State of Maine
Ryan White CAREWare User Guidance Manual
Version 6, Build 47

Updated February 22, 2020

Maine CDC (the Ryan White Part B grantee) and Ryan White Part C grantees in Maine agreed to establish a centralized CAREWare reporting system in mid-2007. This collective system allows for better data quality and an unduplicated count of PLWHA receiving services within the state. Users access the database through a secure connection to the State server maintained by the State Office of Information Technology in cooperation with the Part B Program.

Definitions of services are consistent with definitions provided by the Health Resources and Services Administration in response to the Ryan White Treatment Extension Act of 2009.

This guidance document was prepared by Tara Thomas, Data & Quality Specialist for the Ryan White Part B Program.

This document describes how data are required to be entered as a contractual requirement for Part B Providers. Some Providers may impose additional data entry requirements on their staff.

Updates to this guidance will be made periodically and highlighted.

Contents

User Agreements

Each year, CAREWare users are required to sign an agreement that states the following, and violating any of these Standards may be grounds for suspension or termination of access:

- I understand that CAREWare is contractually required for Ryan White Part B data collection.
- I understand that users are required to apply for a Secure authenticator to access the State system and that Secure authenticators and their PINs may never be shared or used without appropriate authorization.
- I understand that CAREWare passwords may never be shared. If a password is accidentally disclosed, I must change it immediately or contact the database administrator to do so.
- I shall not falsify data entered into CAREWare.
- I shall not share data from CAREWare with individuals for personal use or to any individuals who have no duties related to the data entered in CAREWare.
- I understand that when I add a new client to the CAREWare system, I may see other clients who are listed in the database, in order to determine if the new client is a match with an existing client (i.e., a client who I may share with another agency).
- I understand that while adding new clients to the system, it is possible that I will learn information about other individuals with similar demographic characteristics (name, gender, date of birth) as the clients I enter, who are not in fact clients of my agency (i.e., limited information about a non-disclosed person with HIV).
- I agree that I will not attempt to add anyone to the database, unless he or she is a new client to my agency (i.e., I will not 'phish' for client names through the CAREWare system).
- I agree that if, through adding a client to the CAREWare system, I view information for which I do not have a Release of Information, that information is confidential, and I agree not to discuss, transmit, or narrate it.
- I understand that unauthorized or willful disclosure of CAREWare information will be considered grounds for disciplinary action, up to and including termination or prosecution.
- I understand that the database administrator may track unlawful and/or unauthorized access to client-level data.
- I shall not place sensitive data in the "Common Notes" box.
- I will not grant data sharing requests in CAREWare unless a valid Release of Information is on file, and there is a demonstrated need to share the information.
- I will terminate data sharing immediately if a client revokes his or her authorization.
- I agree that client demographic data shall be reviewed and updated as needed and at least annually.
- I understand that periodic update trainings are required for all CAREWare users.

Troubleshooting

When you experience <u>any</u> problem in CAREWare:

1. Check your e-mail to see if you have been sent a message from the database administrator about any known issues. If you have no CAREWare e-mails, proceed to step 2.

2. Shut your computer down completely (do not just log off) and restart it. If you continue to have problems, proceed to step 3.

3. If you cannot get into the State system and you are getting an error about your account, follow the steps in the bullets below. If you can get into the State system, proceed to step 4.
   - Call the State Office of Information Technology at 624-7700 and use the following script:
   - I'm an outside contractor for the State. I've locked my Active Directory account. The error message is (read error message – if you know for sure that your PIN is working, let them know that you need your **Active Directory password** reset).
   - Note: **It's best not to mention CAREWare when you contact OIT.** Most technicians will not even know what CAREWare is.

4. If you can get into the State system, but you cannot access CAREWare, please contact the database administrator by sending an e-mail to tara.thomas@maine.gov. If possible, please copy and paste your error message into the e-mail and describe the problem you're having in as much detail as possible.

If you have locked your account:

If you have locked your account in the State system, you will need to call the State Office of Information Technology to have it reset. Follow the directions in step 3 above.

If you have locked your CAREWare account, you will receive an email with a reset token. Follow the directions to reset your password.

Logging into CAREWare

This is a two-step process with two sets of user names and passwords

1. Enter the State System
2. Log into CAREWare

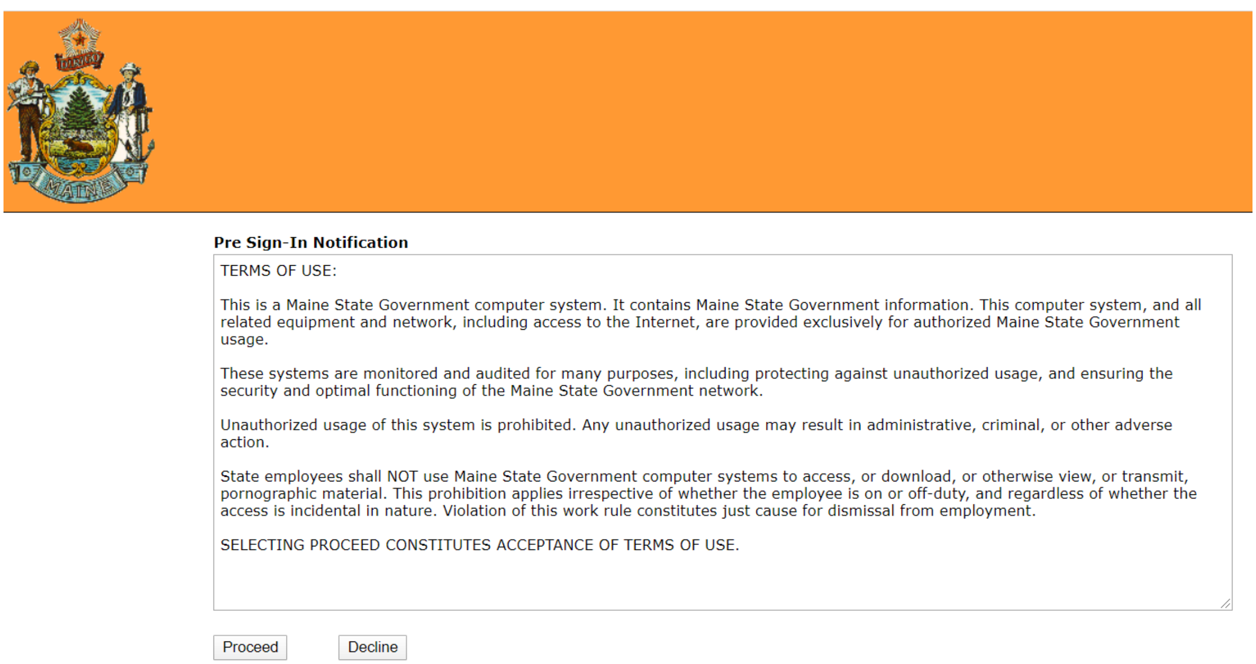
Note: You cannot access CAREWare using Internet Explorer.

This video may be helpful, but note that it references secure2.maine.gov, which was only for testing purposes: https://www.youtube.com/watch?v=s01ejGMSaw4&feature=youtu.be

If you have been using the Pulse Secure application (looks like graphic below), **make sure you are disconnected before you do anything else.**

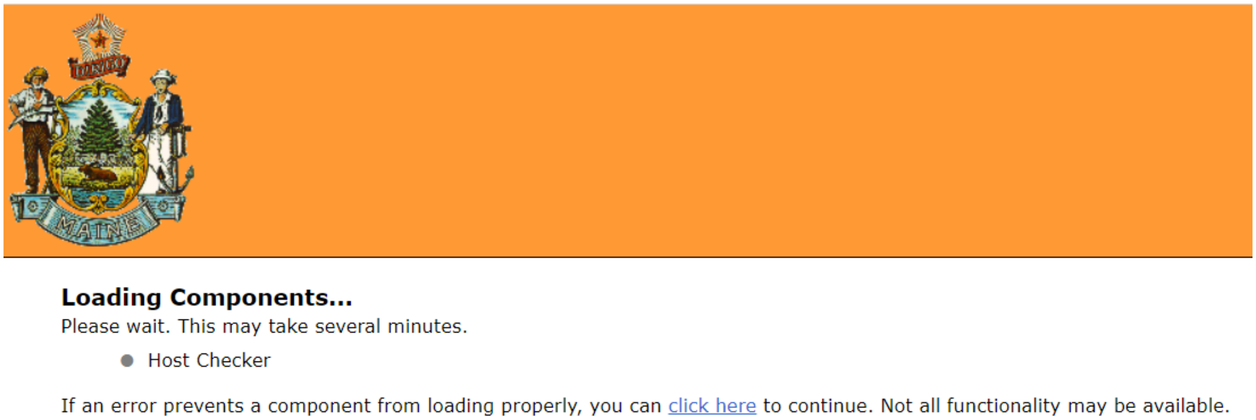
To Enter the State System

Open one of the approved web browsers (currently Google Chrome or Mozilla Firefox). If you have an RSA key fob or soft token, navigate to https://secure.maine.gov. If you have an MFA key fob, navigate to https://secure.maine.gov/mfa

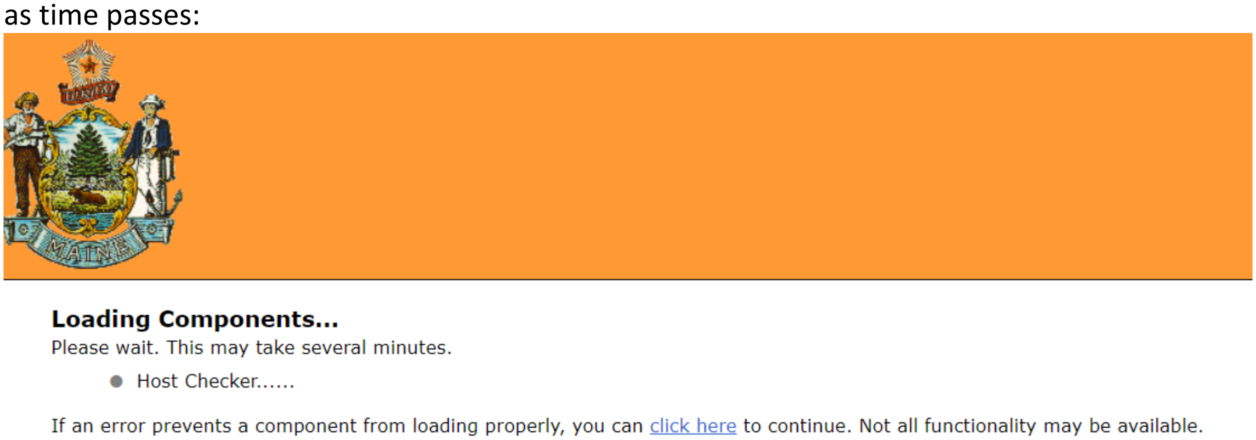


Click Proceed.

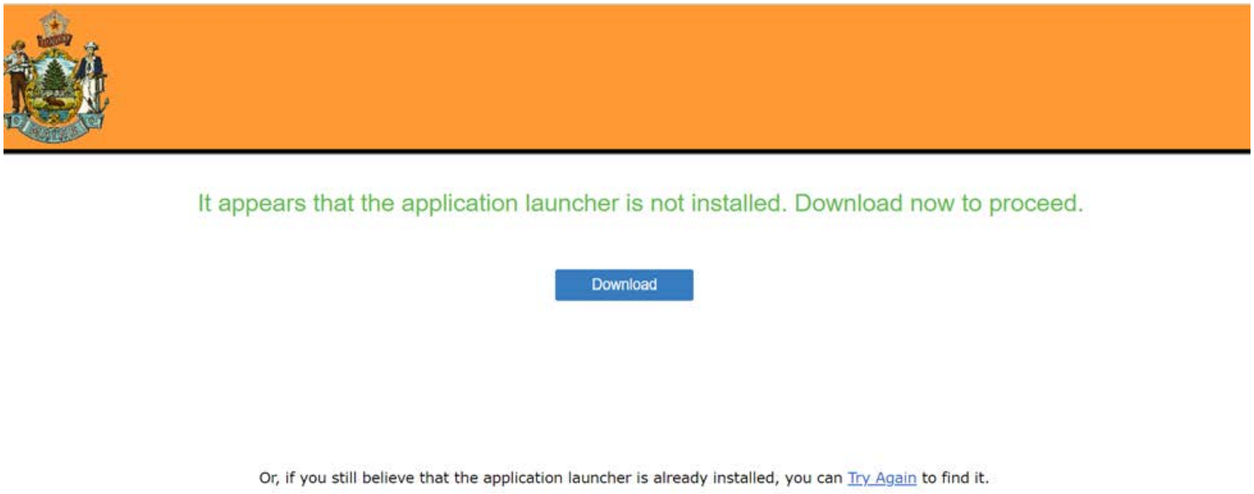
You should see a screen that looks like this:



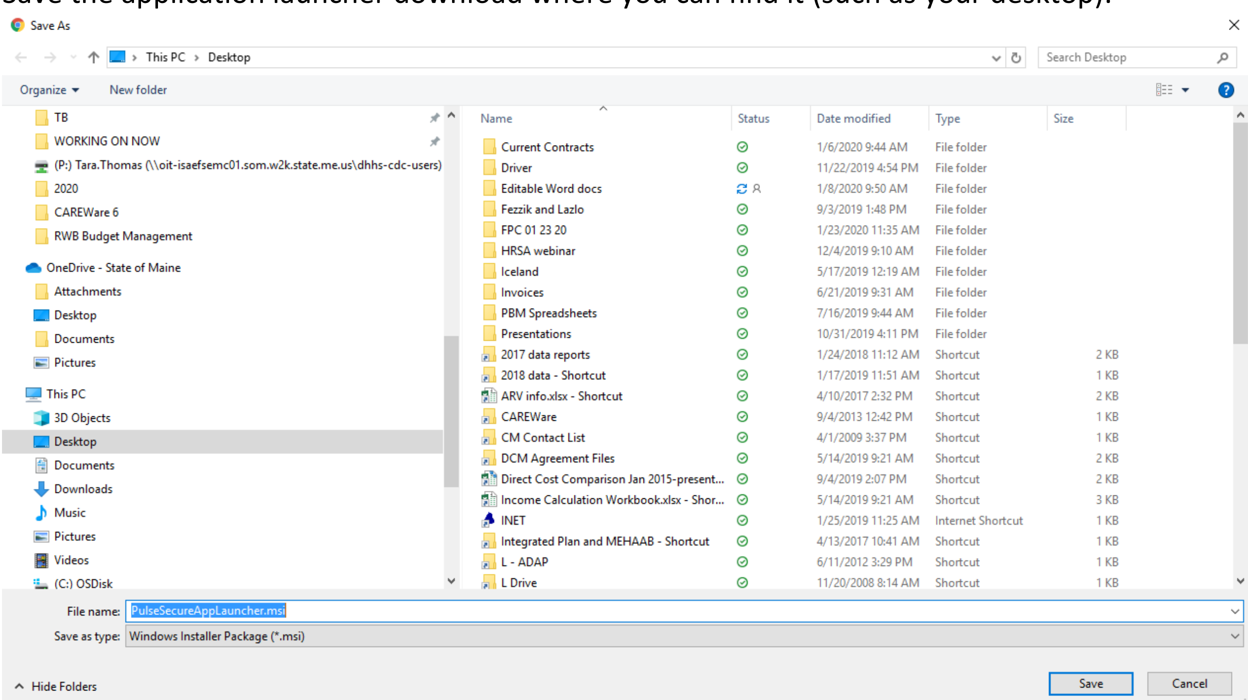
You can tell that it's not stuck because additional dots will appear after the words "Host Checker" as time passes:



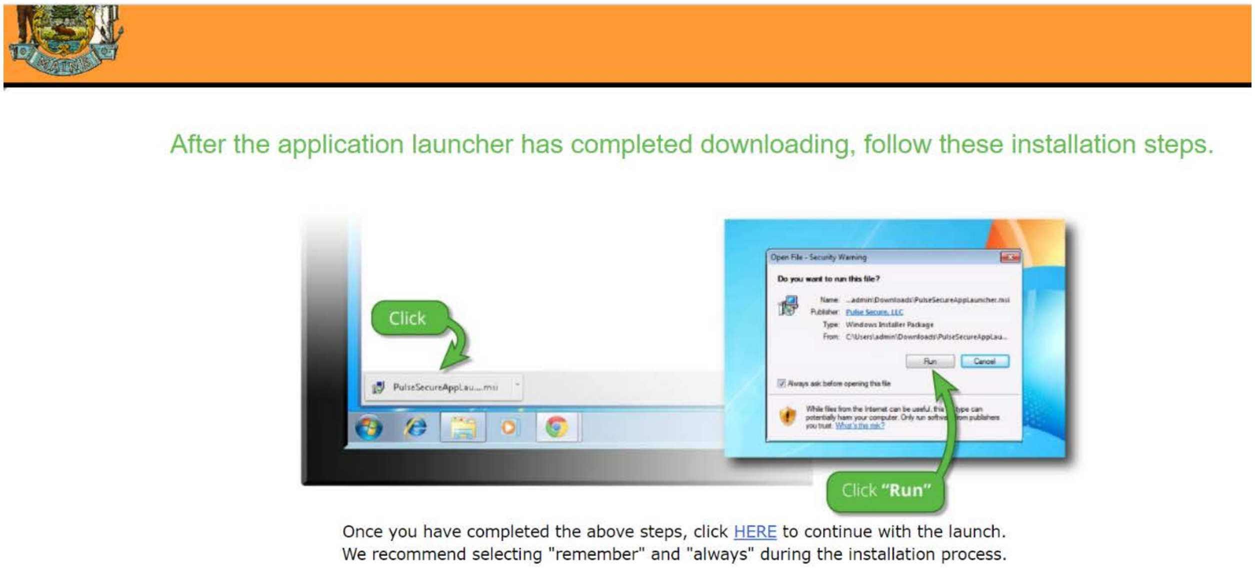
If the application launcher is not already installed on your computer, you will see a screen like this:



