from HRSA Quick Start User Guides:
https://hab.hrsa.gov/program-grants-management/careware

PLEASE NOTE: The client data used in these manuals is purely fictional.

First Things First

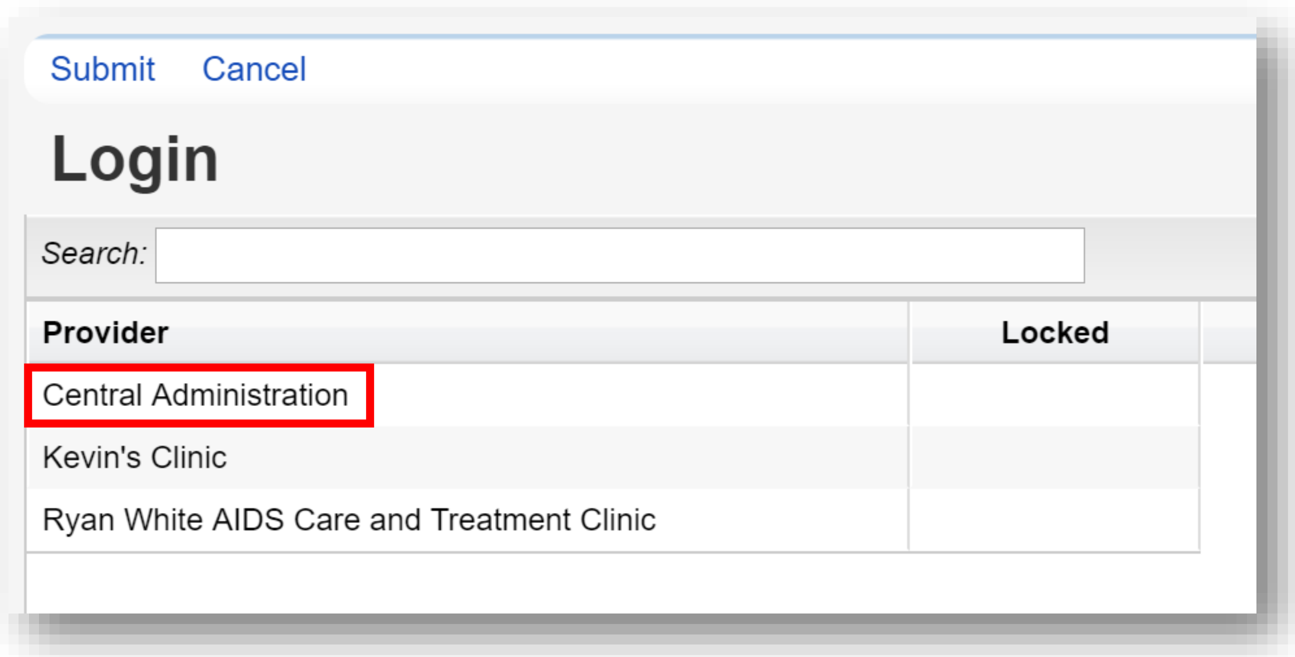
Getting Started

- **You must have the appropriate user privileges to run reports.**
- You should have a number of clients entered in the system so you can see how your reports will look.
- Please see Quick Start guide #7, “Basic Custom Reports,” before moving on to this guide. This manual assumes basic knowledge on creating basic custom reports.

Creating an advanced custom report

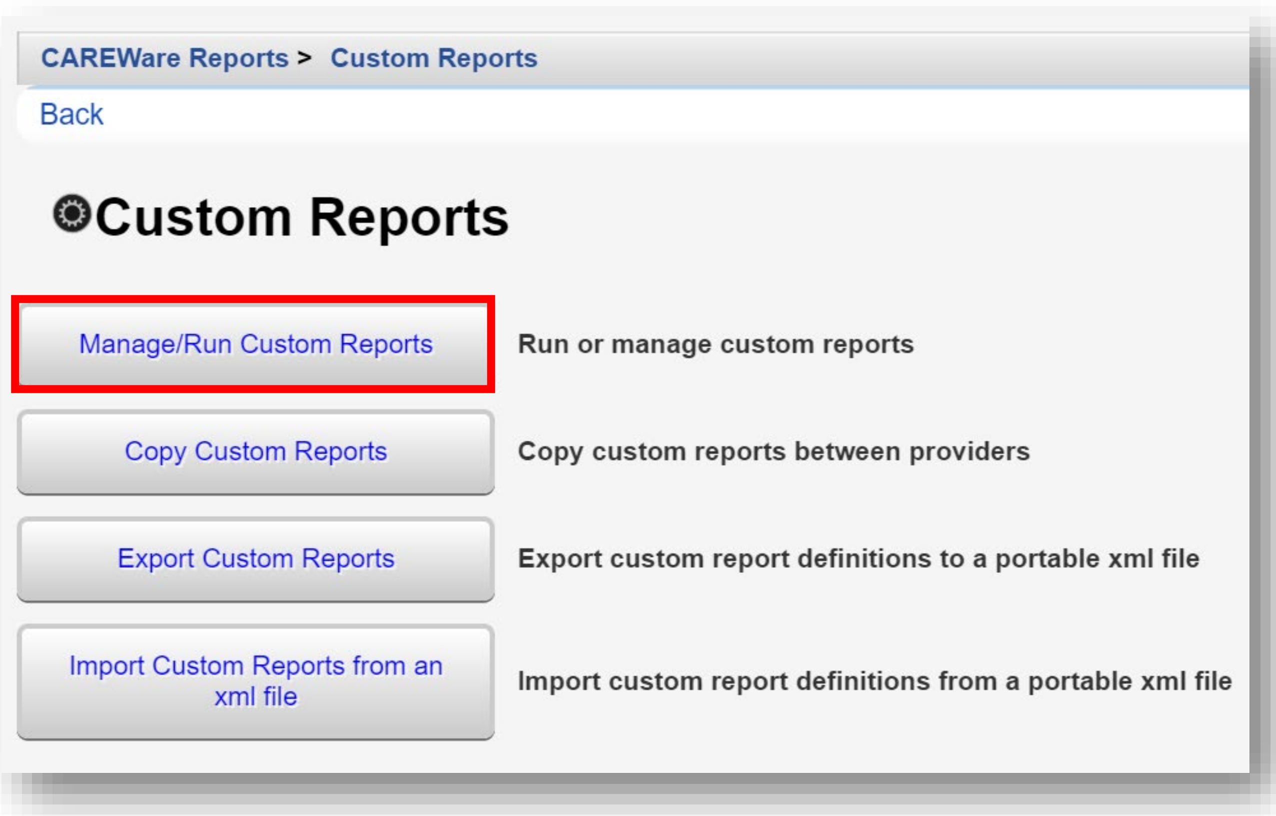
As you get comfortable with custom reports, you can create more complex reports. We will start by creating a “client list” report from the Central Administration domain.

1. Log into CAREWare. For more details on how to do so, please refer to **Quick Start Guide #1**. Choose **Central Administration**.

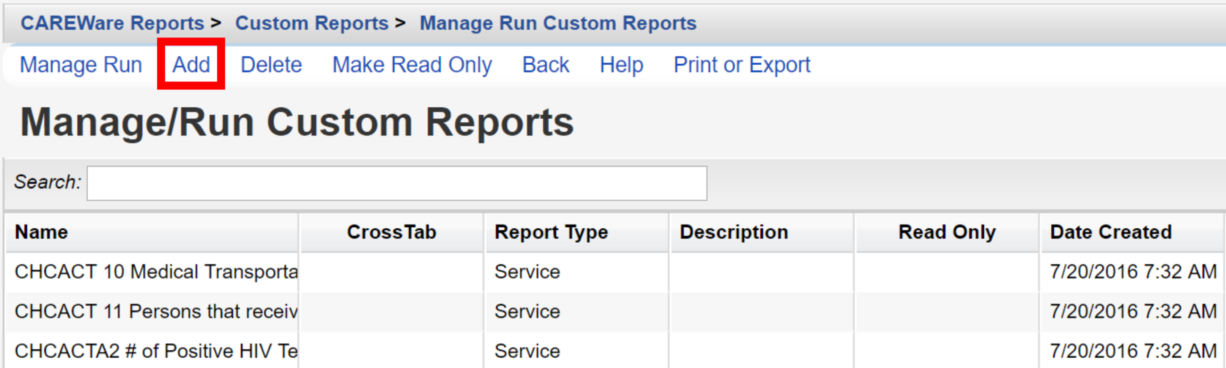


2. Select **Reports** from the Main Menu and then **Custom Reports** from the Menu of Links.

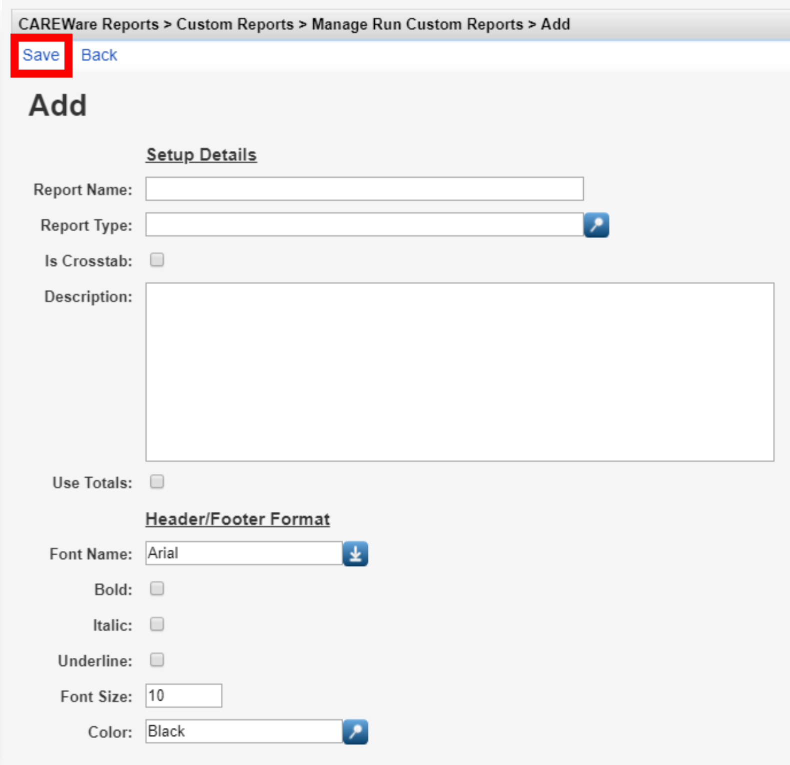
3. The Custom Reports menu will appear. Select **Manage/Run Custom Reports**.



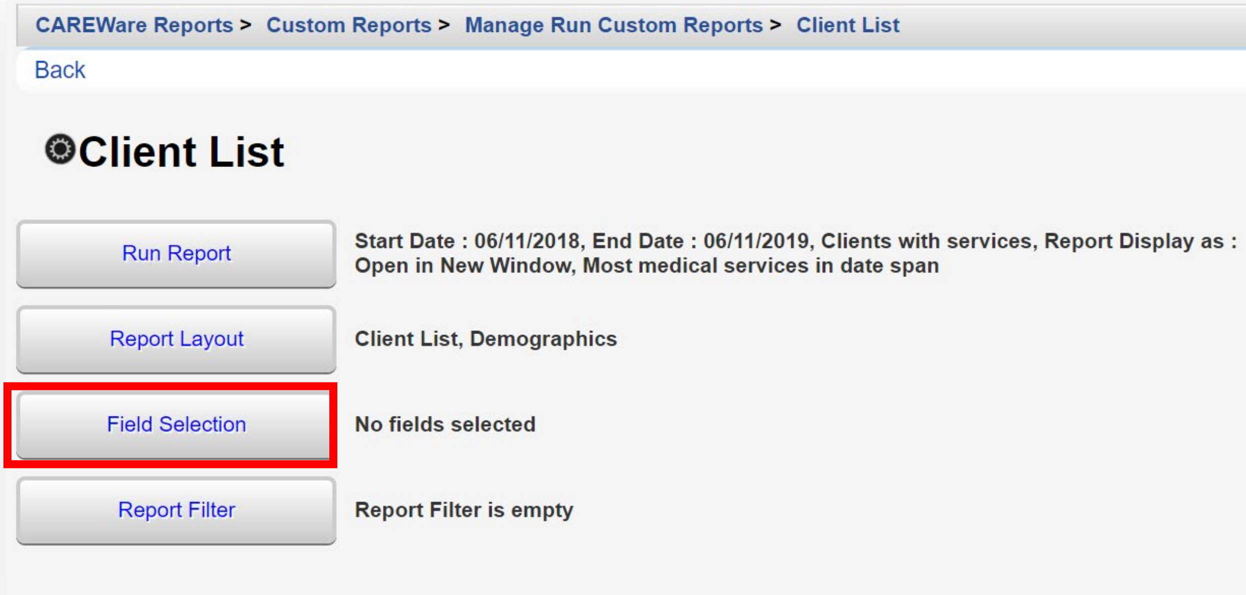
4. Select **Add** from the Action bar.



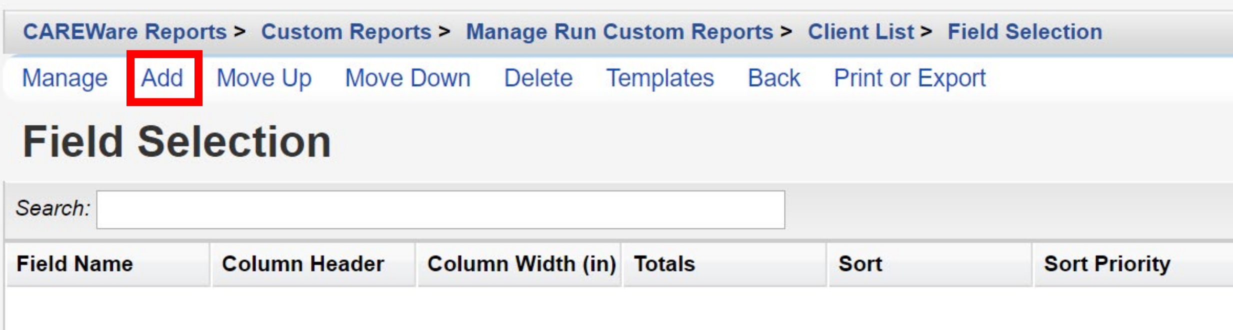
5. Enter in the following information (as applicable) and click **Save.**
   - **Report Name**
   - **Report Type**
   - **Is Crosstab (checkbox)**
   - **Description (optional)**
   - **Use Totals (checkbox – will automatically sum total fields in the report)**
   - **Header/Footer Format (optional)**



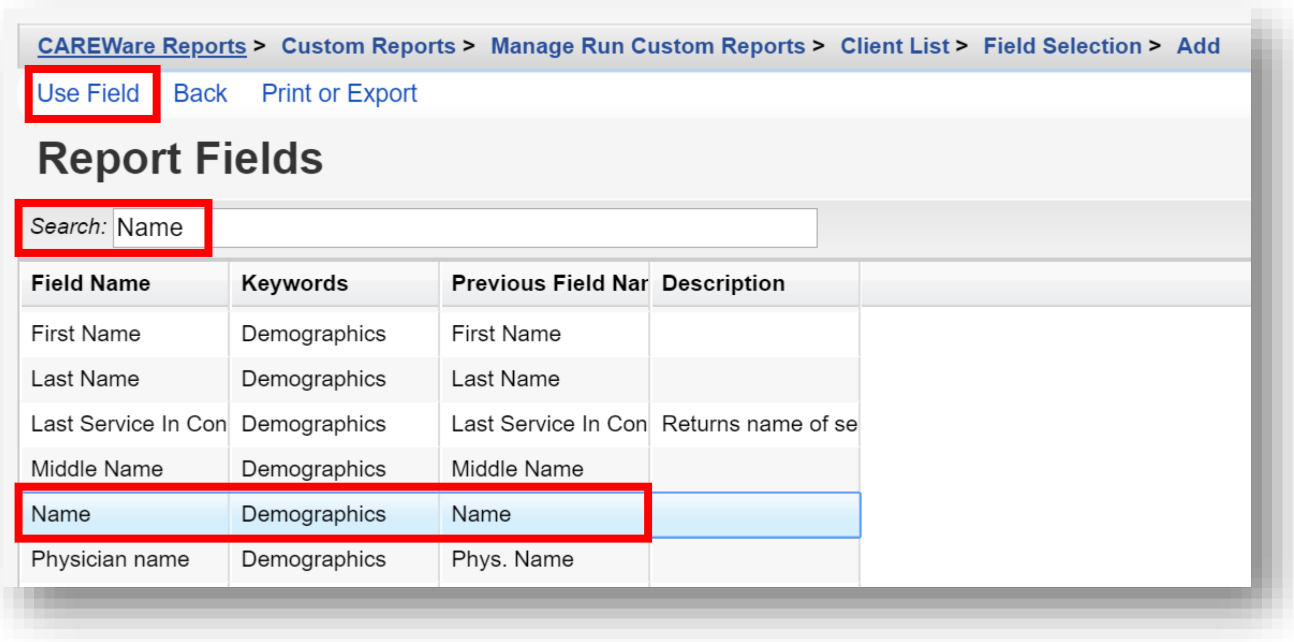
6. Once you click save, you'll be directed to the new Custom Report menu (in this example, *Client List* is the name of our custom report). Select **Field Selection**.



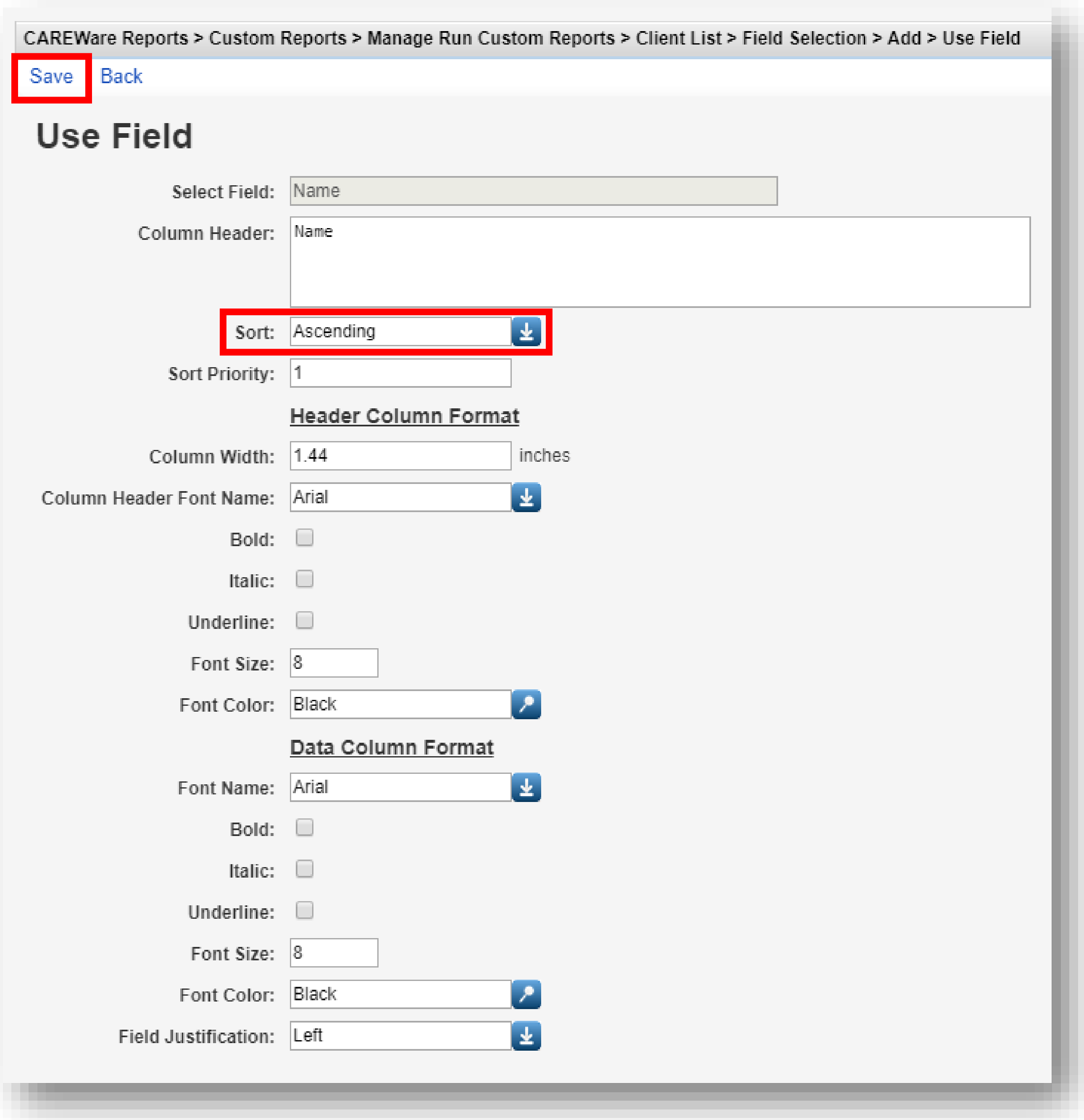
7. Click **Add**.



8. Select **Field Name,** *Name*. Note we have entered “name” in the **Search** box to narrow the list of available field names. Click **Use Field**.

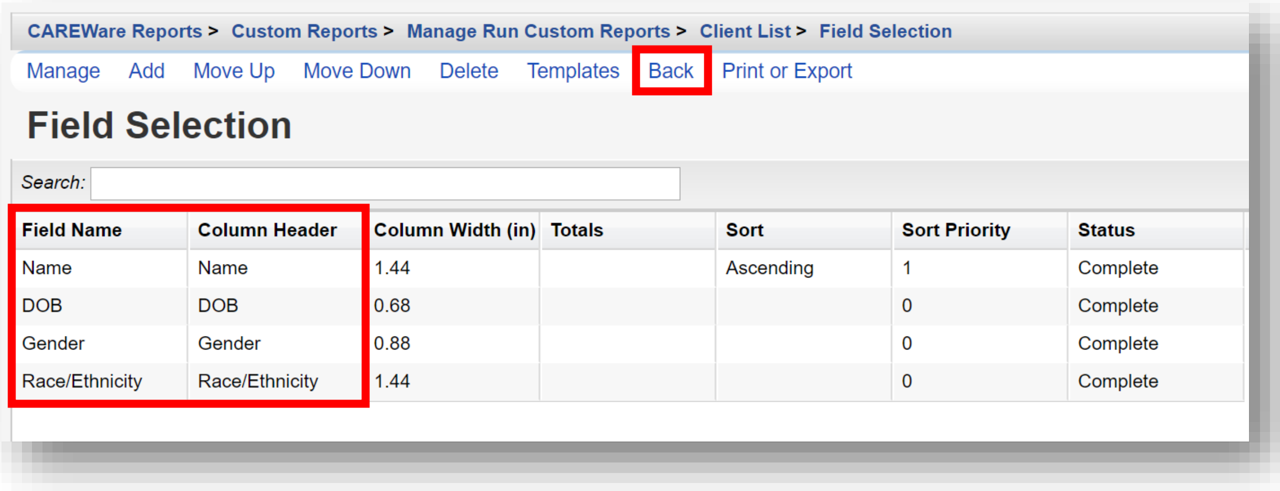


9. Select **Sort**, "Ascending" in order to display the Field Name values (in this example, client names) alphabetically in the report. Use default values for **<u>Header Column Format</u>** and **<u>Data Column Format</u>**. Click **Save**.

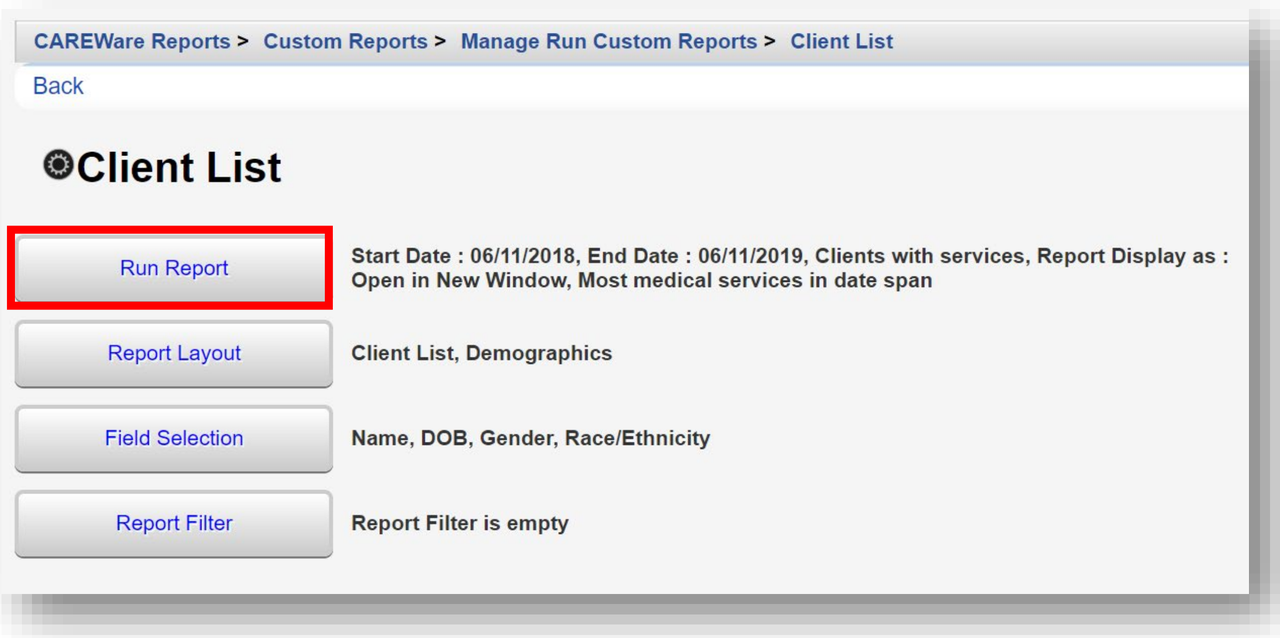


10. Repeat the same steps to add and save Field Names: *DOB*, *Gender*, and *Race/Ethnicity.*

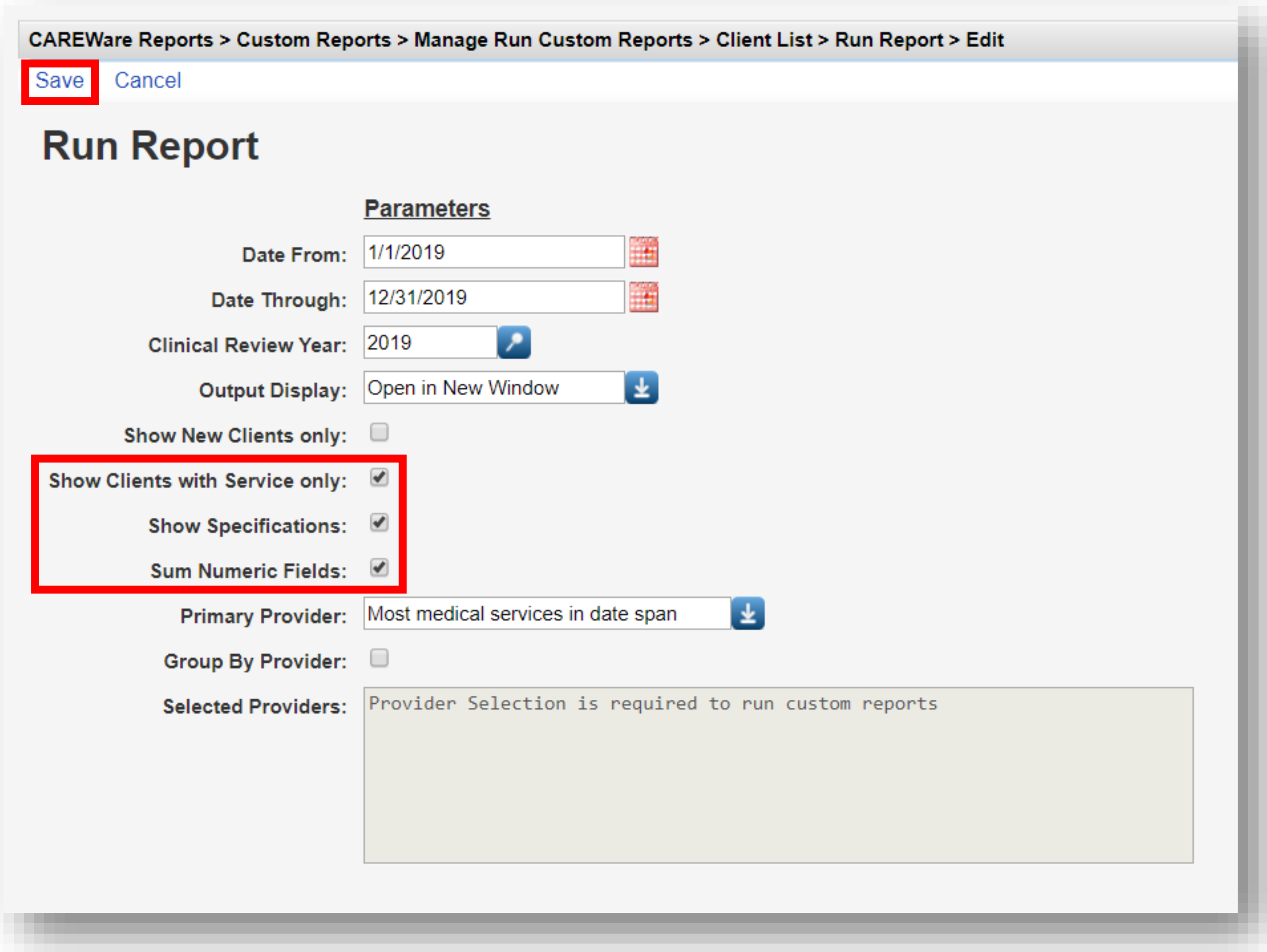
Use default settings for these additional report fields and do not sort. When finished, the **Field Selection** should look like this:



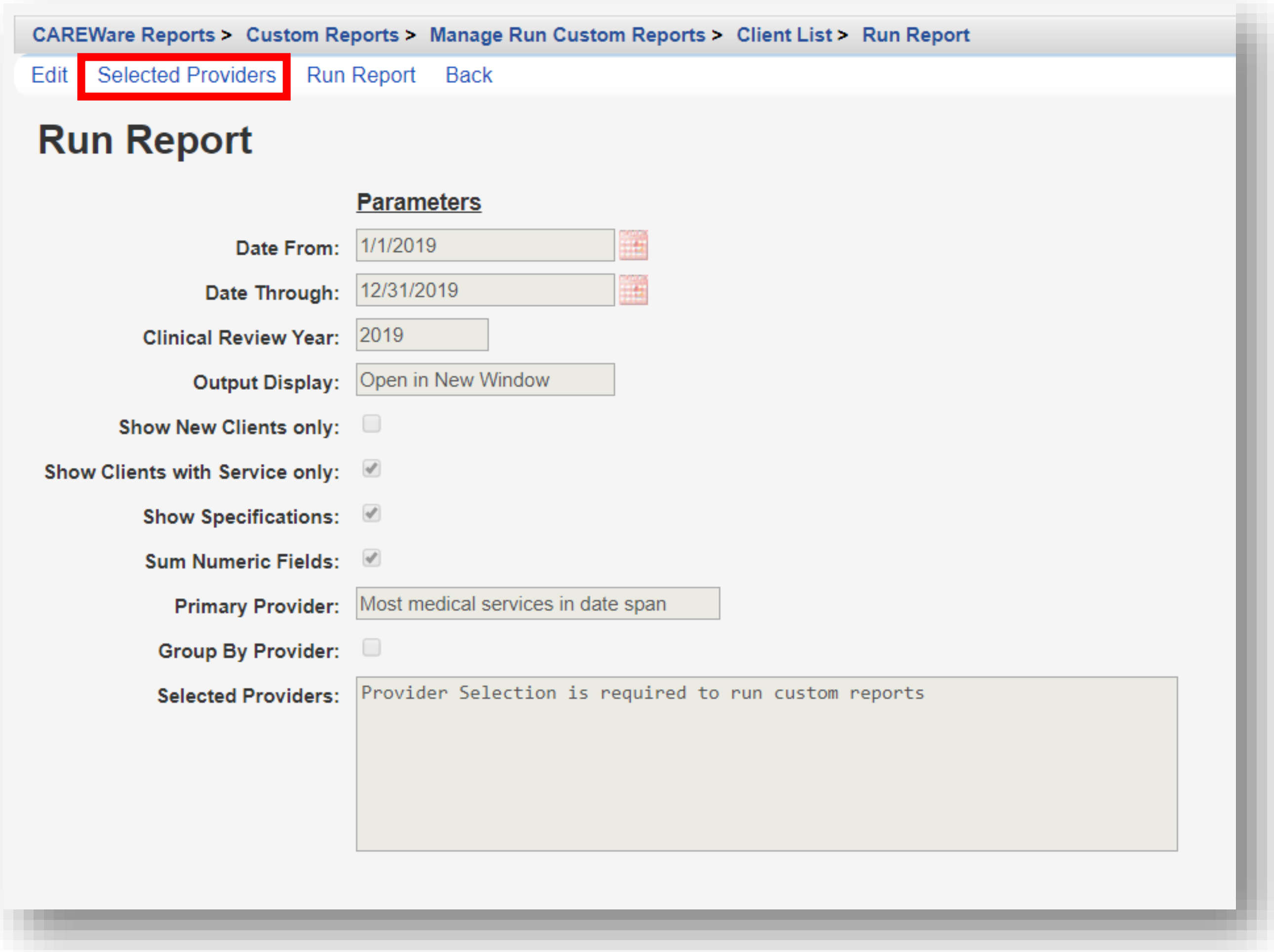
11. Click **Back** (see previous screenshot) and then select **Run Report**.



