

CAREWARE 6

TRAINING MANUAL

CAREWARE 6

CAREWare 6 is the newest version of CAREWare. It has a new interface that runs in an internet browser rather than a program installed on your computer. CAREWare 6 can be used with the following browsers:

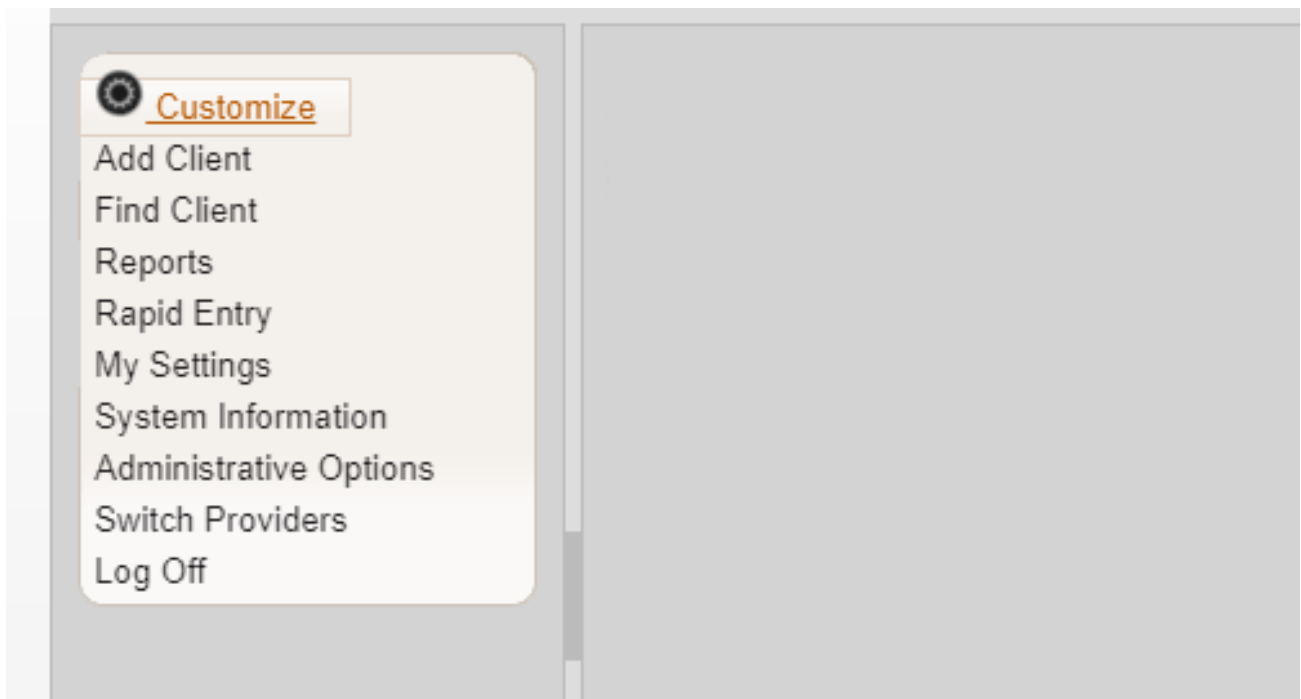
- Chrome
- Firefox
- Microsoft Edge
- Safari

Internet Explorer cannot be used to access CAREWare 6.

WHAT'S NEW IN CAREWARE 6

MENU OF LINKS

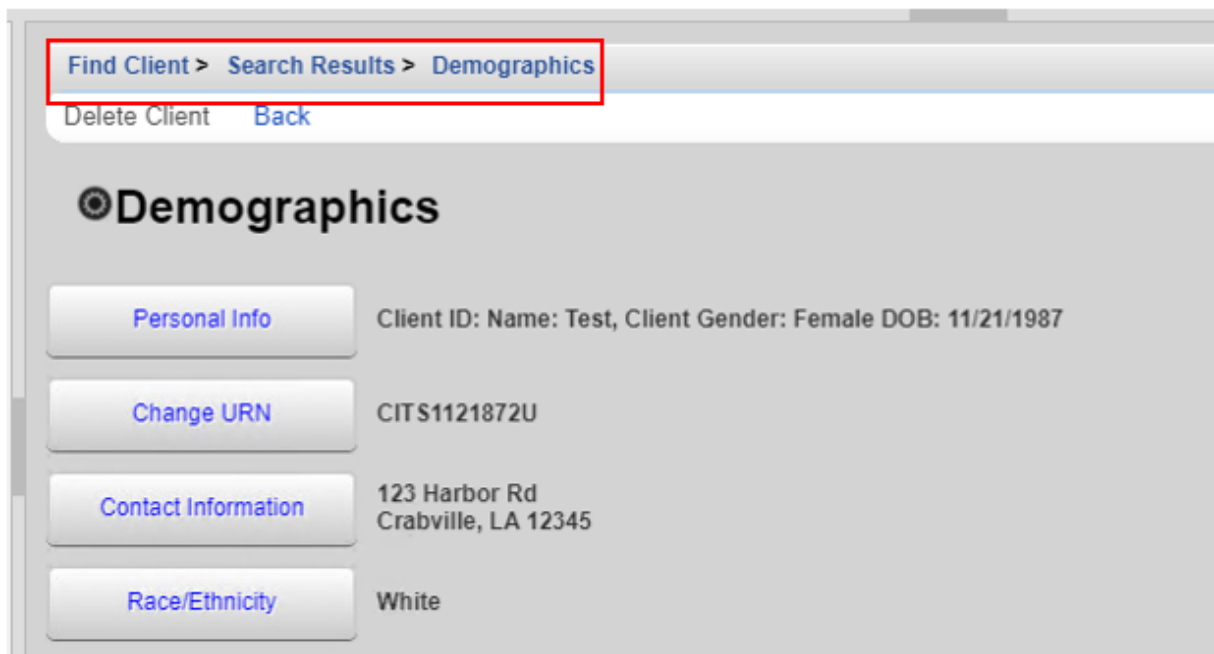
Upon logging in to CAREWare, you will find a Menu of Links on the left-hand side of the screen. Simply click on the item you wish to access.