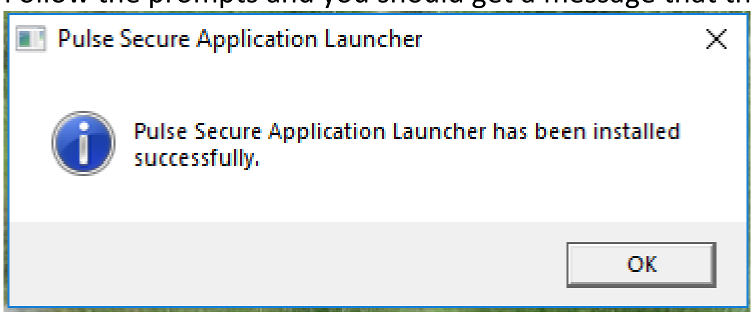
Save the application launcher download where you can find it (such as your desktop):



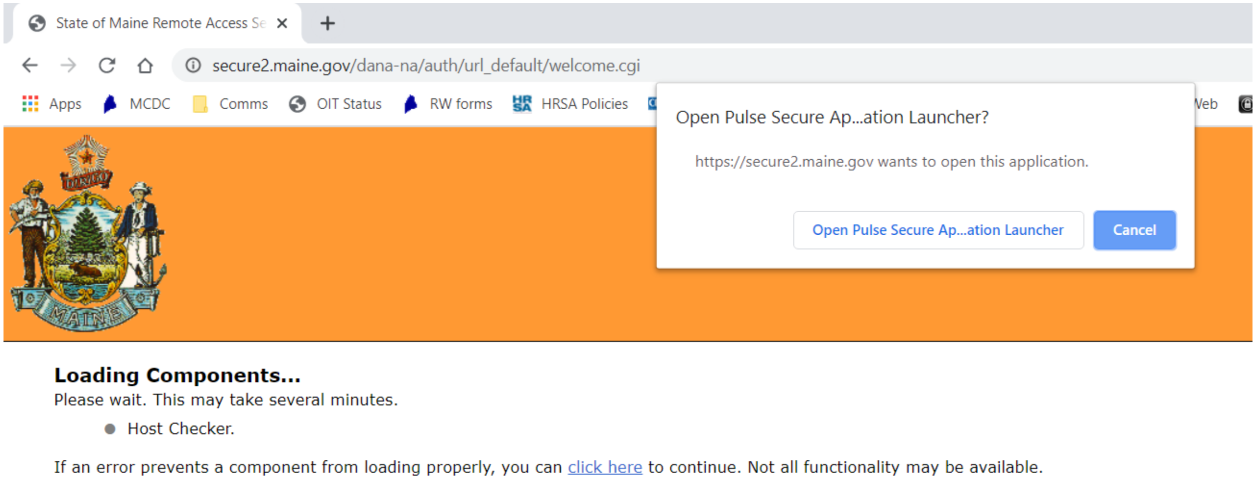
Your screen should look like this:



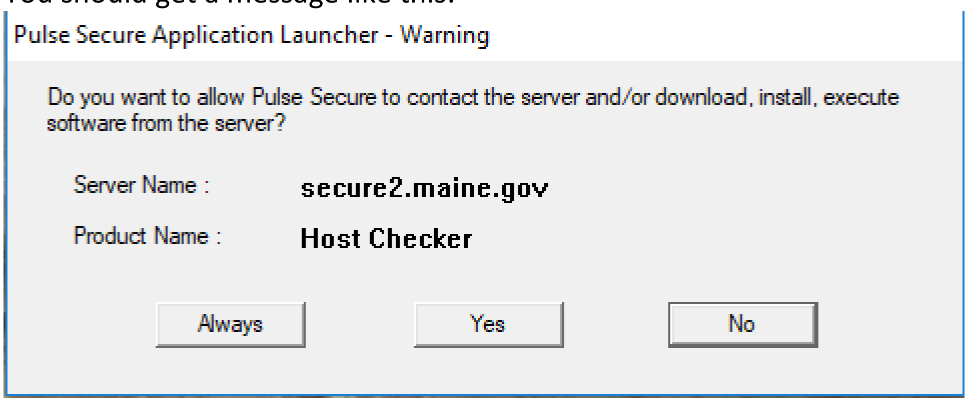
Follow the prompts and you should get a message that the application has installed:



You should now see a notification floating near the top of your browser asking if you want to open the Pulse Secure Application launcher. Click the button to open the launcher:

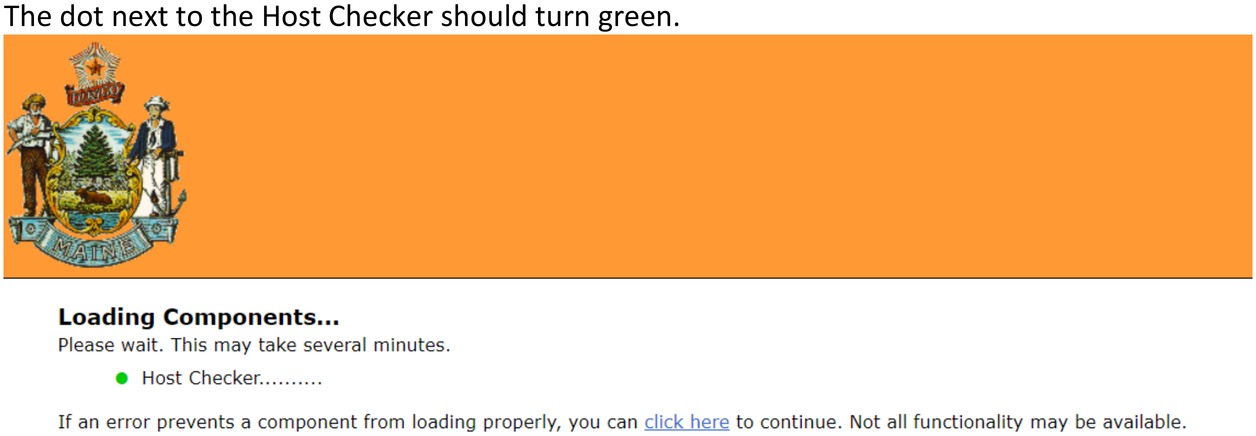


You should get a message like this:



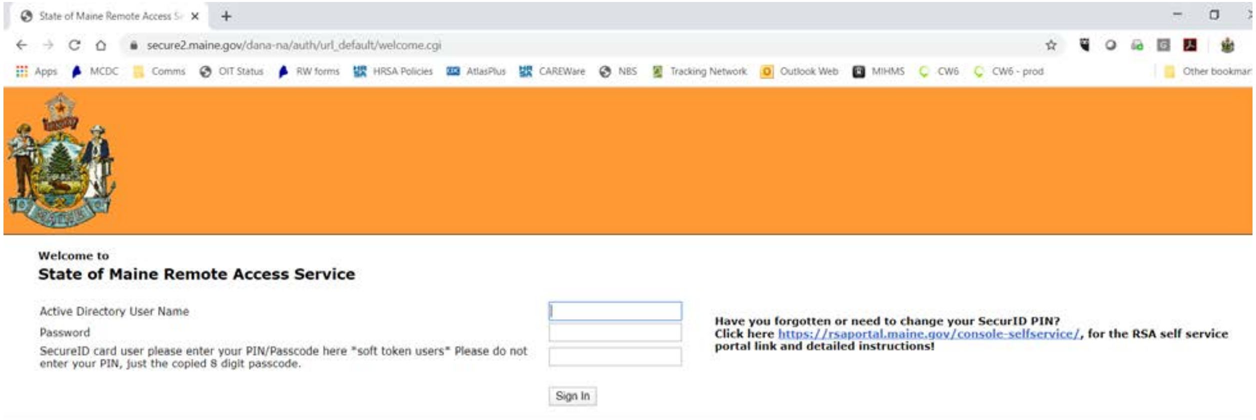
Click Always.

The dot next to the Host Checker should turn green.



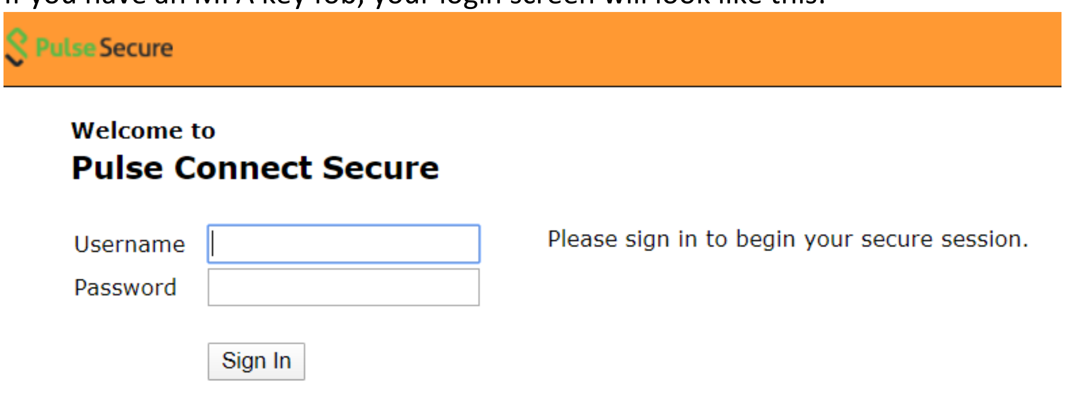
You should see the login screen.

If you have an RSA key fob or soft token, the screen will look like this:



Enter your Active Directory user name (this is usually Firstname.Lastname), your Active Directory password, and follow the instructions for using your SecureID.

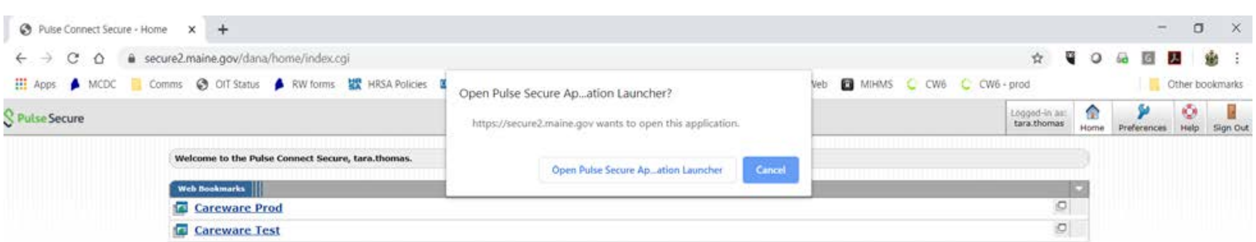
If you have an MFA key fob, your login screen will look like this:



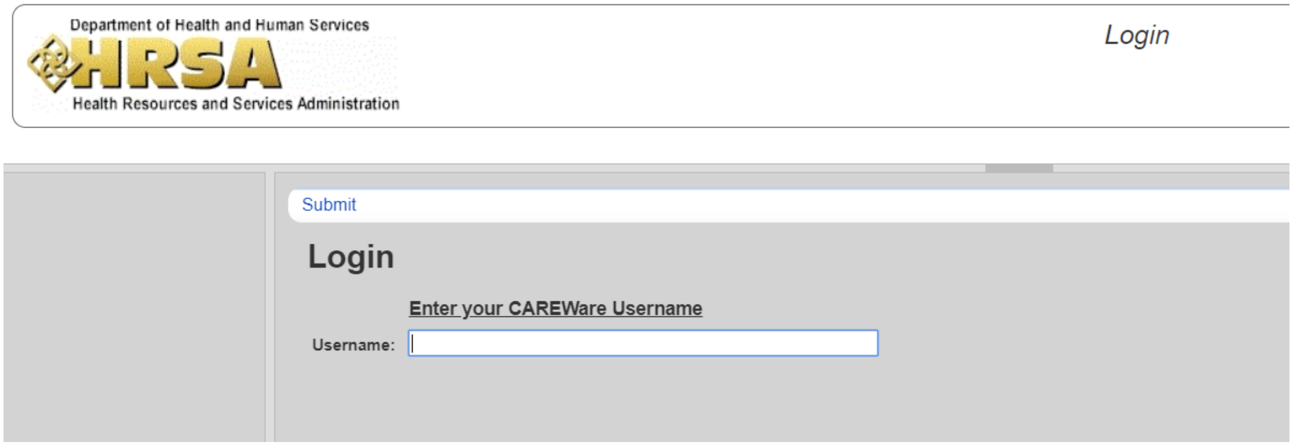
Enter your Active Directory user name (this is usually Firstname.Lastname) and your Active Directory password.

Another screen will appear to prompt for the number on your MFA keyfob. Enter the number.

You should see a web bookmark for CAREWare. Click on the link.

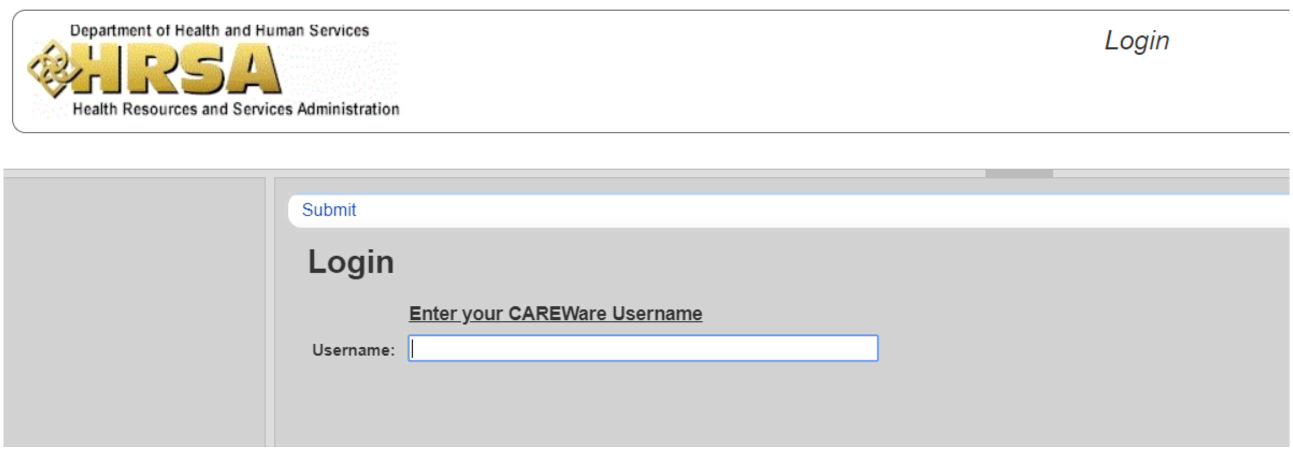


A new window should open with the CAREWare login screen:



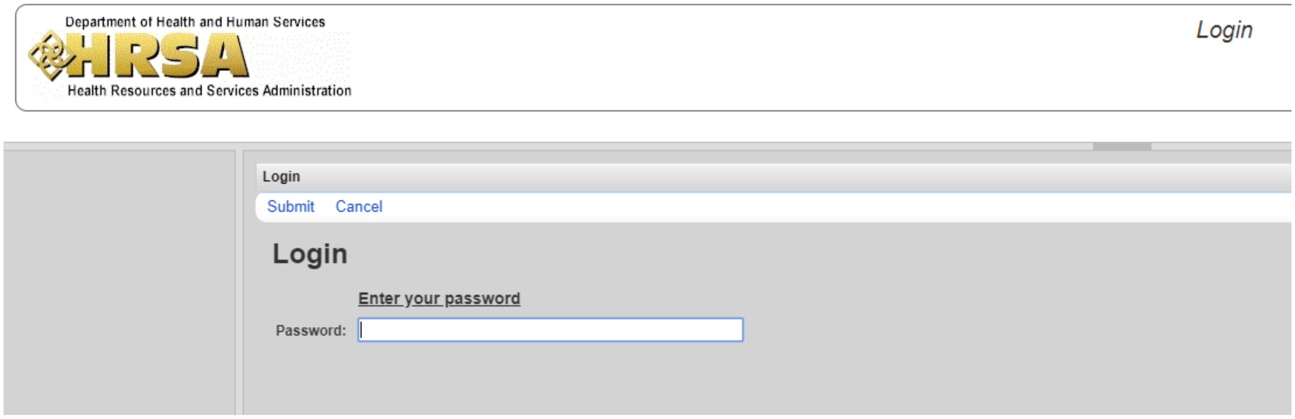
To Log into CAREWare

You will need to enter your CAREWare user name, which is different from the user name you use for the State System. Each CAREWare user name is set up by agency and position (for example, OUFPCCM1) to make it easier to reassign accounts due to turnover.