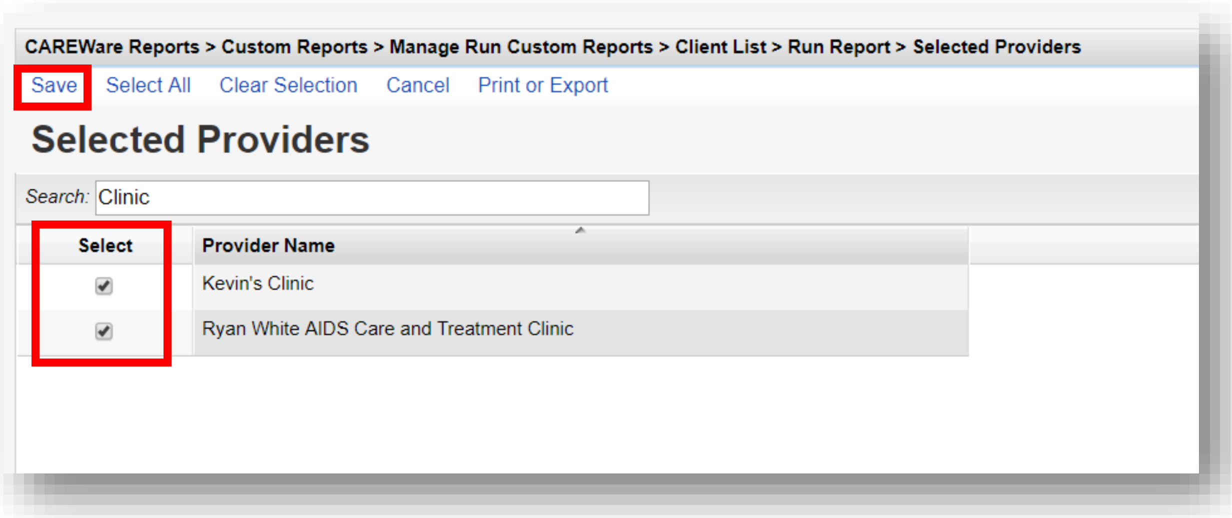
12. Click **Edit** (where Save is in the screenshot below) to change the parameters/date span as desired. Click **Save**. We have selected checkboxes for:
    - **Show Clients with Service only**
    - **Show Specifications**
    - **Sum Numeric Fields**



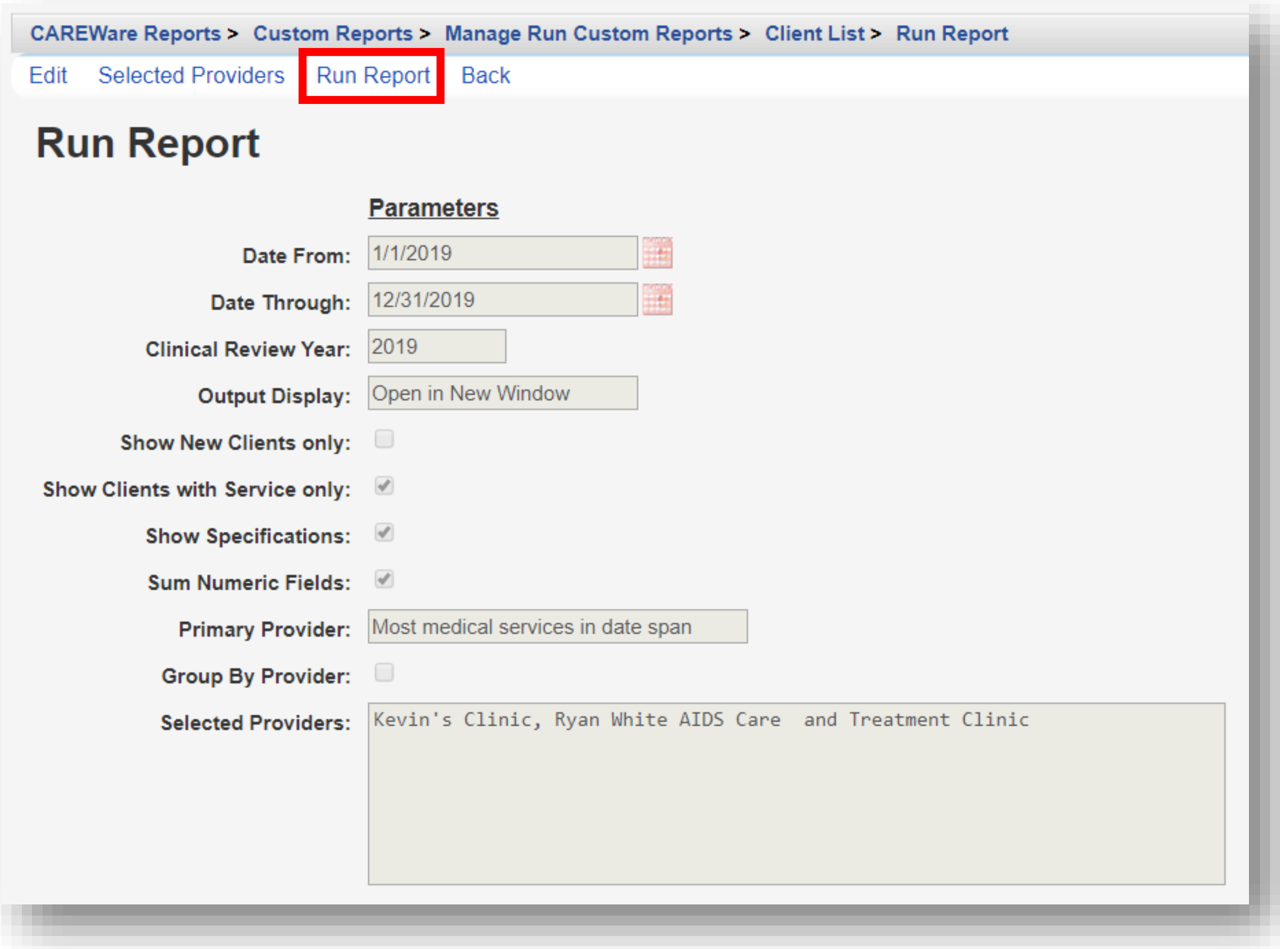
13. Select **Selected Providers**.



14. Select the desired providers using the checkbox. Once complete, click **Save**.



15. Select **Run Report**. Click **View Client List** in the Report generation complete box (not pictured).



16. Below is an example report.

Client List

Data Scope:	**Kevin's Clinic, Ryan White AIDS Care and Treatment Clinic, State ADAP Program**
Report Start Date:	**01/01/2019**
Report End Date:	**12/31/2019**
Report Criteria:	**Report Filter is empty**
Restrictions:	**Clients with services only**

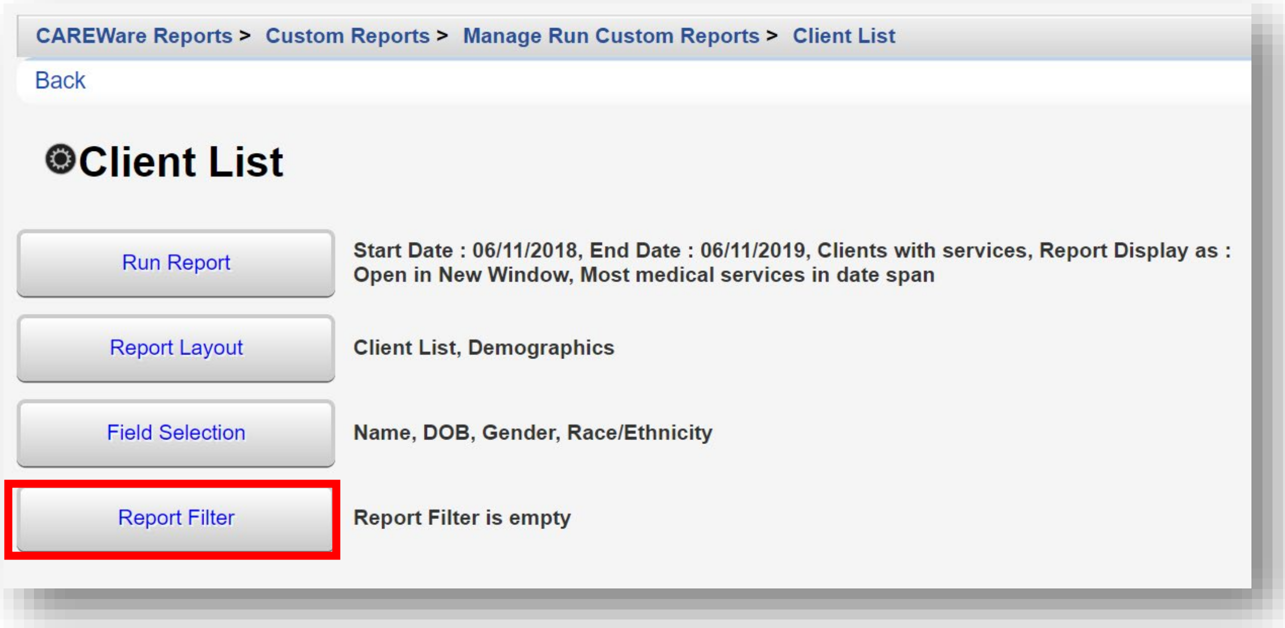
Name:	DOB:	Gender:	Race/Ethnicity:
Aaberg, Aaron, Morin	04/05/1992	Male	Hispanic
Aadland, Abbey,	06/27/1975	Female	More than one race
Aaland, Abdul,	08/08/1989	Male	More than one race
Adap, Sigourney,	10/19/1991	Female	Hispanic
Appleseed, Johnny,	12/05/1965	Male	Hispanic

NOTE: Clients need to have at least one service visit during the date span to be included in the report. If no date span was entered, you would get a list of ALL your clients.

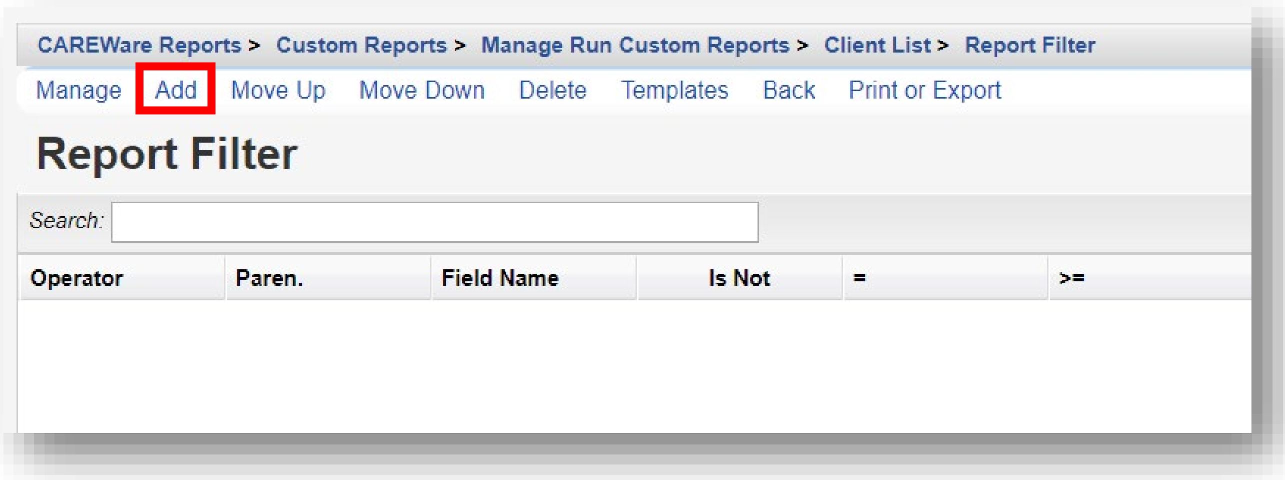
Adding Report Filters

Now we will add some filters to the report.

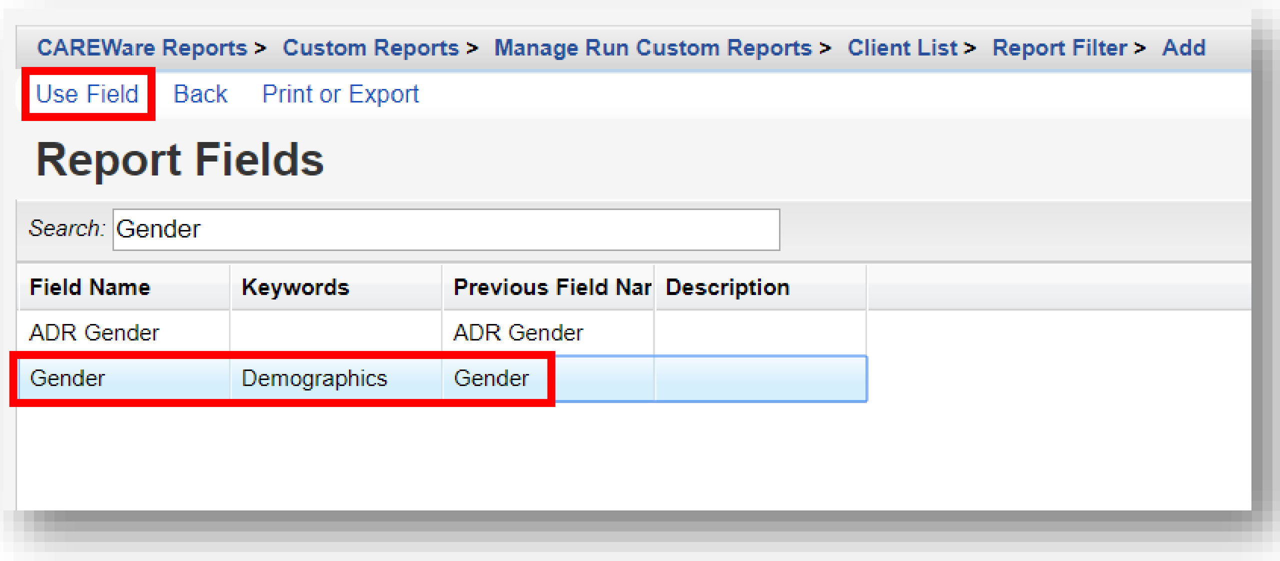
1. Select **Report Filter** from the Custom Report menu (in this example, *Client List* is the name of our custom report).



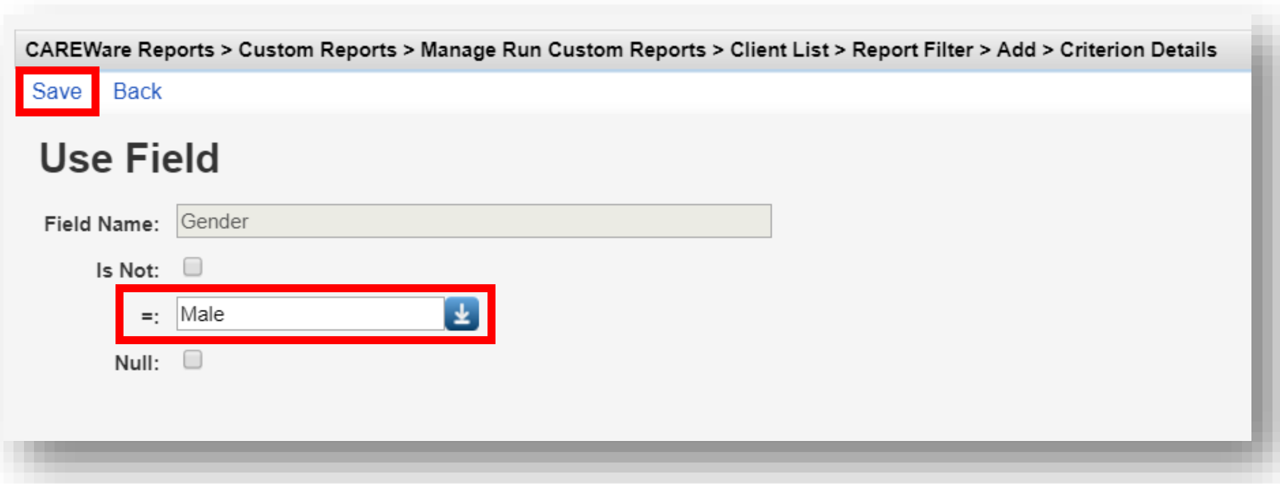
2. Click **Add** from the Action bar.



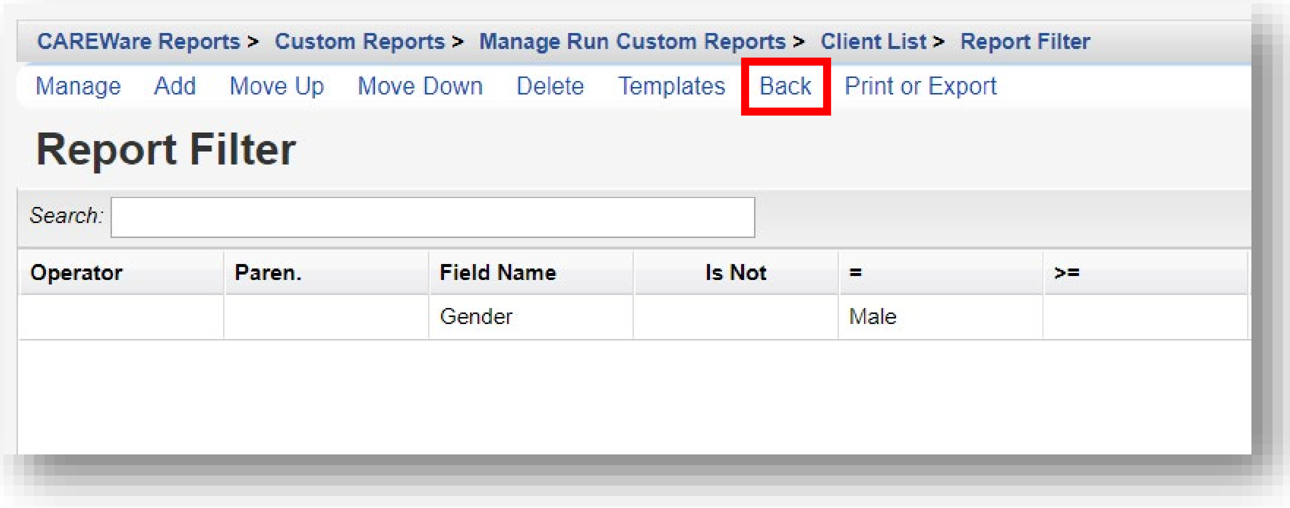
3. Select *Gender* from the **Field Name** column (use the search bar to narrow your results, if desired). Click **Use Field**.



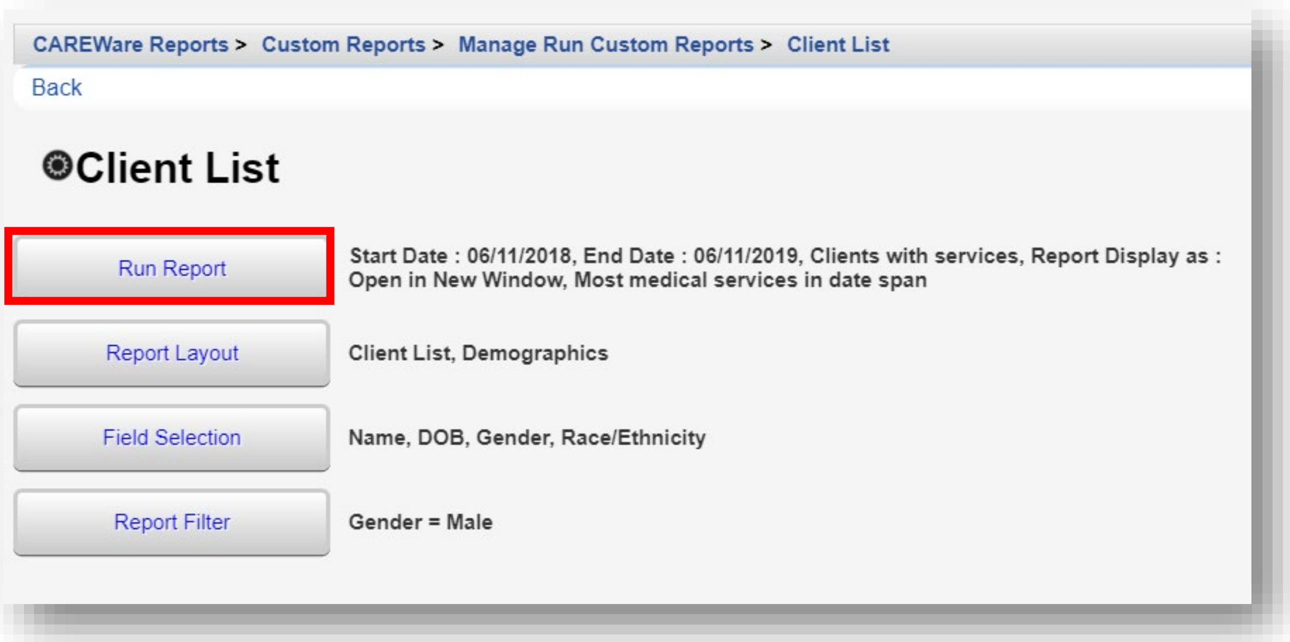
4. Enter in the desired criterion. In this example, we are filtering for clients who identify as Male. Click **Save**.



5. Click **Back** from the Report Filter screen to return to the Custom Report menu.

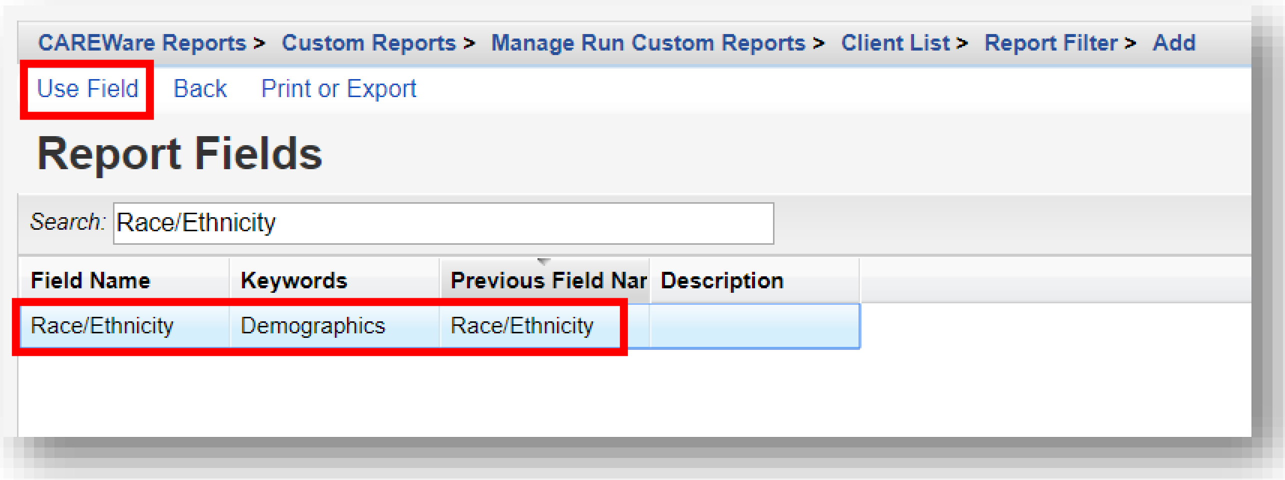


6. Select **Run Report** and then follow the steps on pages 9 through 11 (beginning with step 12). Once you run the report, you will now note that only “Male” clients are included.

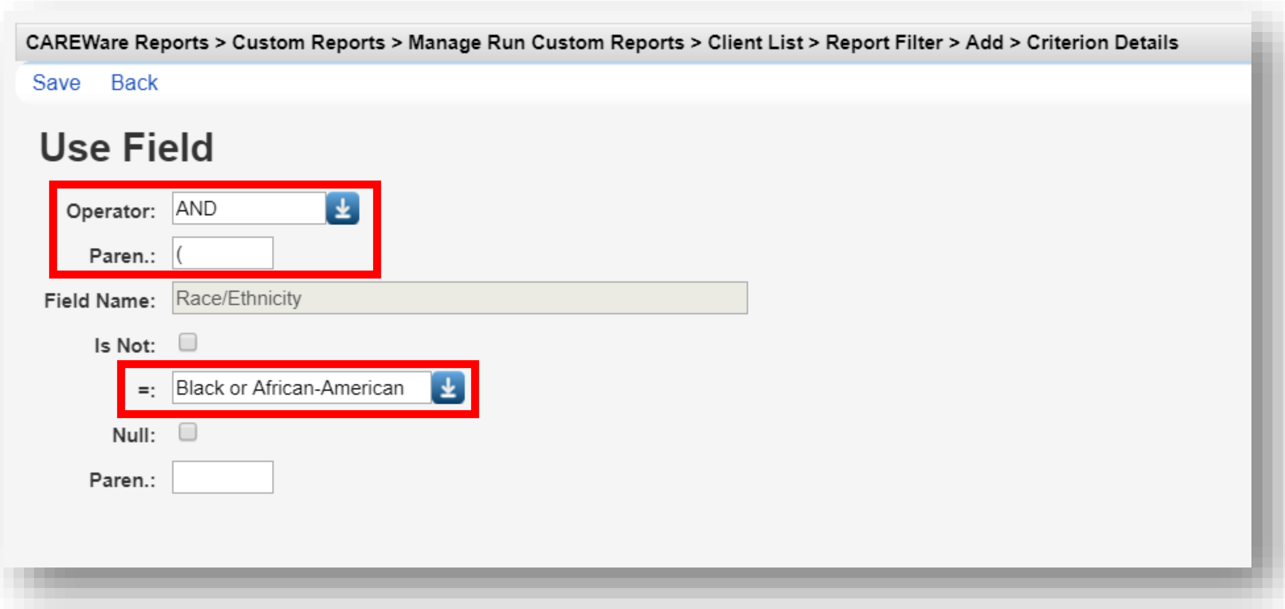


We will now use the AND / OR operators in our report criteria:

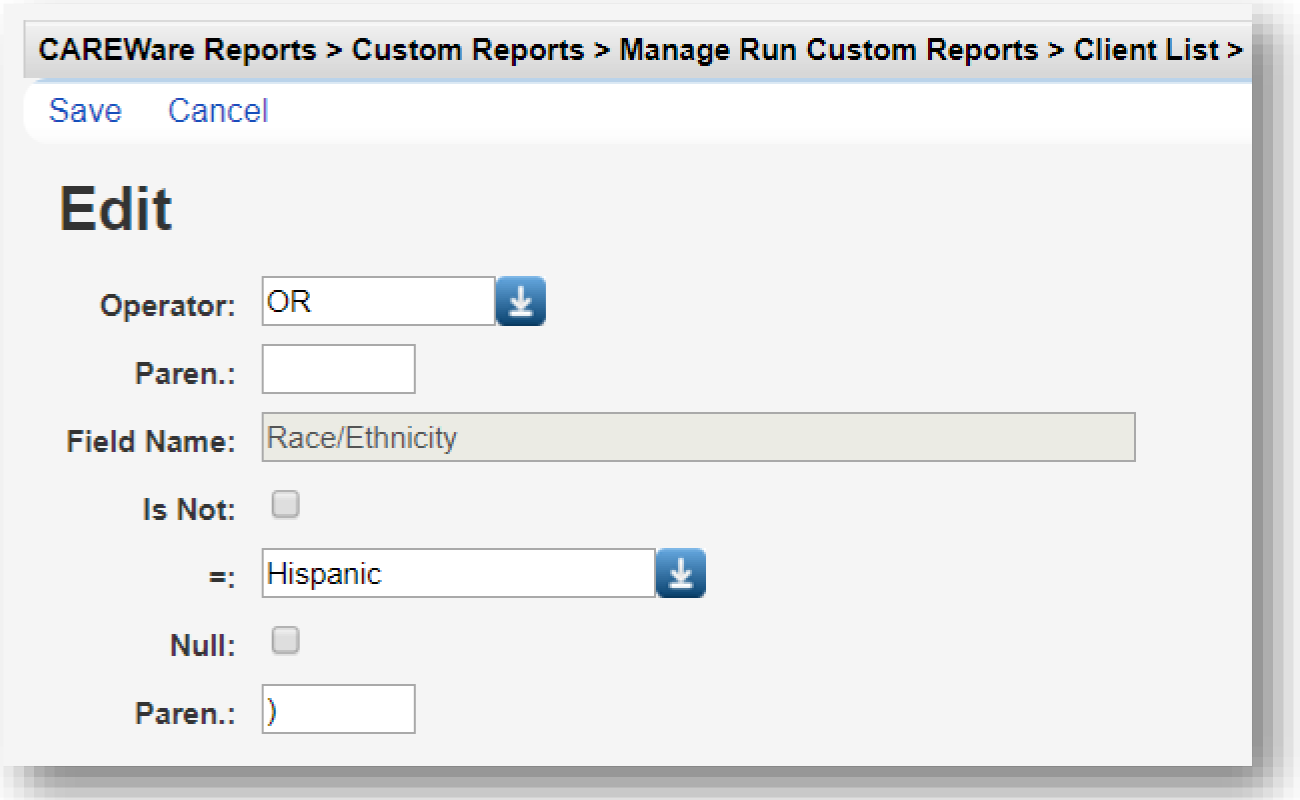
7. Follow steps 1 and 2 on page 13 to return to the Report Fields menu and search for the field name "Race/Ethnicity." Select the field name and click **Use Field** from the Action bar.



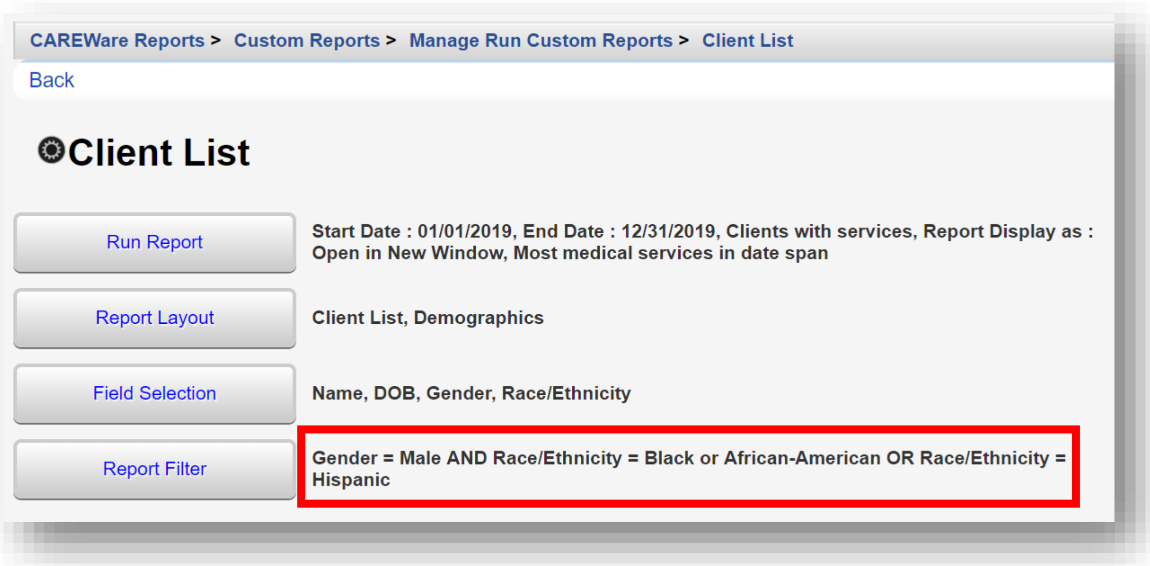
8. Use the Operator field to choose between "And" or "Or." The Paren field is used to define additional report filter criteria within the parenthesis. In this example, we are using the "And" operator and only filtering for clients whose race/ethnicity is Black or African-American (the selection is made from the drop down list within the "=" field). The first "open" Paren field denotes that the race/ethnicity must be Black or African American. Click **Save**.



9. Repeat the previous step except this time, use the “Or” operator and include clients whose race/ethnicity is Hispanic. This time, the second “closed” Paren field (while using the “Or” operator) denotes that the race/ethnicity could be Hispanic.



The *Client List* criteria are listed next to the Report Filter in the Link Summary. For the client to be listed on the report, they would need to be Male AND Black/African American OR Hispanic.



In addition to the other report parameters and restrictions, they would also need to have received a service in the 2019 reporting year (calendar year).