BREADCRUMBS

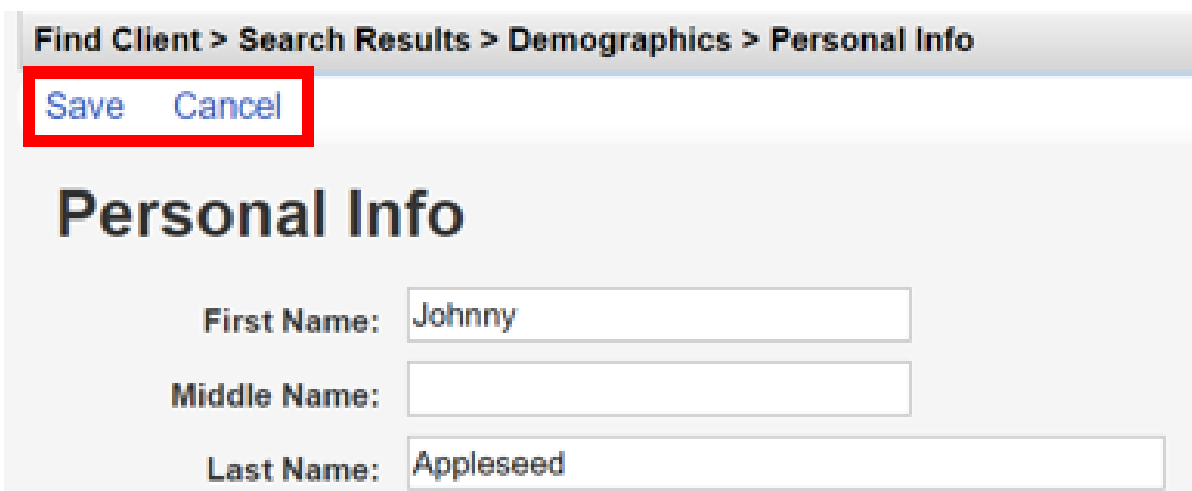
Breadcrumbs or Breadcrumb Trails allow users to keep track and maintain awareness of their locations within CAREWare 6.

- In this example: [Find Client](#) > [Search Results](#) > [Demographics](#) is considered the Breadcrumb Trail



The screenshot shows the 'Demographics' page in CAREWare 6. At the top, a breadcrumb trail is displayed: [Find Client](#) > [Search Results](#) > [Demographics](#). Below the trail are links for 'Delete Client' and 'Back'. The main heading is 'Demographics'. On the left, there are four buttons: 'Personal Info', 'Change URN', 'Contact Information', and 'Race/Ethnicity'. To the right of these buttons, the following information is displayed: 'Client ID: Name: Test, Client Gender: Female DOB: 11/21/1987', 'CITS1121872U', '123 Harbor Rd Crabville, LA 12345', and 'White'.

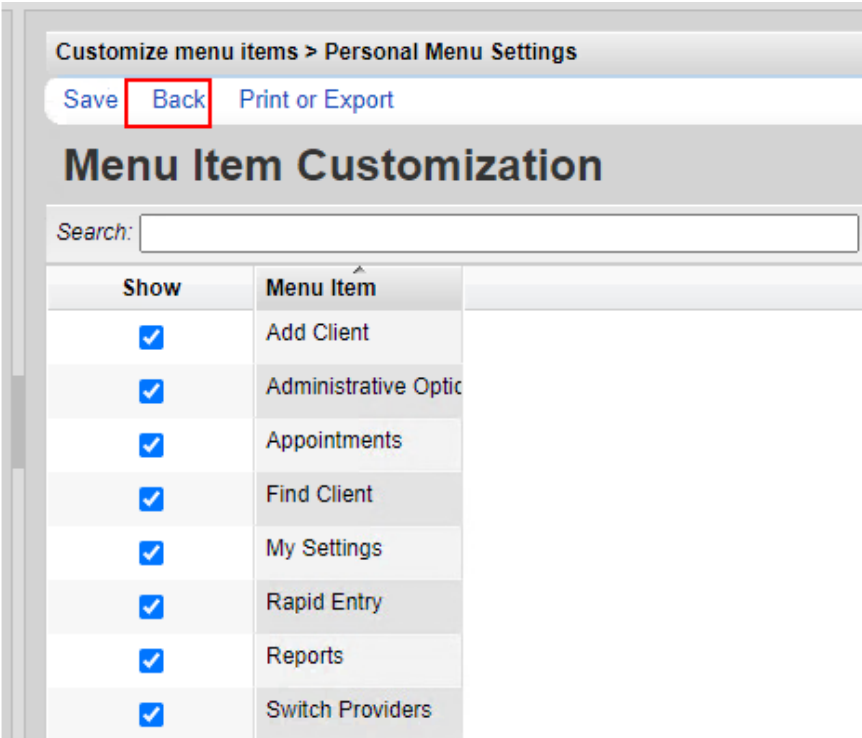
If the items in the Breadcrumb trail are blue (as in the example above), click on the item link to return to that section. If they are black, you must either click [Save](#) or [Cancel](#) to return to the previous section.