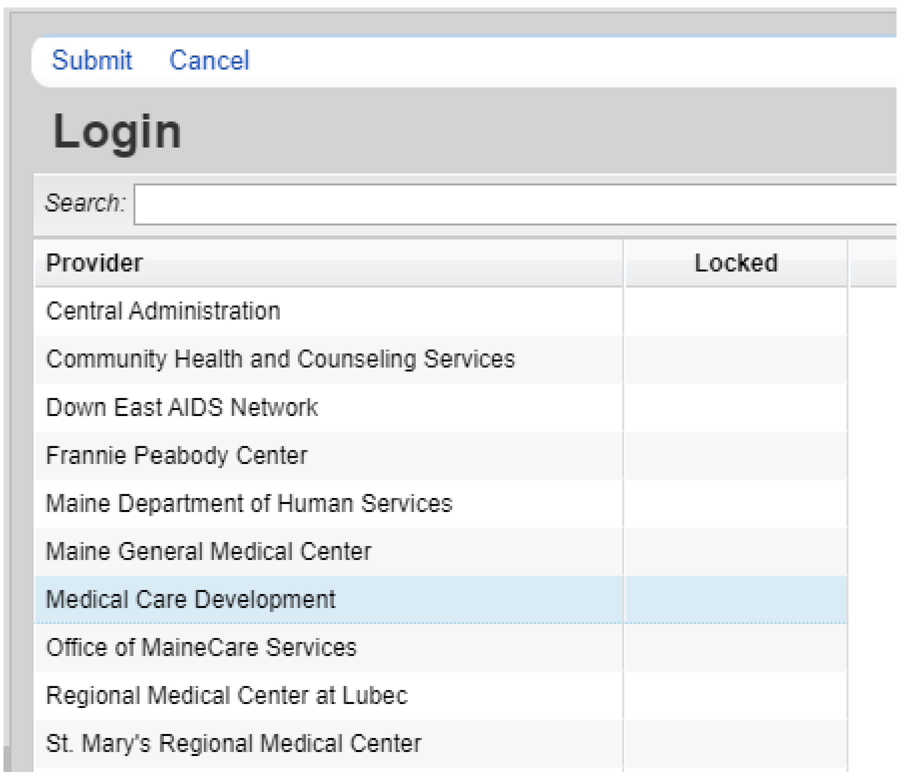


Your CAREWare password expires every 90 days. **Passwords must be at least 8 characters long and contain at least two non-letter characters.**

If you enter either your user name or password incorrectly, you will be prompted to enter both your user name and password again. If you enter either your user name or password incorrectly three times, your account will be locked and you will be emailed a reset token.



If you have access to more than one Provider domain in CAREWare, you will be presented with a list of domains. Otherwise, you will go right into your assigned Provider domain.

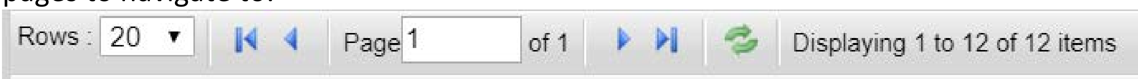


Navigation

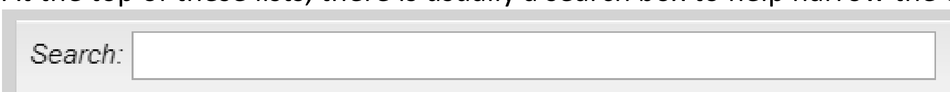
For security reasons once CAREWare is running, your session can only remain inactive for **30 minutes**. After that, you will be signed out and will have to sign back in.

Display

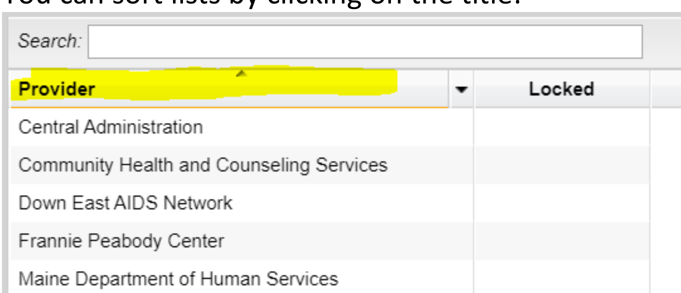
Throughout CAREWare, you will see short lists with options for number of rows to display and pages to navigate to:



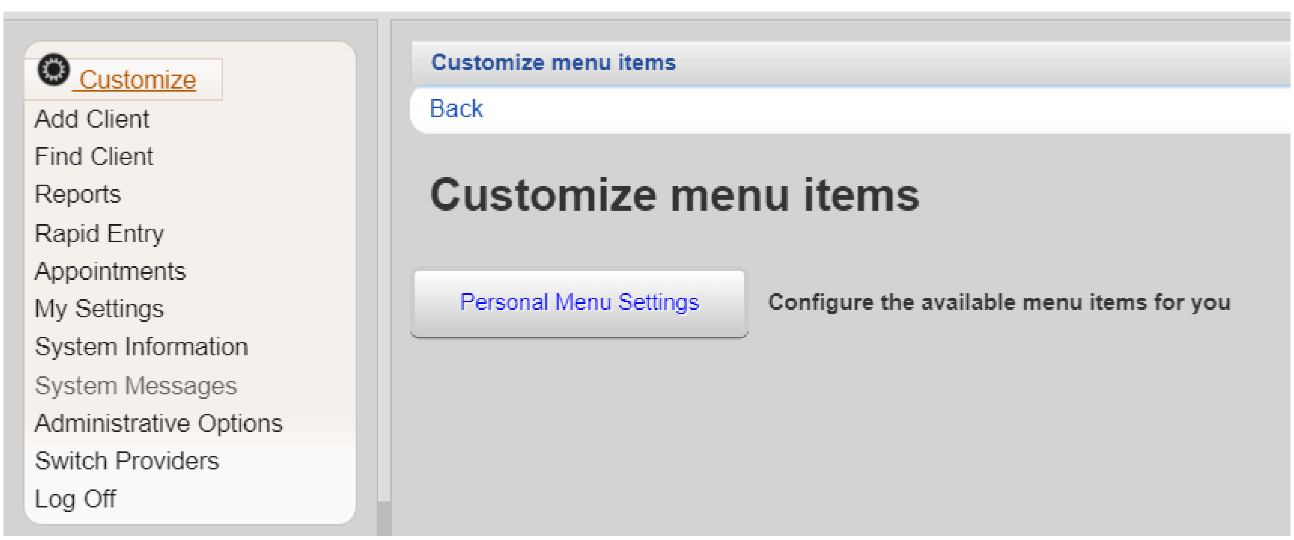
At the top of these lists, there is usually a search box to help narrow the options:

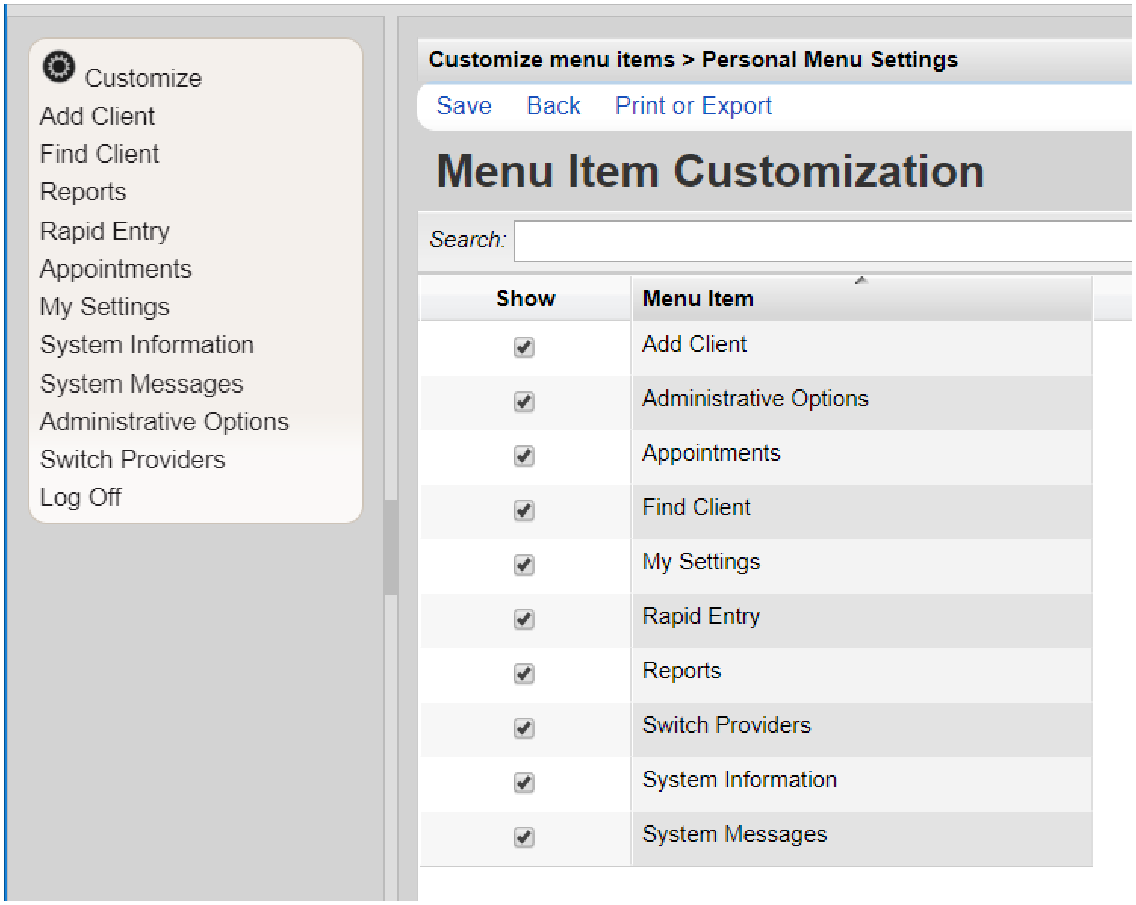


You can sort lists by clicking on the title:



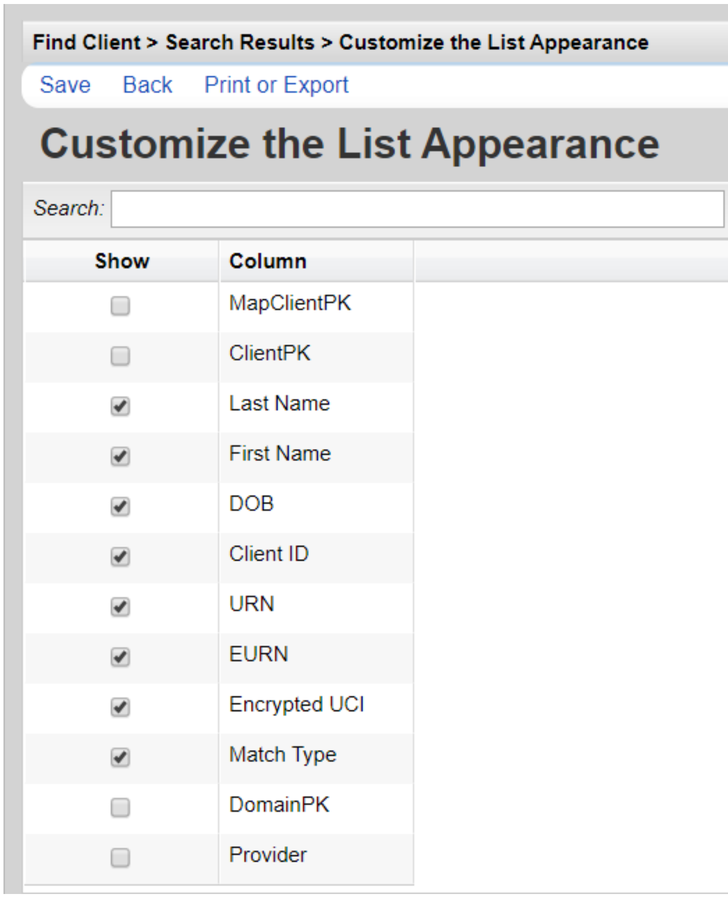
You will see Customize wheels at the top of every menu. Be careful customizing menus – it only affects your account and only affects the options that are visible. Removing an item from a menu does not delete data.





You can also customize any list by clicking the arrow in the titles:

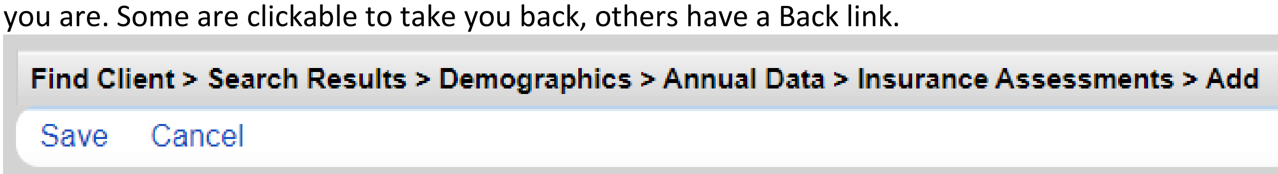
Last Name	First Name	DOB	Client ID	URN
Testrecord	Another	4/1/1972 12:00:00 A		AOTS0401721U
Testrecord	Bob	1/1/2017 12:00:00 A		BBTS0101171U
Test	Ima	1/1/2010 12:00:00 A		IATS0101102A
Testtesttest	Newest	1/1/1960 12:00:00 A	12345	NWTS0101602U
Testrecord	Test	3/6/1979 12:00:00 A		TSTS0306792U
Testrecord	Test	3/6/1979 12:00:00 A		TSTS0306794A
Tester	Testy	9/5/1975 12:00:00 A	101101	TSTS0905752U

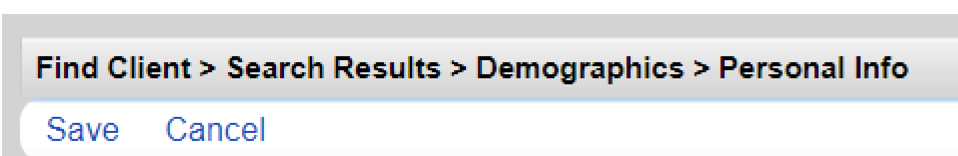


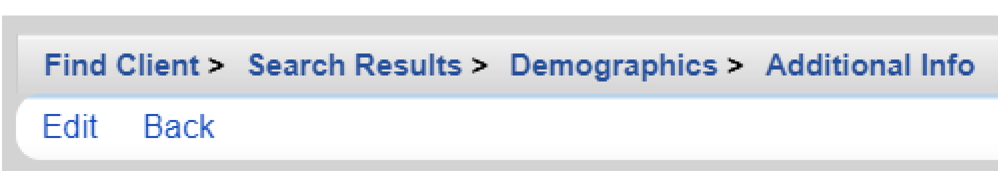
If the screen is too small, you may increase the size like any web browser by pressing Ctrl and +.

Breadcrumbs

Like a lot of websites, CAREWare includes breadcrumbs to show the path that led you to where you are. Some are clickable to take you back, others have a Back link.

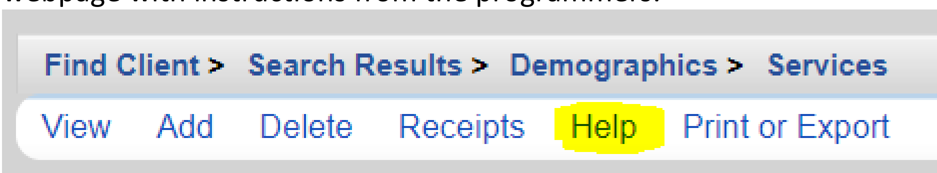


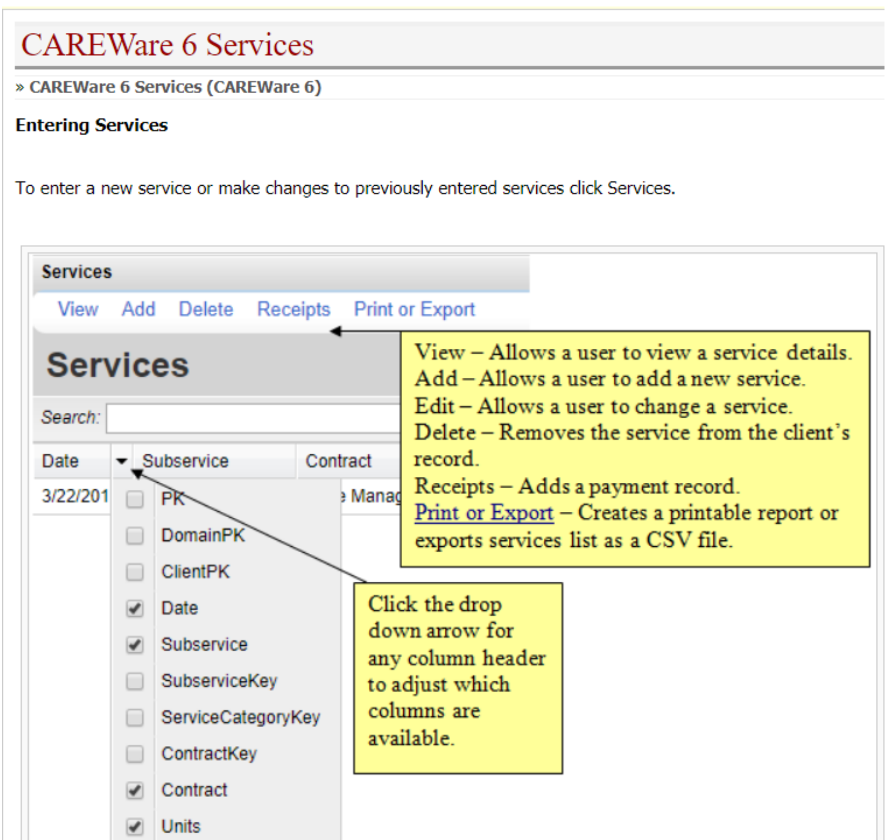




Help

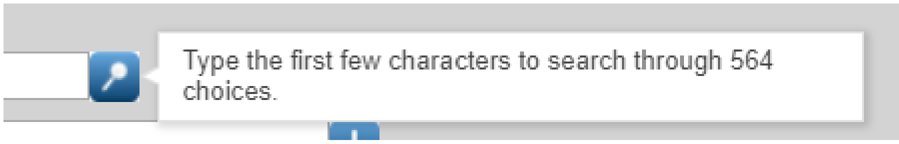
In the first release, not all CAREWare screens have Help links. The ones that do will take you to a webpage with instructions from the programmers:





Dropdowns

When you hover over a down arrow or a magnifying glass, a bubble will appear to show you how many options are in the list. If it is more than 10, there will be a magnifying glass and you will have to type the first few characters to limit your choices. If there are 10 or fewer options, there will be a down arrow and you will be able to see the whole list, but you can still type the first few characters to limit the list.