Client List

Data Scope: Kevin's Clinic, Ryan White AIDS Care and Treatment Clinic, State ADAP Program

Report Start Date: 01/01/2019

Report End Date: 12/31/2019

Report Criteria: Gender = Male AND Race/Ethnicity = Black or African-American OR Race/Ethnicity = Hispanic

Restrictions: Clients with services only

Name:	DOB:	Gender:	Race/Ethnicity:
Aaberg, Aaron, Morin	04/05/1992	Male	Black or African-American
Appleseed, Johnny,	12/05/1965	Male	Hispanic
Cesar, Rex,	06/30/1987	Male	Hispanic
Fish, Blue,	04/12/1990	Male	Hispanic
Ghost, Caspar,	11/19/1974	Male	Hispanic
Kranepool, Bob,	12/21/1955	Male	Hispanic
Smith, Dominic,	01/01/1990	Male	Black or African-American

Using Totals

NOTE: The following sections assume you are now comfortable creating field selections and filters. We will show you what your field selections and filters should look like, but we'll now skip walking through each step to create them.

If you need to sum certain values or group the report in a specific way (e.g. over clients or service categories), you can check the **Use Totals** on the **Report Layout** link. **Use Totals** also includes functions to calculate the minimum or maximum or average of a group of observations, such as CD4 or Viral Load counts.

We'll do two examples of the Use Totals function, one for a custom service report where there are often multiple services per client, and one for a custom lab report, where there are often multiple lab tests per individual.

Service Report (with totals)

1. Here is the top portion of a basic custom service report (fields "Name," "Srv Category," and "Srv Long Name") sorted in "Ascending" order by client.

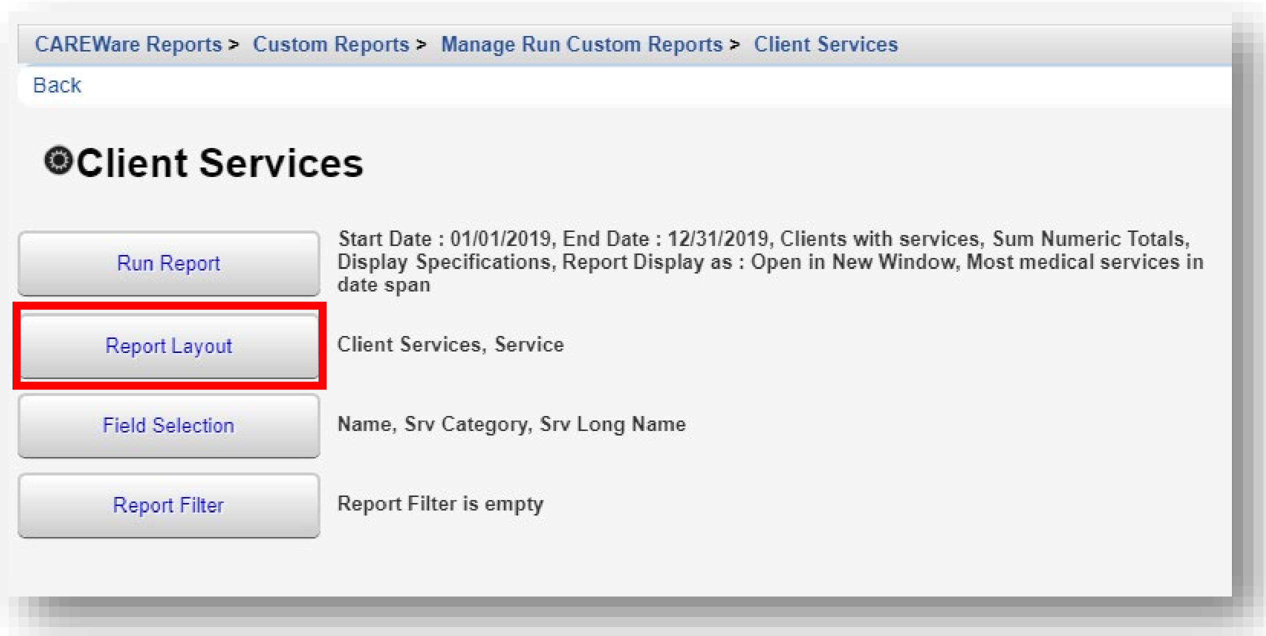
Client Services

Data Scope:	**Kevin's Clinic, Ryan White AIDS Care and Treatment Clinic, State ADAP Program**
Report Start Date:	**01/01/2019**
Report End Date:	**12/31/2019**
Report Criteria:	**Report Filter is empty**
Restrictions:	**Clients with services only**

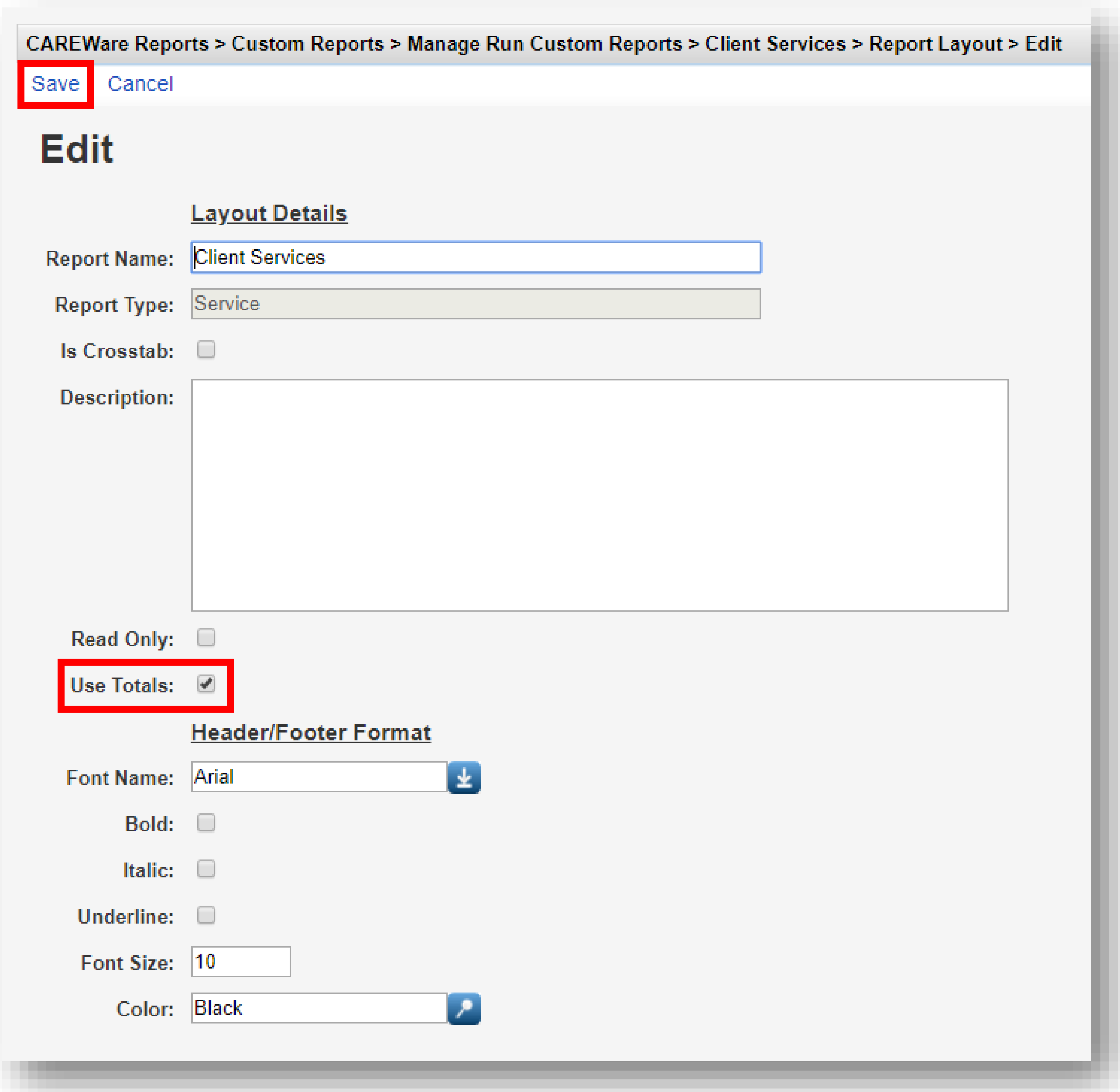
Name:	Srv Category:	Srv Long Name:
Aaberg, Aaron Morin	Oral Health Care	Oral Health Care
Aadland, Abbey	Medical Case Management	MCM Non Face-to-face
Aadland, Abbey	Medical Case Management	MCM Face-to-face
Aaland, Abdul	Medical Case Management	Medical Case Management
Adap, Sigourney	Medical Case Management	Assessment/CMF
Appleseed, Johnny	Medical Case Management	MCM Non Face-to-face
Appleseed, Johnny	Medical Case Management	MCM Face-to-face
Appleseed, Johnny	Early Intervention Services	EIS Outreach
Appleseed, Johnny	Early Intervention Services	EIS Outreach
Appleseed, Johnny	Early Intervention Services	EIS Outreach

You can see that some clients appear multiple times on the report, because they've received multiple services in the date range.

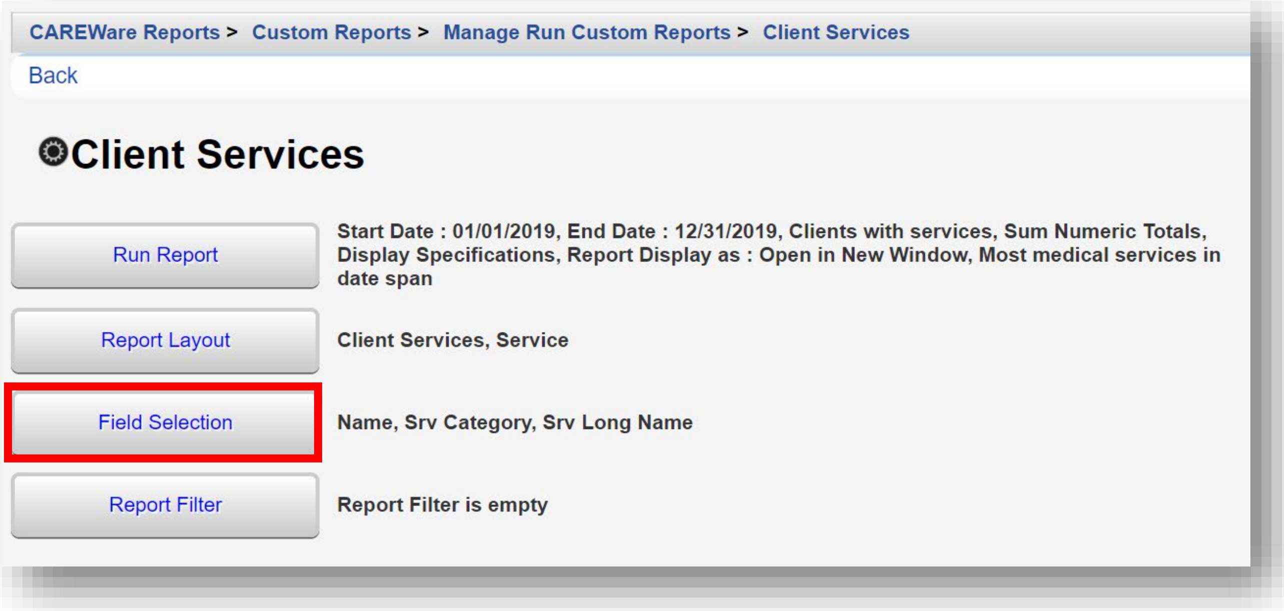
2. Select **Report Layout** from the Custom Report menu (in this example, *Client Services* is the name of our custom report).



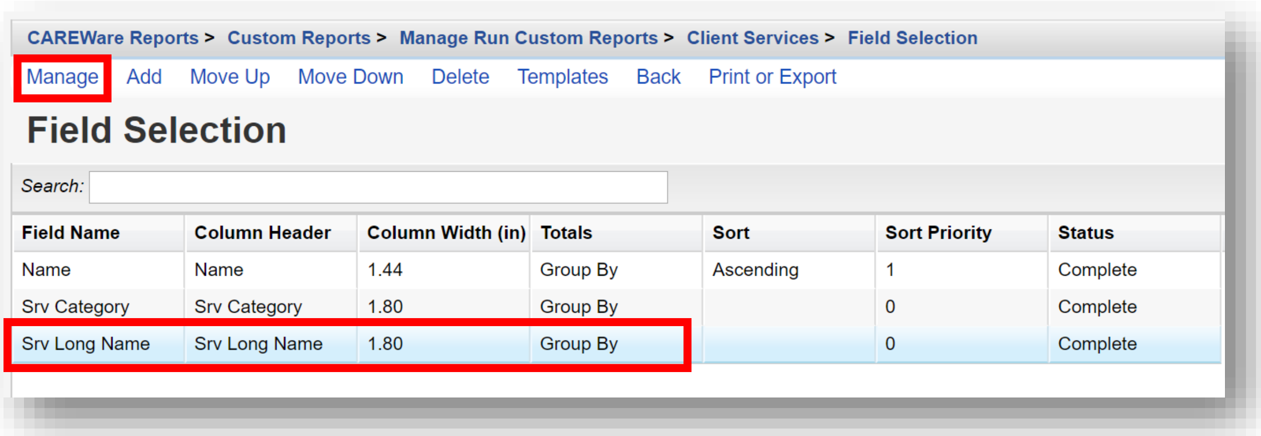
3. Click **Edit** (will be where Save is in the below screenshot) and then check the **Use Totals** box. Click **Save**.



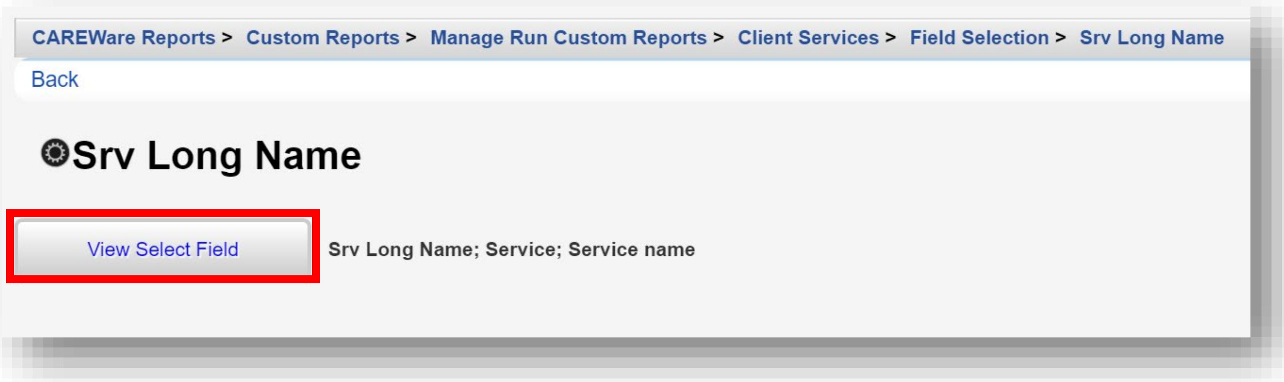
4. Click on the **Field Selection** Link.



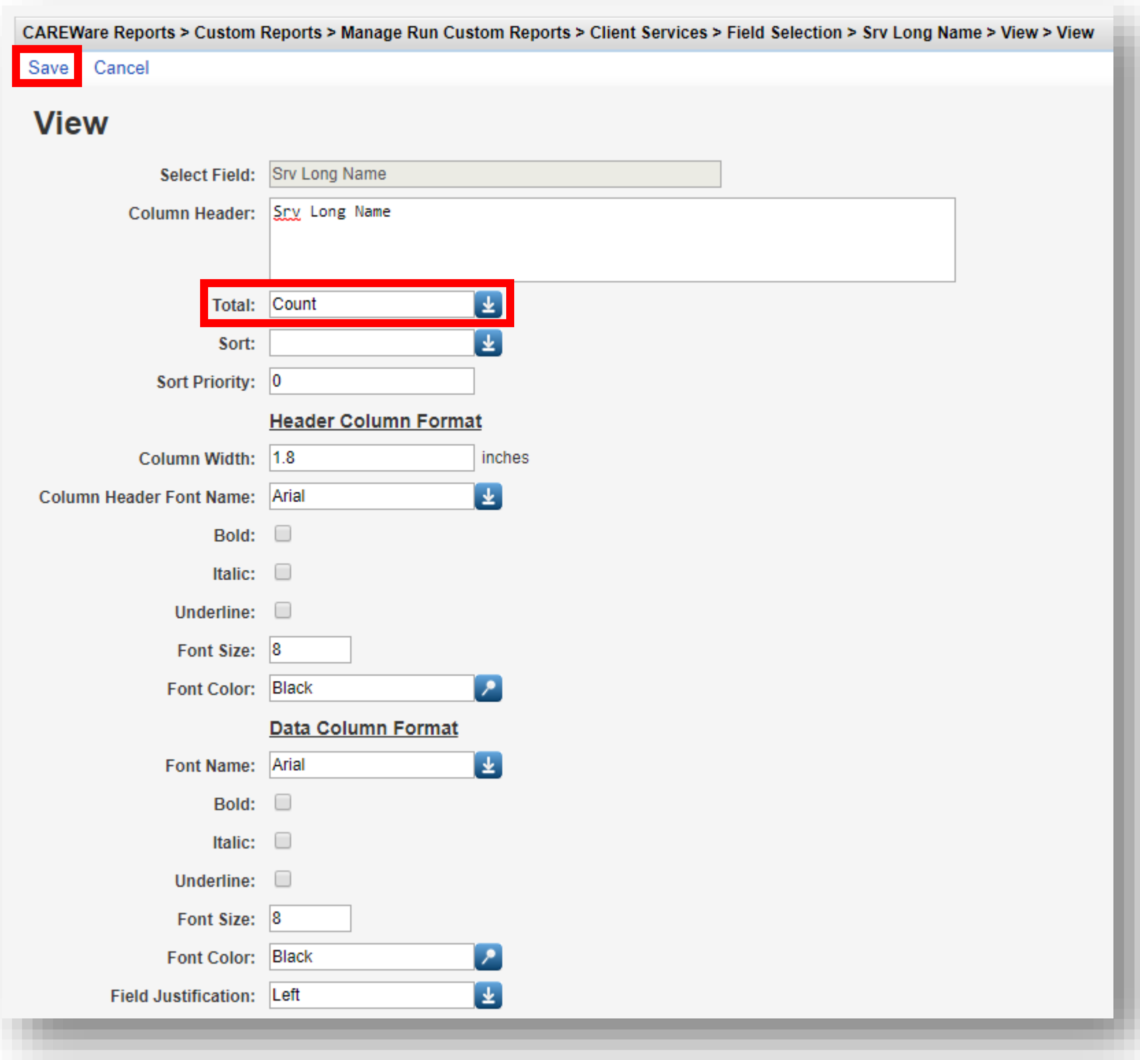
5. Highlight the Field Name (in this example, *Srv Long Name)* and click **Manage** from the Action bar.



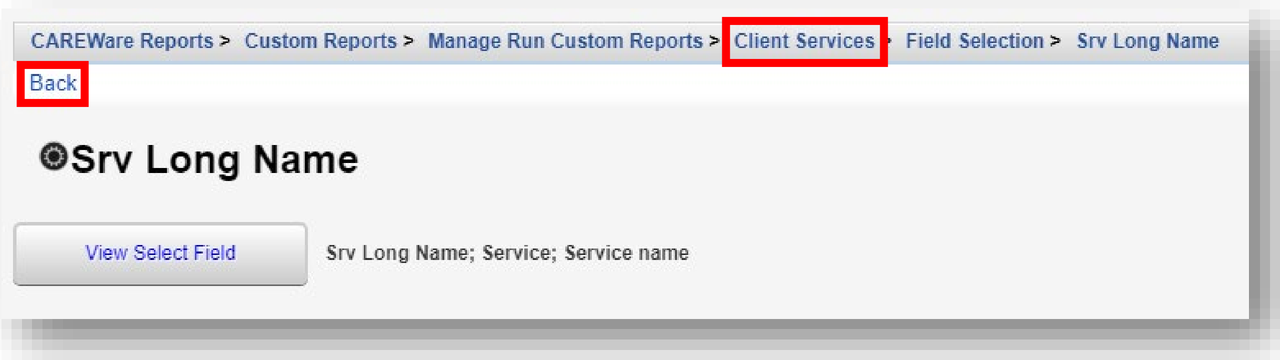
6. Click View Select Field.



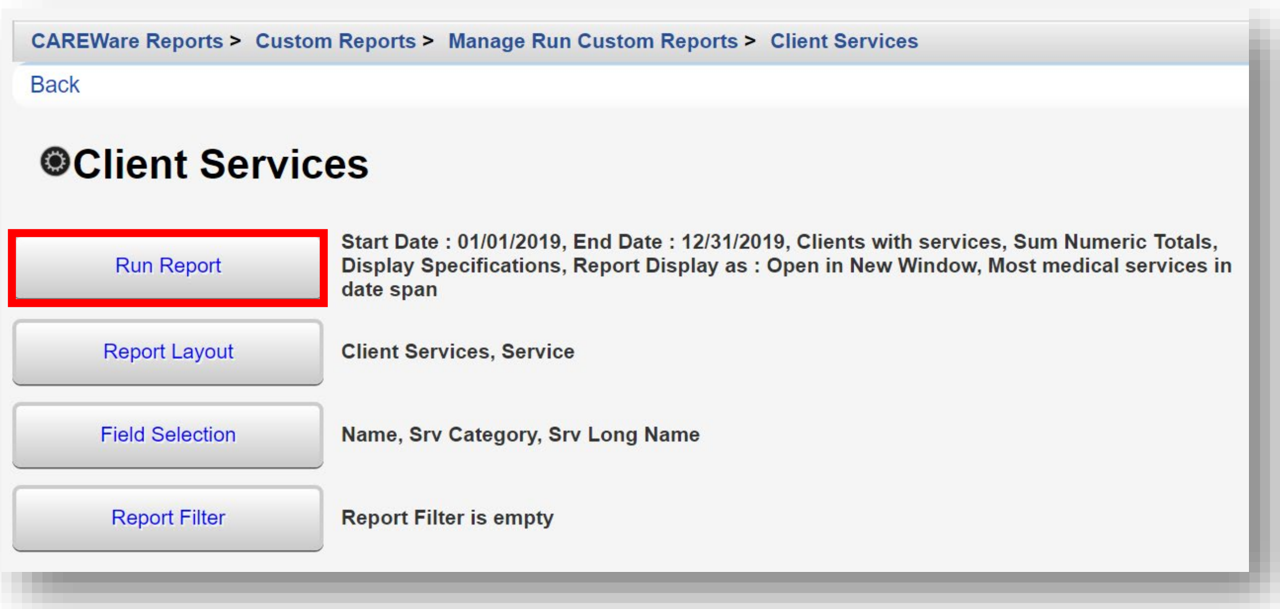
7. Click **Edit** (will be where Save is in the below screenshot) and then change the Total field, from *Group By* to *Count* in the drop-down box. Click **Save**.



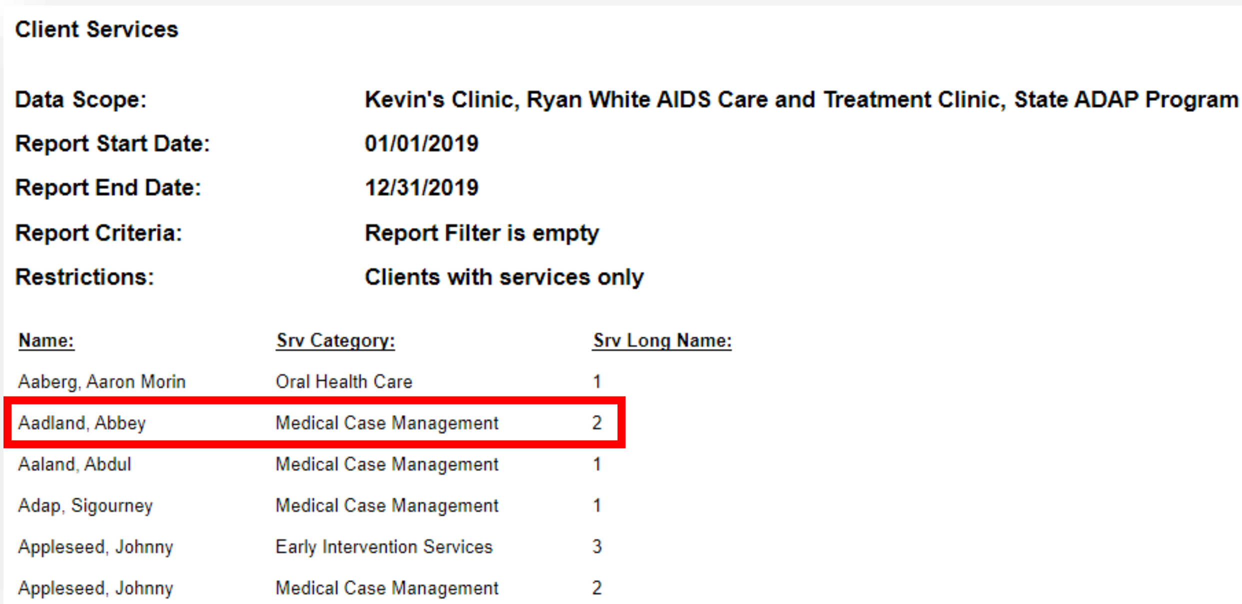
8. Return to the Custom Report menu by clicking **Back** twice or clicking on the report's name within the Breadcrumb links.



9. Re-run the "Client Services" report.



The report now returns the total subservices a client receives within a service category. Notice for the client Abbey Aadland, there is now only one line for Medical Case Management, with the number 2 in the Srv Long Name column, indicating how many of those services were received in the date span.



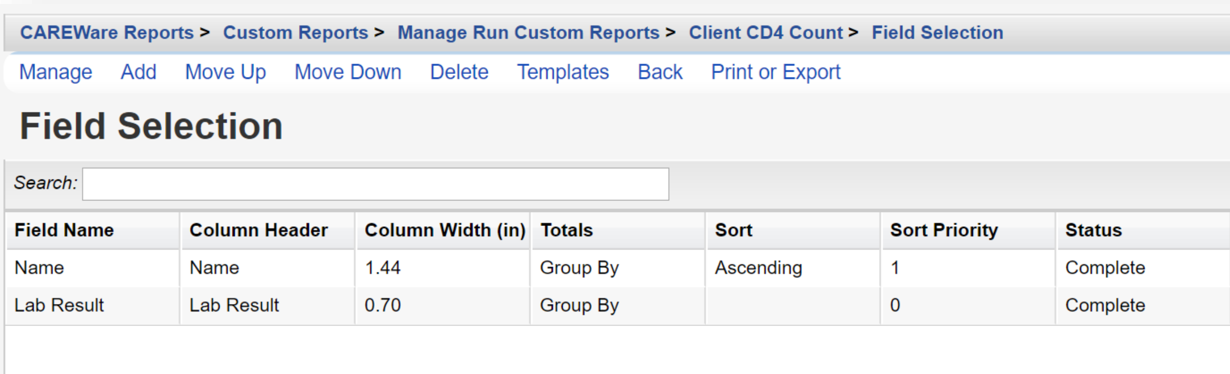
Client Services

Data Scope:	**Kevin's Clinic, Ryan White AIDS Care and Treatment Clinic, State ADAP Program**
Report Start Date:	**01/01/2019**
Report End Date:	**12/31/2019**
Report Criteria:	**Report Filter is empty**
Restrictions:	**Clients with services only**

Name:	Srv Category:	Srv Long Name:
Aaberg, Aaron Morin	Oral Health Care	1
Aadland, Abbey	Medical Case Management	2
Aaland, Abdul	Medical Case Management	1
Adap, Sigourney	Medical Case Management	1
Appleseed, Johnny	Early Intervention Services	3
Appleseed, Johnny	Medical Case Management	2

Lab Report (with totals)

1. Here is the Field Selection setup of a basic custom report (fields “Name”, “Lab Result”), sorted “Ascending” by client.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client CD4 Count > Field Selection

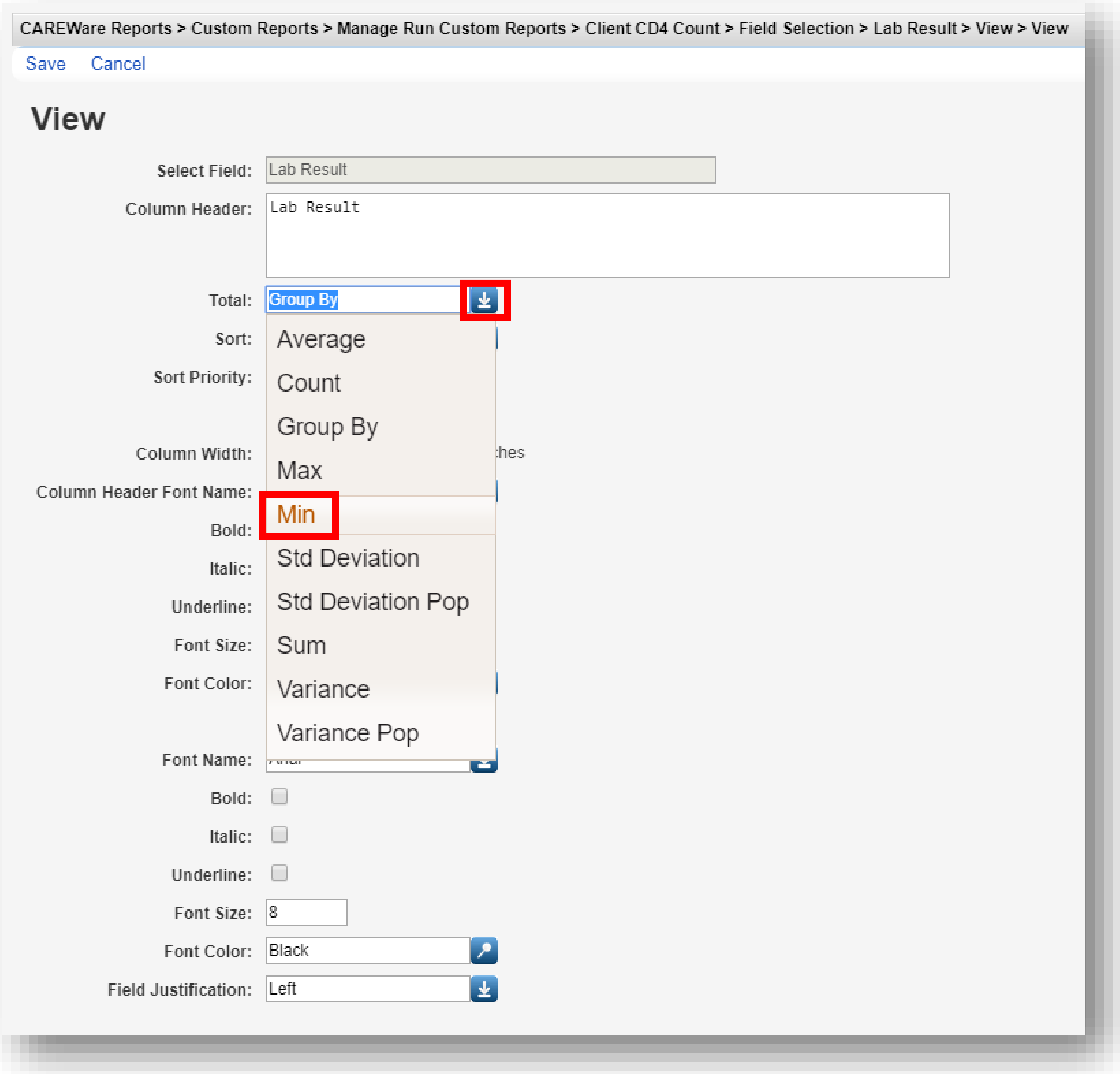
Manage Add Move Up Move Down Delete Templates Back Print or Export

Field Selection

Search:

Field Name	Column Header	Column Width (in)	Totals	Sort	Sort Priority	Status
Name	Name	1.44	Group By	Ascending	1	Complete
Lab Result	Lab Result	0.70	Group By		0	Complete

2. Change the **Total** field in the Field Name “Lab Result” from *Group By* to *Min* in the drop-down box.



3. Below is an example of the “Client CD4 Count” custom lab report with *Min* total used.

Client CD4 Count

Data Scope:	**Kevin's Clinic, Ryan White AIDS Care and Treatment Clinic, State ADAP Program**
Report Start Date:	**01/01/2019**
Report End Date:	**12/31/2019**
Report Criteria:	**Report Filter is empty**
Restrictions:	**Clients with services only**

Name:	Lab Result:
Appleseed, Johnny	300
Beagle, Barney J	1
Brown, Buster j	45
Cesar, Rex	221
Client, Natalia S	900

Using Calculated Objects in Custom Reports

The ability to analyze changes in lab results and other indicators is available with the addition of calculated objects fields in CAREWare.