The screenshot shows the 'Personal Info' page in CAREWare 6. At the top, a breadcrumb trail is displayed: [Find Client](#) > [Search Results](#) > [Demographics](#) > [Personal Info](#). Below the trail are links for 'Save' and 'Cancel'. The main heading is 'Personal Info'. Below the heading, there are three text input fields: 'First Name: Johnny', 'Middle Name:', and 'Last Name: Appleseed'.

CUSTOMIZATION

You can customize which menu items are visible by clicking on the Customize button and uncheck any items you don't want on the menu then click **Save**.



CLIENT RECORDS

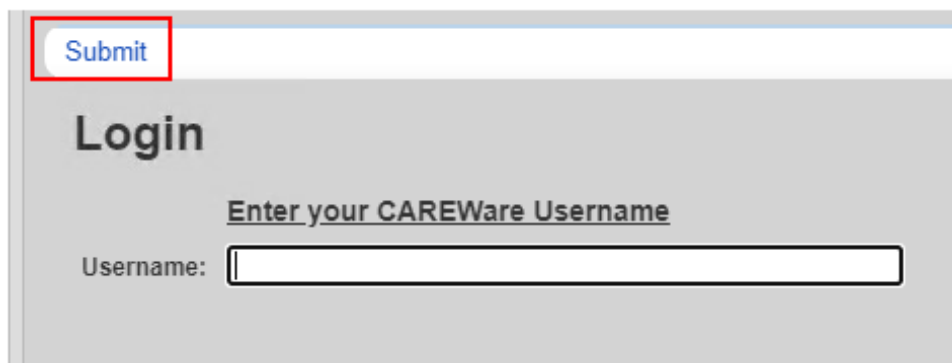
Client records open in a separate tab on your browser. When you have finished with a client's record, make sure to close out of that tab.



LOGGING INTO CAREWARE 6

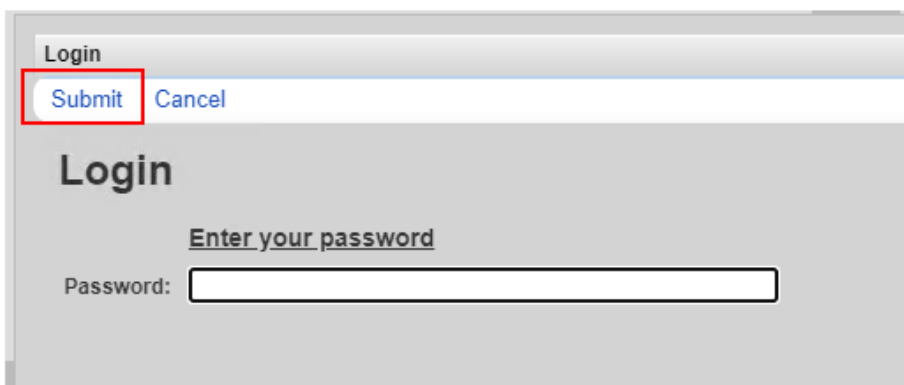
01 Open your browser and go to lacan.ixn.com

02 Enter your CAREWare username and click **Submit**.



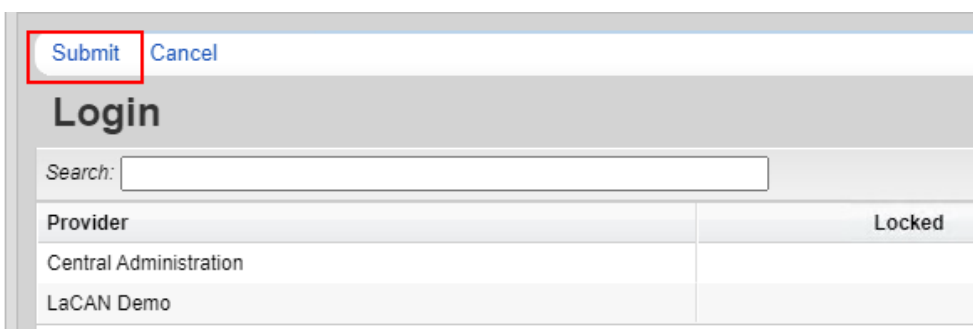
The screenshot shows a web browser window with a login form. At the top left, a blue button labeled "Submit" is highlighted with a red rectangle. Below it, the word "Login" is displayed in a large, bold font. Underneath "Login", the text "Enter your CAREWare Username" is shown. Below this text, the label "Username:" is followed by a text input field.