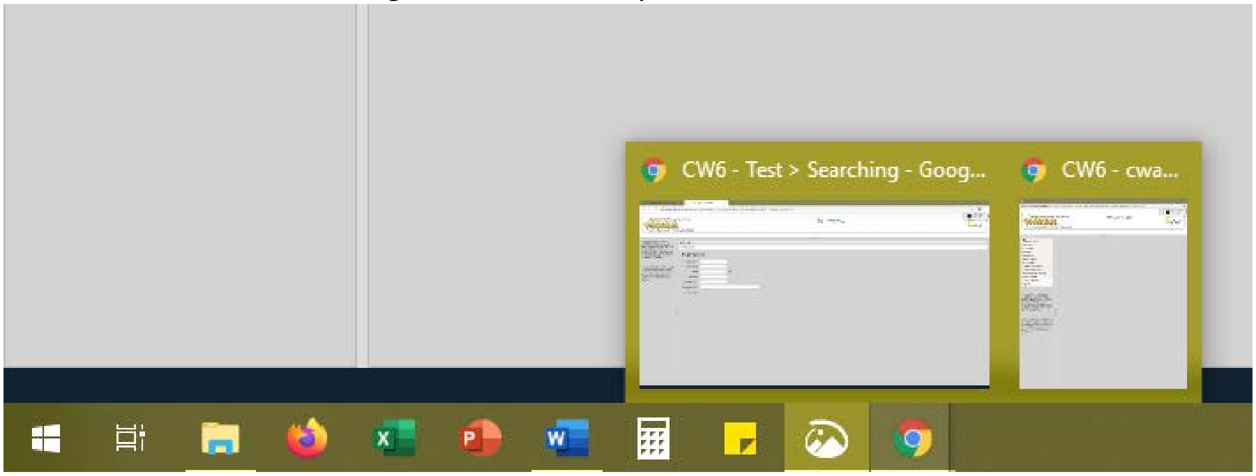
View the CAREWare overview and navigation webinar at https://youtu.be/_dtSvFwe9nM

Main Menu and Tabs

The Main Menu will look like this:

As soon as you click on a function listed in the Main Menu, a new tab will open.

If you are using Google Chrome as your browser, all additional tabs may open in the first window with the web bookmark. You can toggle back to the window with the Main Menu by using your mouse to hover over the Google Chrome icon in your task bar:

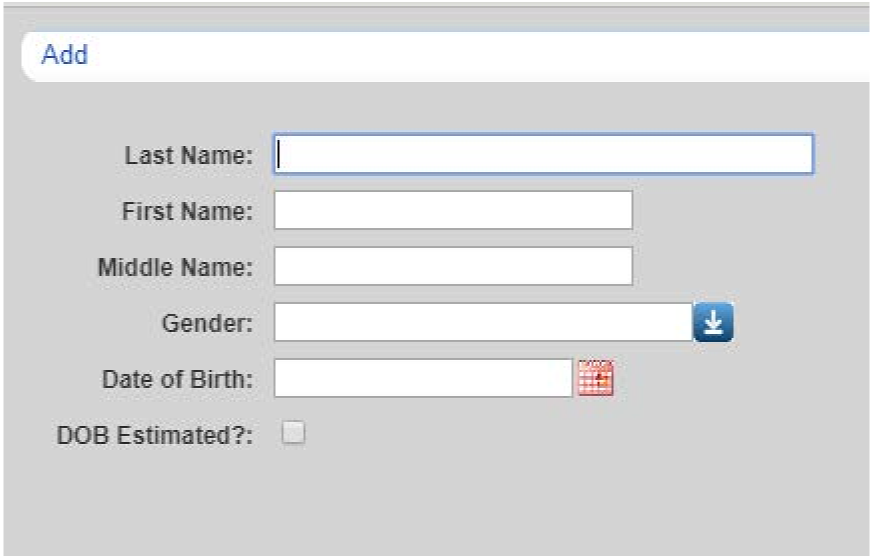


Add Client

View the webinar about adding clients at https://youtu.be/fOj6f4-2huI

Only clients who do not have a record in CAREWare need to be added to the database. If a client has been discharged and returns for services, you simply need to reactivate the client's record.

To add a new client, select “Add Client” from the main menu and the following box will appear.

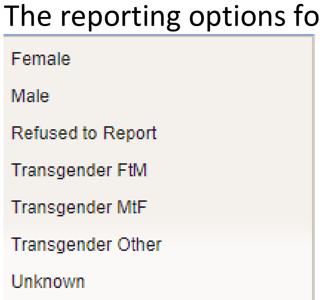


Enter the complete, legal last name and first name of the client. Note that although the field is labeled “Middle Name,” the middle initial will suffice.

It is essential to use the client’s full legal name with appropriate capitalization and correct date of birth to ensure that the client is not counted twice in state data.

Select the appropriate gender based on the reporting options available and enter the complete date of birth. Estimated birth dates should never be used.

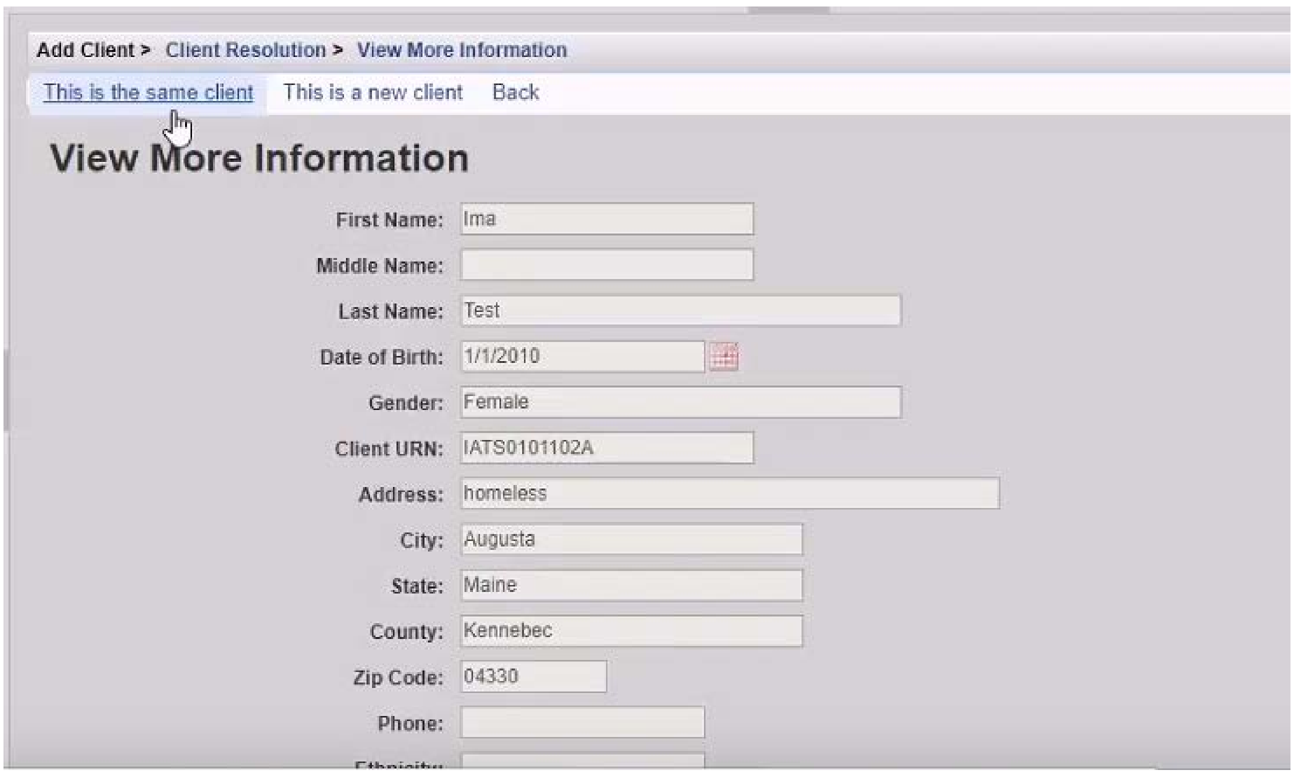
The reporting options for gender are:



Click the blue Add link.

If the client is already in the system (because he or she received services elsewhere or because the client’s name, gender, and birth date closely match another client in the system) you will get a warning and a list of clients who may be duplicates.

Once you select a record from the list to View More Information, you will see more demographic information and can select “This is the same client” or “This is a new client” if it is truly someone else.



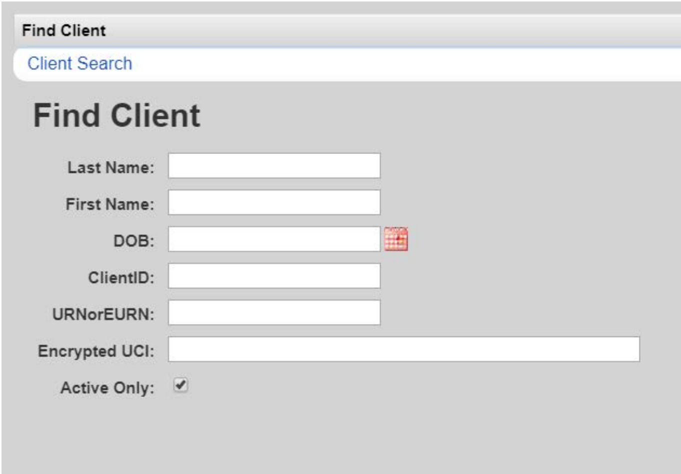
You may choose to cancel the “add client process” here, or view more information about the selected client.

Confidentiality Note - “phishing” for information:

The “Add Client” process is the only time a user may preview the database to see if a person is listed in the database as receiving services elsewhere. To uphold the strictest confidentiality, it may be prudent for agencies to designate a single person to enter all new clients for that agency. In the event that someone views information on a person who is not actually a client of your program, you must log information viewed in a Disclosure Log and notify the Database Administrator immediately.

Find Client

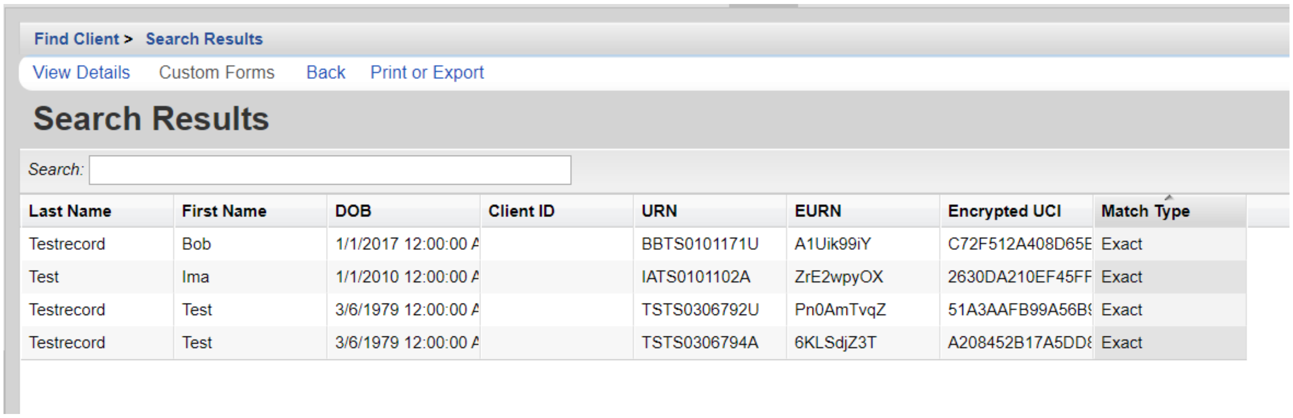
The “Find Client” screen looks like this. There may be additional custom fields in different Provider domains:



If you need to find a client who has been discharged, you must uncheck the box marked “View Active Clients Only.”

Once you have entered the search criteria you want, click the Client Search link or hit the Enter key on your keyboard.

If only one record meets your search criteria, you will go right into it. Otherwise, a list of search results will appear:

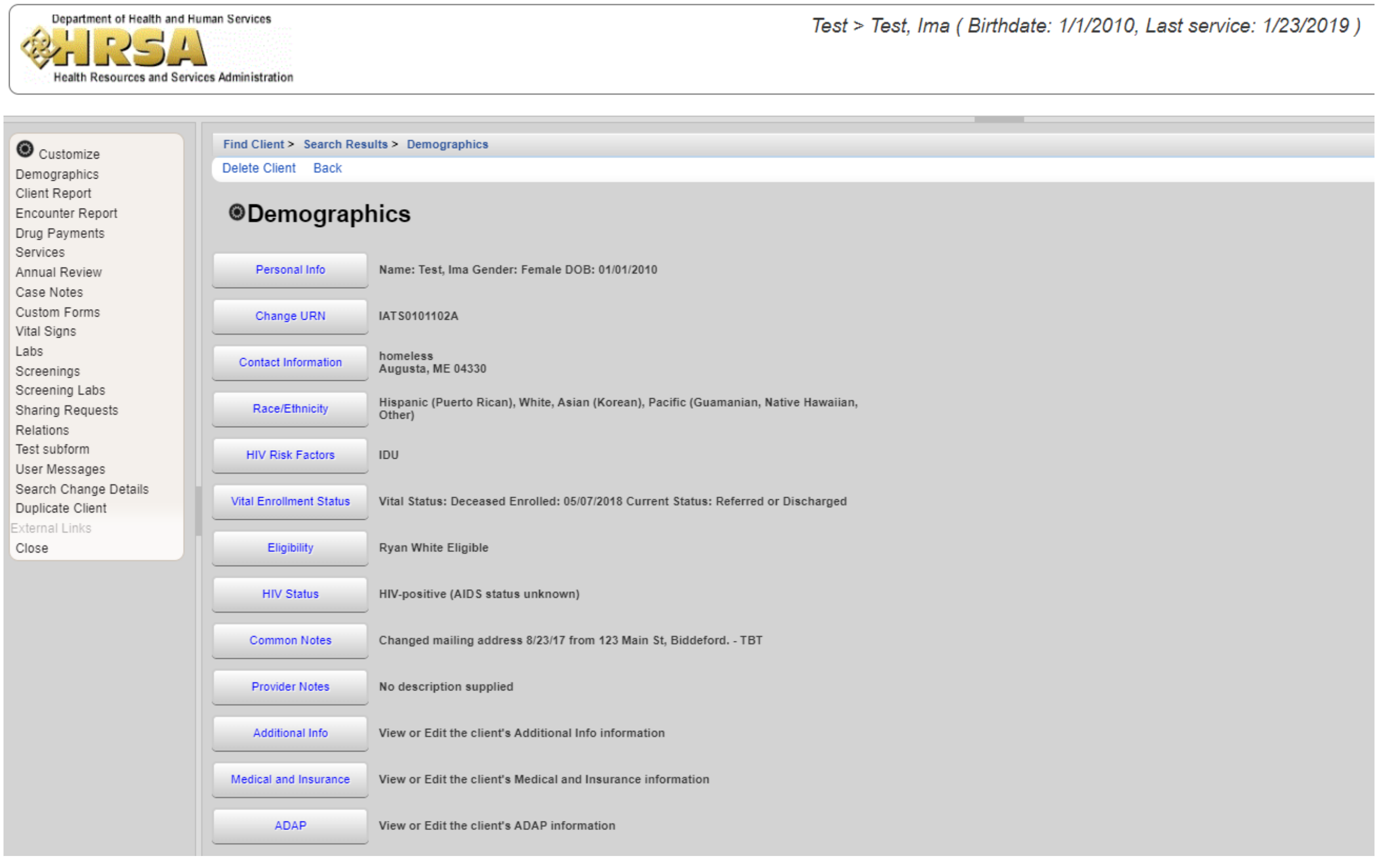


Last Name	First Name	DOB	Client ID	URN	EURN	Encrypted UCI	Match Type
Testrecord	Bob	1/1/2017 12:00:00 A		BBTS0101171U	A1Uik99iY	C72F512A408D65E	Exact
Test	Ima	1/1/2010 12:00:00 A		IATS0101102A	ZrE2wpyOX	2630DA210EF45FF	Exact
Testrecord	Test	3/6/1979 12:00:00 A		TSTS0306792U	Pn0AmTvqZ	51A3AAFB99A56B	Exact
Testrecord	Test	3/6/1979 12:00:00 A		TSTS0306794A	6KLSdjZ3T	A208452B17A5DD	Exact

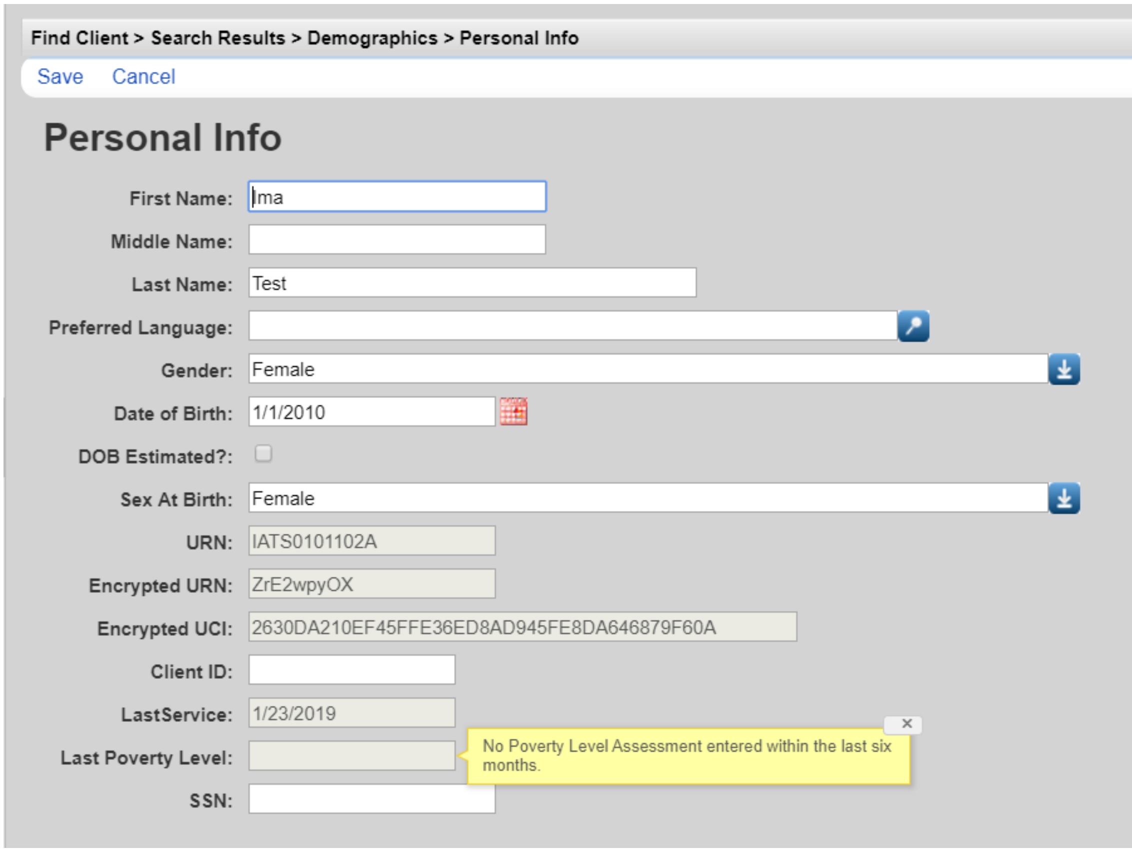
To open the client’s record, select the client and double click on the client’s name or click the View Details link.