Using calculated objects will allow you to determine:

- The highest and lowest quantitative lab value within a specified date range
- The change in lab values from one period to the next (e.g., how much did a client’s CD4 count or viral load increase or decrease?)
- The first medical service after HIV diagnosis with a specified date range

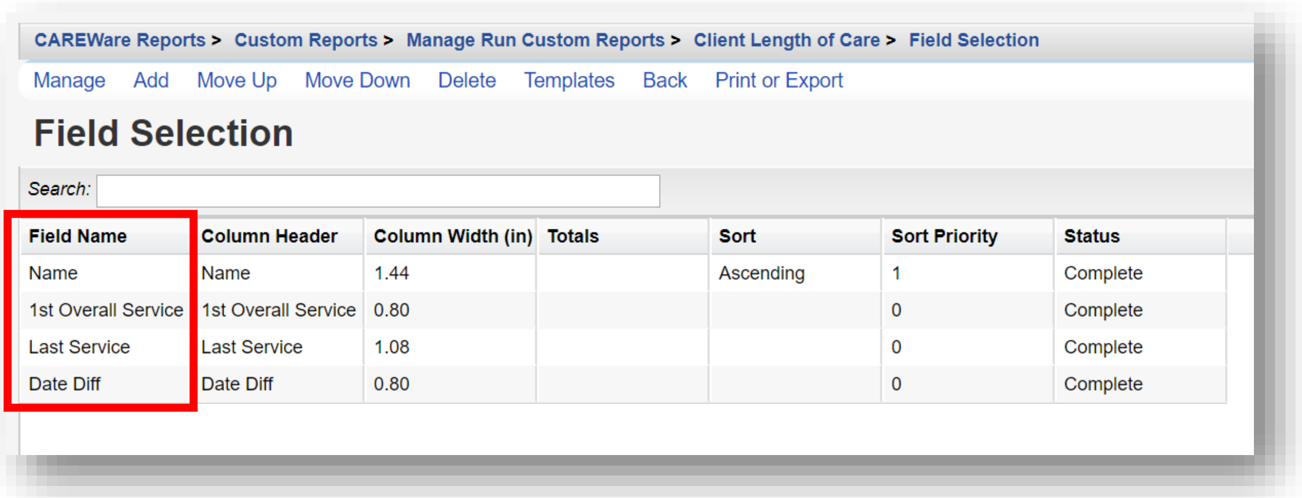
Setting up date ranges for comparison

Say you want to look at how long your clients have been receiving services.

There is a calculated object field that will look at the first service date and compare that to the last service date and calculate the difference between them.

In custom demographic reports, we select one of the calculated objects as one of our report fields.

1. Add a new custom *Demographic* report (see *Creating an advanced custom report* on page 2). We have named the report “Client Length of Care” in this example.
2. Use the following Field Names within the Field Selection menu: “Name,” “1st Overall Service,” “Last Service,” and “Date Diff.” For a refresher on how to access the Field Selection menu and how to add fields, please see page 5 through 8.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client Length of Care > Field Selection

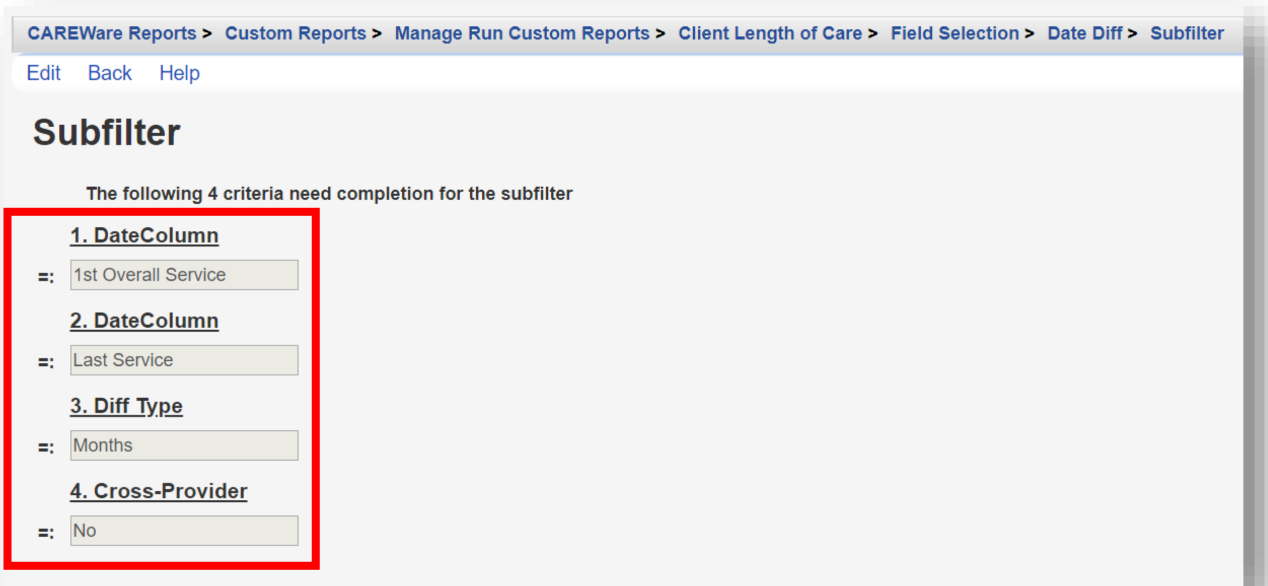
Manage Add Move Up Move Down Delete Templates Back Print or Export

Field Selection

Search:

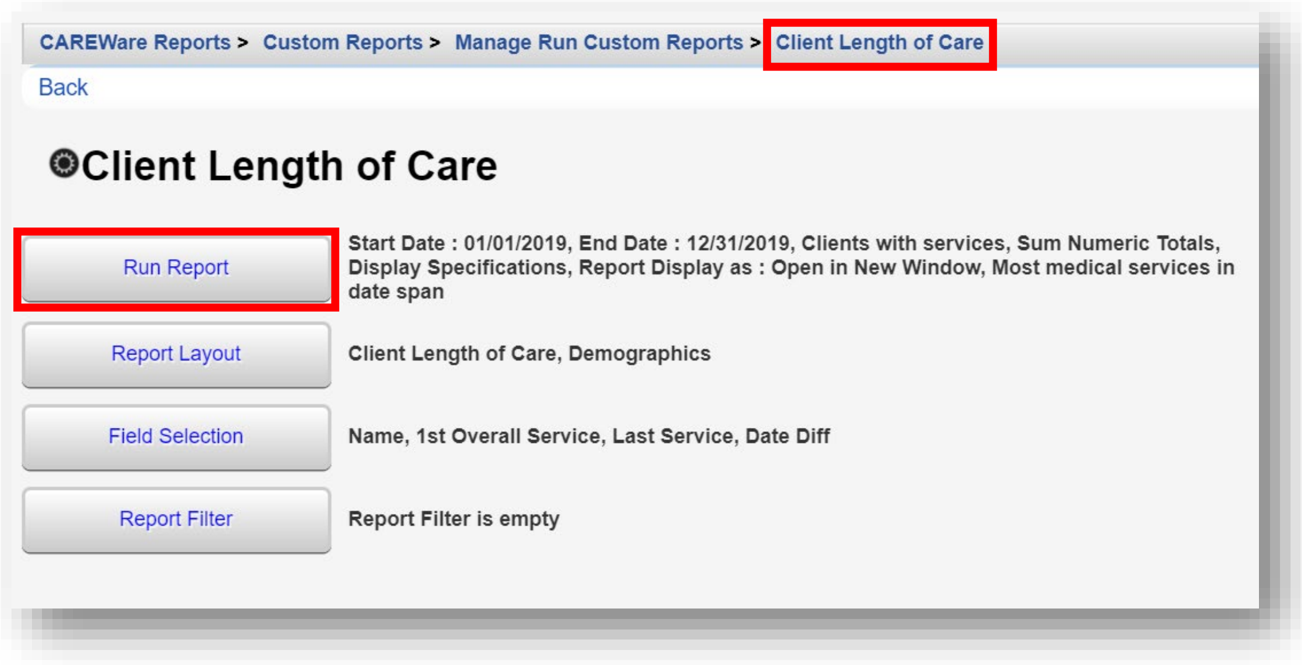
Field Name	Column Header	Column Width (in)	Totals	Sort	Sort Priority	Status
Name	Name	1.44		Ascending	1	Complete
1st Overall Service	1st Overall Service	0.80			0	Complete
Last Service	Last Service	1.08			0	Complete
Date Diff	Date Diff	0.80			0	Complete

3. When adding the "Date Diff" field, use the following parameters:
   - **1. DateColumn** = *1st Overall Service* from the drop-down box
   - **2. DateColumn** = *Last Service* from the drop-down box
   - **3. Diff Type** = *Months* from the drop-down box
   - **4. Cross-Provider** = *No* from the drop-down box

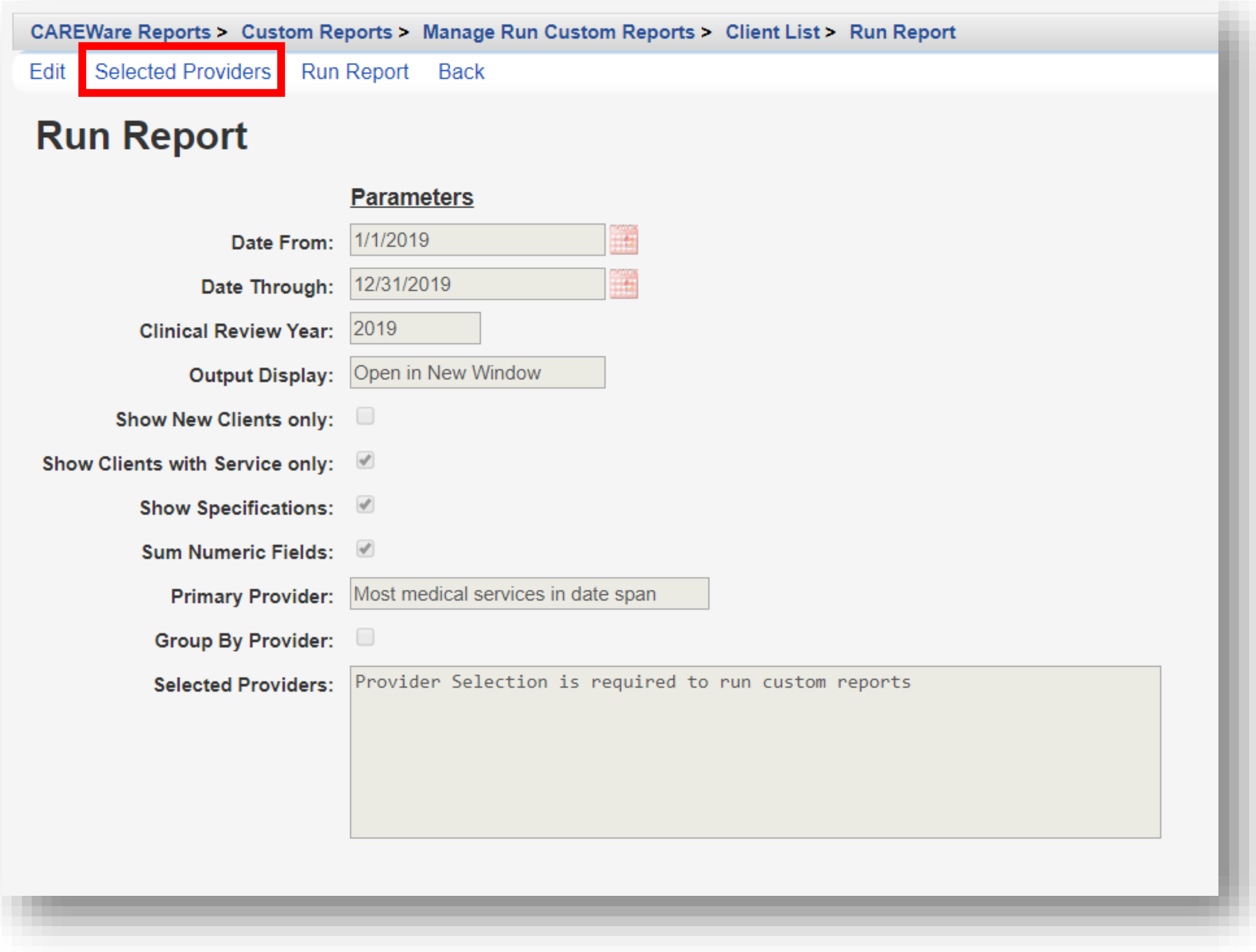


NOTE: Select "No" for the Cross-Provider Subfilter when running a report for a single provider. Select "Yes" to run a report for multiple providers and if there are multiple provider domains configured in CAREWare.

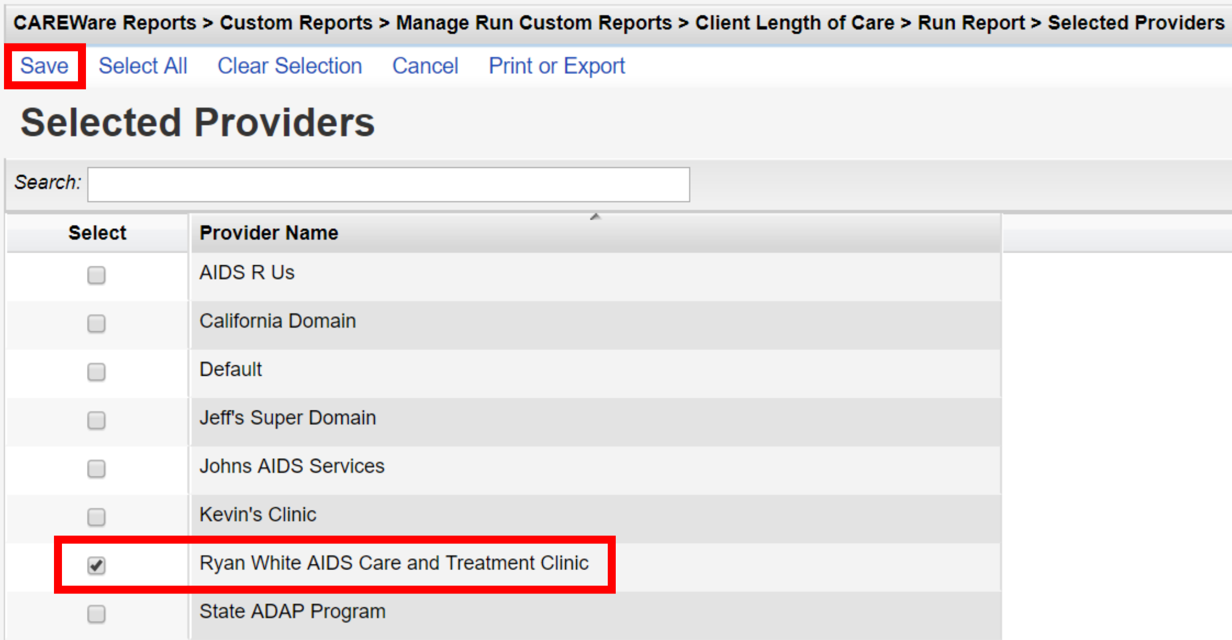
4. Return to the Custom Report menu by clicking the name of the report in the breadcrumb link and click the **Run Report** Link.



5. Click **Selected Providers** from the Action bar.



6. Select the desired providers using the checkbox. Once complete, click **Save**.



7. Run the “Client Length of Care” custom demographic report (see step 15 on page 11). An example of the results are found below.

Client Length of Care

Data Scope:	**Ryan White AIDS Care and Treatment Clinic**
Report Start Date:	**01/01/2019**
Report End Date:	**12/31/2019**
Report Criteria:	**Report Filter is empty**
Restrictions:	**Clients with services only**

Name:	1st Overall Service:	Last Service:	Date Diff:
Adap, Sigourney	10/02/2012	04/10/2019	78
Appleseed, Johnny	01/30/2019	04/08/2019	3
Appleseed, Martha	04/01/2019	04/01/2019	0
Badland, Abbey	11/13/2018	02/11/2019	3
Baker, Clam	09/25/2012	03/01/2019	78
Brown, Buster	09/27/2018	01/24/2019	4

Now looking at the same report, we will select multiple providers (see step #6), and change the Cross-Provider Subfilter to “Yes” (see step #3). Below are the results.

Client Length of Care

Data Scope:	**Kevin's Clinic, Ryan White AIDS Care and Treatment Clinic**
Report Start Date:	**01/01/2019**
Report End Date:	**12/31/2019**
Report Criteria:	**Report Filter is empty**
Restrictions:	**Clients with services only**

Name:	1st Overall Service:	Last Service:	Date Diff:
Aaberg, Aaron Morin	01/01/2013	05/31/2019	76
Aaland, Abdul	11/01/2014	01/26/2019	50
Adap, Sigourney	10/02/2012	04/10/2019	78
Appleseed, Johnny	01/30/2019	04/08/2019	3
Appleseed, Martha	05/06/2014	04/01/2019	59
Badland, Abbey	11/01/2014	05/15/2019	54
Baker, Clam	09/25/2012	03/01/2019	78
Ball, Abigail	11/17/2014	05/31/2019	54
Ball, Wrecking	05/23/2019	05/23/2019	0
Brown, Buster	09/27/2018	01/24/2019	4

The number of months elapsed between the first and last service dates, with Cross-Provider Subfilter, set to “Yes”, and multiple provider names selected, changes the report results.

Notice there are additional clients in the report and the number in the **Date Diff** column for client Martha Appleseed changed from 0 (in the previous single-provider report) to 59 months of care.

Other similar reports can be configured, such as the length of time between a client’s First Service and First Medical Visit, or the length of time between a client’s Enrollment Date and First Medical Visit or Lab result.

For further information, please see the Creating Custom Reports section of the jProg website: https://www.jprog.com/wiki/CAREWare%206.UG-Creating-Custom-Reports.ashx

CAREWare 6

Section 9:

User and System Administration

Adapted from HRSA Quick Start User Guides:
https://hab.hrsa.gov/program-grants-management/careware

PLEASE NOTE: The client data used in these manuals is purely fictional.

First Things First

Getting Started

- You must have the appropriate user privileges to run reports.

Creating New Users

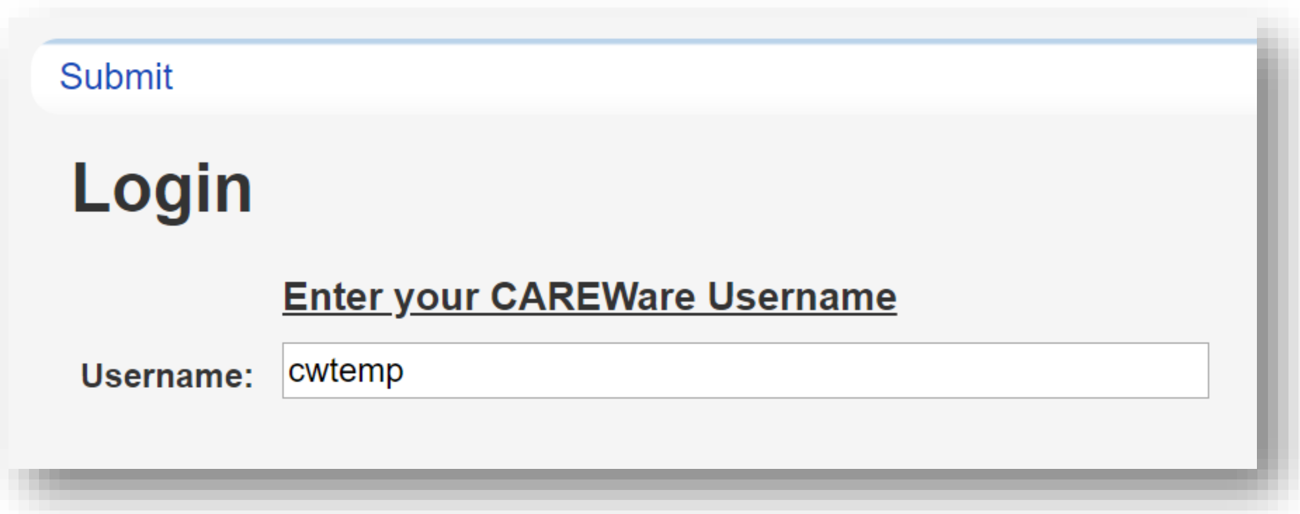
CAREWare comes with a single, default user, **cwtemp,** with the default password **TEMPCW100**. All passwords in CAREWare are **case-sensitive**, meaning that if you create a password like “Connie@01,” you can’t type “connie@01” when you log in.

User **cwtemp** comes with all system privileges, to allow setup of real users and assign their system privileges.

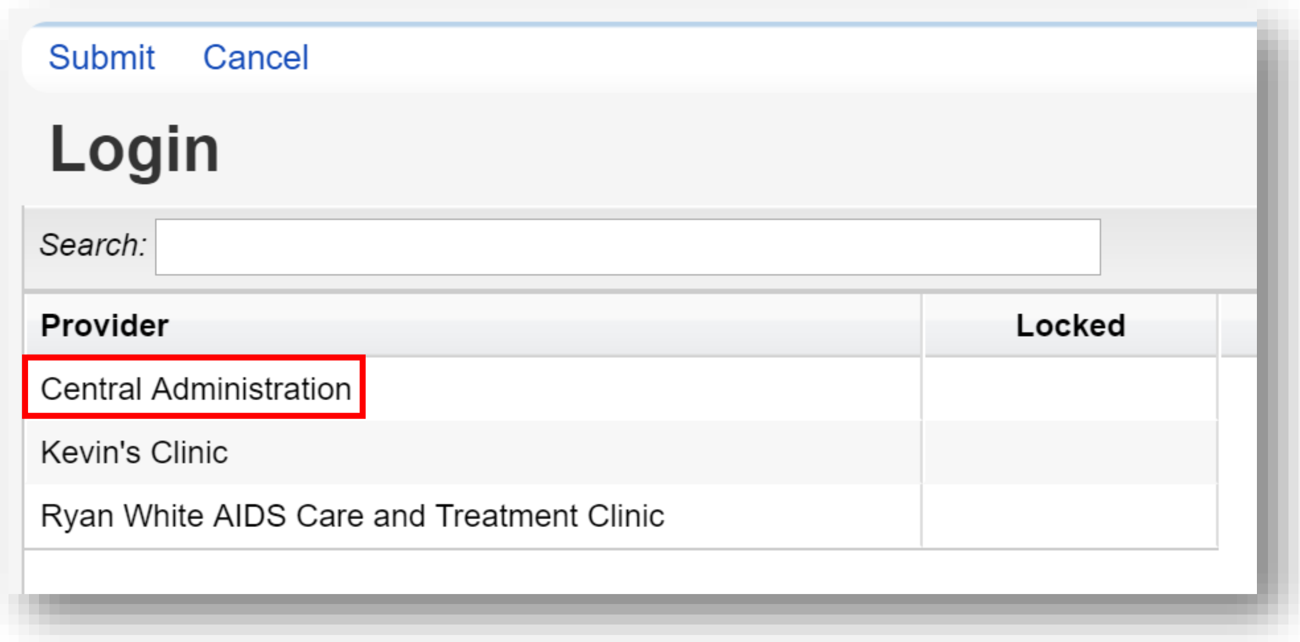
PLEASE NOTE: The Health Insurance Portability and Accountability Act (HIPAA) requires certain steps to protect the privacy and security of client protected health information (PHI).

One of these steps includes deactivating the **cwtemp** user after you’ve set up your real users; as this is a publicly available login ID that could be used for unauthorized access to your database if you haven’t changed it. If you choose to keep the **cwtemp** user active, change the password as soon as possible.

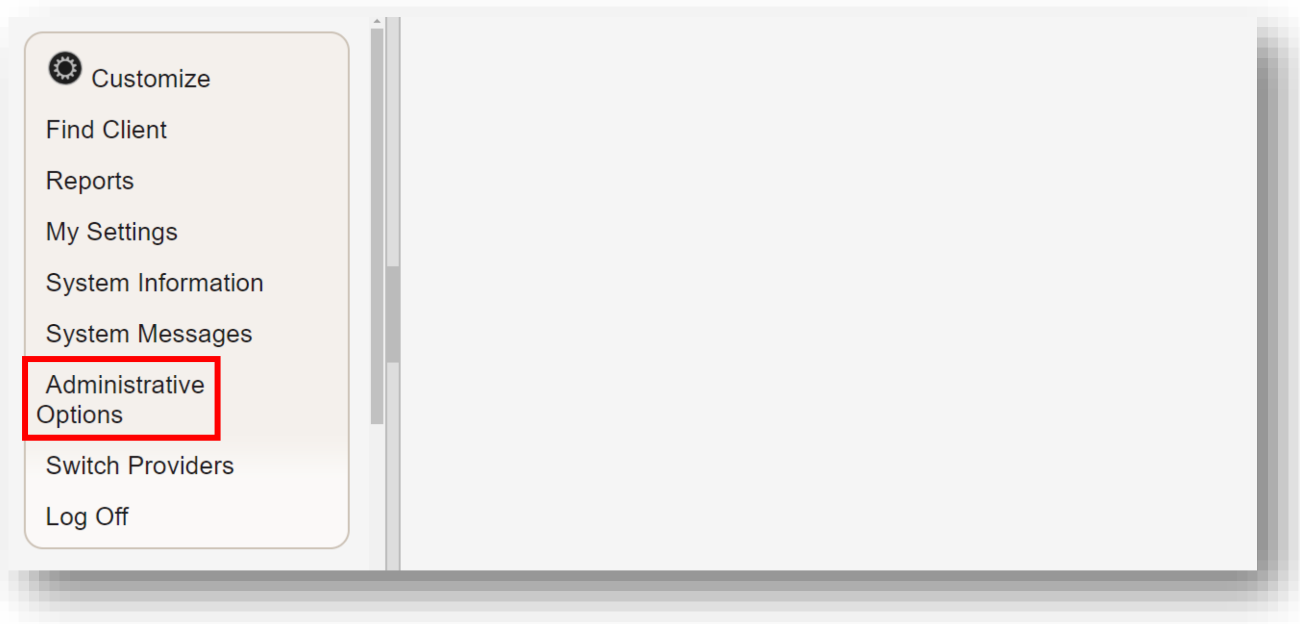
1. If you are setting up CAREWare for the first time, log in with the **cwtemp** login. Otherwise, log in with a user ID that already has full administrative privileges. You will see a screen that will give you the option to log in to **Central Administration** or either **Default or Your Provider (Domain) Name**, depending on how far your system has already been configured. Our sample database has already been configured, so its name appears here.



2. From the **Login** menu, choose **Central Administration.** For security reasons, you only have 20 seconds to choose one or the other domains.

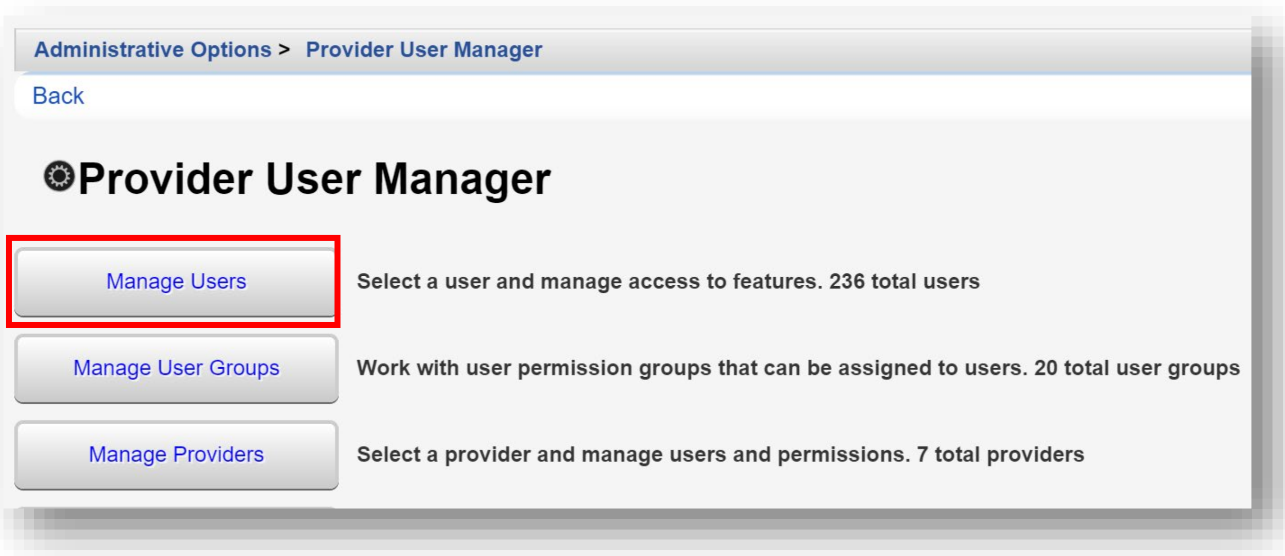


3. Select **Administrative Options** from the **Main Menu**.

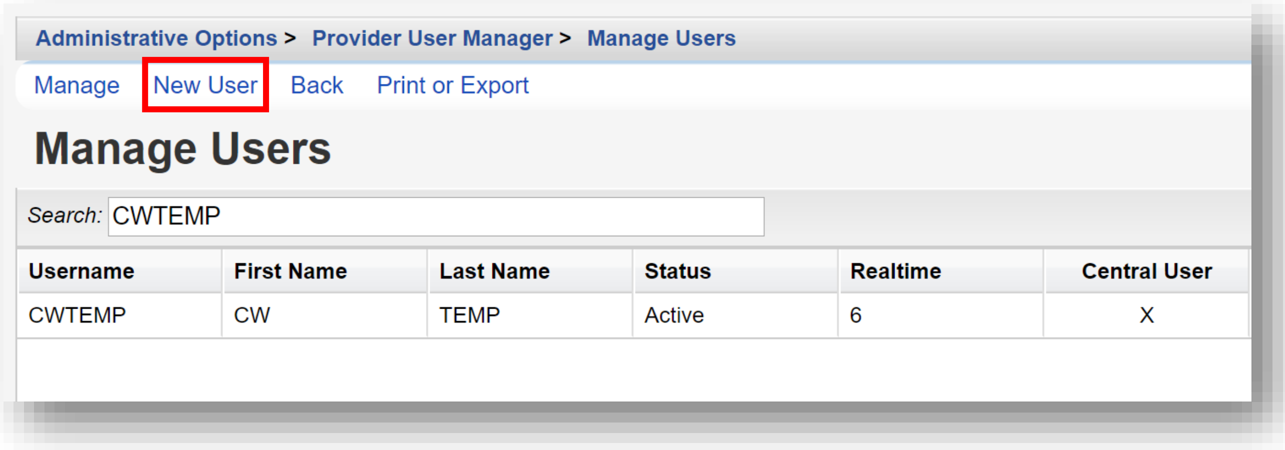


4. Select **Provider User Manager** from the links menu.

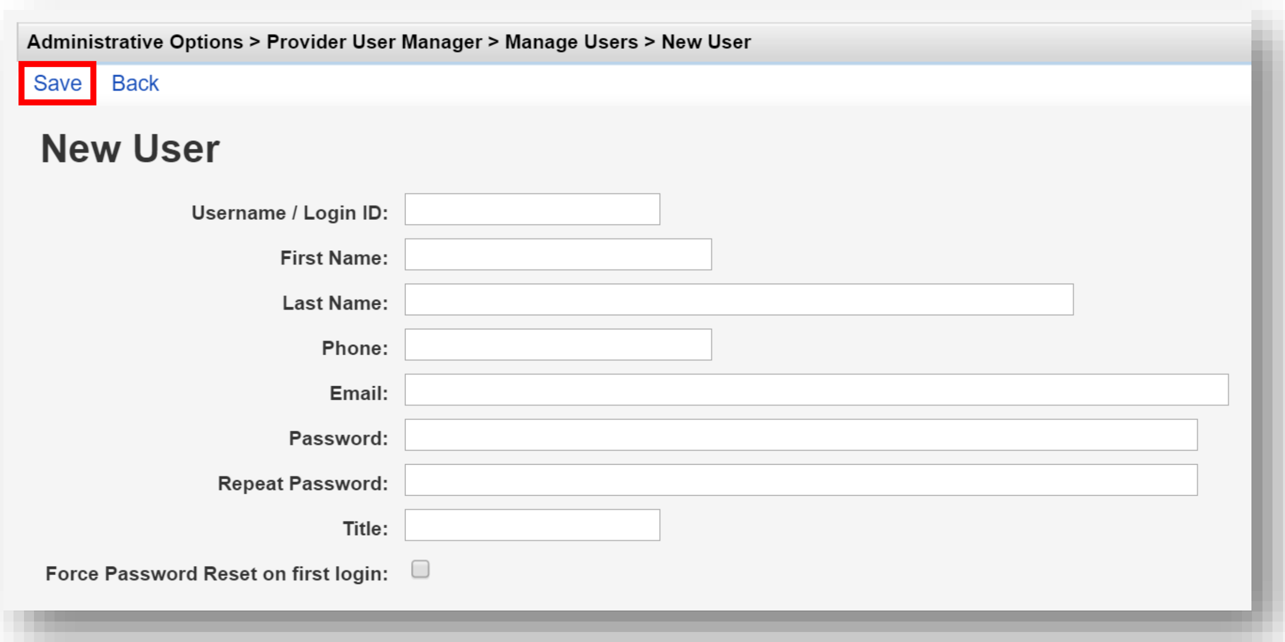
5. From the Provider User Manager menu, select **Manage Users** from the links menu.



6. You are now on the Manage Users menu. If you are configuring CAREWare for the first time, you'll only see the one user, **CWTEMP**. Select **New User** from the action bar.