03 Enter your CAREWare password and click **Submit**.



The screenshot shows the same web browser window as the previous one, but now the password field is visible. The "Submit" button at the top left is still highlighted with a red rectangle. Below the "Login" heading, the text "Enter your password" is shown. Below this text, the label "Password:" is followed by a text input field.

04 (If Applicable) Select the Domain you would like to use and click **Submit**.



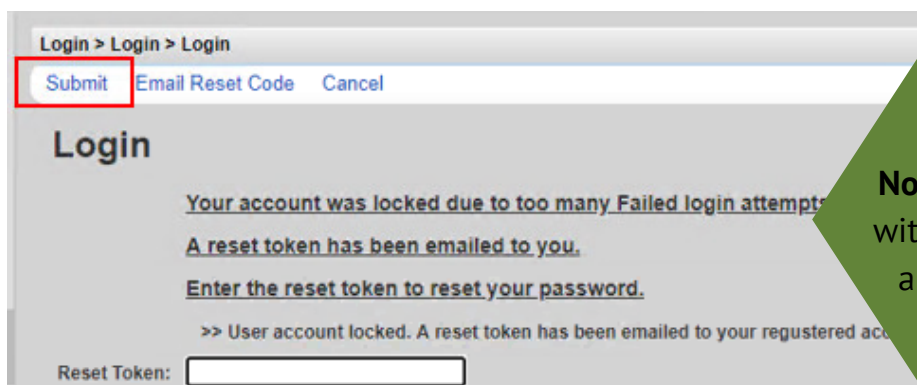
The screenshot shows the same web browser window as the previous ones, but now a table for domain selection is visible. The "Submit" button at the top left is still highlighted with a red rectangle. Below the "Login" heading, there is a "Search:" label followed by a text input field. Below this, there is a table with two columns: "Provider" and "Locked". The table has two rows: "Central Administration" and "LaCAN Demo".

Provider	Locked
Central Administration	
LaCAN Demo	

RESETTING PASSWORDS

After three failed login attempts your account will be locked.

- 01 Click **Email Reset Code**
- 02 Check your email for the Reset Token.
- 03 Enter the Reset token and click **Submit**.



Login > Login > Login

Submit Email Reset Code Cancel

Login

Your account was locked due to too many Failed login attempts.

A reset token has been emailed to you.

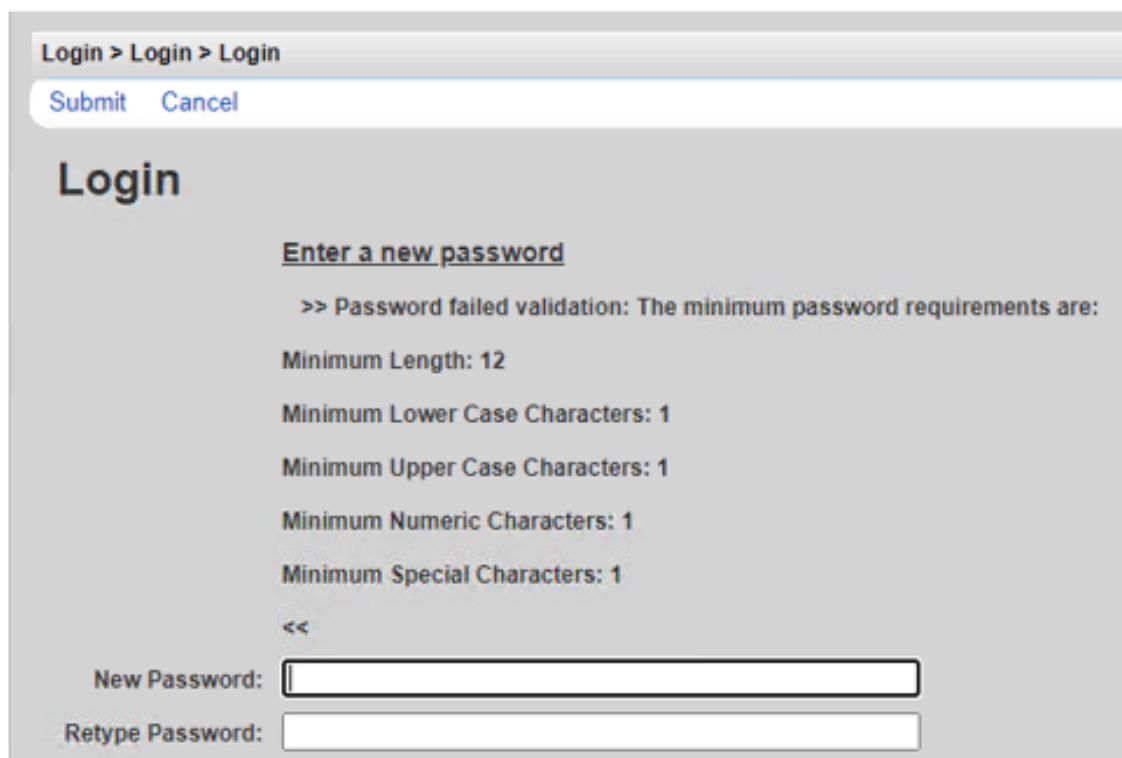
Enter the reset token to reset your password.