Demographics

When you open a client record, it automatically opens in Demographics with splash screens that show summary data next to buttons to access each section of the record.



Personal Info



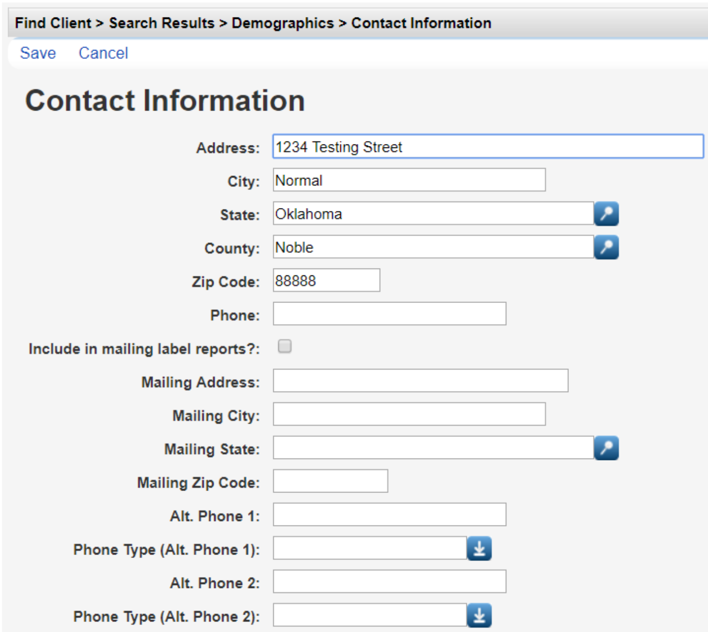
Fields <u>required</u> for Part B reporting:

- **Gender**
- **Date of Birth**
- **Sex at Birth**

The name fields should always contain the client's full legal name. If the client has a nickname, please enter that in Common Notes. If a client completes a legal name change, you may change this information directly in CAREWare (as long as your user account has permission to do so). If the client has not <u>legally</u> changed names, put the new name in Common Notes, as you would a nickname.

Client ID is a local field, meaning it is not shared across Provider domains.

Contact Information



Fields required for Part B reporting:

- **County**

Note: The address listed in the splash screen area next to the Contact Information button is the physical address. There is no way to see if the physical and mailing addresses are different in the client record unless you click the Contact Information button to see the details.

When making updates, remember:

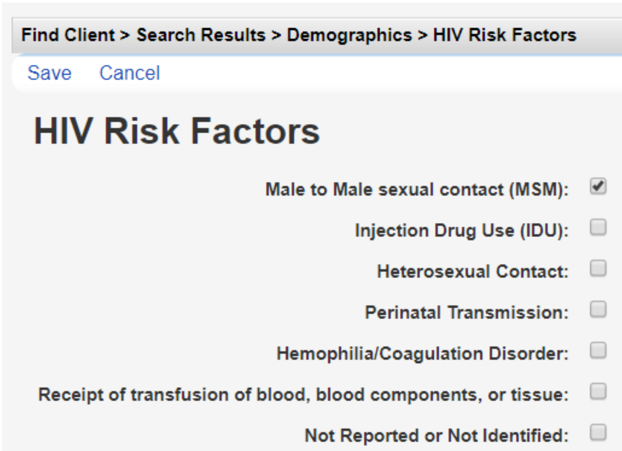
1. Contact information is automatically shared across Provider domains. If you make an update, any providers with a record for this client will automatically change as well.
2. Make a note in the Common Notes box about what you changed and the date you changed it, so that other providers can be sure their information is up-to-date.
3. Verify that the county is still correct, as it is a required reporting field. You can look up counties by town using this website: http://www.maine.gov/local/
4. If your client is homeless, you still have to select Maine as the state and identify the appropriate county. A mailing address must also be included if the client is enrolled in Ryan White Part B services.

Race/Ethnicity

All clients must have both an Ethnicity and at least one Race selected. These fields are required for Part B reporting. Information will be entered from the client's intake, but you may update it as needed. Multiple races may be selected. The following definitions are required for all Federal reporting:

- *White (not Hispanic)* is an individual having origins in any of the original peoples of Europe, the Middle East, or North Africa, but not of Hispanic ethnicity.
- *Black or African American (not Hispanic)* is an individual having origins in any of the black racial groups of Africa, but not of Hispanic ethnicity.
- *Hispanic or Latino(a)* is an individual of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.
- *Asian* is an individual having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.
- *Native Hawaiian or Other Pacific Islander* is an individual having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.
- *American Indian or Alaska Native* is an individual having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment.

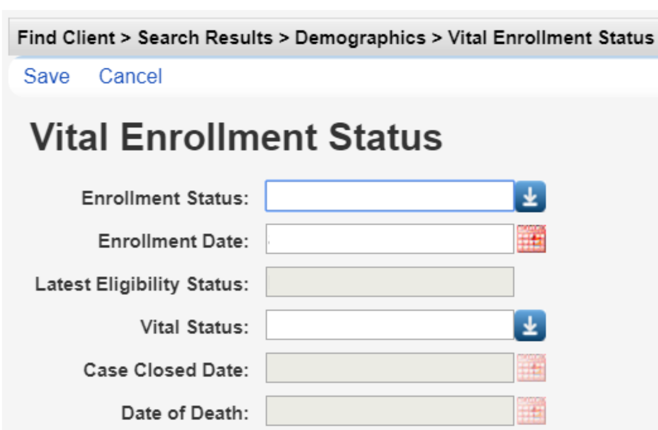
HIV Risk Factors



This information is <u>required</u> for Part B reporting.

Enter the HIV risk factors at the time of intake. If, during the course of working with the client, you learn more about a client's exposure to HIV, these risk factors may be updated at any time. Multiple risk factors may be selected.

Vital/Enrollment Status

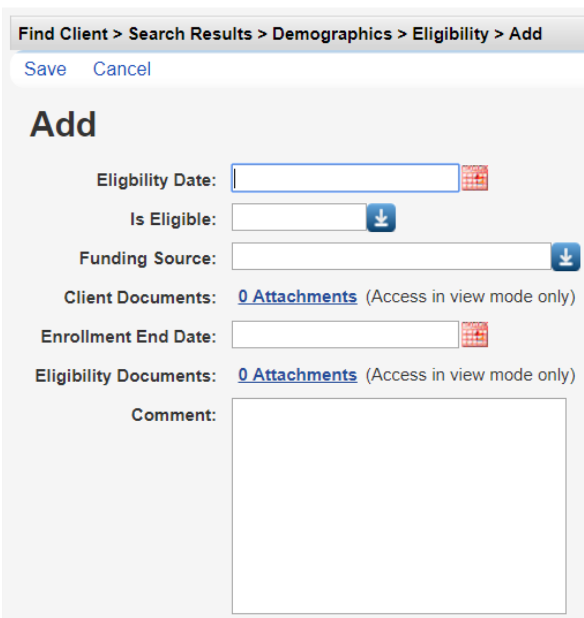


Fields <u>required</u> for Part B reporting:

- **Enrollment Status**
- **Enrollment Date**
- **Case Closed Date (as applicable)**
- **Vital Status**
- **Date of Death (as applicable)**

- The defaults are a Vital Status of "Alive" and an Enrollment Status of "Active." It's possible for a client to be deceased and still be an active case, as you may still be providing medical case management, charting, etc. for a deceased client.
- Once the Enrollment Status is set to "Inactive/Case Closed," you can't enter any more services without resetting the Enrollment Status to "Active."
- The Enrollment Date should be the date of intake. *Note that the enrollment year is used by CAREWare for the Ryan White Program Data Report to determine if this client is new in the current year or not*. The client always keeps his or her original enrollment date, no matter how many times the client is discharged and returns to service at your agency.

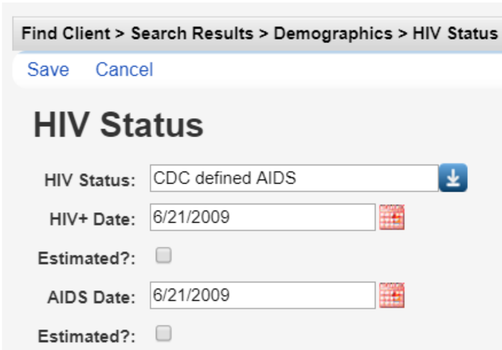
Eligibility

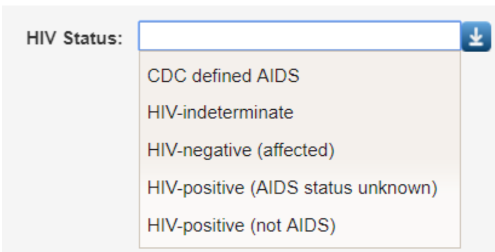


These fields are <u>required</u> for Part B reporting.

Enter a record when a client is enrolled in Ryan White services. Enter a record for the day after a client is disenrolled from Ryan White services for any reason.

HIV Status





These fields are required for Part B reporting.

Common Notes

Common Notes are visible to anyone who has a record for this client. **Do not put confidential information in this space.** Use Common Notes for preferred names and notes about changes to contact information.

How to format changes to contact information:
mm/dd/yy: Changed [type of info] from [old info] – [user name]

Example:
12/02/19: Change address from 286 Water St – CWAdmin

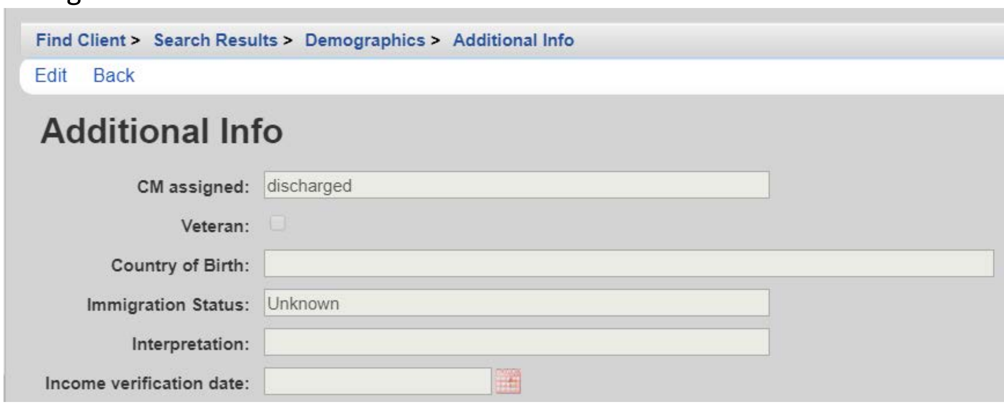
If there are previous notes about changes to this same information, they can be deleted if they are no longer relevant. The Common Notes space is not meant to be a running record of every address/phone change.

Provider Notes

Provider Notes are only visible to other users within your Provider domain. It is still best practice to refrain from entering confidential information (such as user names and passwords) in this space.

Additional Info

The fields in the Additional Info screen may vary among Provider domains. If you have edit permissions for this screen, you will have to click the blue Edit link before you can make any changes.

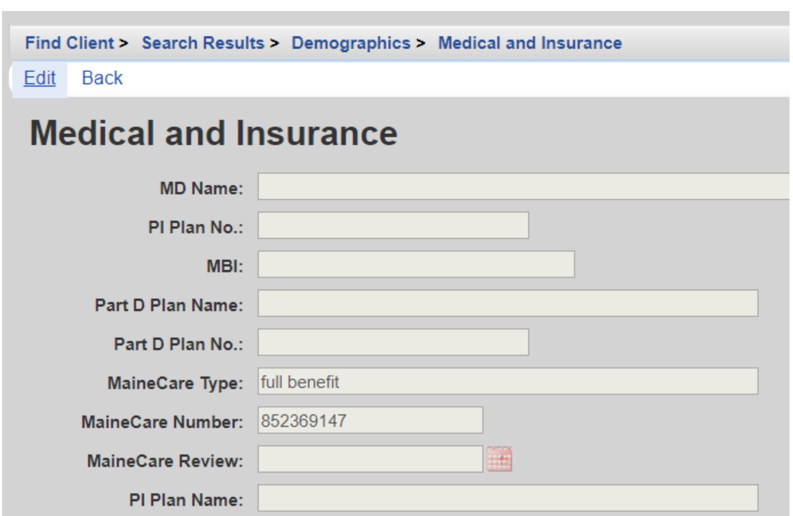


CM assigned and Immigration Status are required for Part B reporting.

Medical and Insurance

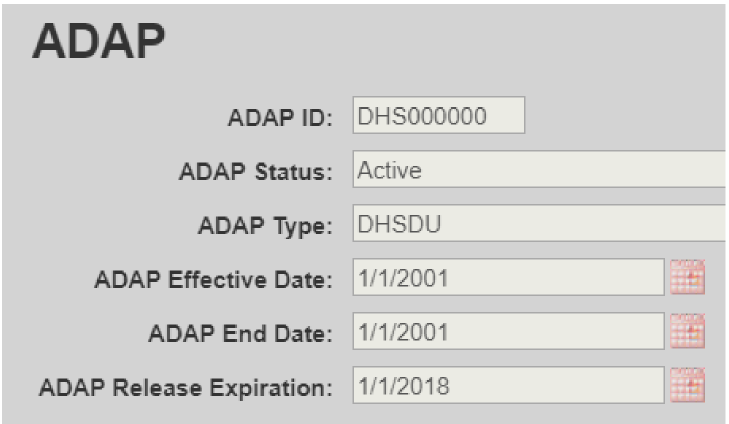
The fields in the Medical and Insurance screen may vary among Provider domains. If you have edit permissions for this screen, you will have to click the blue Edit link before you can make any changes.

Be aware: If you change the MaineCare type for a person who is an ADAP member, please contact ADAP immediately about the change to ensure continued access to medications.



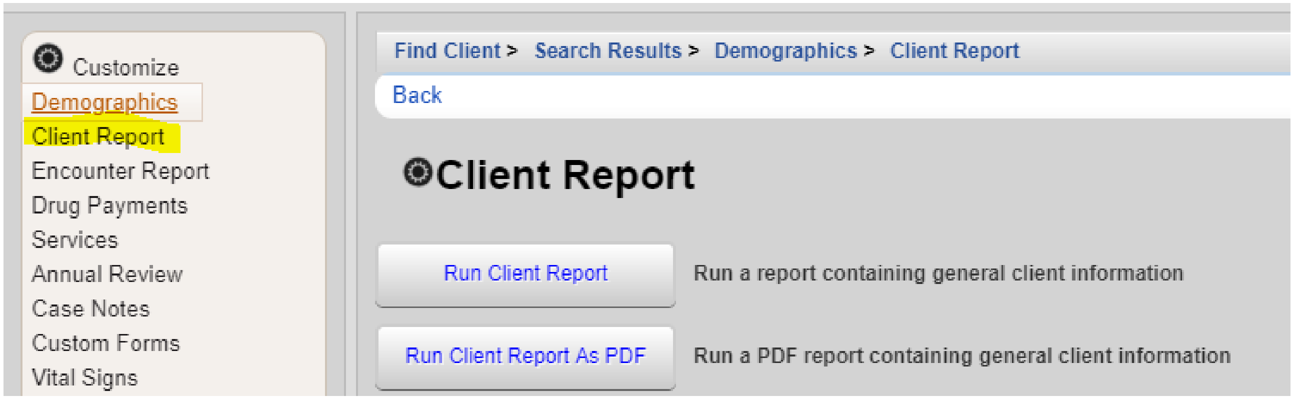
ADAP

The ADAP screen is always read-only. You cannot edit this screen. If you see information that you think is incorrect, contact ADAP immediately.