7. Enter in the following information (as applicable) and click **Save.**
   - **Username / Login ID**
   - **First Name**
   - **Last Name**
   - **Phone**
   - **Email**
   - **Password (repeat)**
   - **Title**
   - **Force Password Reset on first login** (checkbox)



TIP: You may want to standardize how new username formats are created. For example; the full Last name, and first initial of the First name or vice-versa.

The **Force Password Reset on first login** checkbox can be useful for network CAREWare administrators. A “default” password can be assigned to the user for the initial login. Users will then be required to change their password to continue.

The CAREWare password must be at least 8 characters, with two non-alpha characters - i.e., numbers or special characters. Passwords are case-sensitive. HIPAA compliance requires you to select a password that:

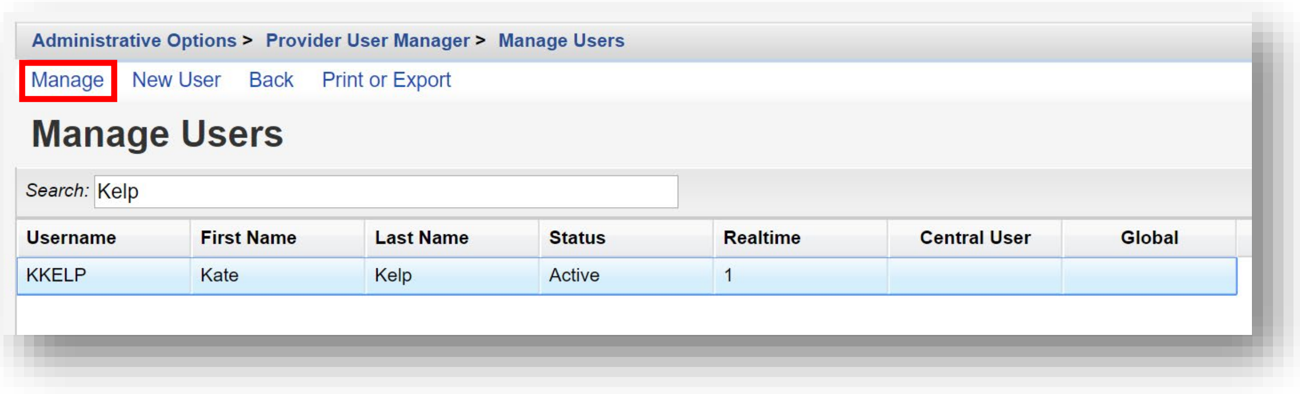
- Is not easy to guess (e.g. not using “password1234”)
- Has an alphanumeric combination (i.e., you might want to select a word and replace its vowels with numbers and symbols, i.e., “d1d@ct1c” for “didactic”)
- Is changed on a regular basis (every 90 days is typical in many corporate environments; check with your local IT department for company policy and standards if applicable)

Phone and email fields are optional. (* Note: if using the **Password Reset Manager,** a feature that allows users to unlock their own accounts; a valid email address is required in user information, to receive a password reset token via email.

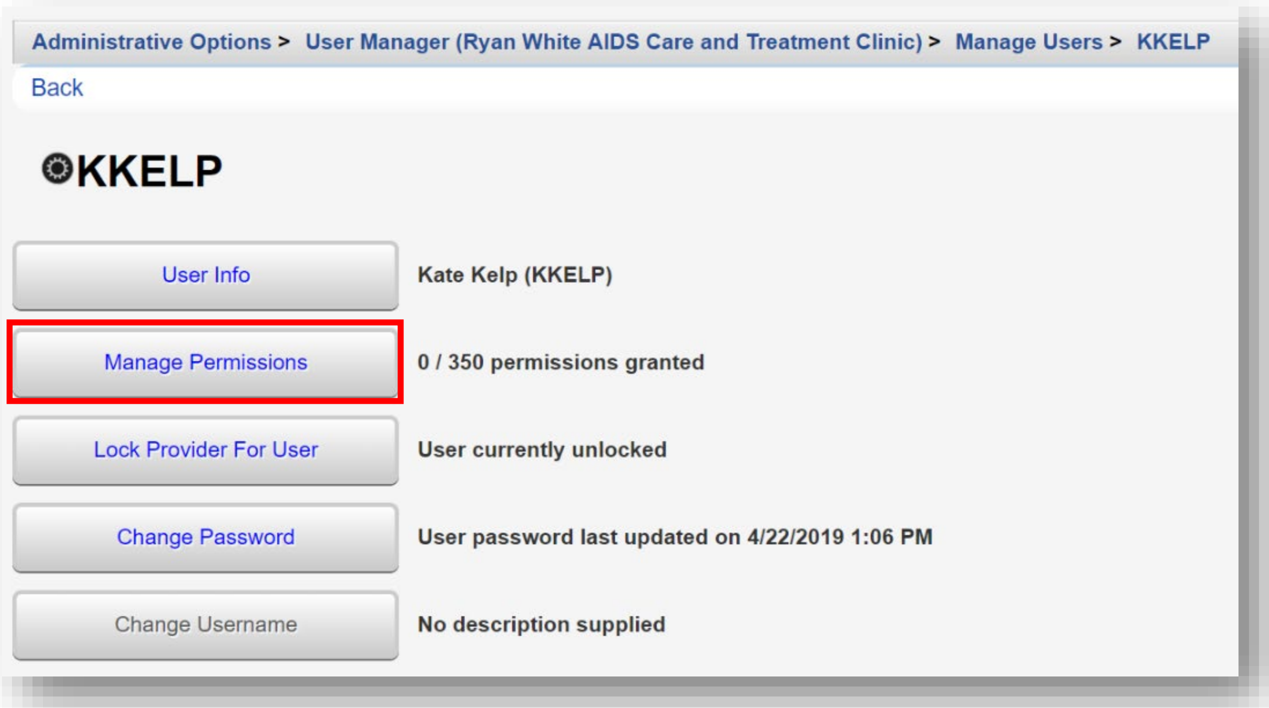
It is generally recommended to complete all user contact information fields.

User/Provider Assignment

1. From the Manage Users Menu, select the desired user and click **Manage**.



2. Select **Manage Permissions** from the links menu.



By default, new users have no permissions. They will be unable to complete any tasks, including adding, finding clients, or editing client information.

User permissions can be Granted Individually or Granted via Groups. Final Permission Status are the combination of both individual and group permissions granted.

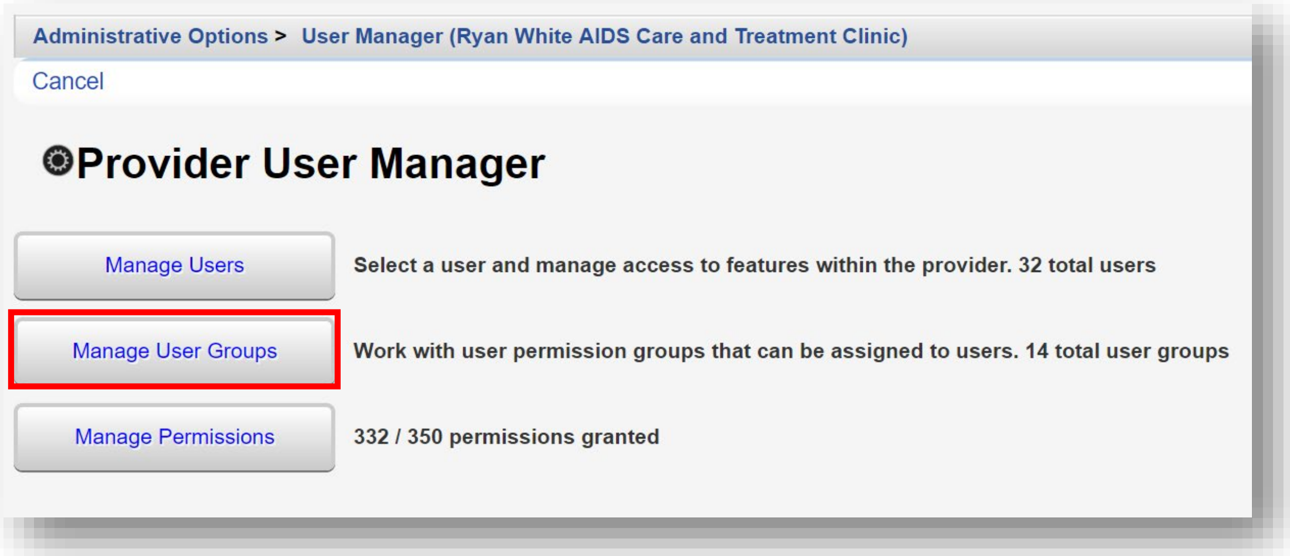
3. From the Permissions for User menu, highlight the permission you would like to add for the user (in this example we are adding the permission "Add Client") and select **Grant Individual Permission** from the action bar.

With over 350 other user permissions however, adding additional user permissions in this manner would be time-consuming and make it difficult to be consistent for a large number of users. To resolve this issue, we can utilize User Groups.

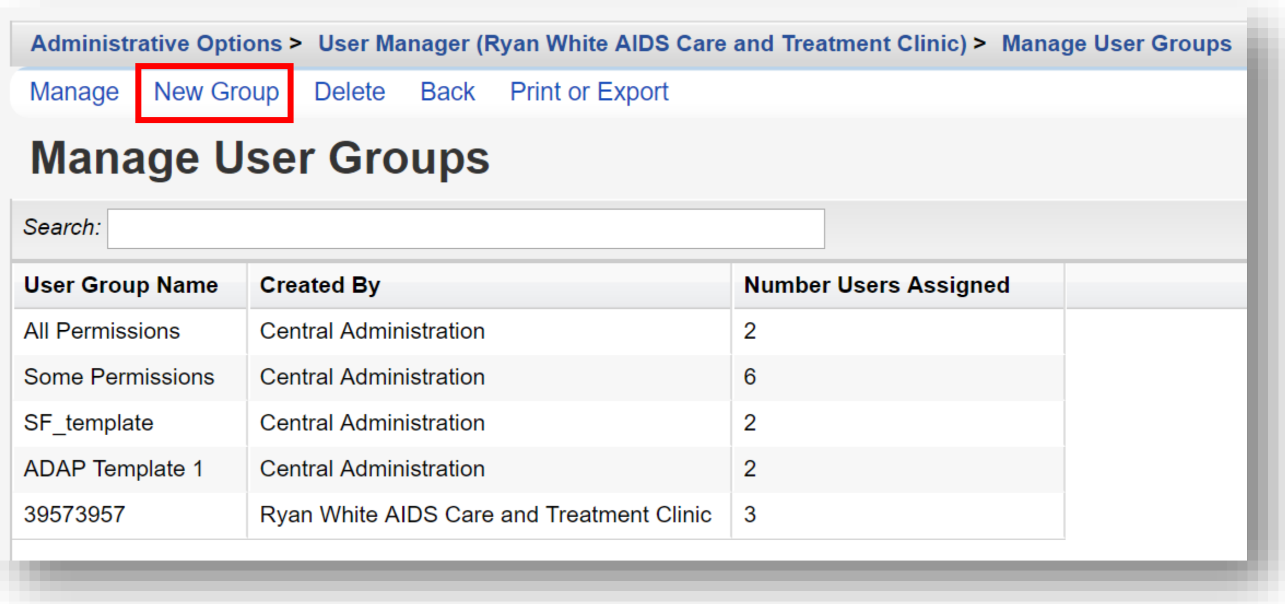
Creating User Groups

Groups can be created from either the Central Administration or Provider domain. We will create a new user group for a Provider domain.

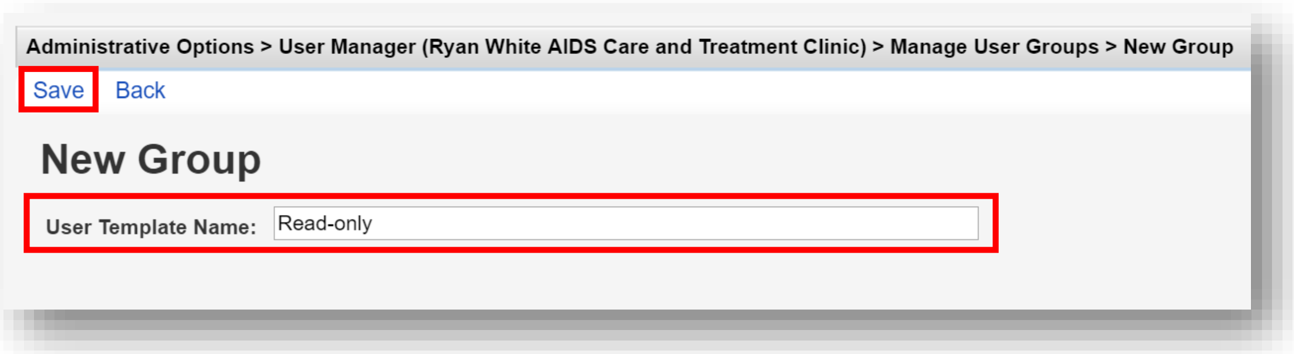
1. From the Provider User Manager menu (return to pages 1-3 for directions on accessing this menu), select **Manage User Groups** from the **l**inks menu.



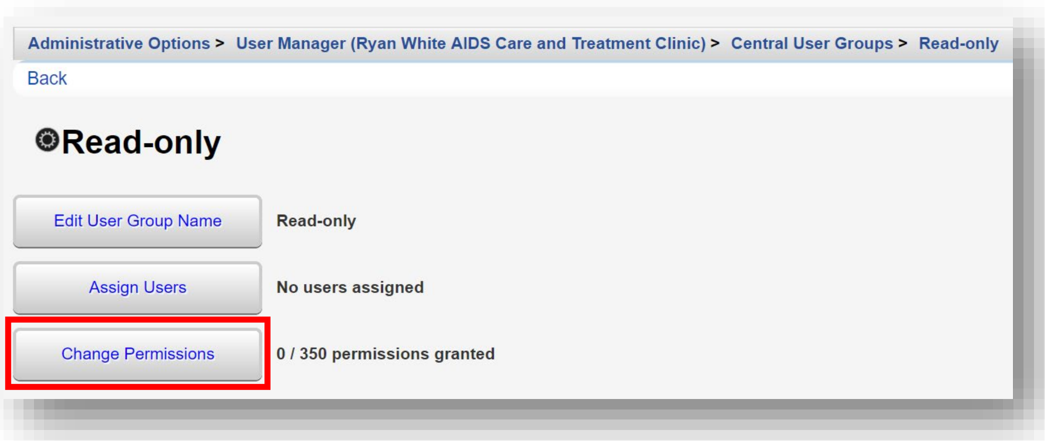
2. Select **New Group** from the action bar.



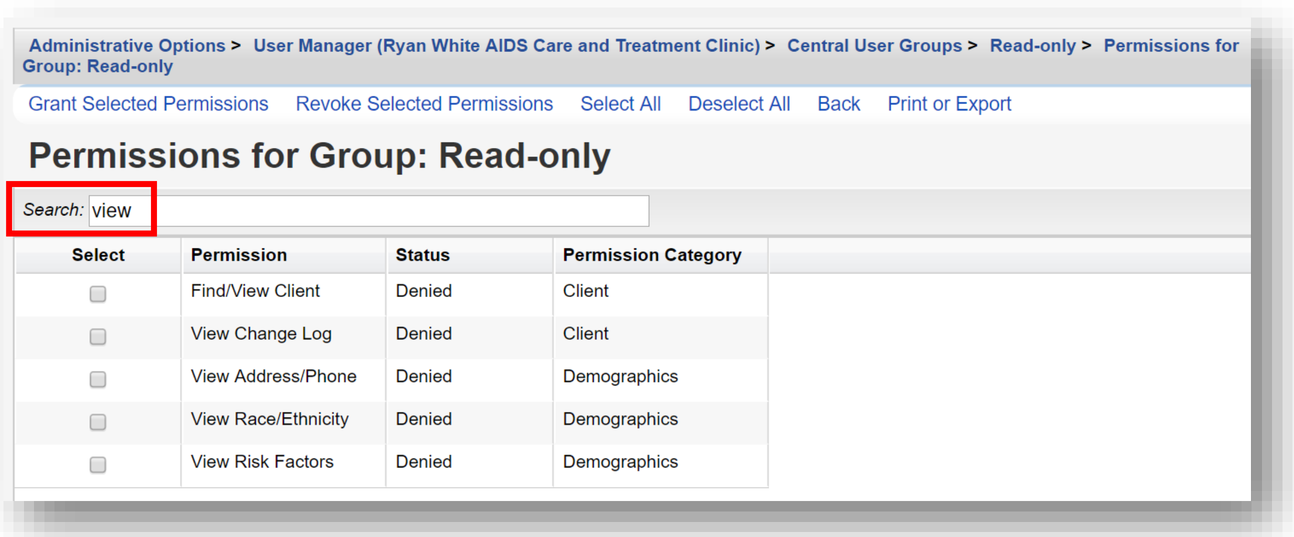
3. Enter a **User Template Name** and click **Save**. You will now be on the new group's link menu.



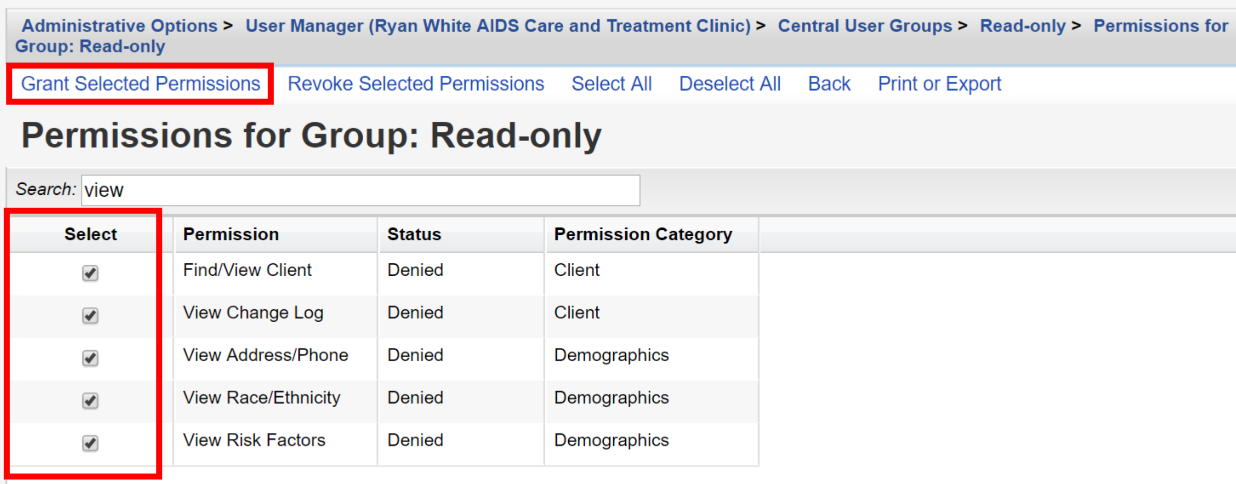
4. From the group's links menu (in this example, the group's name is Read-only), select **Change Permissions**.



5. Enter "view" in the Search box. User permissions related to "view" are displayed.

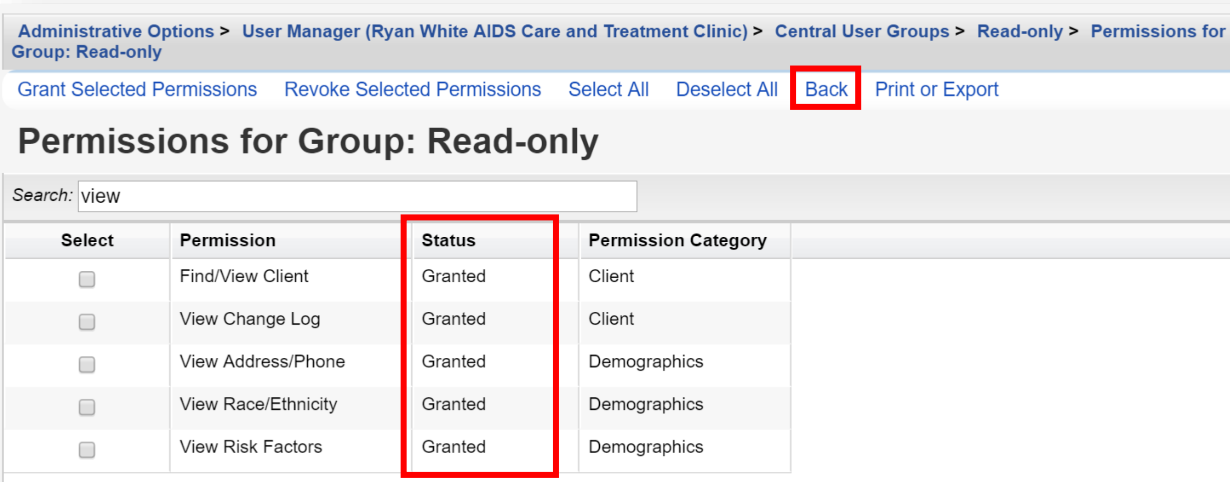


6. Select desired permissions for the Read-only user group by using the check boxes in the Select column. Note: to narrow the search results, enter additional criteria in the Search field. Once all desired permissions are selected, click **Grant Selected Permissions**.

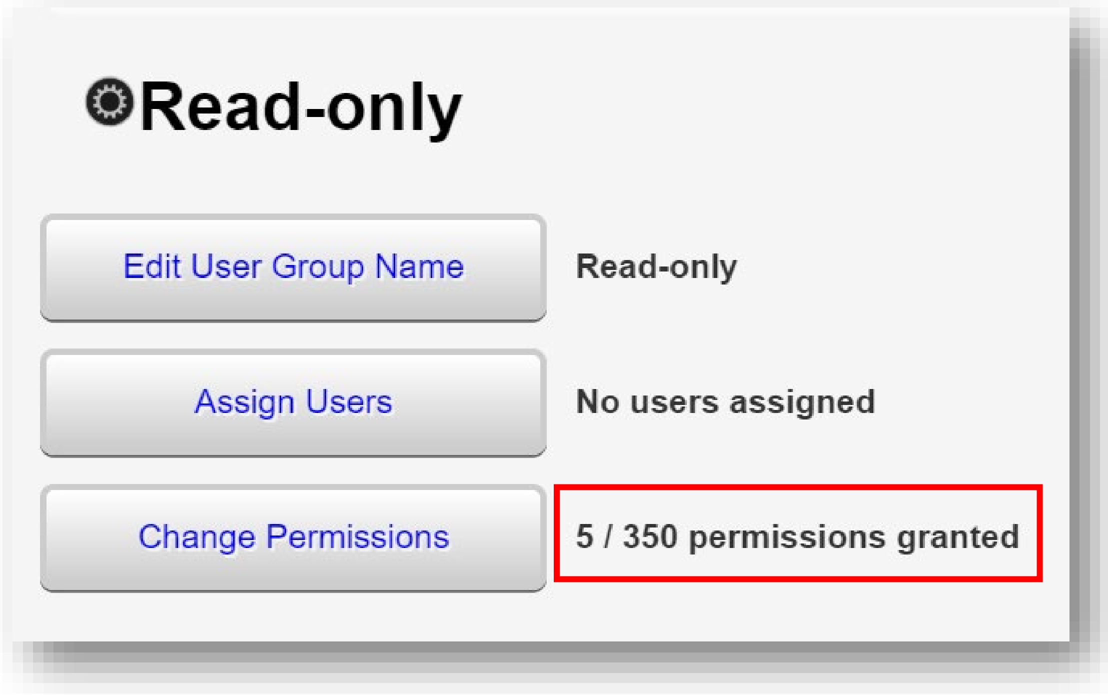


NOTE: The **Select All** can be used from the action bar (see previous screenshot). However, using this method may grant unintended user permissions. It should be used with caution. By clicking at the top of the **Status** column, the Granted permissions will be sorted before the Denied permissions.

7. Note that the Status column for the previously selected permissions have changed to Granted. Click **Back** to return to the group's links menu.

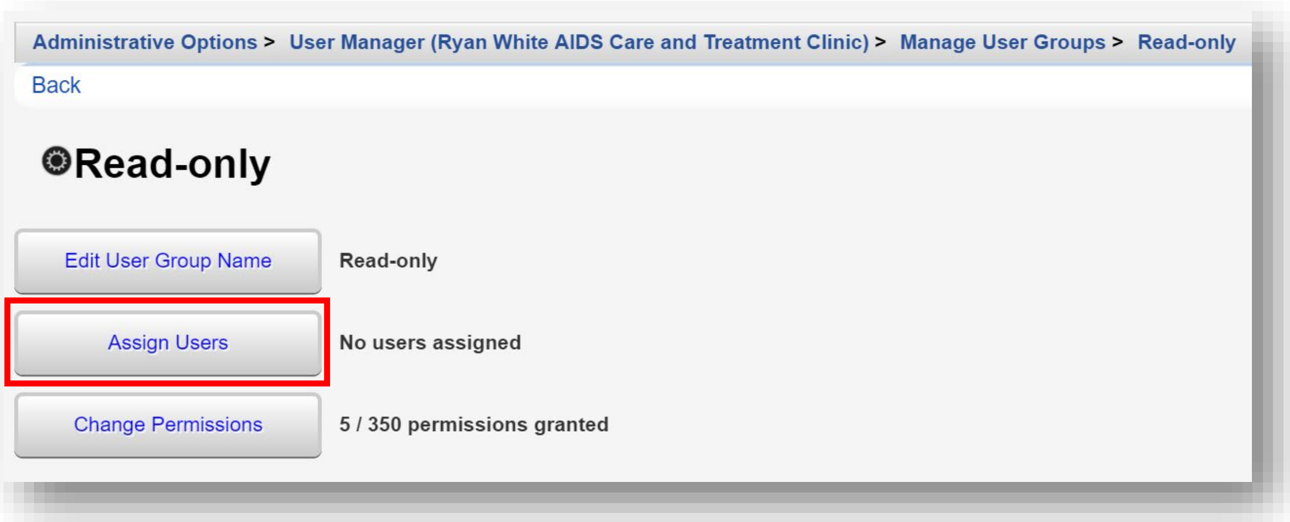


8. Note that 5 out of 350 permissions are now granted to the **Read-only** group.

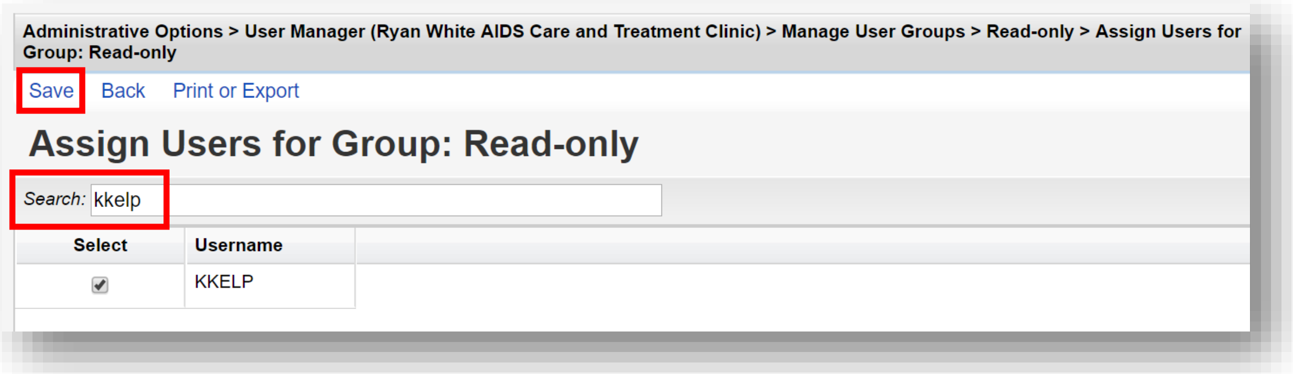


Assigning Users to User Groups

1. From the user group's links menu, click **Assign Users**.



2. Use the Search box field to search for the desired user (in this example, we are searching for user “kkelp”). Use the checkbox to select the user and click **Save**.

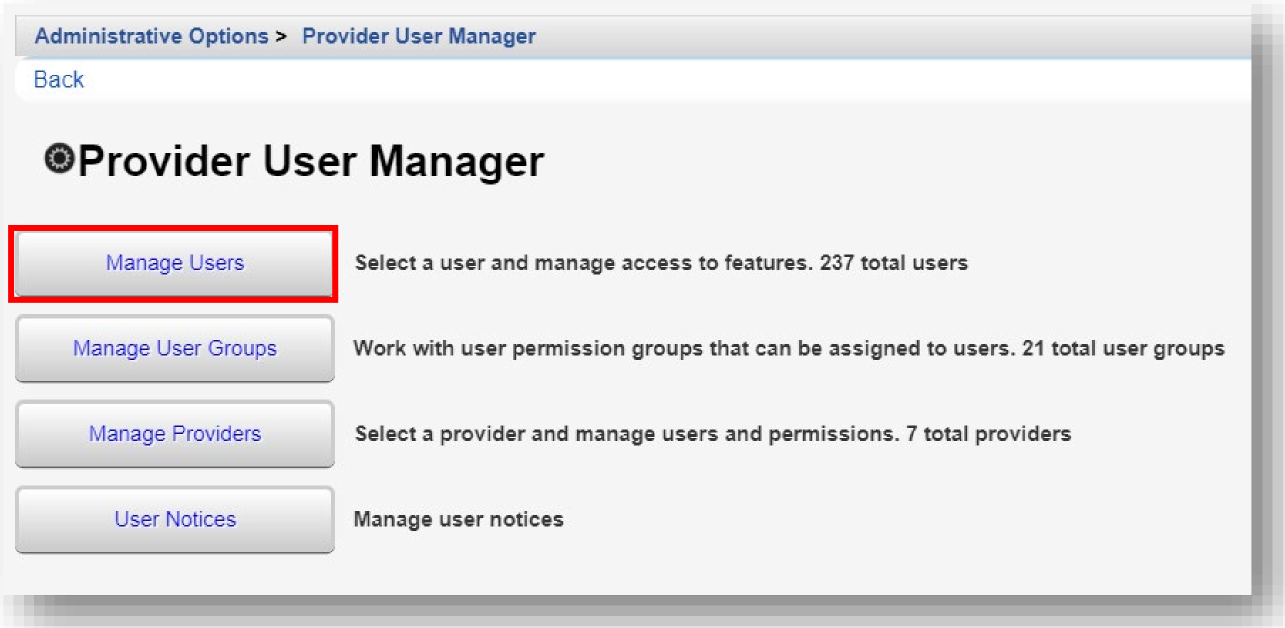


3. After clicking save, you will return to the user group’s links menu. User “KKelp” has been assigned to the user group, Read-only, which has been granted five (5) permissions.

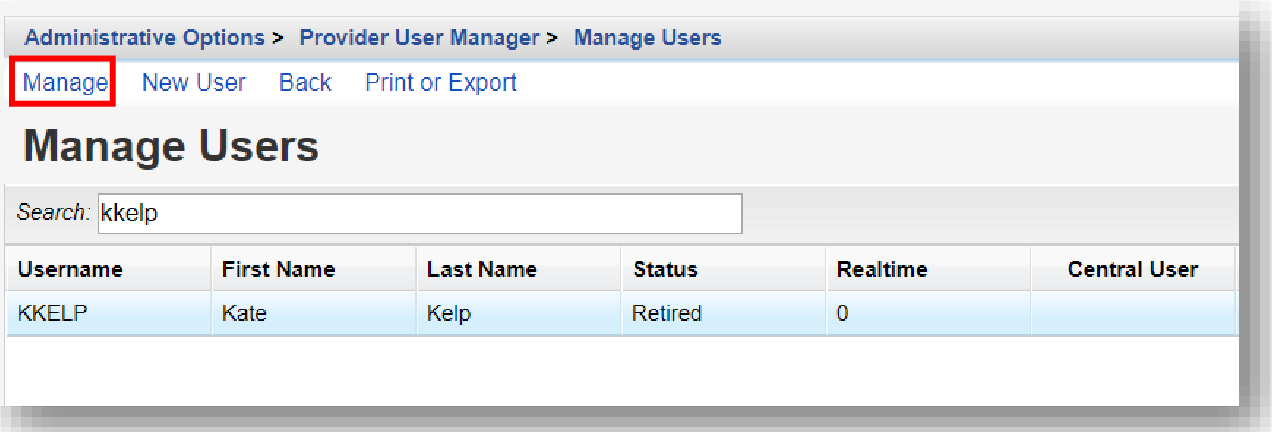
Other User Management Options

It is recommended to manage user accounts from the Central Administration domain to access the full menu of user options.