>> User account locked. A reset token has been emailed to your registered account.

Reset Token:

Note: If you do not receive an email with the token, please contact SHHP and we can reset your password.

- 04 Enter your new password, then retype it and click **Submit**.
- 05 You will then be asked to log in with your new password.



Login > Login > Login

Submit Cancel

Login

Enter a new password

>> Password failed validation: The minimum password requirements are:

Minimum Length: 12

Minimum Lower Case Characters: 1

Minimum Upper Case Characters: 1

Minimum Numeric Characters: 1

Minimum Special Characters: 1

<<

New Password:

Retype Password:

ACCESSING CAREWARE 6

TWO-FACTOR AUTHENTICATION IN CAREWARE

WHAT IS TWO-FACTOR AUTHENTICATION?

Two-factor authentication (2FA) is a type of multi-factor authentication which is a way to protect access to data systems by requiring both something the user knows, like a password, and something the user possesses, such as a code or token to log in. Use of 2FA is required in your organization's installation of CAREWare. This document will instruct you on how to enroll in 2FA with either your mobile device or with an authenticator application that stays on your desktop or computer.

WHAT WILL CHANGE WITH TWO-FACTOR AUTHENTICATION?

CAREWare users will be able to get the two-factor code from one of two places:

- Username
- Password
- Two factor code from the WinAuth application or the Google Authenticator App

TWO-FACTOR AUTHENTICATION OPTIONS

CAREWare users will be able to get the two-factor code from one of two places:

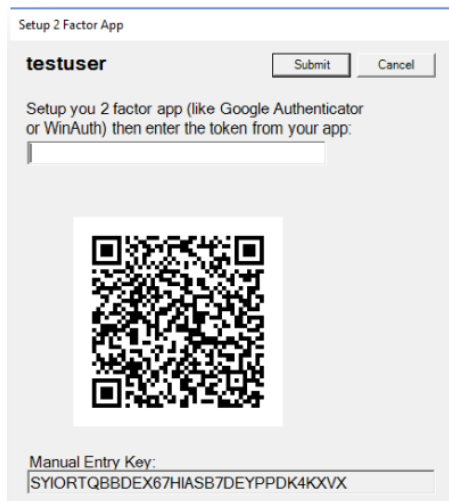
- The Google Authenticator (available free in iOS App Store and the Google Play app store)
- The WinAuth application (available free online)

The WinAuth app is the easier of the two options to use. Using the WinAuth application will require your IT staff to install a program and configure it in order to receive codes to use during the login process.

OPTION 1: GOOGLE AUTHENTICATOR APP ENROLLMENT

- 01** In the App Store or the Google Play app Store, search for and download Google Authenticator.
- 02** Sign into CAREWare as usual. You will be asked to set up your 2-factor app and then enter the code or token to verify that you are the appropriate user of the account.
- 03** On your mobile device open the Google Authenticator app and select **Begin Setup**.
- 04** Select **Scan Barcode**. You may be prompted to allow access to the camera or other resources on your phone. **Allow access**.

- 05 With your phone, in the Google Authenticator app, take a picture of the QR code to enroll your device.
- 06 You should now see a six-digit number and a countdown. **IMPORTANT:** Wait until the countdown ends and a new number appears before proceeding to the next step.
- 07 Once the number regenerates, type the six-digit number into CAREWare and press **Submit.**



- 08 You should now be logged into CAREWare.

REGULAR LOGIN PROCESS WITH THE GOOGLE AUTHENTICATOR APP

Once you have enrolled your device with the Google Authenticator app, when you log into CAREWare, you will get a code from this application every time you log in and will need to enter it each time you want to access CAREWare.

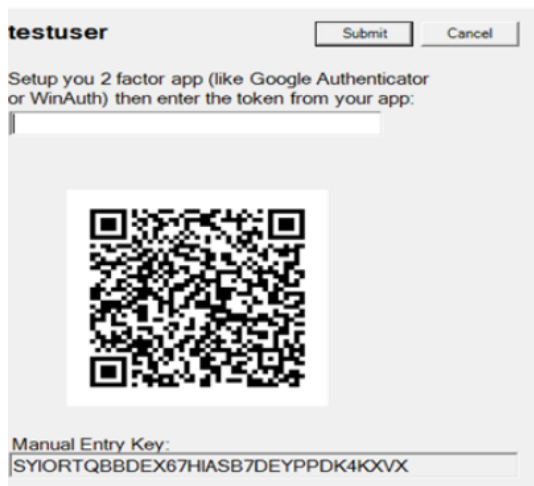
IMPORTANT: Wait until the countdown ends and a new number appears before entering the six-digit code into CAREWare.