- ADAP ID = The ID used for all Ryan White Part B services. This number is not derived from any client information, so it may be used as an identifier in email.
- ADAP Status = Active or Inactive. Some members may be listed as Active for a brief time after their ADAP End Date, but they will not have access to any Part B services after their ADAP End Date.
- ADAP Type = the coverage that ADAP wraps around.
    - DHSDU = Medicare Part D and MaineCare (full benefit, expansion coverage, or Waiver only)
    - DHSMD = Medicare Part D
    - DHSMC = MaineCare (full benefit, expansion coverage, or Waiver only)
    - DHSPI = private insurance, ADAP does not pay premiums
    - DHSHE = private insurance, ADAP pays the premiums
    - DHSSA = no insurance for medications
- ADAP Effective Date = last time ADAP Type changed.
- ADAP End Date = the date ADAP coverage will end or ended. Some members may be listed as Active for a brief time after their ADAP End Date, but they will not have access to any Part B services after their ADAP End Date.
- ADAP Release Expiration = the date the ADAP release expires.

Client Report

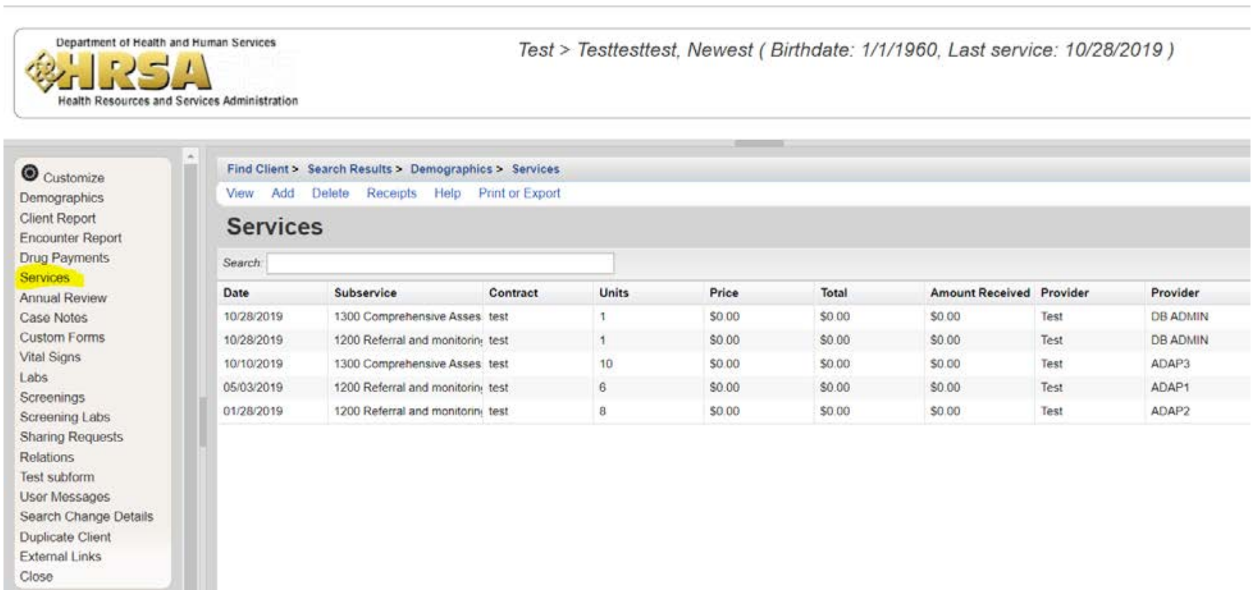


The client report is a summary report that shows the information on the Demographics screen. It may be printed or saved as a PDF.

Services

By contract, Part B case managers are required to log all services in CAREWare within <u>5 calendar days</u> of the contact.

Phone messages, mailings, e-mails, dropping off items at a client's house (outside of a home visit), picking up items for a client (food, prescriptions, etc.), and scheduling are not client contacts, and therefore services <u>should not</u> be entered as services. Case notes should document these activities.



Service fields <u>required</u> for Part B reporting:

- **Individual service entries for each client**

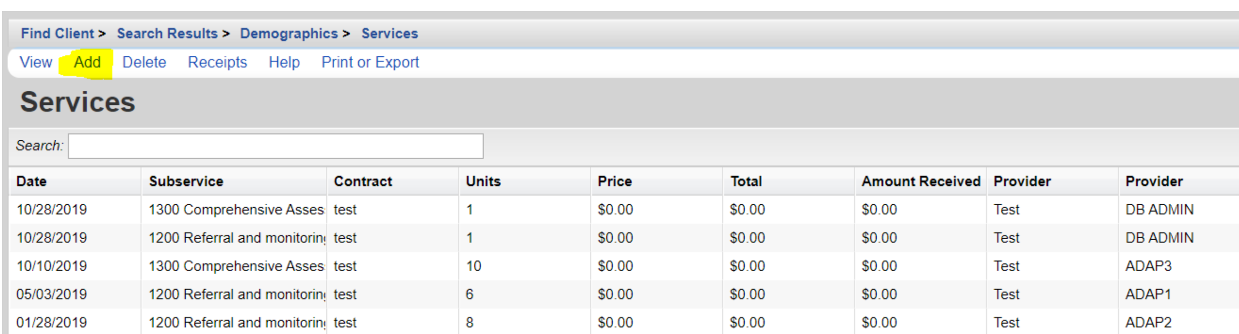
Entering Services

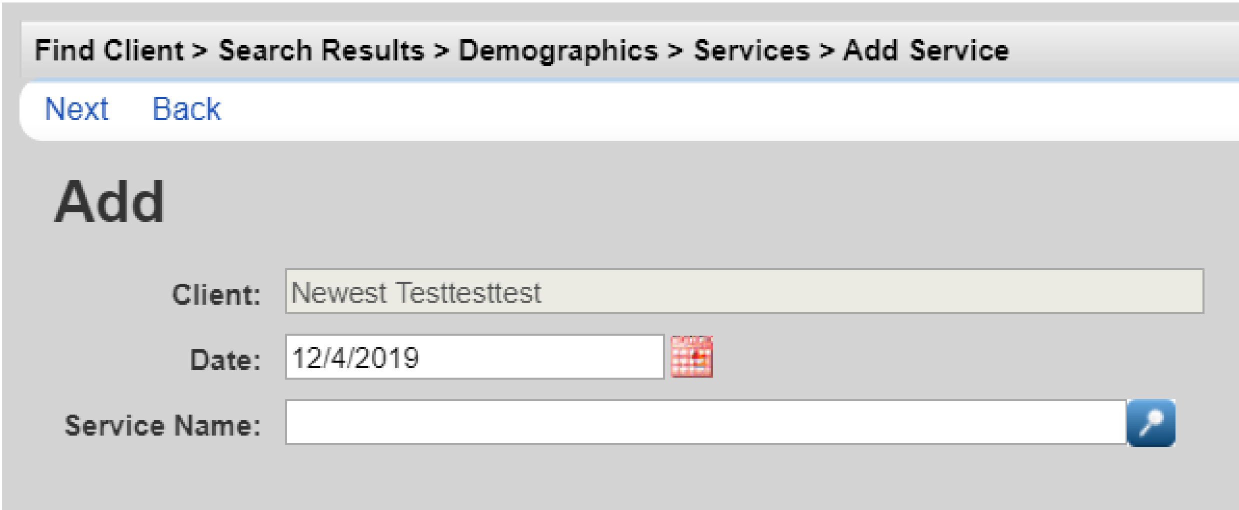
View the webinar on entering services at https://youtu.be/7ZV7Z9FSqhs

The following are the only required Case Management service codes for Part B:

Code	Service Name	Units	Definition
RW1000	Care Plan	1 unit = 15 minutes	This service should be logged when a case manager completes a care plan with the client.
RW1200	Referral and monitoring service from care plan	1 unit = 15 minutes	This service should be logged when a case manager coordinates a referral for a client, facilitates the client's link to a service identified in the care plan, follows up to ensure that a client has received a service identified on the care plan, or screens for barriers related to accessing a service identified on the care plan. This includes collateral contacts.
RW1300	Comprehensive assessment	1 unit = 15 minutes	This service should be logged when a case manager completes an intake, re-intake, or annual assessment.
1800	Discharge	1 unit	Use this service to show when a client is discharged from Ryan White case management.
1900	RWB Medical Transportation Assistance	1 unit	This service should be logged when a client is granted RWB medical transportation assistance in the form of bus tickets, taxi fares, or gas cards to ensure transportation to medical and case management appointments.

To enter a new service, click the blue Add link at the top of the screen, just under the breadcrumbs.

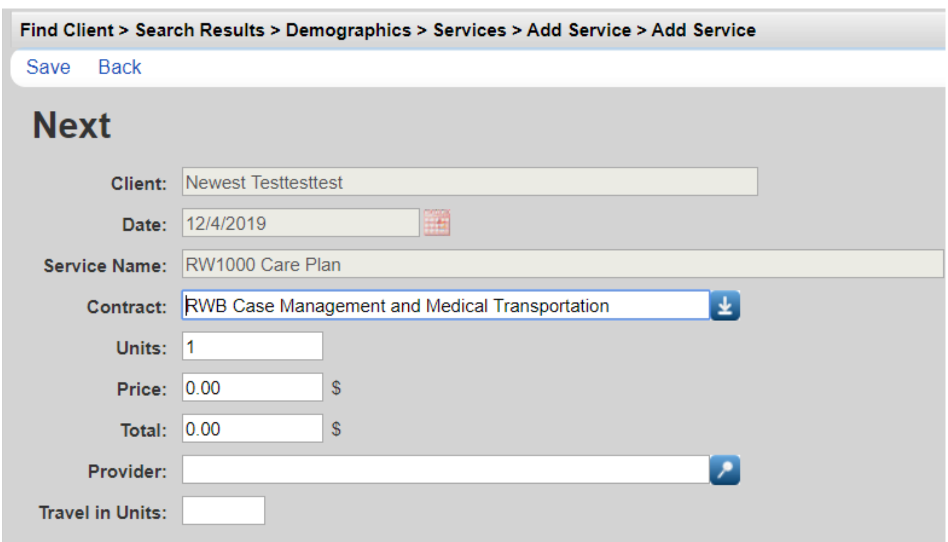




The Add screen will show you the client name so that you can confirm you are in the correct record. This field is not editable.

Enter the date and find the service name by typing the first letters or numbers of the service code as listed above.

Once you have entered the date and service name, hit Enter on your keyboard or click the blue Next link.



The contract box will be limited to funding contracts associated with the service you have selected. RWB services will only have one contract, so you do not need to change the default.

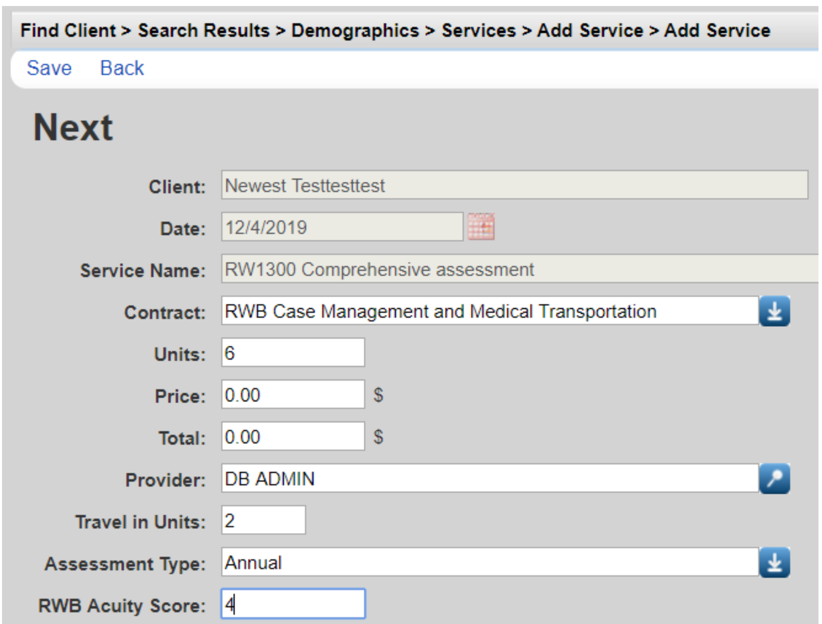
Enter the number of units as appropriate. For medical transportation assistance, you will need to enter a cost. CAREWare will automatically calculate the total by multiplying the units by the cost.

Under Provider, enter your user name by typing the first few letters and selecting the correct one.

Enter any associated travel time in units.

Logging Assessments

Service 1300 Comprehensive Assessment is logged like most other services, but it also includes extra boxes to identify the type of assessment and acuity score.



For type of assessment:

- Select "Intake" if the client is accessing medical case management with your agency for the first time.
- Select "Reintake" if the client has been discharged from services with your agency for one year or more.
- Select "Annual" if this is the routine annual assessment of an active client.

For acuity score, enter the **total** acuity score for the client from the assessment document:

Acuity Assessment					
Area	0 pts Client identifies no needs in this area	1 pt Client identifies low needs in this area	2 pts Client identifies moderate needs in this area	3 pts Client identifies high needs in this area	4 pts Client is in crisis in this area
1. Access					
2. Housing					
3. Food/Nutrition					
4. Transportation/Home Care					
5. Education/Employment/Financial Support					
6. Treatment Adherence					
7. Dental Care					
8. Mental Health/Social Support					
9. Substance Use					
10. Relationships					
11. Legal					
12. Other					

Total Acuity Score: _____

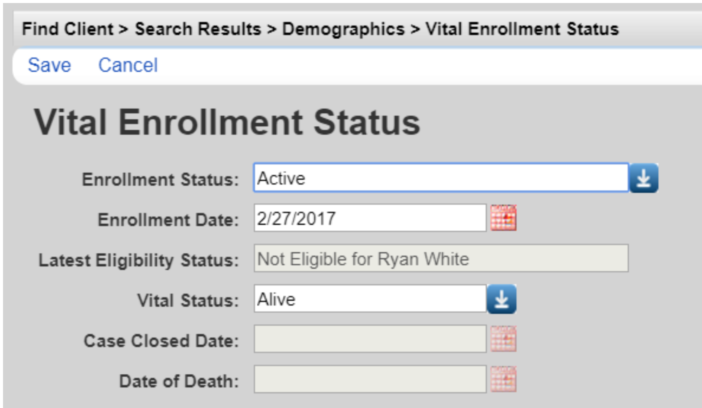
Logging Discharges

There are several steps to logging discharges.

1. Log service 1800 Discharge
2. On the Demographics screen, change the client's Vital Enrollment Status to the type that most accurately reflects the situation and enter the discharge date in the box labeled "Case Closed Date."

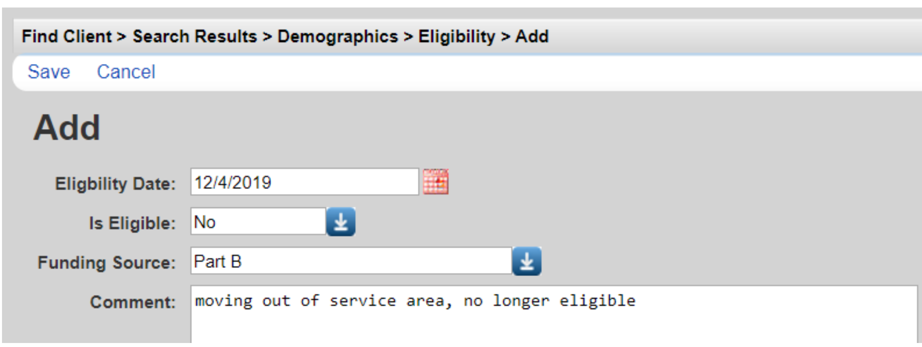
   Use one of the following:

   - Referred **or Discharged** —The client was referred to another program or services and will not continue to receive services at this agency; the client became self-sufficient and no longer needed Ryan White Program-funded services; the client voluntary left your program; or the client refuses to participate.
   - Relocated – The client moved out of the service area.
   - Removed—The client was removed due to violation of rules.
   - Incarcerated
   - **Inactive/Case Closed should only be selected if the client has died**

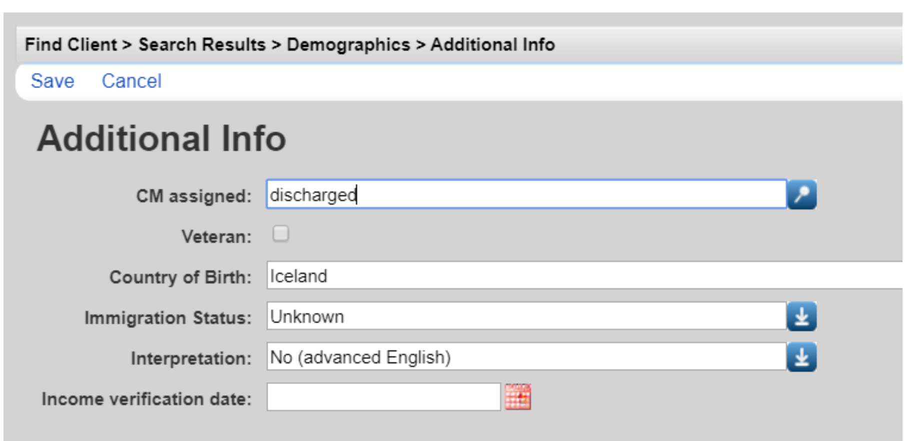


When you change the Enrollment Status from Active, you will be able to enter a Case Closed Date. If you change the Vital Status to Deceased, you will be able to enter a Date of Death.

3. On the Demographics screen, under Eligibility, add a record showing the client is no longer eligible for RWB services.