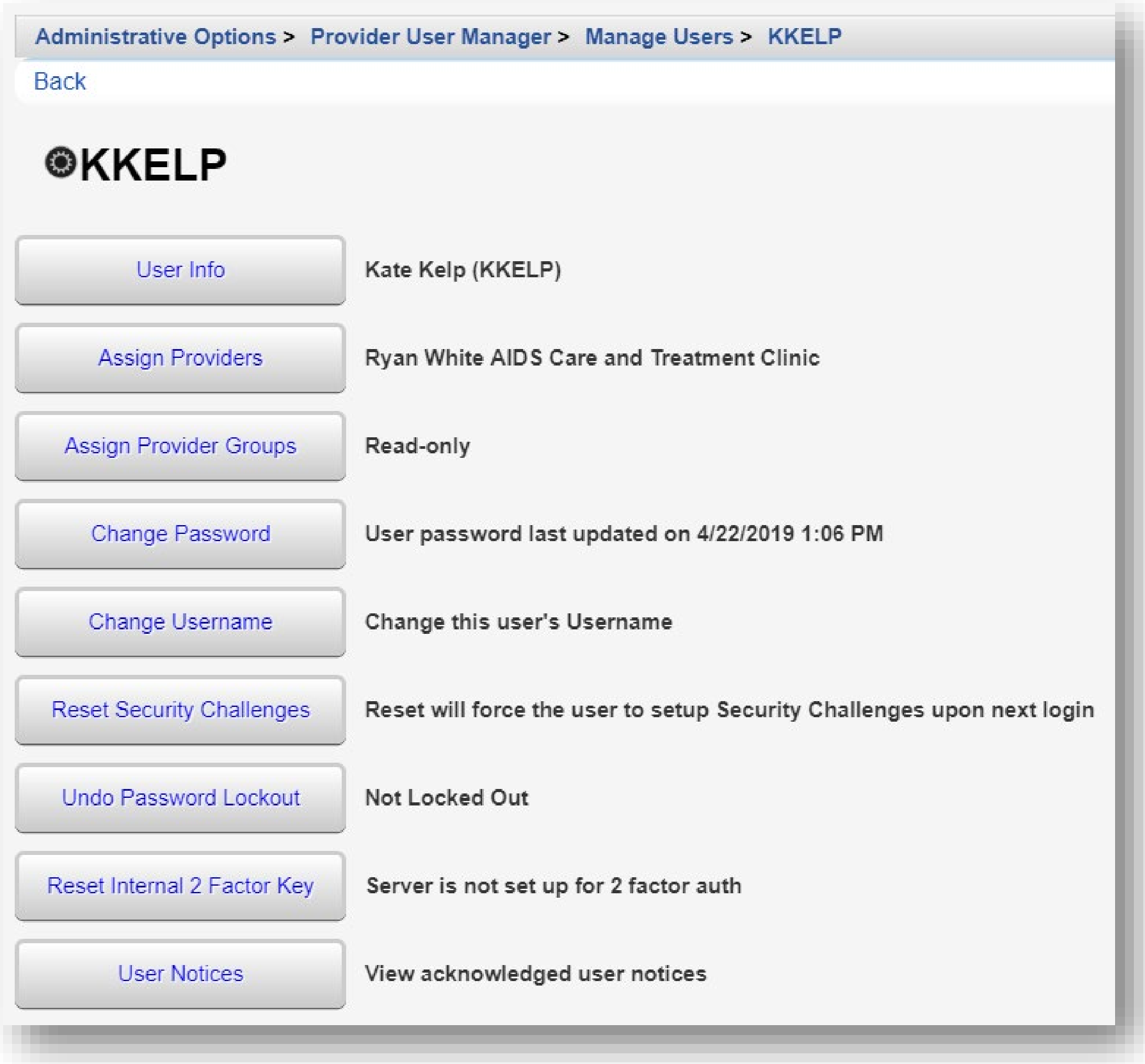
1. From the Provider User Manager menu (return to pages 1-3 for directions on accessing this menu), select **Manage Users** from the links menu.



2. From the Manage Users Menu, select the desired user and click **Manage**.



3. You are now on the user's menu:



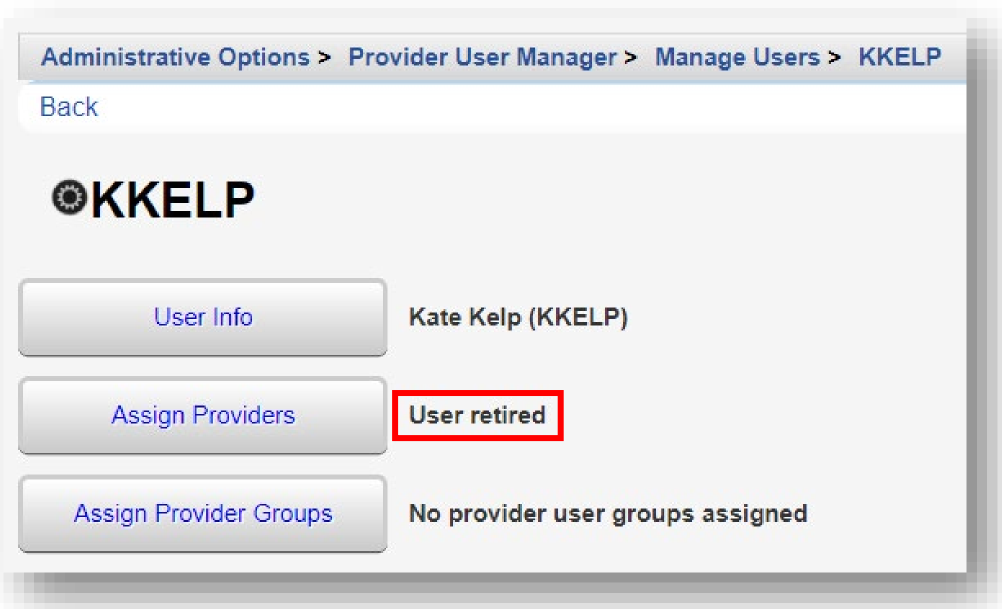
4. Select a desired link menu to complete/edit the following:
   - **User Info**
   - **Assign Providers**
   - **Assign Provider Groups**
   - **Change Password**
   - **Change Username**
   - **Reset Security Challenges**
   - **Undo Password Lockout**
   - **Reset Internal 2 Factor Key**
   - **User Notices**
   - **Undo Password Lockout** – When users enter their password incorrectly more than three times, you must Undo Password Lockout. By default, the user account will be automatically locked out of CAREWare, until unlocked.

There are several other (optional) user account security settings available in CAREWare, including:

- **Reset Security Challenges** – For users who have been locked out and unlocked, resetting the security challenge questions will require them to create new challenge questions when they log in again.
- **Email Password Reset** – Enabling this feature will allow users who are locked out to reset their own password using a token sent to the email address in their user settings.

A user account cannot be Deleted, only the username can be changed. Users can be assigned and reassigned to multiple providers.

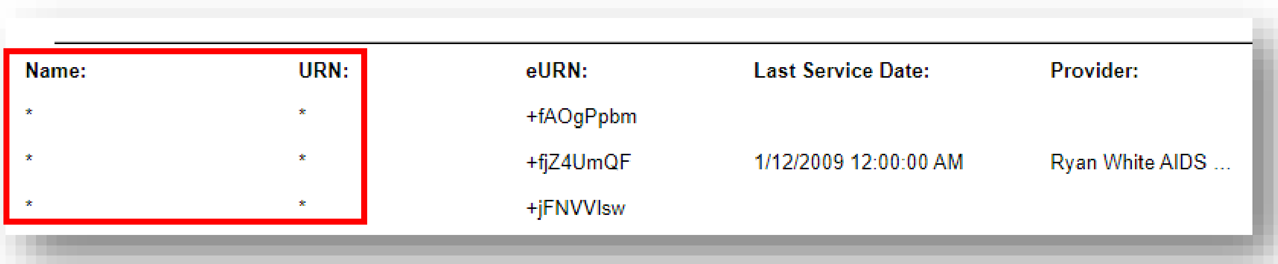
If a user is not assigned to any provider, the user account will automatically change to **User retired**. (Note: when a user account is "retired", all previously assigned individual and group permissions will automatically be revoked.)



Restriction of PII in Reports

This feature allows administrators to restrict users' access to Personal Identifying Information (PII) that is available in most CAREWare built-in reports on a field-by-field basis. With sufficient permissions, a user may select the **Hide Personally Identifying Information** box to conceal certain field selections in prebuilt reports.

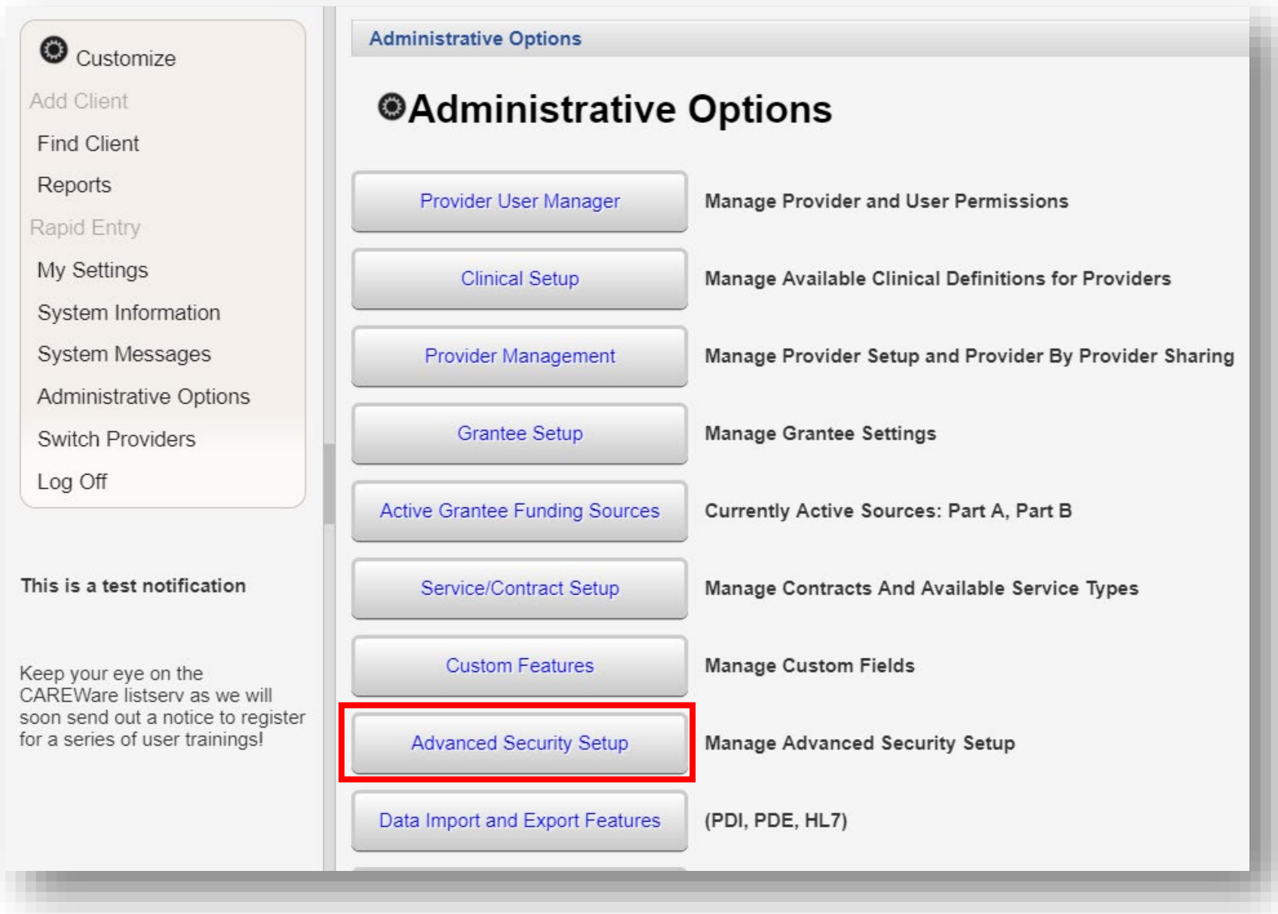
When reports are run, PII fields will be replaced with asterisks in the restricted fields:



Name:	URN:	eURN:	Last Service Date:	Provider:
*	*	+fAOgPpbm		
*	*	+fjZ4UmQF	1/12/2009 12:00:00 AM	Ryan White AIDS ...
*	*	+jFNVVIsw		

Report restrictions can also be managed via permission groups configured within the **User Group Admin (Reports)** menu in the **Central Administration** domain.

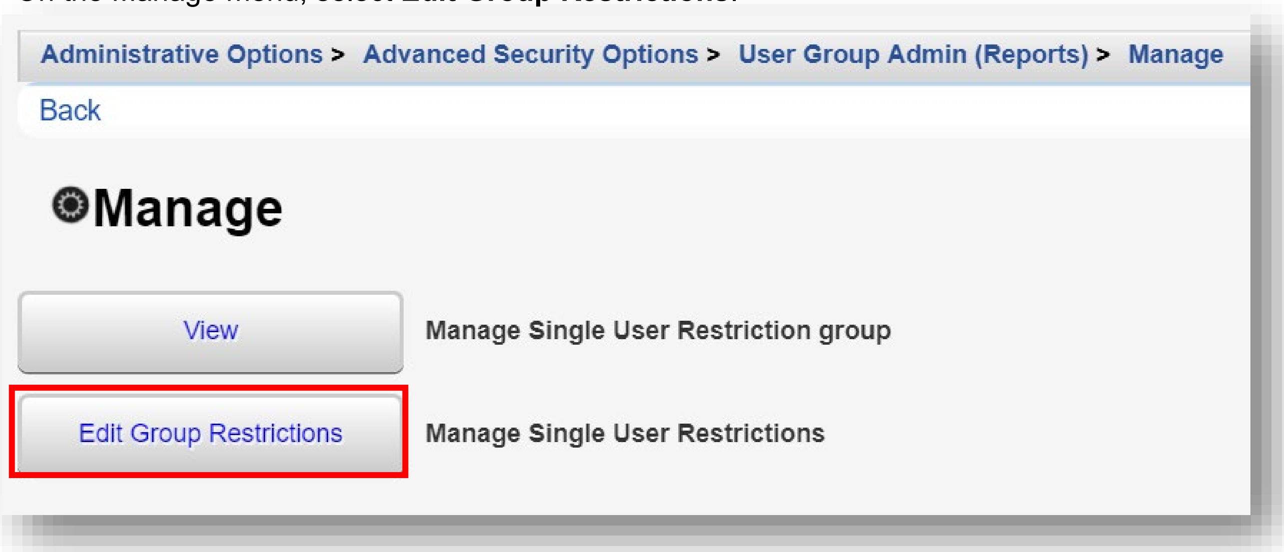
1. From Administrative Options on the **Main Menu**, select the **Advanced Security Setup** link.



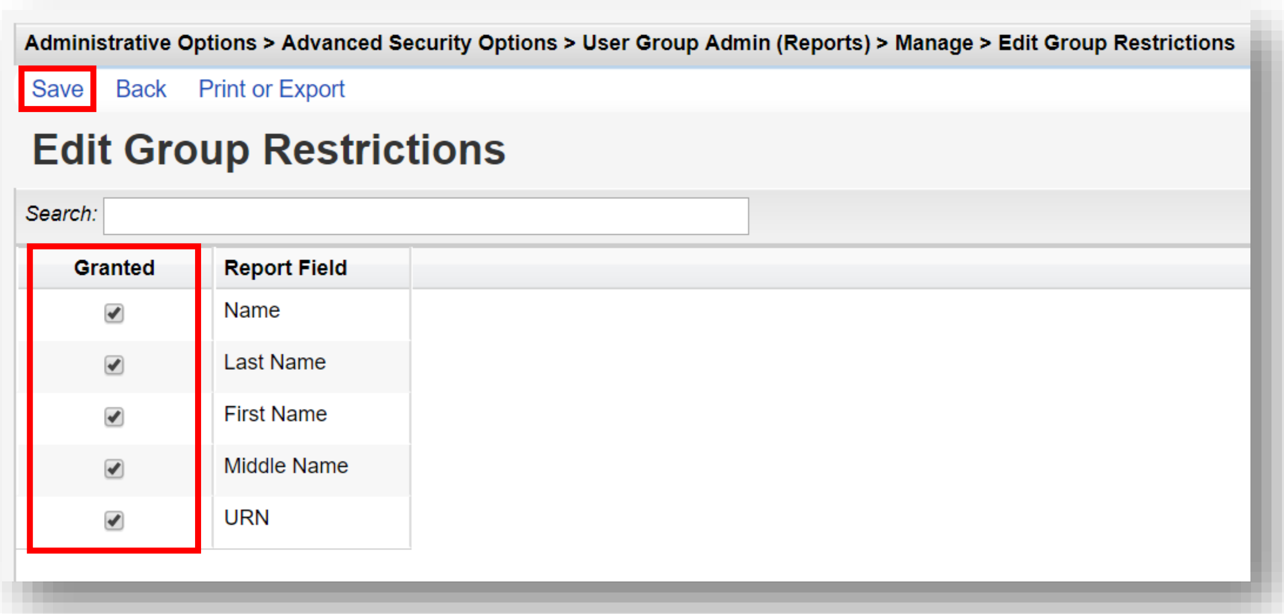
2. Select the **User Group Admin (Reports)** link.

3. Select the PII Restricted Group from the User Group column. Note the number five (5) under the Restrictions column. Click **Manage** from the action bar.

4. On the Manage menu, select **Edit Group Restrictions**.

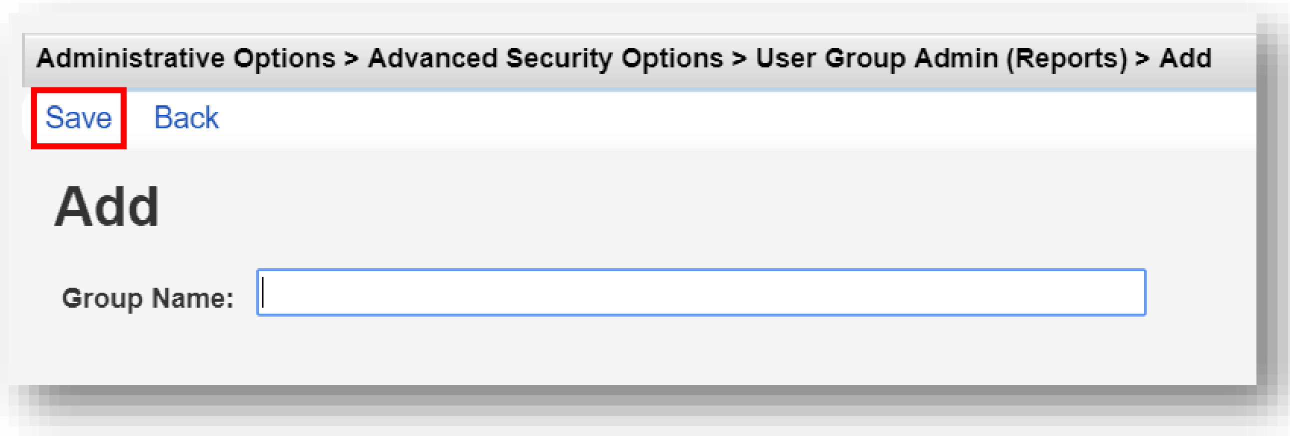


5. By default, five (5) PII Restricted fields are preselected: Name, Last Name, First Name, Middle Name, and URN. These are the fields that will be hidden when the **Hide Personally Identifying Information** box is selected for prebuilt reports. To edit restrictions, check/uncheck the boxes in the Granted column and click **Save**.

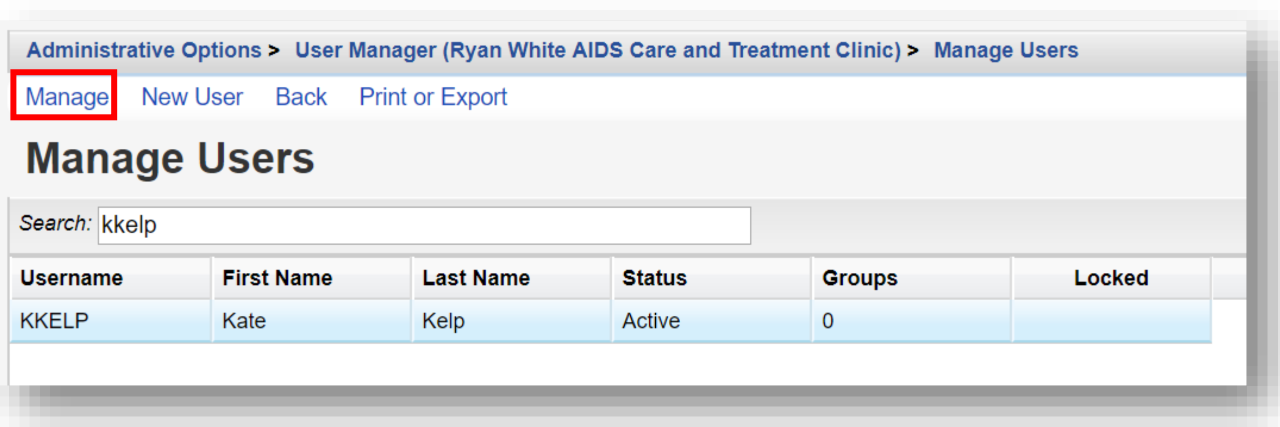


6. On the User Group Admin (Reports) menu (see steps 1-3), **new User Group(s) with** customized restricted fields can also be created. To do so, click **Add** from the action bar.

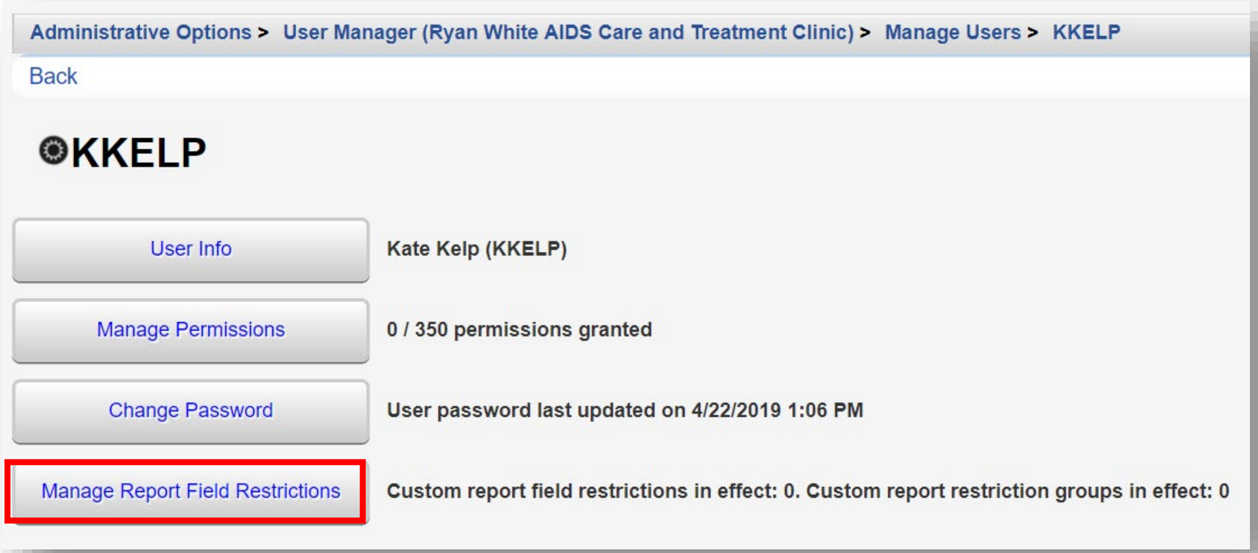
7. Enter in the **Group Name** and click **Save**.



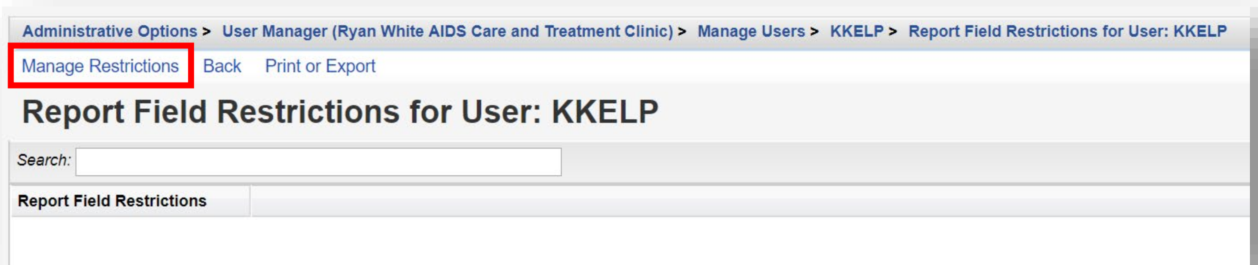
8. To apply the restrictions, go to the Manage Users menu (see pages 1-3) and select the desired user. Click **Manage**.



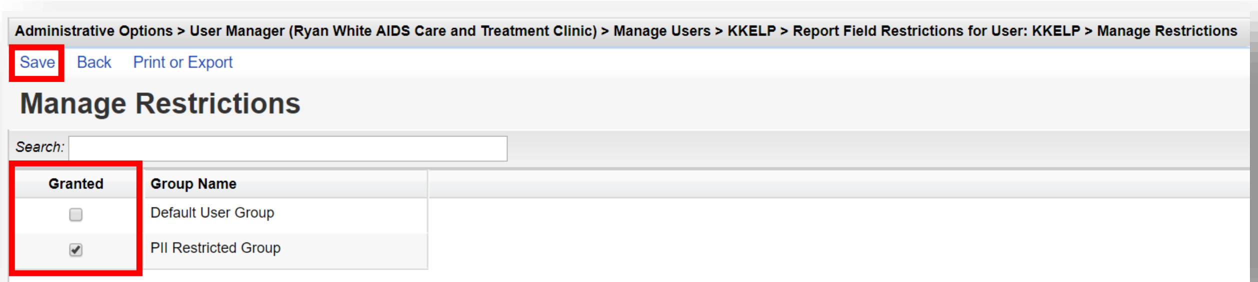
9. Select Manage Report Field Restrictions.



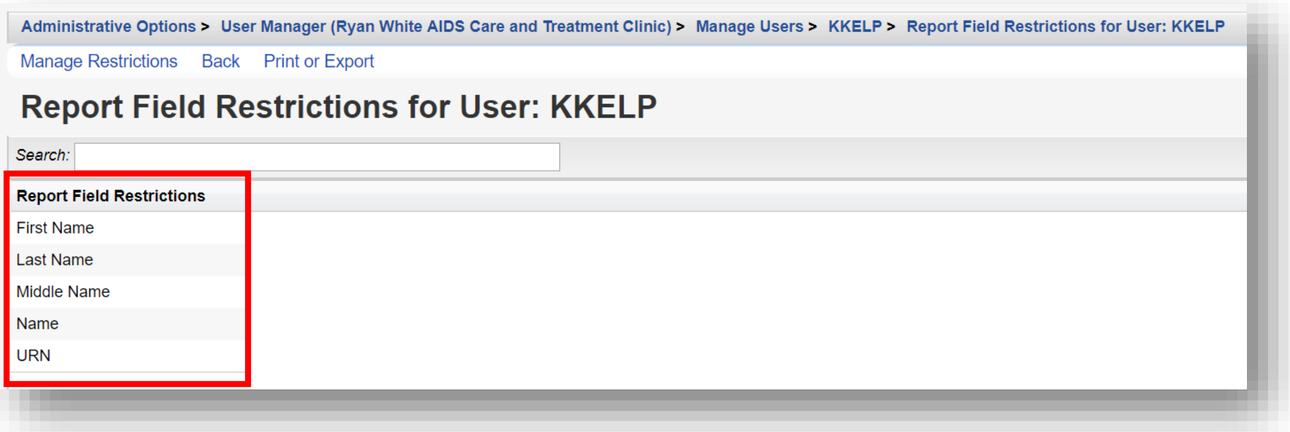
10. From the Report Field Restrictions for User menu, select **Manage Restrictions**.



11. Select the desired Group name by placing a check in the Granted column. Click **Save**.



12. The Report Field Restrictions are now displayed for the selected user.

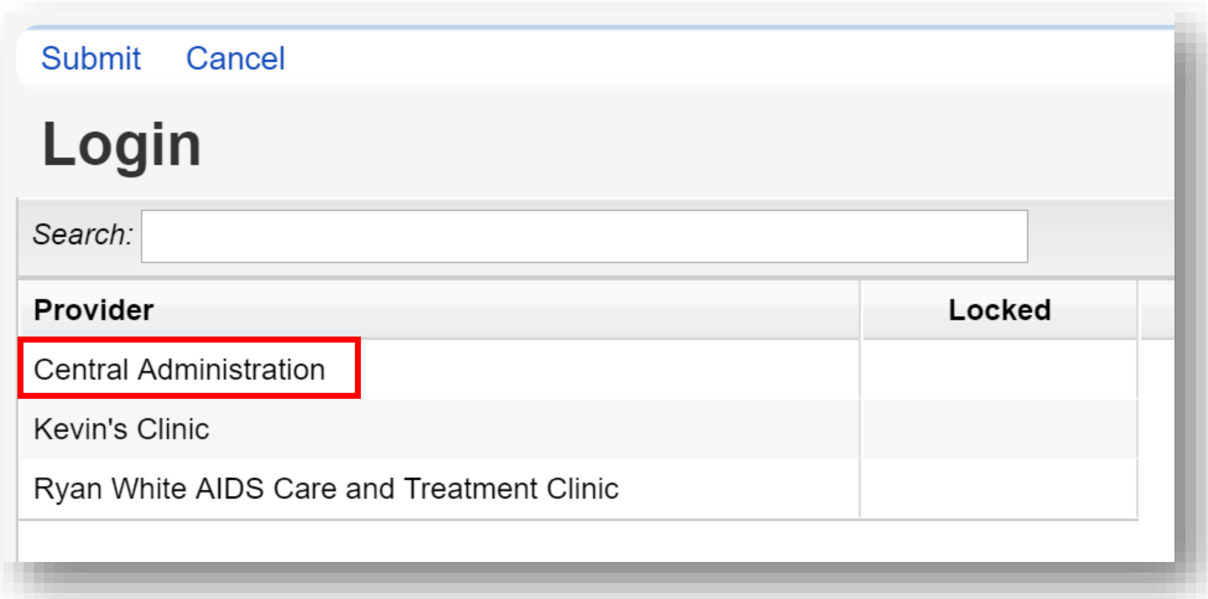


Configuring Provider Permissions

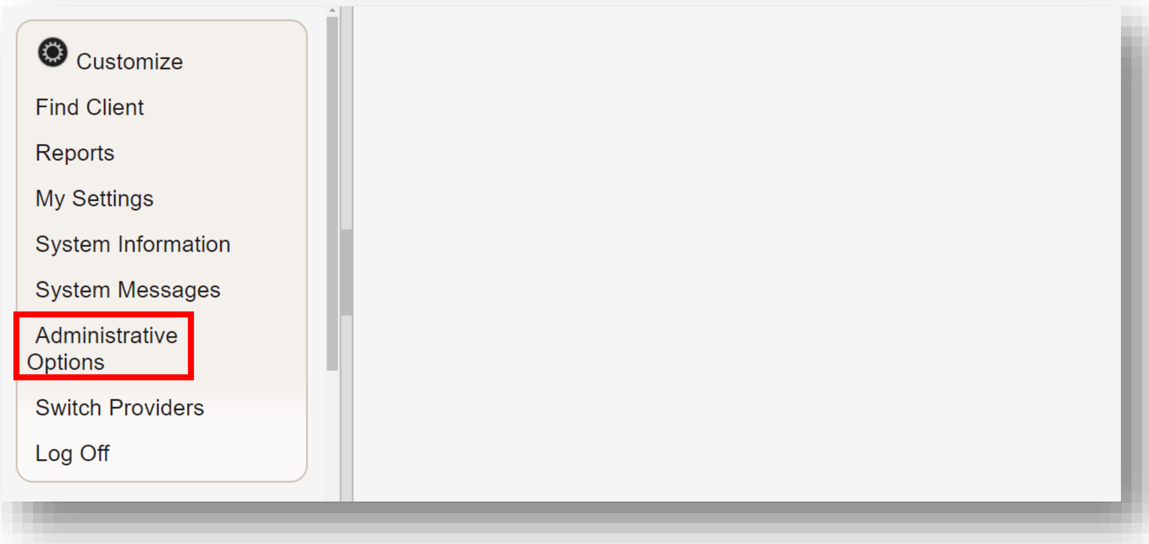
Once you've set up your Central Administration user, it's time to set up your provider permissions. These will restrict the permissions available to users within the provider domain. For instance, as the central administrator, you may want to control whether or not providers can make changes to contracts.

By restricting certain providers' permissions, you make it impossible for any user at that provider to change those configurations. These permissions have to be administered at the Central Administration level.