Login process: Username> Password > Authenticator Code

- 01 Start CAREWare as normal. Log in with your usual username and password.
- 02 When prompted for the code, open your Google Authenticator app and wait for the current code to be replaced by a new code.
- 03 When the new code appears, enter the six-digit number into CAREWare and submit it. You should be logged in.

OPTION 2: WINAUTH AUTHENTICATOR APP ENROLLMENT

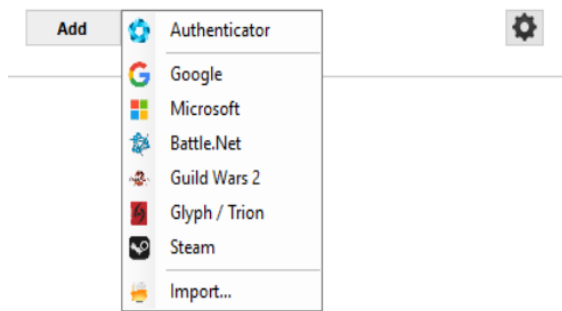
- 01 Your IT staff will need to install and set up a shortcut for you to use WinAuth
- 02 Sign in to CAREWare as usual. You will be asked to set up your 2 factor app, then enter the token to verify that you are the appropriate user of the account



- 03** Launch WinAuth. Click **Add** to set up the CAREWare authenticator. Select the top option—Authenticator.

WinAuth

Click the "Add" button to create or import your authenticator

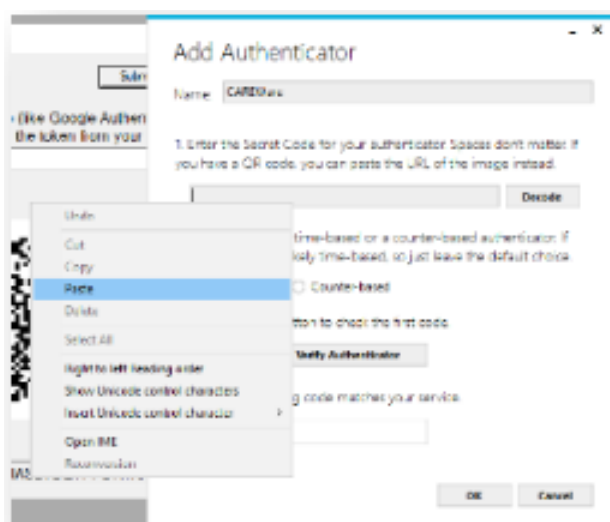


- 04** On the next screen, add the name CAREWare for the Name.

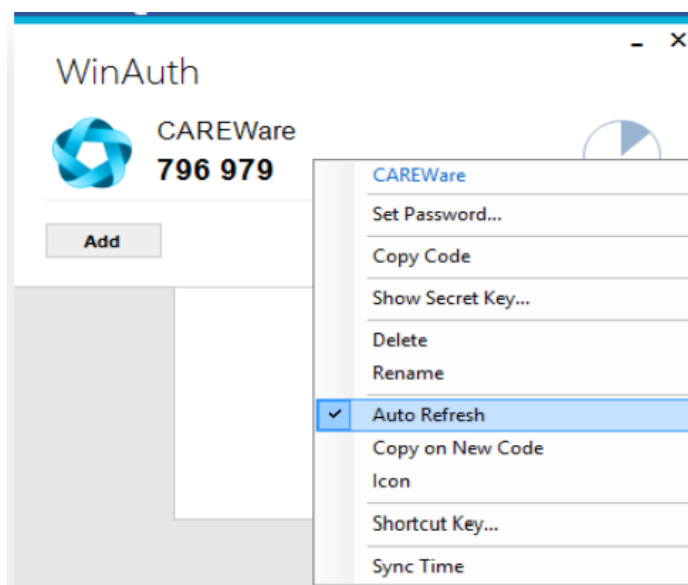
Add Authenticator

Name: CAREWare

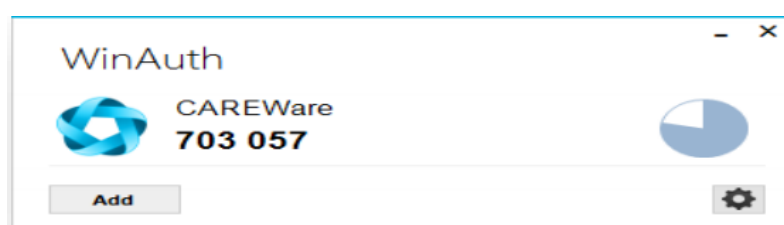
- 05** Select the **Manual Entry Key** from the Setup 2 Factor App screen in CAREWare, right click and copy it. Right click and select paste in the field to the left of the Decode button in WinAuth.