4. On the Demographics screen, under Additional Info, change the CM Assigned to Discharged.

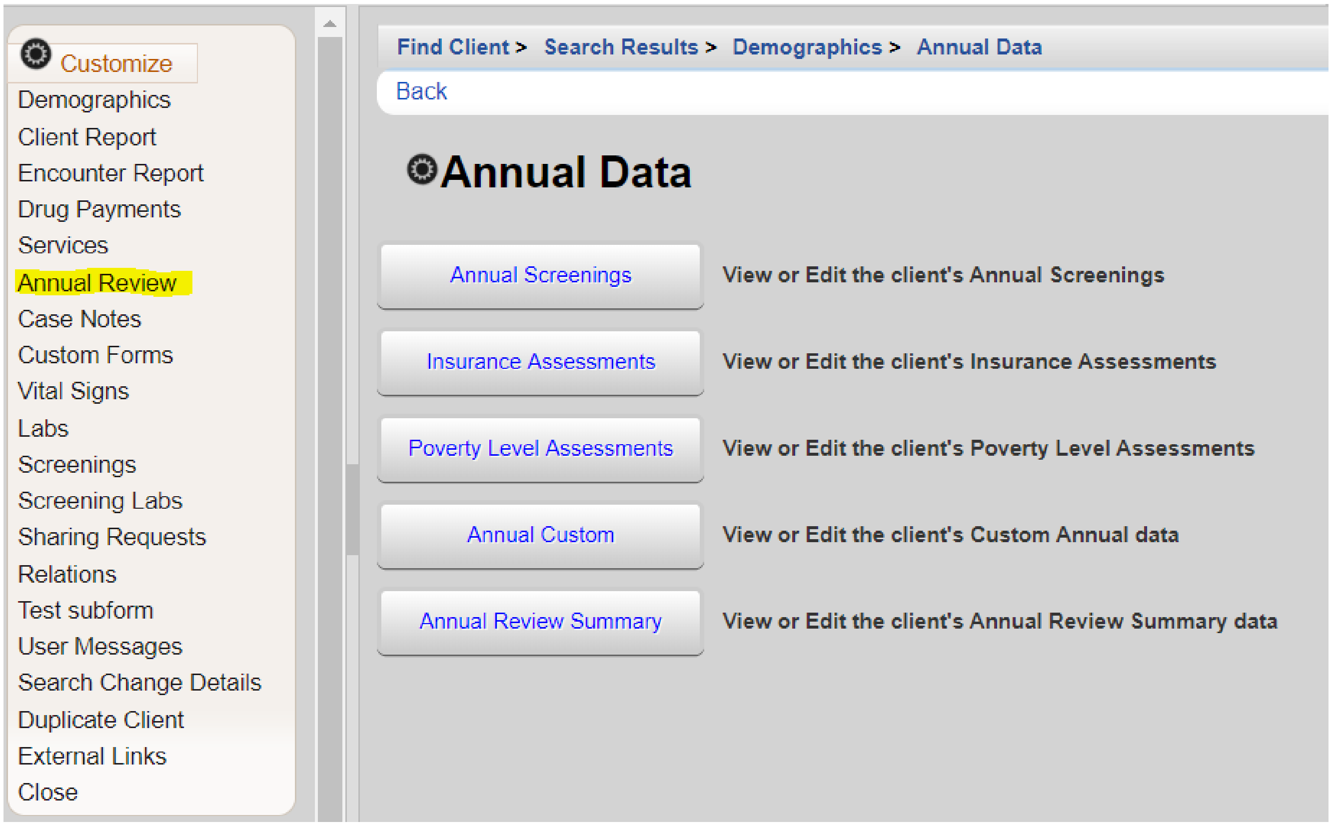


Editing Services

You may edit previously entered services by double clicking on the service and selecting the blue Edit link.

Annual Review

View the webinar on updating the Annual Review at https://youtu.be/KKPG6ettDFY



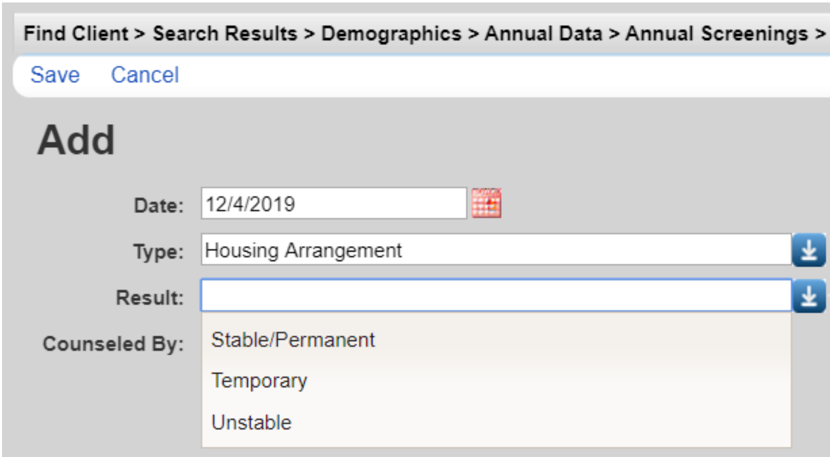
Annual Review fields required for Part B reporting:

- **Annual Screenings -> Housing Arrangement**
- **Annual Screenings -> HIV Primary Care**
- **Insurance Assessments -> Insurance types**
- **Poverty Level Assessments -> Household Size** (legal household as defined by Ryan White Part B)
- **Poverty Level Assessments -> Household Income** (for all members of the client's legal household)
- **Poverty Level Assessments -> Individual Income** (income for the client only)

You will notice that the drop-down menus are limited. This is because these fields are tied specifically to federal reporting. **All of the Annual Review fields should be entered at Intake and then reviewed and updated each time there is a change or at least annually.**

Housing Arrangement

Click the Annual Screenings button and then click the blue Add link.



Temporary Housing includes:

- Transitional housing
- Temporarily staying with friends or family (couch surfing)
- Hotel or motel (not paid for with emergency shelter voucher)
- Other temporary arrangement

Unstable Housing Arrangements include:

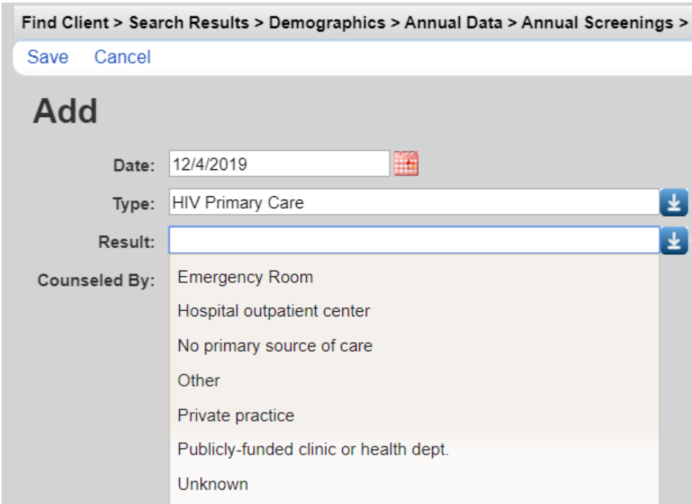
- Emergency shelter
- Place not designed for, or ordinarily used as, a regular sleeping accommodation for people (vehicle, abandoned building, bus/train station/airport)
- Hotel or motel paid for with emergency shelter voucher

For clients in institutional care use:

- **Stable Permanent Housing** for an institutional setting with greater support and continued residence expected (psychiatric hospital or other psychiatric facility, foster care home or foster care group home, or other residence or long-term care facility)
- **Temporary housing** for temporary placement in an institution (e.g., hospital, psychiatric hospital, or other psychiatric facility, substance abuse treatment facility, or detoxification center)
- **Unstable Housing** for jail, prison, or a juvenile detention facility

HIV Primary Care

Click the Annual Screenings button and then click the blue Add link.

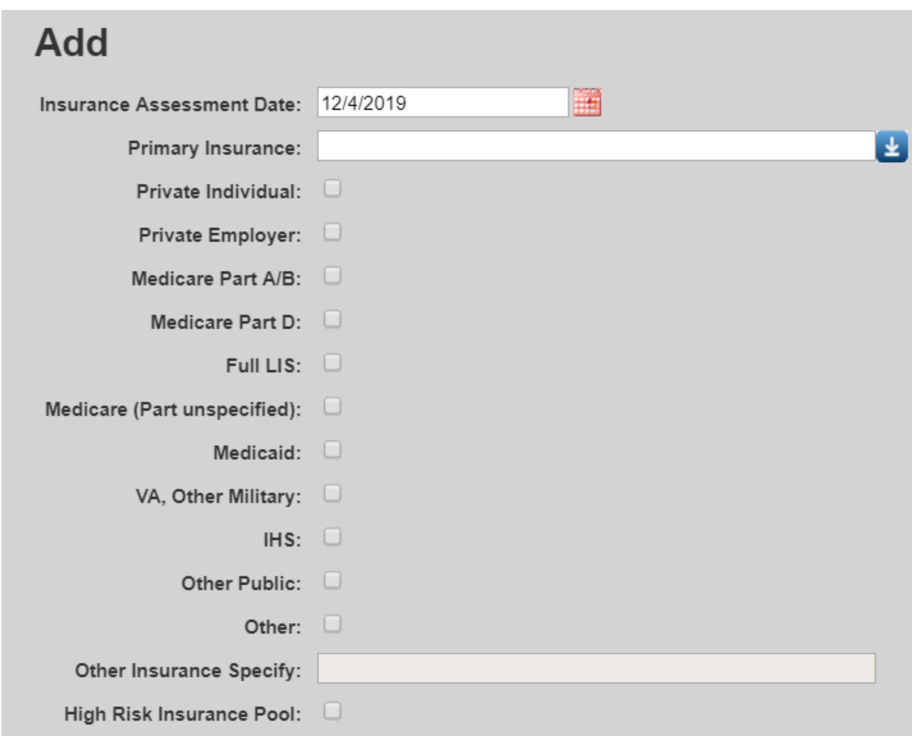


Insurance Assessments

Any time a client experiences a change in insurance (primary or other types), you should add a new insurance record. **If the client has ADAP, you should also contact ADAP to be sure they are aware of the change.**

Click the Insurance Assessments button and then click the blue Add link.

Enter the date of the change (most likely the date you are entering the information). Select the client's primary insurance type – the medical insurance that provides the most reimbursement. Then check the boxes for all other insurance types that apply.



The primary insurance is always the insurance that pays the most for the client's care. They are listed in order in CAREWare.

How to report Medicare Part C: Select Medicare A/B. If they also have prescription coverage through their Part C plan, check Medicare Part D.

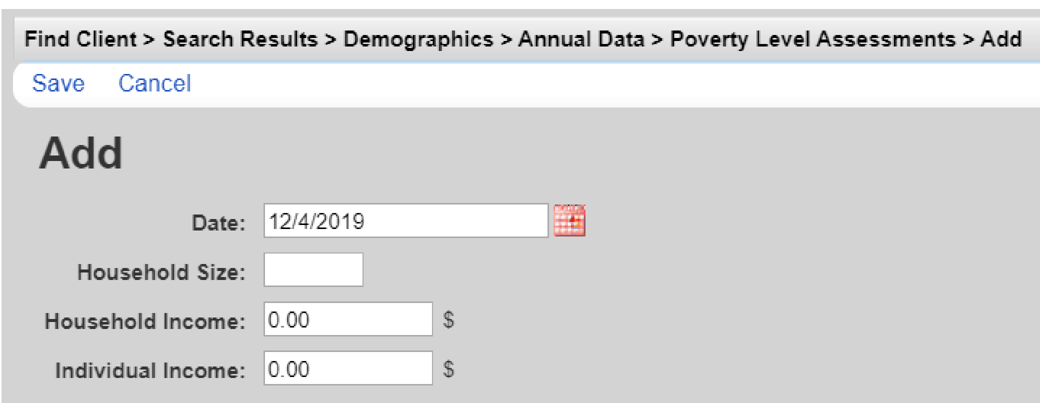
Note: You should never select Medicare (Part unspecified) and Medicare Part D cannot be selected as a primary insurance.

ADAP is not considered insurance, so ADAP should not be reflected here. Free Care is also not considered insurance and should not be reflected here.

Poverty Level Assessments

Ryan White Part B programs (including ADAP) define household as a family of two or more people related by birth, marriage, adoption, or other legally defined dependent relationship. We recognize that this definition may be different from other programs, such as HAVEN and MaineCare. All household size and income information entered in the Poverty Level Assessments must reflect the Ryan White Part B definition.

Click the Poverty Level Assessments button and then click the blue Add link.



Household Size should reflect the total number of people in the legal household as defined above.

The Household Income should reflect the all income for all of the people counted in Household Size. All income, from full- or part-time employment, produced by all dependents must be declared as part of the household income.

Individual Income will automatically populate if the household size is 1. Otherwise, enter the total annual income for <u>only</u> the client in this box.

Case Notes

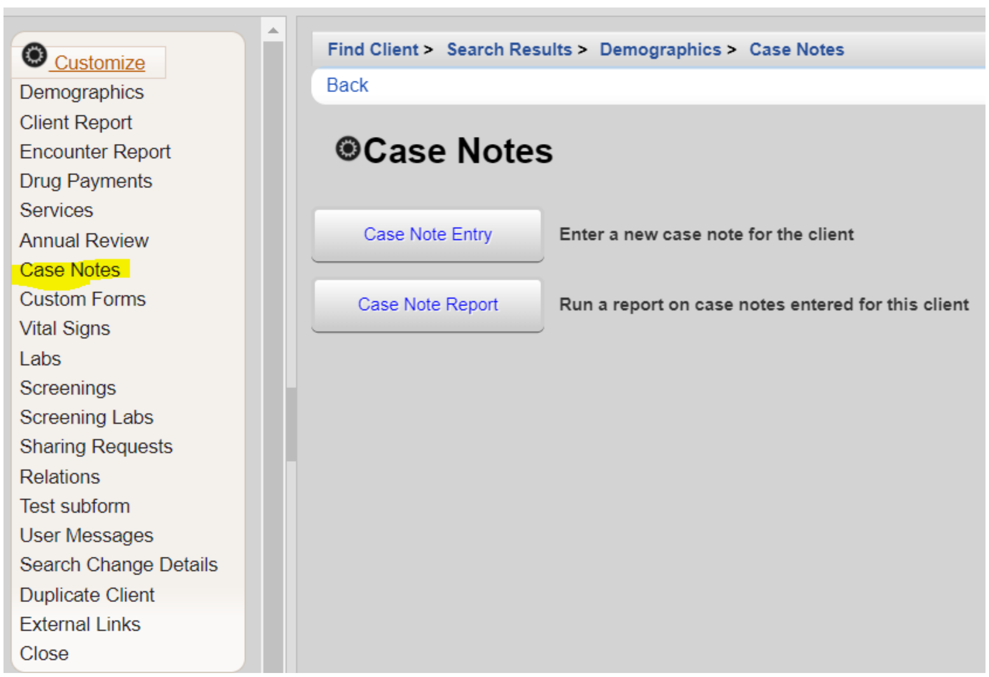
As of **March 1, 2012**, Ryan White Part B case managers must log all case notes in CAREWare. Case notes must be entered within 5 calendar days of the contact with the client.

Agencies may request, in writing, exceptions to completing case notes in CAREWare in the following situations:

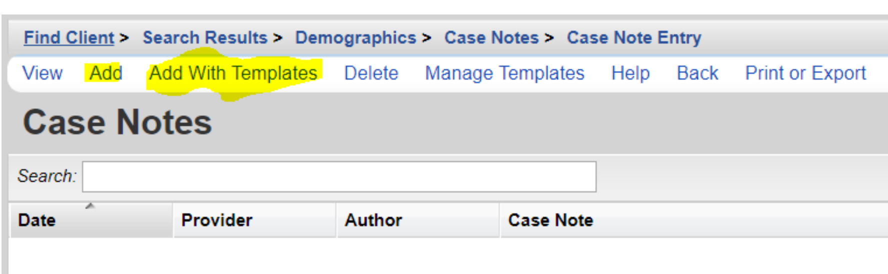
- Client is also an employee of the agency
- Case Manager has requested a reasonable accommodation for a physical limitation associated with extensive typing

Note that even when demographic, service, and clinical data is shared between providers, case notes will always remain private and visible only to staff with appropriate permissions at the agency where the note originated.