1. Log in to the **Central Administration** domain.

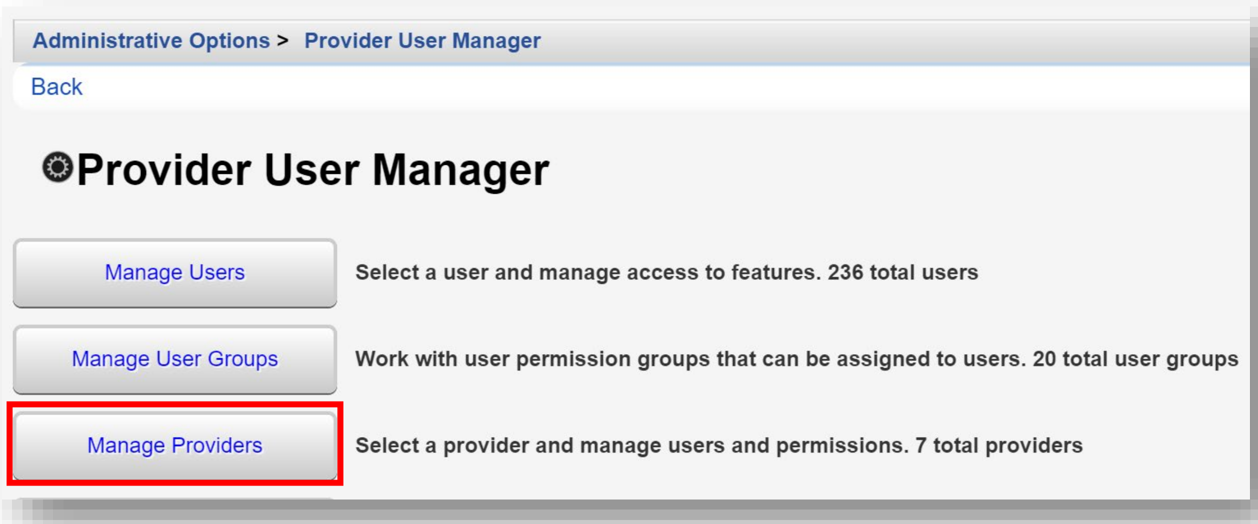


2. Select **Administrative Options** from the **Main Menu**.



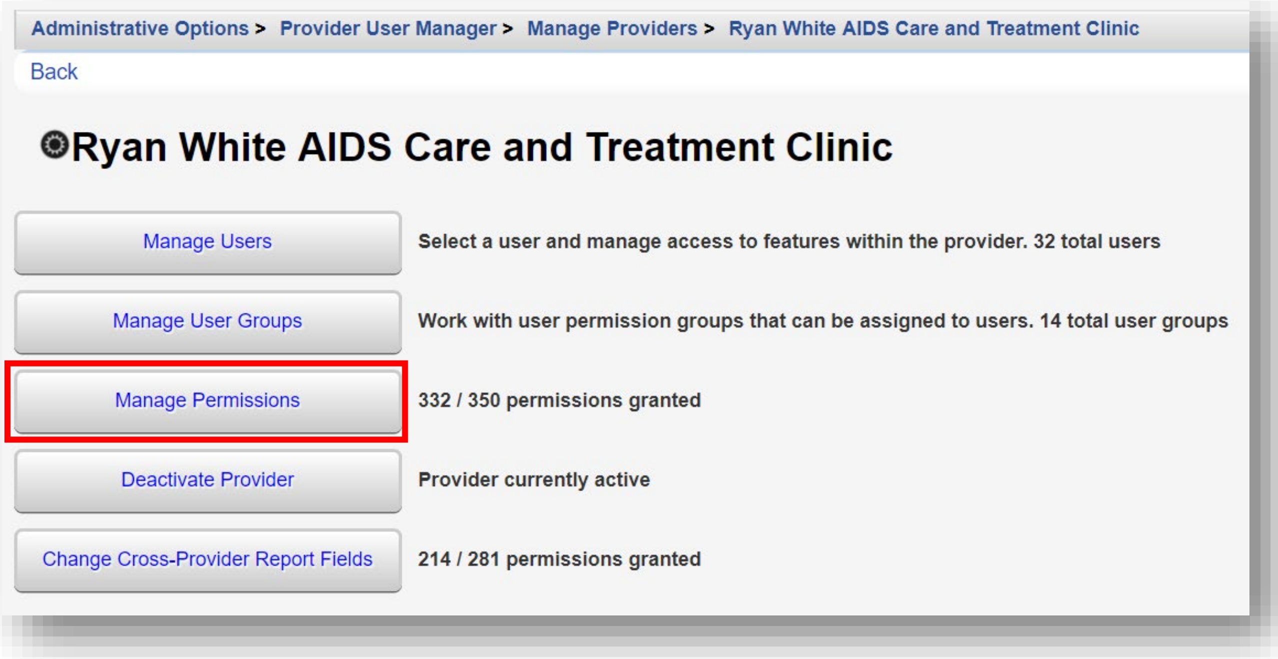
3. Select **Provider User Manager** from the links menu.

4. From the Provider User Manager menu, select **Manage Providers** from the links menu.

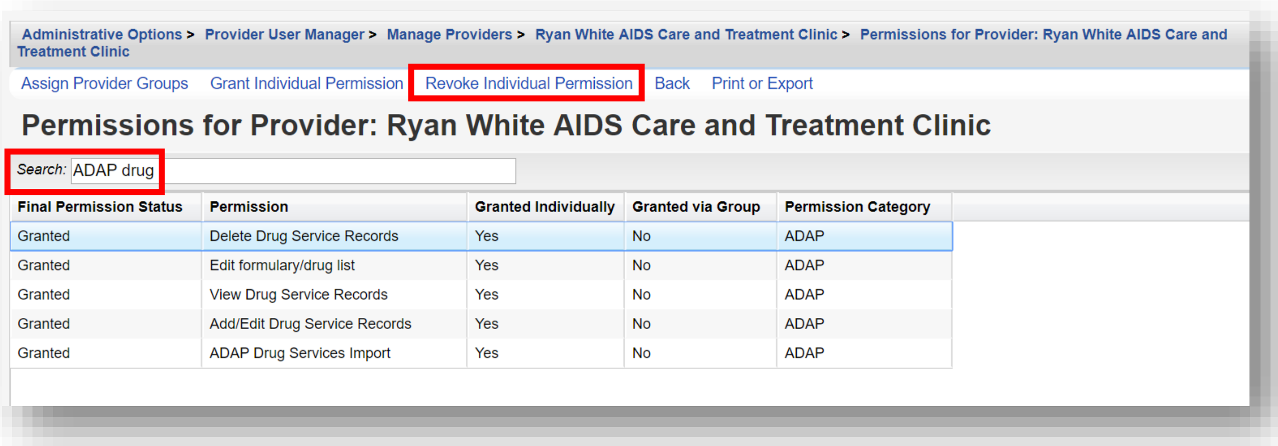


5. Select the relevant provider and click **Manage** from the action bar.

6. Select **Manage Permissions** from the link menu.



7. In this example, we will revoke some ADAP drug permissions as this agency does not provide any ADAP services. Enter "ADAP drug" in the Search box. Select one of the ADAP permissions and select **Revoke Individual Permission** from the action bar. Continue until the remaining ADAP drug permissions are revoked.



8. Now, once we switch providers and log into the Ryan White AIDS Care and Treatment Clinic provider domain, the “ADAP drug” permissions are listed as “No (Locked for Provider)” under the **Granted via Groups** column.

Permission	Final Permission Status	Granted via Groups	Granted Individually	Permission Category
Delete Drug Service Records	Denied	No (Locked for Provider)	No	ADAP
Edit formulary/drug list	Denied	No (Locked for Provider)	No	ADAP
View Drug Service Records	Denied	No (Locked for Provider)	No	ADAP
Add/Edit Drug Service Records	Denied	No (Locked for Provider)	No	ADAP
ADAP Drug Services Import	Denied	No (Locked for Provider)	No	ADAP

Now, regardless of group permissions applied, no user at this agency can access the locked section unless you unlock the **Permissions for Provider** or change **Provider Permissions Group** from the Central Administration domain.

Other Provider Management Options

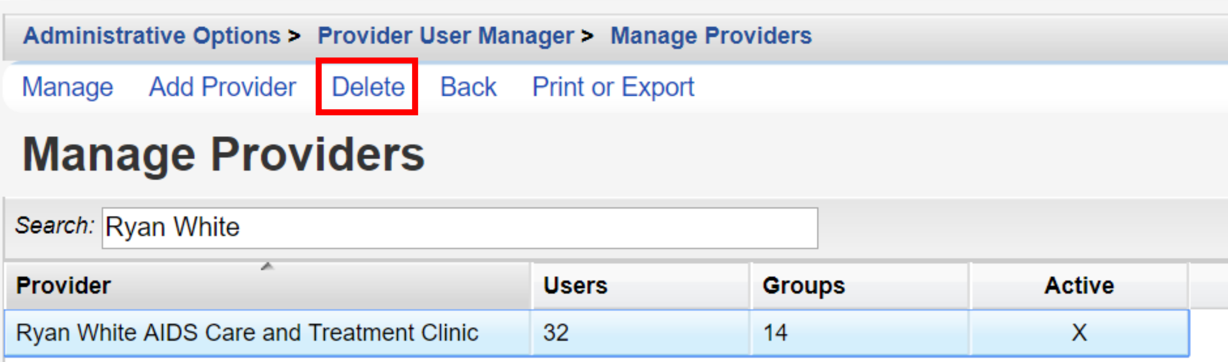
Deleting Providers

WARNING: Deleting a Provider will PERMANENTLY remove the provider, including all records (tests, services, referrals, etc.) associated with this provider. Additionally, any clients that are ONLY associated with this provider will also be deleted. Once these records are deleted, there is NO WAY TO RESTORE the data.

Instead, it is recommended to **Deactivate** a Provider, which will retain provider settings and save client data, should the provider be reactivated in the future. Please refer to the next section for further instructions.

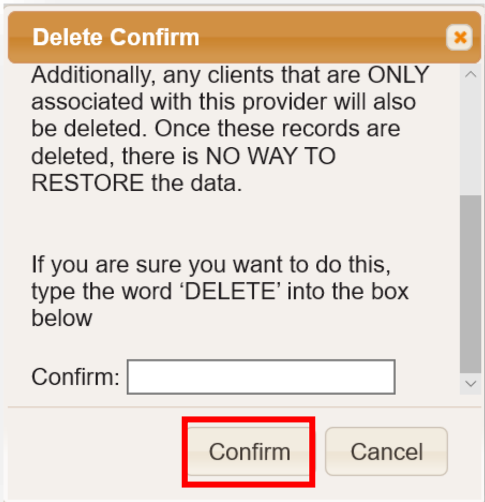
To delete a provider:

1. From the Manage Providers menu, highlight the desired provider by clicking on the provider’s name, and click **Delete** from the action bar.



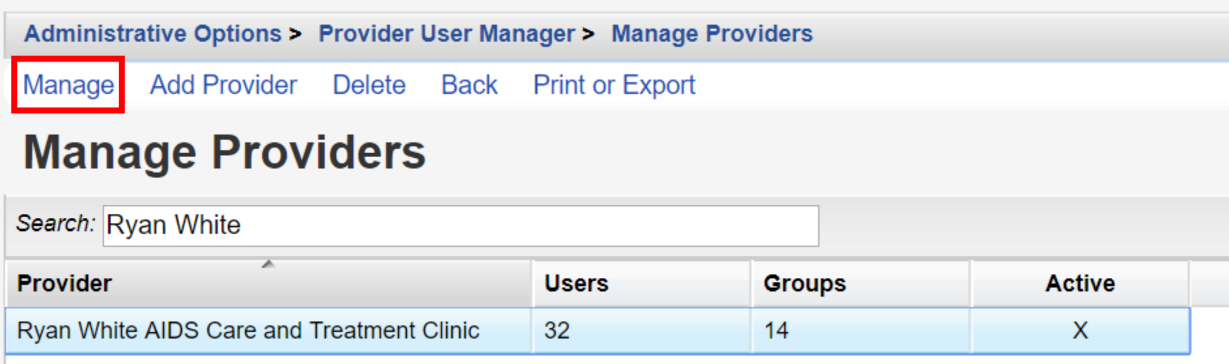
Provider	Users	Groups	Active
Ryan White AIDS Care and Treatment Clinic	32	14	X

2. A Delete Confirm box will appear. To confirm, you must type in the word “DELETE” into the text box and click **Confirm**.

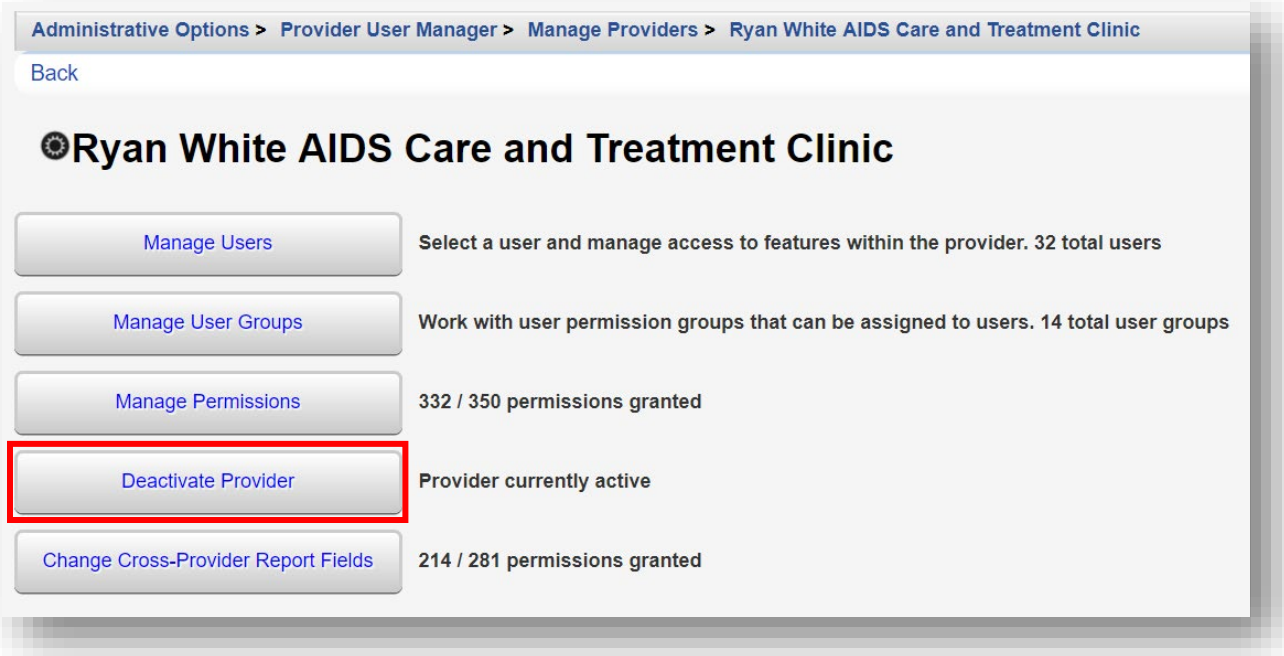


Deactivating Providers

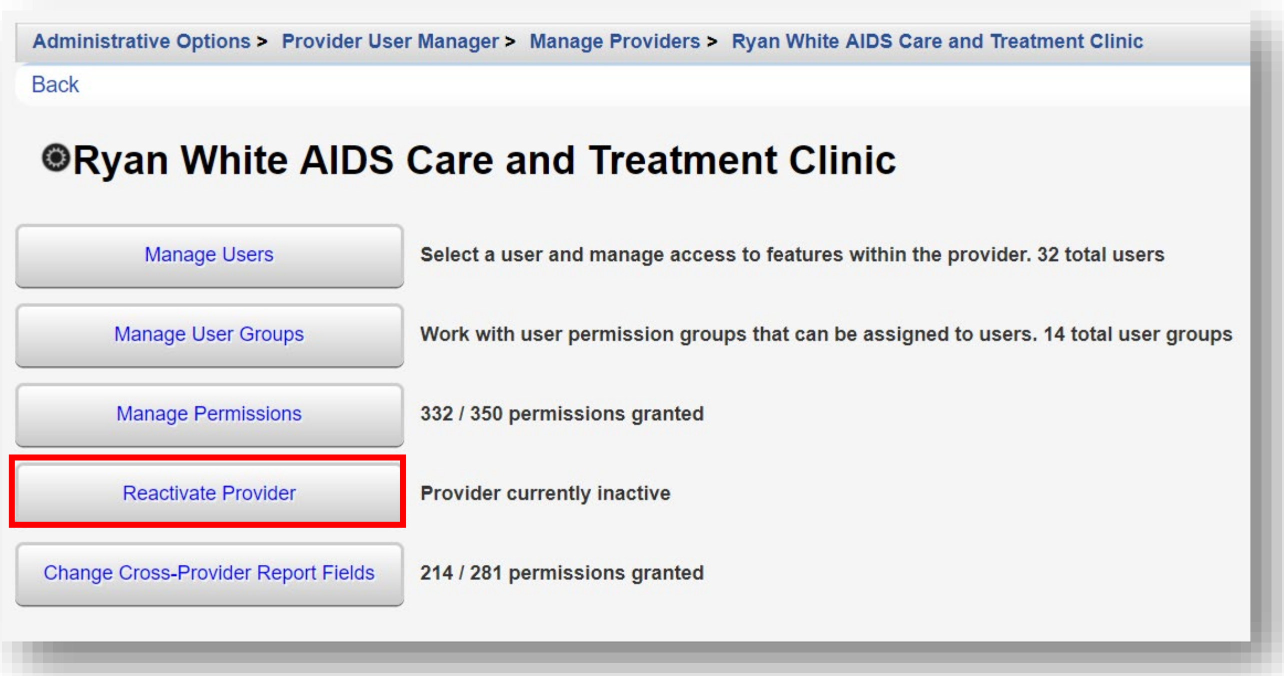
1. From the Manage Providers menu, highlight the desired provider by clicking on the provider’s name, and click **Manage** from the action bar.



2. Select the **Deactivate Provider** link.



3. The link will change to **Reactive Provider**. To reactivate the provider, select the **Reactivate Provider** link.

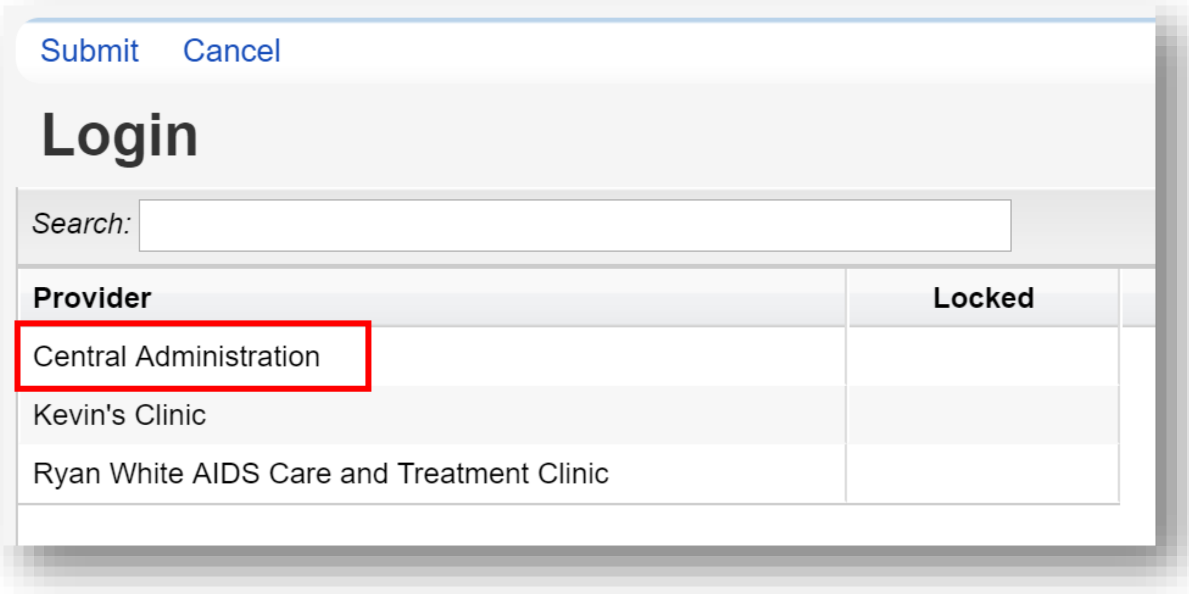


Using the Provider Setup

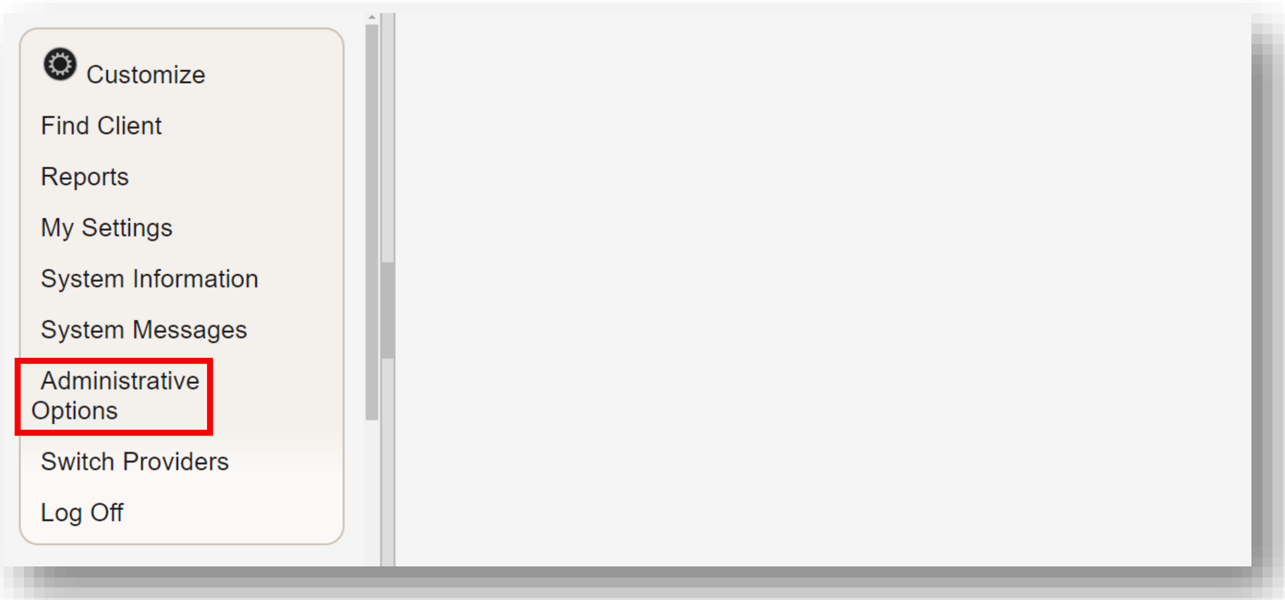
Provider Setup is used to edit an agency's name, information, contact information, or add a provider logo. This is also where you would rename the "Default" provider to your agency's name, in a new installation of CAREWare.

From Central Administration, you can set up all providers.

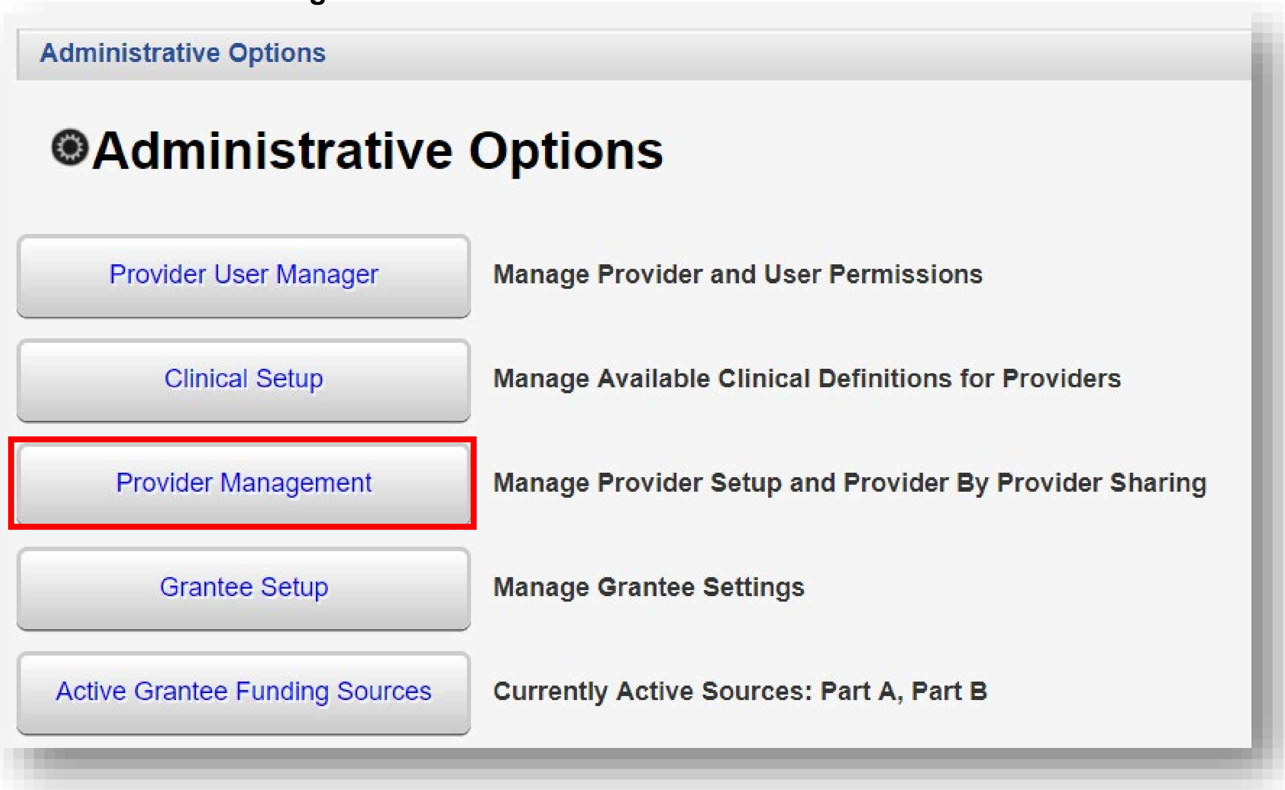
1. Log in to the **Central Administration** domain.



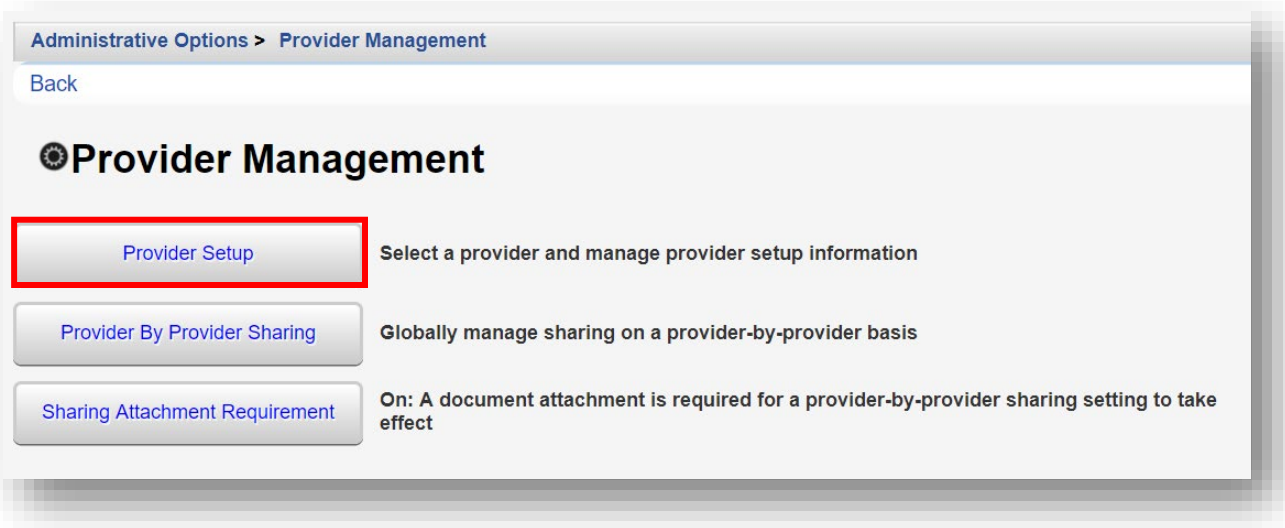
2. Select **Administrative** Options from the **Main Menu**.



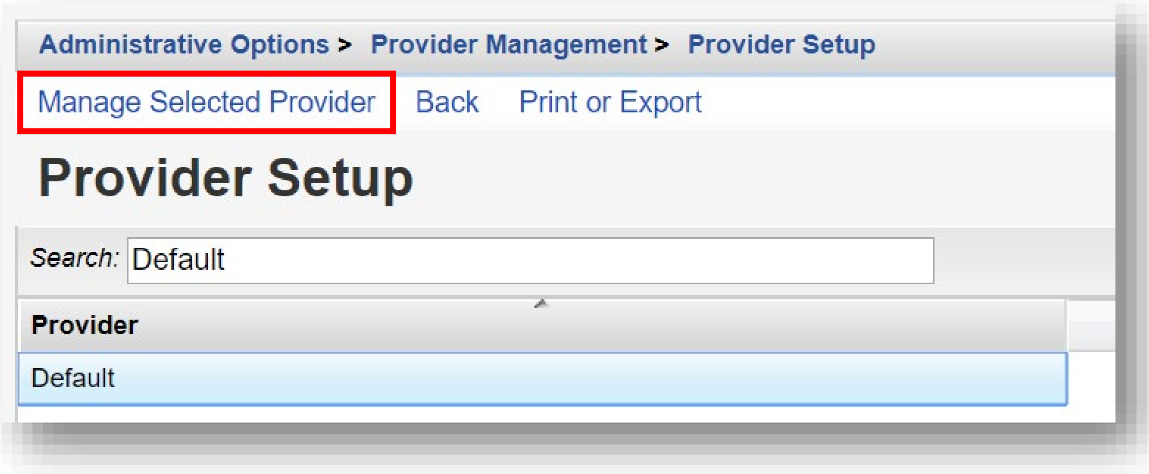
3. Select **Provider Management** from the links menu.



4. Select **Provider Setup**.



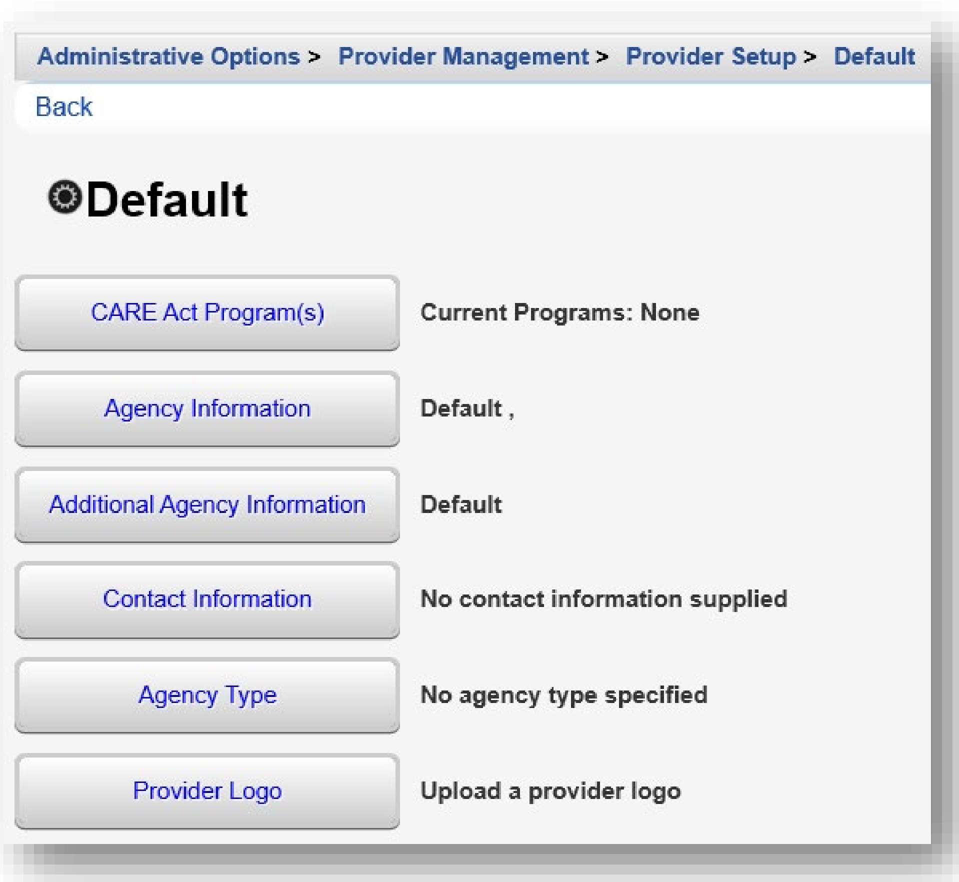
5. Select “Default” provider, then click **Manage Selected Provider** from the action bar.