- 06 The Time-based option is the default and should not be configured differently that it is.
- 07 Press Verify Authenticator. A six-digit code should appear at the bottom of the screen with a green timer that shrinks as it expires.
- IMPORTANT: Wait until the countdown ends and a new number appears before proceeding to the next step.
- 08 Once the number regenerates, type the six-digit number into CAREWare and press **Submit**.
- 09 You should now be logged into CAREWare.
- 10 In WinAuth, press **OK**. This brings you to a “Protection” Screen where you can create a password to protect your code generator for CAREWare.
- 11 Do not select the “Encrypt to only be useable on this computer” nor “Lock with a YubiKey”
- 12 Press **OK**.
- 13 On the code generation window, right click and make sure **Auto Refresh** is checked.



When you launch WinAuth, you will be prompted for the password you created in step 10 above and you will see this window containing your CAREWare 2FA code.



REGULAR LOGIN PROCESS WITH THE WINAUTH AUTHENTICATOR APP

Once you have enrolled with the WinAuth authenticator app, when you login to CAREWare, you will get a code from it every time you login and must enter this code in order to proceed.

IMPORTANT: Wait until the countdown ends and a new number appears before entering the six-digit code into CAREWare.

Login process: Username > Password > WinAuth Code

- 01 Start CAREWare as normal. Login with your usual username and password.
- 02 When prompted for the code, open your WinAuth authenticator app and wait for the current code to be replaced by a new code.
- 03 When the new code appears, enter the six-digit number into CAREWare and submit it. You should be logged in.

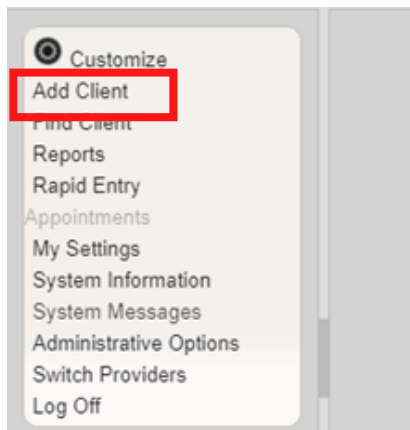
HOW TO GET ASSISTANCE WITH TWO-FACTOR AUTHENTICATION

If you have specific questions regarding the CAREWare application, WinAuth application, or Google Authenticator, please contact the CAREWare Help Desk by:

- Completing a help desk ticket at: <https://louisianahealthhub.org/careware-submission-form/>

HOW TO ADD A CLIENT

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



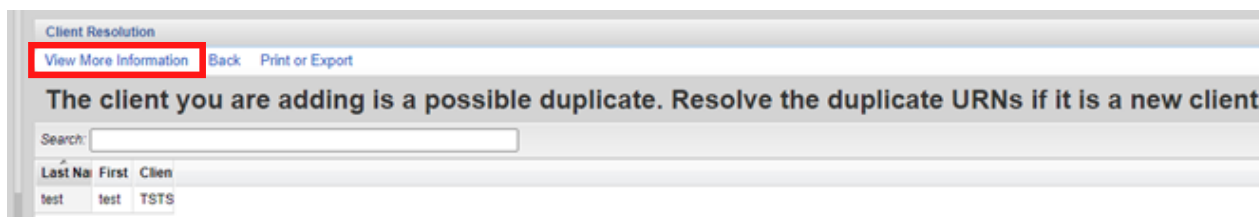
- 02 Enter the Last Name, First Name, Gender, and Date of Birth of the client. All fields are required, except Middle Name and the DOB Estimated checkbox . Click **Add**.

A screenshot of a web form titled 'Add'. It contains several input fields: 'Last Name:', 'First Name:', 'Middle Name:', 'Gender:', and 'Date of Birth:'. The 'Date of Birth' field has a small calendar icon to its right. Below these fields is a checkbox labeled 'DOB Estimated?'. A blue 'Add' button is located at the top left of the form area.

Note: Enter the **legal** last name, first name and Date of birth of the client from an identification card such as driver's license, birth certificate, social security card, passport or other official document.

POSSIBLE DUPLICATE CLIENT

- 01 If a client's information is similar to an existing CAREWare record, you will see the message stating "The client you are adding is a possible duplicate."
- 02 Select the client from the list and select **View More Information** to review additional client information.

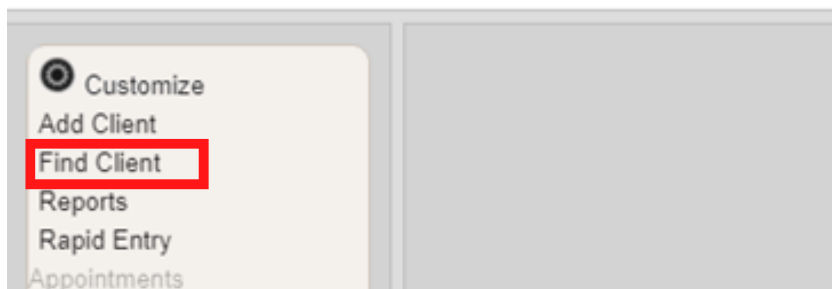


- 03 Compare client information to determine if this is the same client.

- 04 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.

HOW TO FIND A CLIENT

- 01 To search for a client, select **Find Client** from the main menu.



- 02 Enter search text into any of the fields and press **Client Search**.