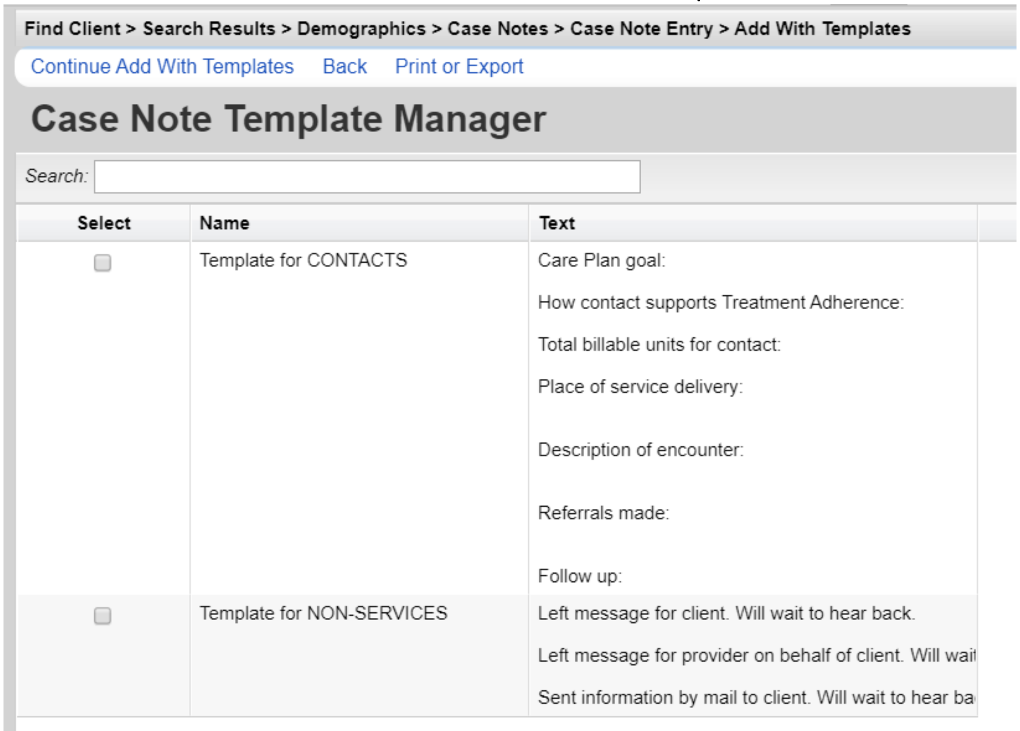
View the webinar on case notes at https://youtu.be/ins4_wTfhyY



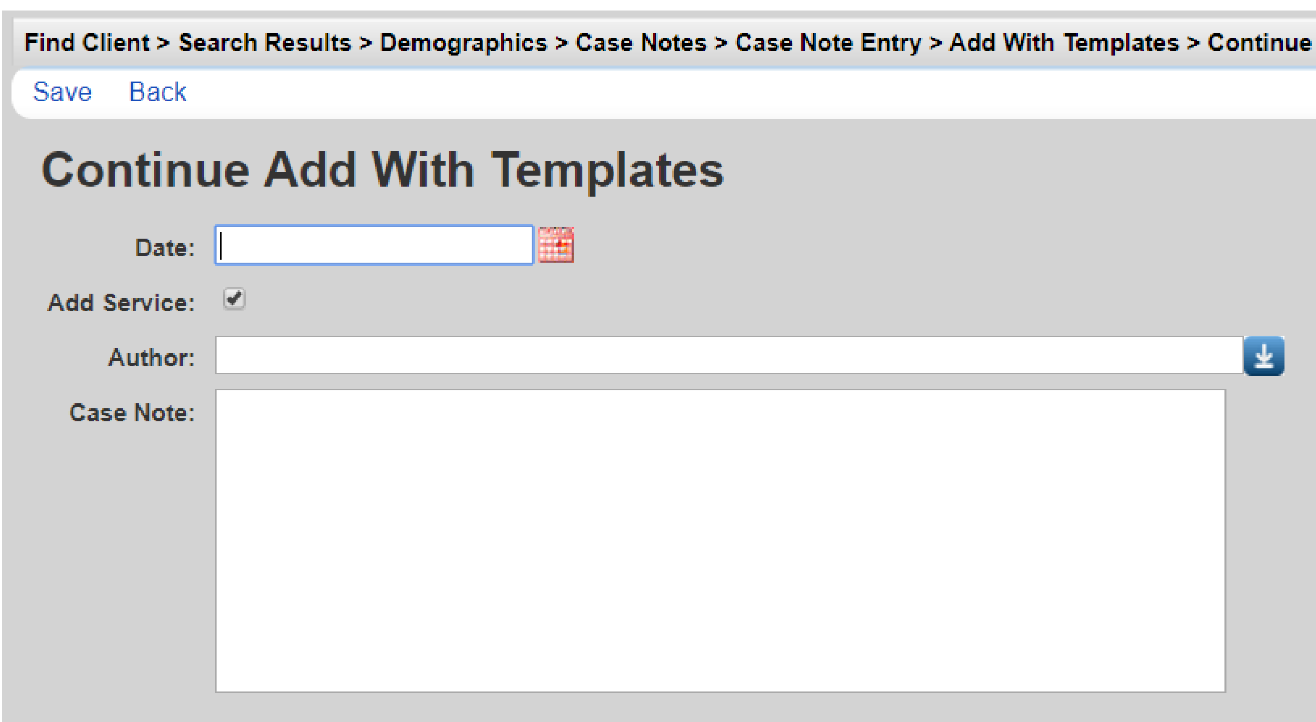
When you click on the Case Note Entry button, you will have the option to add case notes with or without templates.



If you select “Add With Templates” you will have to check the box for the template you want and then click the blue link for Continue to Add With Templates:



Once you are in the case note, enter the date that corresponds to the encounter with the client, select your user name from the Author drop-down, and enter your text for the case note. If the Add Service box is checked, you will go directly into a new service entry when you save the case note.



When to use each template:

Use the **Contacts** template to document any contact with the client or on the client's behalf that relates to a goal from the care plan and a need identified in the assessment.

Use the **Contacts NOT logged as services** template when you need to document an action that is not covered by Part B and therefore should not be logged as a service, such as:

- Phone messages
- Letters, other mailings, e-mails
- Dispensing assistance or dropping items at a client's house (outside of a home visit)
- Picking up items for a client (food, prescriptions, etc.)
- Scheduling medical case management visits without working on a care plan goal
- Any activity that does not relate to a care plan goal and a need identified on the assessment

For Contacts NOT logged as services, delete the text that does not apply and add any necessary detail.

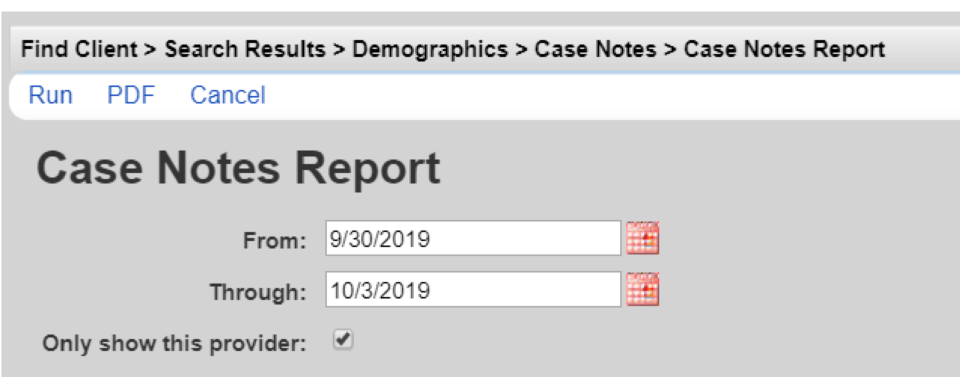
Remember:

- **You are not the client's biographer**
- **Case notes are legal documents that may be subpoenaed**
- **Clients may review their records at any time**

Keep notes concise.
Never identify another individual's status in a client's notes.

Printing Case Notes

Click the Case Note Report button. Set the From and Through dates for the period you want to view/print.

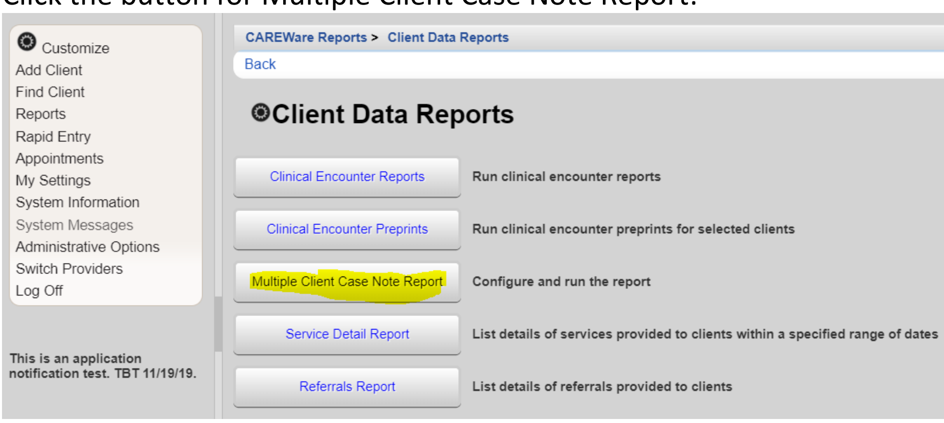


Click the blue Run link if you want to print your notes. Click the blue PDF link if you want to save your case note as a PDF.

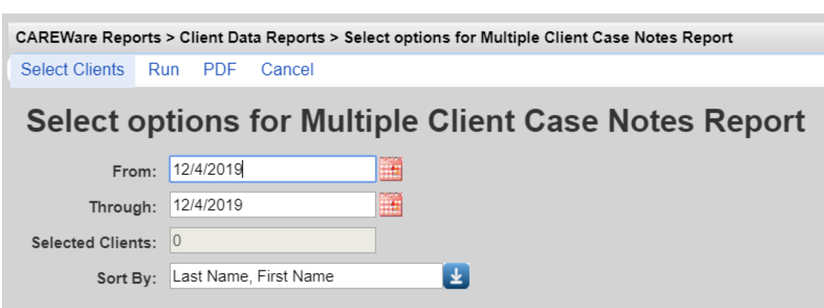
Printing Multiple Case Notes

To print case notes on multiple clients, you will have to return to the main menu (rather than a client menu) and click Reports | Client Date Reports.

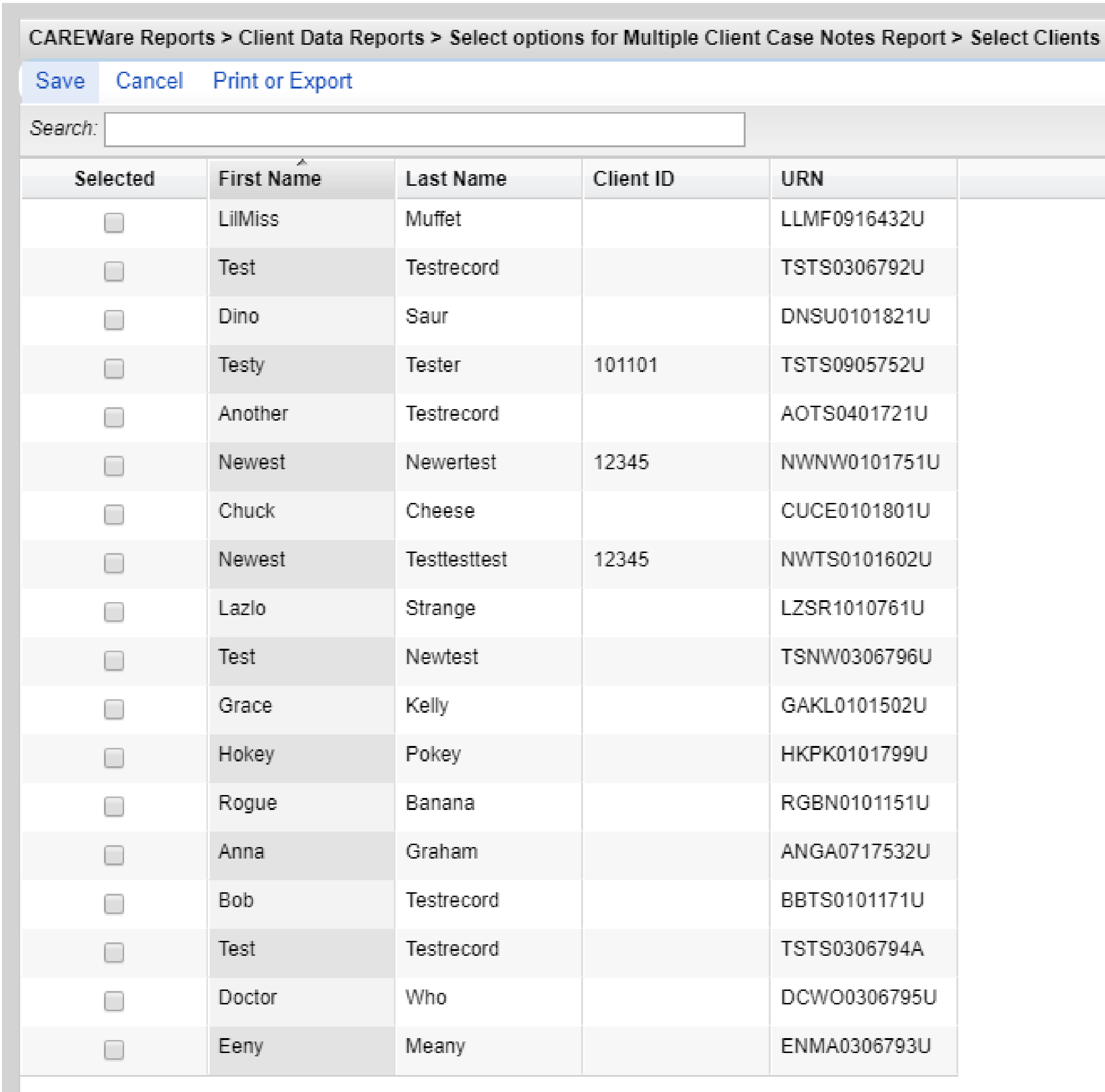
Click the button for Multiple Client Case Note Report:



Client the blue Select Clients link to select the clients whose case notes you wish to print:



Note that ALL **<u>ACTIVE</u>** CLIENTS being served by your agency will appear in the client list. (If your client's enrollment status has been set to anything other than "active," the client will NOT appear.) Check the boxes for the clients whose notes you wish to print and click the blue Save link.


CAREWare Reports > Client Data Reports > Select options for Multiple Client Case Notes Report > Select Clients

Save Cancel Print or Export

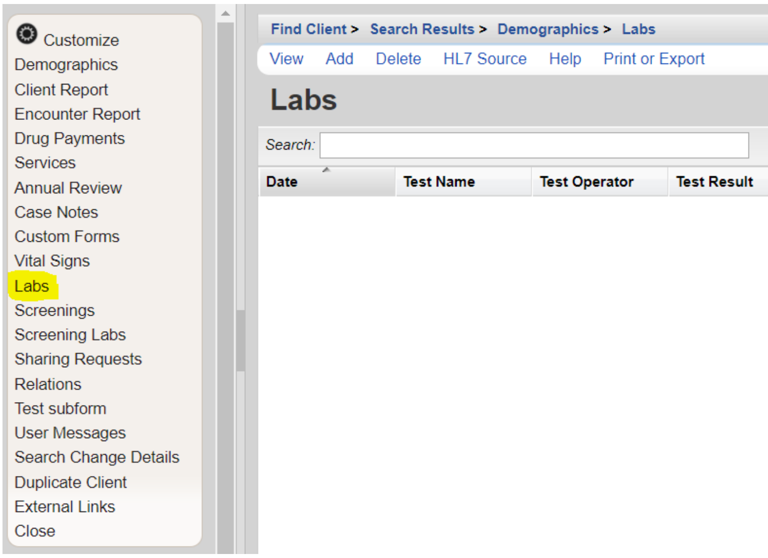
Search:

Selected	First Name	Last Name	Client ID	URN
	LilMiss	Muffet		LLMF0916432U
	Test	Testrecord		TSTS0306792U
	Dino	Saur		DNSU0101821U
	Testy	Tester	101101	TSTS0905752U
	Another	Testrecord		AOTS0401721U
	Newest	Newertest	12345	NWNW0101751U
	Chuck	Cheese		CUCE0101801U
	Newest	Testtesttest	12345	NWTS0101602U
	Lazlo	Strange		LZSR1010761U
	Test	Newtest		TSNW0306796U
	Grace	Kelly		GAKL0101502U
	Hokey	Pokey		HKPK0101799U
	Rogue	Banana		RGBN0101151U
	Anna	Graham		ANGA0717532U
	Bob	Testrecord		BBTS0101171U
	Test	Testrecord		TSTS0306794A
	Doctor	Who		DCWO0306795U
	Eeny	Meany		ENMA0306793U

1. Set the date span for the notes you wish to print.
2. Click the blue Run link to run the report and print it.

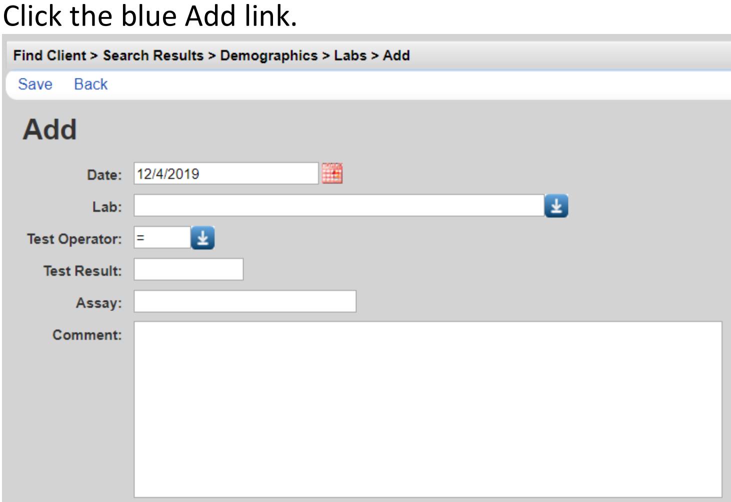
Labs

View the webinar on entering labs at https://youtu.be/H2TaEq6WBA8



Labs should only be entered when you have the date the lab was drawn and the exact result from a medical record/report or directly from a medical provider. **Self-reported labs should not be entered in the Labs section of CAREWare.**

Click the blue Add link.



The date should always be the date the lab was drawn.

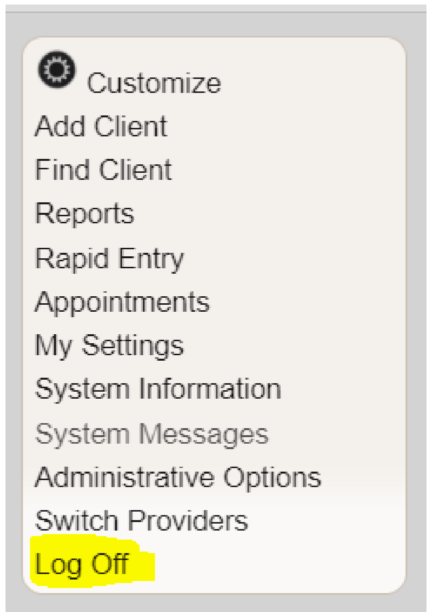
Select the type of Lab, the test operator (=, <, >).

Enter the test result and assay, as appropriate.

Logging Off

Step 1:

When you have finished using CAREWare, exit from the program by selecting Log Off from the main menu:



Step 2:

In the original window with the web bookmark, click the Sign Out button in the upper right corner.