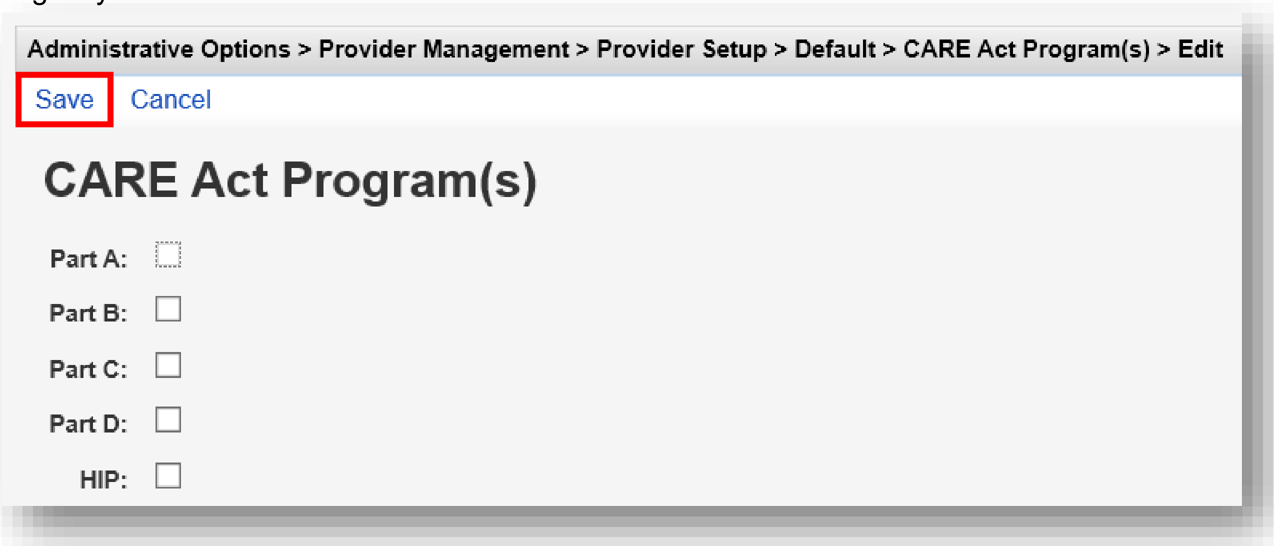
Using the Provider Setup, CAREWare administrators can set up sharing for services, clinical data, case notes, appointments, custom subforms, and the form designer.

As a stand-alone provider, this is not applicable and will not be covered here. (For further information regarding multiple provider and network data sharing options, please refer to the CAREWare developer website: https://www.jprog.com/)

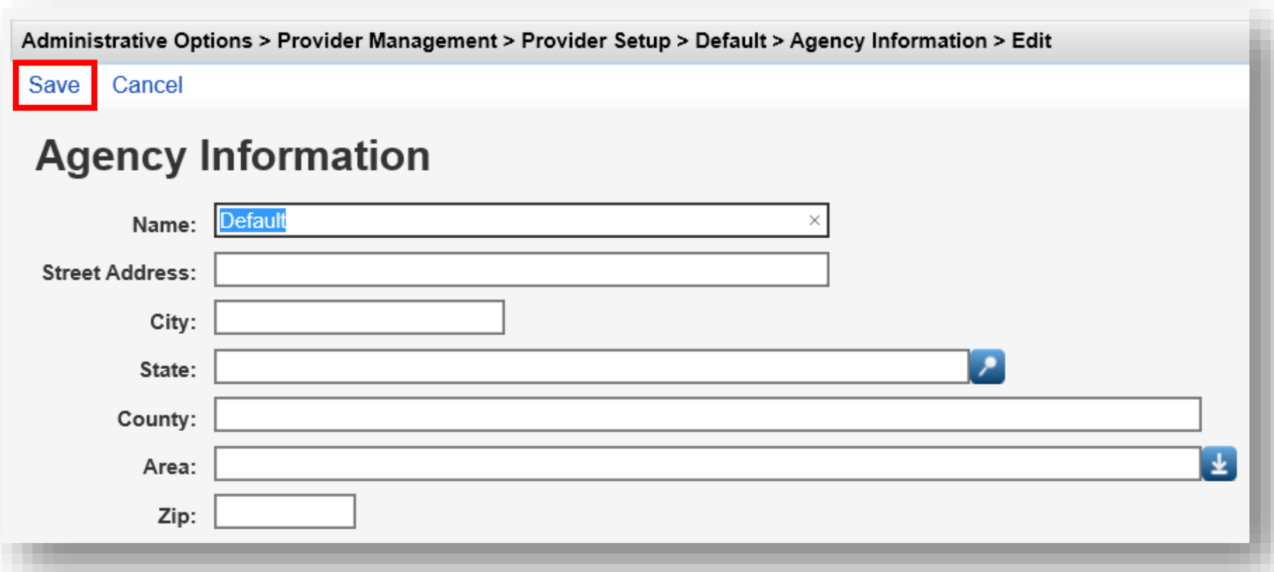
6. Once you click **Manage Selected Provider**, you will be at the provider’s Provider Setup menu.



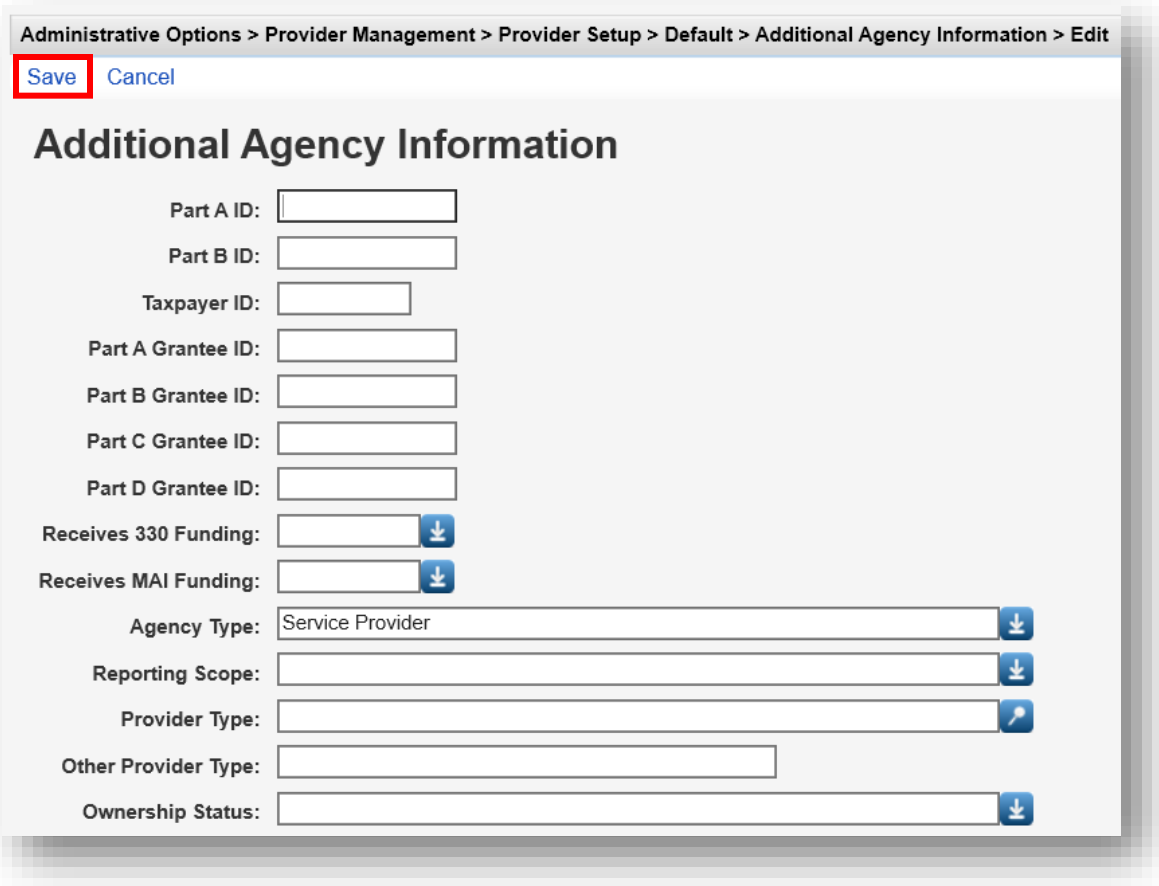
7. Select **CARE Act Program(s)**. Click **Edit**. Check the Ryan White funding sources your agency receives. Click **Save**.



8. Select **Agency Information**. Enter your provider information (this is the information that will replace the “Default” provider), in a new installation of CAREWare. Click **Save**.

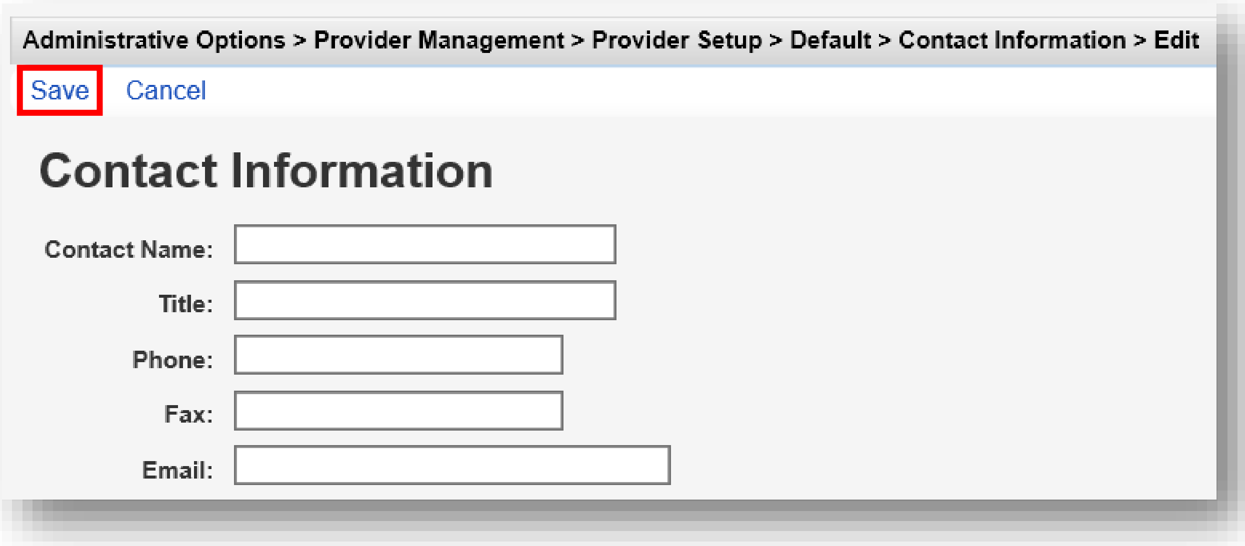


9. Select **Additional Agency Information**. Enter your provider information. It is recommended to use the ID's applicable on the RSR report for easy cross reference. Click **Save**.

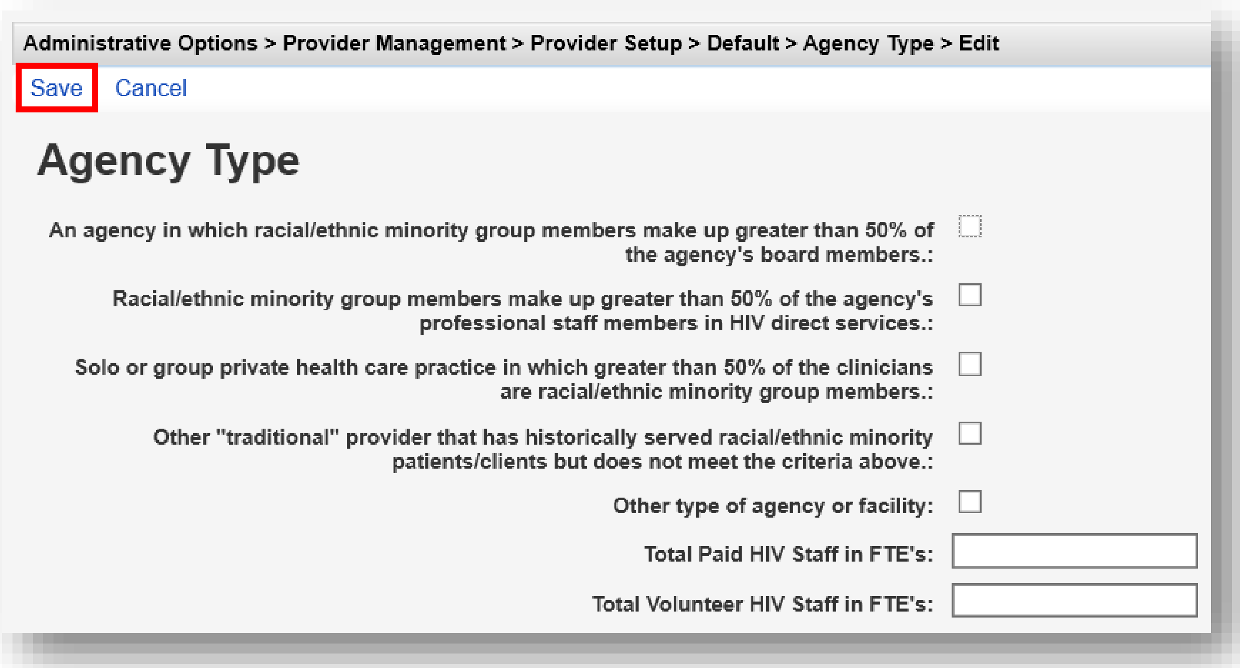


TIP: The agency DUNS number can be entered in the **Other Provider Type** field.

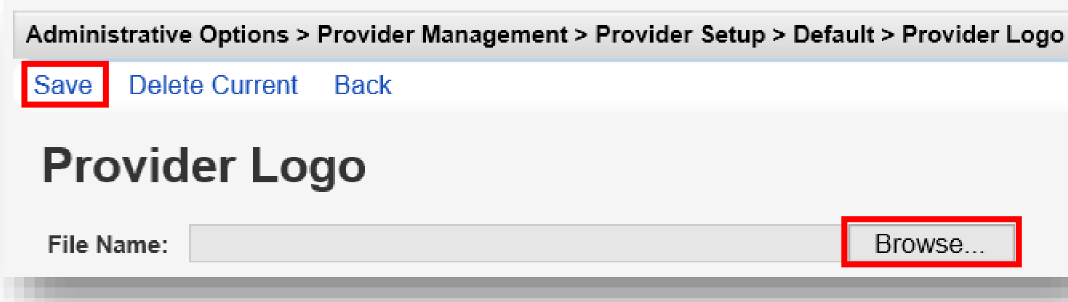
10. Select **Contact Information**. Enter the primary contact information for your agency. Click **Save**.



11. Select **Agency Type**. Enter all that apply for your agency. Click **Save**.



12. Select **Provider Logo,** to add or change your agency logo. Select **Browse** to upload any .BMP, .GIF, .JPG, or JPEG file format. This file will then be displayed on your agency's title page in CAREWare.

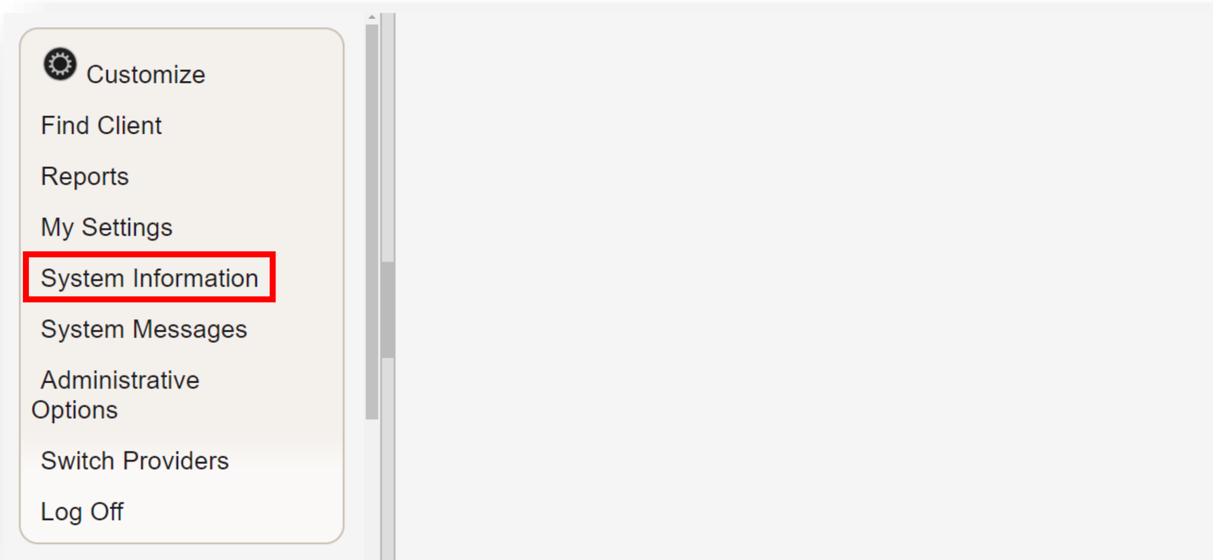


System Information and Messages

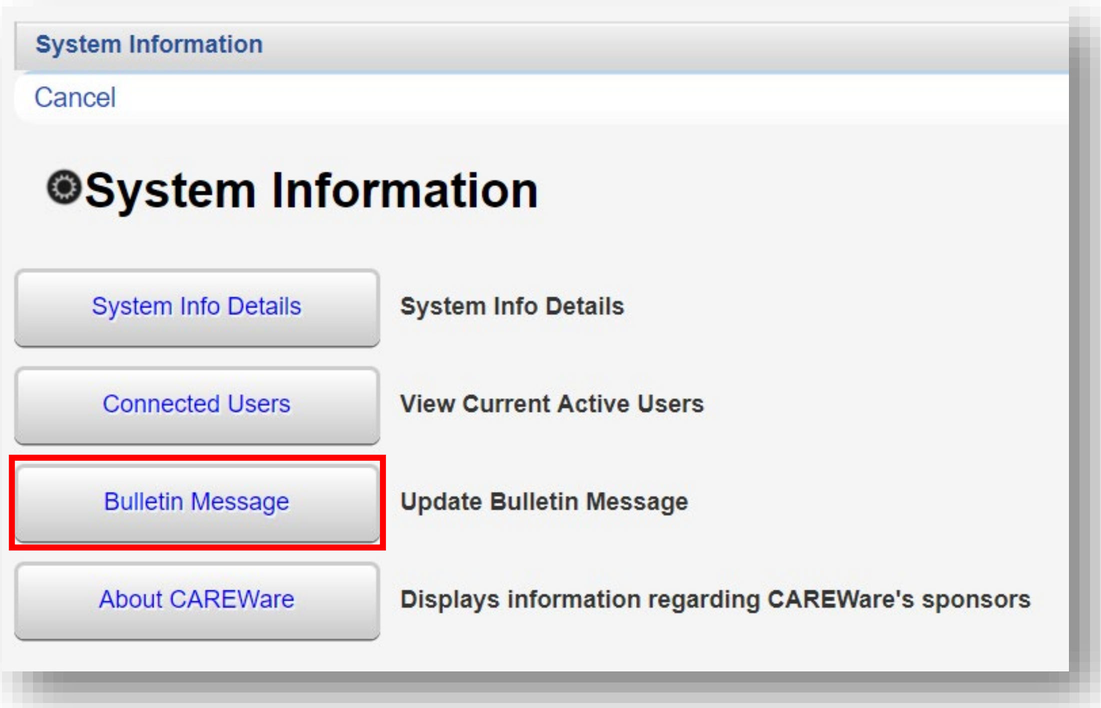
System Information

System Information will provide CAREWare administrators the current CAREWare Business Tier version, the number of clients in your agency database, currently connected users, etc.

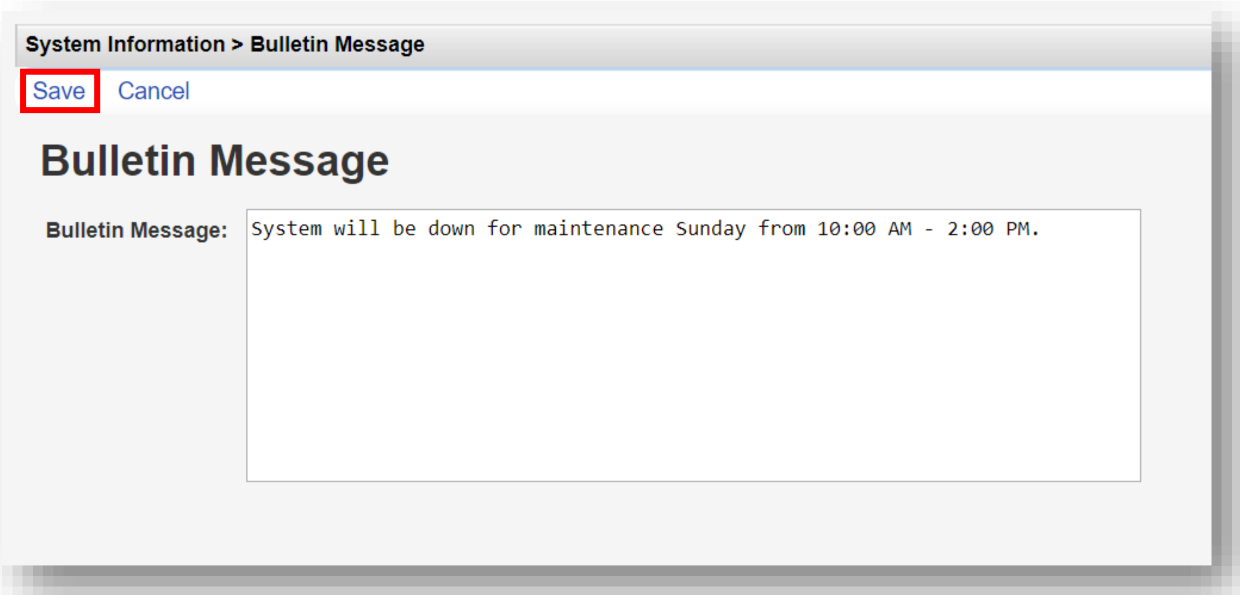
1. Select System Information from the Main Menu.



2. Select **Bulletin Message**.



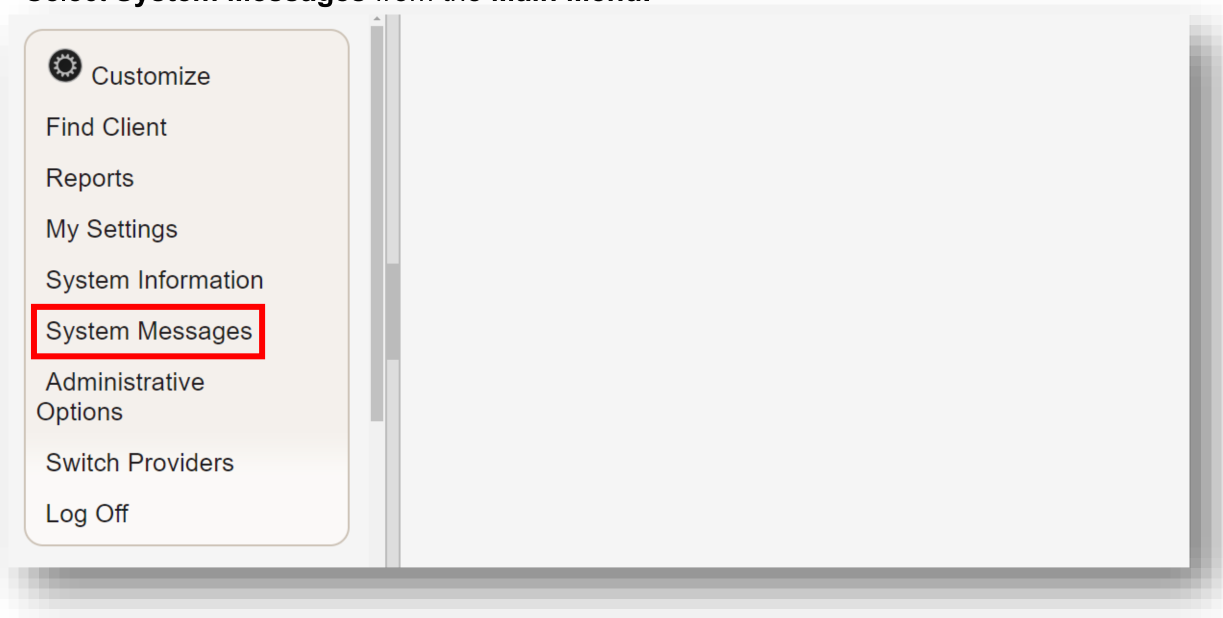
3. Here, you can publish a "bulletin message" that will appear on all users' screens. Enter a message into the text box and click **Save**.



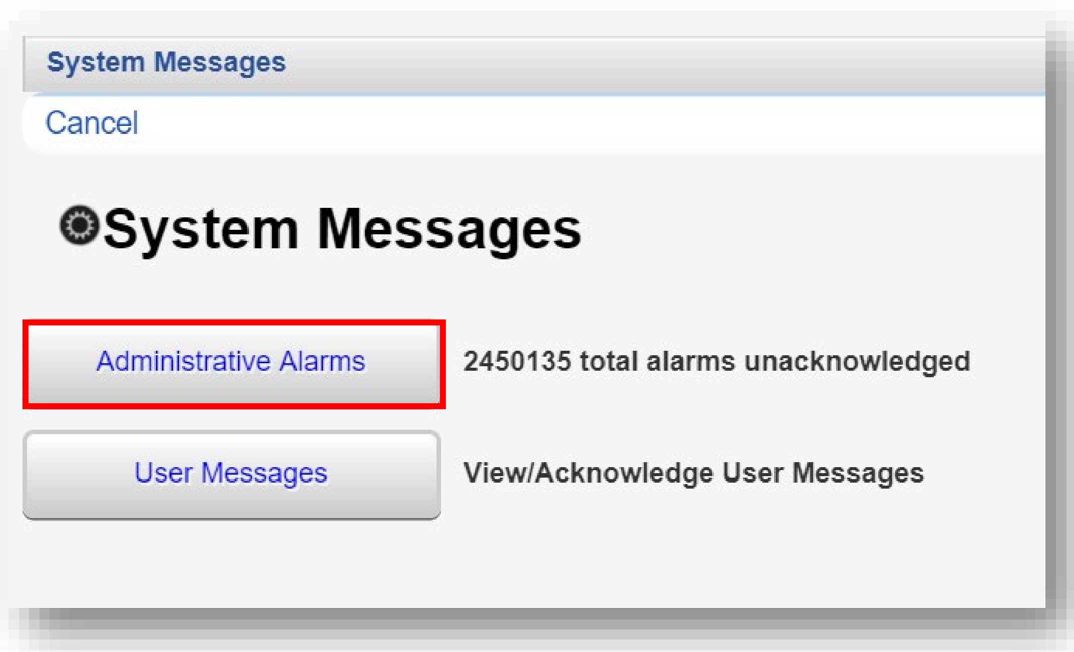
System Messages

System Messages provide CAREWare administrators information regarding Administrative Alarms and allow them to send User Messages.

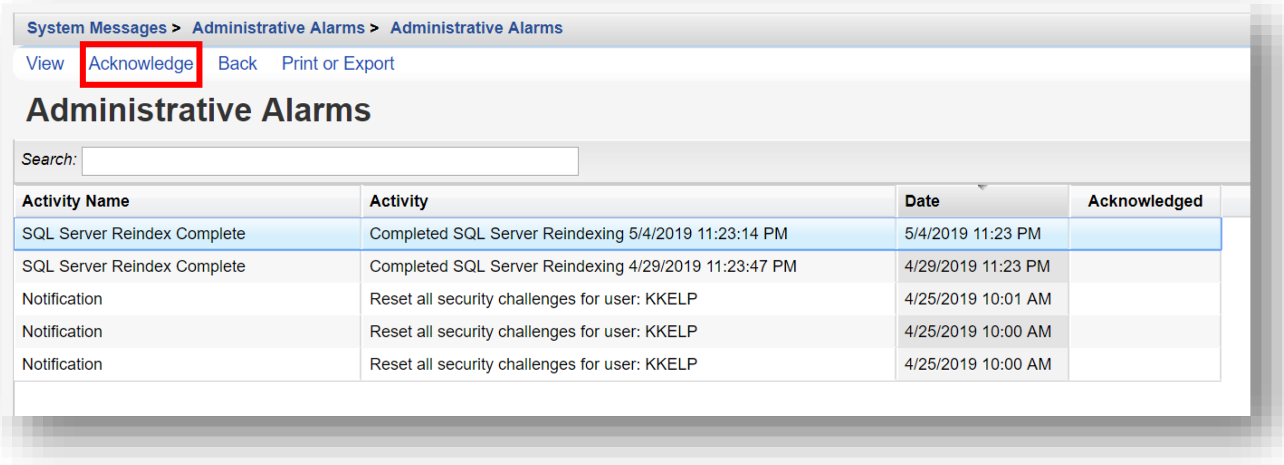
1. Select **System Messages** from the **Main Menu.**



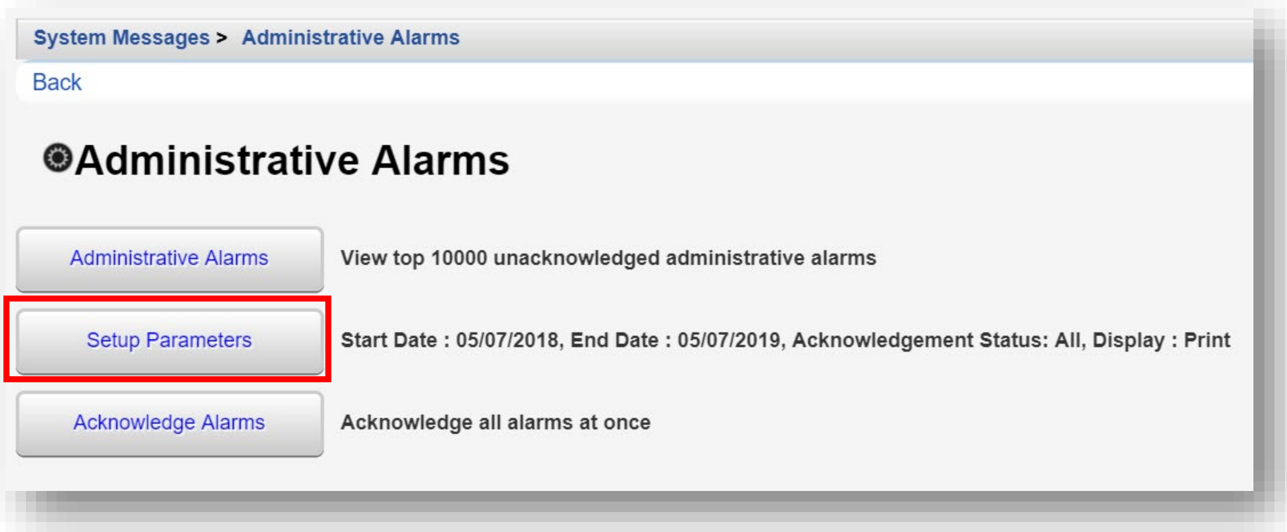
2. Select **Administrative Alarms**. Administrative alarms are system notifications and are typically user-related, regarding attempted permission violations or account locks or unlocks.



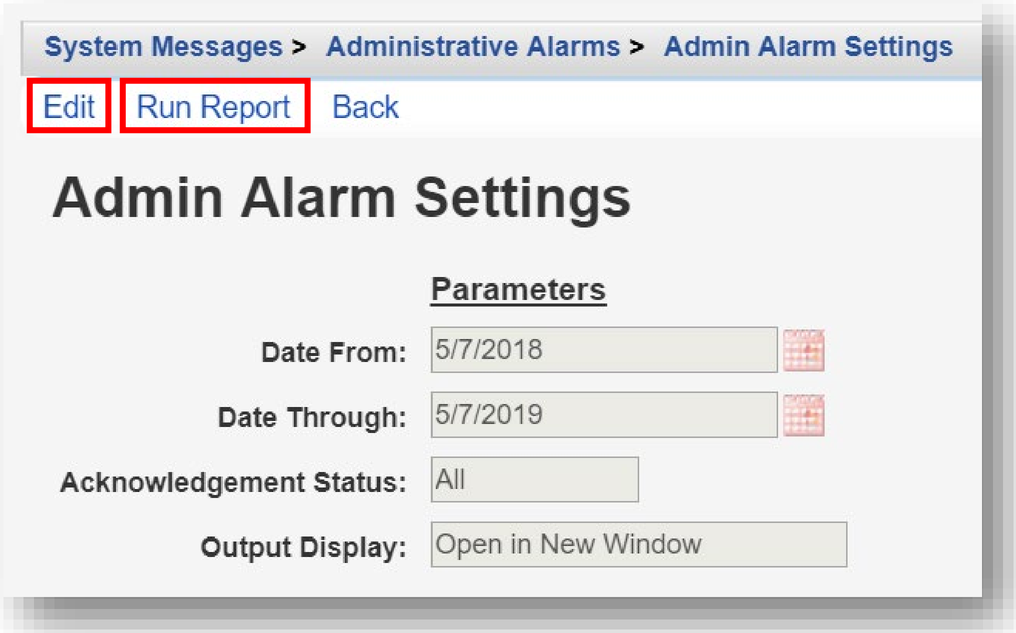
3. After review, Administrative alarms can be cleared/acknowledged, by selecting one or more notifications. Click **Acknowledge** on the action bar.



4. Administrative alarms can also be sorted and printed like other reports in CAREWare. Select **Setup Parameters** from the **Administrative Alarms** link menu.



5. Click **Edit** and enter the report specifications. Once complete, click **Save** (this option will take the place of Edit within the action bar). Then, click **Run Report**.



6. Administrative alarms can ALL be cleared or acknowledged automatically. Select **Acknowledge Alarms** from the **Administrative Alarms** link menu. (Note: all alerts will be deleted so should be used with caution.)