A screenshot of the 'Find Client' search form. At the top, there is a 'Search Results' header with a 'Client Search' button highlighted by a red box. Below this is the 'Find Client' section, which contains several input fields: 'Last Name:', 'First Name:', 'DOB:', 'ClientID:', 'URNorEURN:', and 'Encrypted UCI:'. There is also a checkbox labeled 'Active Only:' which is checked. A small calendar icon is next to the 'DOB:' field.

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

A screenshot of the search results page. At the top, there is a 'Find Client > Search Results' header. Below it, there are links for 'View Details', 'Back', and 'Print or Export'. The 'View Details' link is highlighted with a red box. Below the links is a 'Search Results' section with a search bar and a table of results.

Last Name	First Name	Client ID	URN	EURN	Encrypted UCI	Match Type
Appleseed	John		JHAP0105851U	XqYSZJ4bl	ECA88A4A1FE658	Exact
Appleseed	Johnny	EMR123	JHAP1205651U	T+oN+bl1n	8A30545F3C06276	Exact
Appleseed	Martha		MRAP0507784U	HN+keK2Qa	1A6A4DF54CAB24	Exact

- 04 After clicking **View Details**, the Demographics screen will appear.

DEMOGRAPHICS

Like CAREWare 5, the demographic information is shared across domains with the exception of Eligibility, Enrollment Status, and Provider Notes.

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

The demographics screen in CAREWare 6 has the demographic information broken down into sections.

Demographics

Personal Info	Client ID: Name: test, person Gender: Female DOB: 03/02/1984
Change URN	PRTS0302842U
Contact Information	1263 Street Dr Townville, LA 12345
Race/Ethnicity	American Indian, Asian (Filipino)
HIV Risk Factors	Hemophilia
Vital Enrollment Status	Vital Status: Alive Enrolled: 03/15/2014 Current Status: Referred or Discharged
Eligibility	Ryan White Eligible
HIV Status	HIV-positive (AIDS status unknown) HIV Date: 02/02/2012

Common Notes	8/12/2020 RP @SHHP Case Notes are seen across domains. 12/1/15 MW @ SHP: merged duplicate client record 10/15/15 JS @ CARES: updated client address and emergency contacts 9/1/15 MW @ SHP: updated client address. Client moved to Lafayette
Provider Notes	8/12/2020 RP: These notes are only seen at your agency
Client Information	View or Edit the client's Client Information information
Emergency Contacts	View or Edit the client's Emergency Contacts information
LA HAP Elig Info	View or Edit the client's LA HAP Elig Info information

PERSONAL INFO

Personal Info


First Name:

Middle Name:

Last Name:

Preferred Language:

Gender:

Date of Birth: 

DOB Estimated?: ☐

Sex At Birth:

URN:

Encrypted URN:

Encrypted UCI:

Client ID:

LastService:

Last Poverty Level:


Note:
The Personal Info section includes
the date of Last Service and Last
Poverty Level.

CHANGE URN

Find Client > Search Results > Demographics > Change URN

[Save](#) [Cancel](#)

Change URN

New URN: 


Note: The Change URN section
allows the URN to be
edited if needed


CONTACT INFORMATION

Contact Information

Address:


City:

State: 

County: 

Zip Code:


Phone:

Phone Type: 

Include in mailing label reports?: ☐


Mailing Address:

Mailing City:


Mailing State: 

Mailing Zip Code:

Alt. Phone 1:

Phone Type (Alt. Phone 1): 

Alt. Phone 2:

Phone Type (Alt. Phone 2): 

RACE/ETHNICITY

Race/Ethnicity

Asian: ☒

Asian Indian: ☐

Asian Chinese: ☐

Asian Filipino: ☒

Asian Japanese: ☐

Asian Korean: ☐

Asian Vietnamese: ☐

Asian Other: ☐


Black or African American: ☐

American Indian or Alaska Native: ☒

Other: ☐

Native Hawaiian or Other Pacific Islander: ☐

White: ☐

Hispanic or Latino: 

Select the race and ethnicity the client identifies as. Multiple selections are allowed. Any clients who identify as Asian, Native Hawaiian or Pacific Islander, or Hispanic, will need to select a subgroup as well.

HIV RISK FACTORS

Find Client > Search Results > Demographics > HIV Risk Factors

[Save](#) [Cancel](#)

HIV Risk Factors

Male to Male sexual contact (MSM): ☐

Injection Drug Use (IDU): ☐

Heterosexual Contact: ☐

Perinatal Transmission: ☐

Hemophilia/Coagulation Disorder: ☒

Receipt of transfusion of blood, blood components, or tissue: ☐

Not Reported or Not Identified: ☐


Check all the boxes that apply for HIV Risk Factors (modes of HIV transmission to the client.) These entries may be based on client self-report and/or the case manager's professional assessment.


VITAL ENROLLMENT STATUS

Find Client > Search Results > Demographics > Vital Enrollment Status


[Save](#) [Cancel](#)


Vital Enrollment Status


Enrollment Status: 

Enrollment Date: 

Latest Eligibility Status:

Vital Status: 

Case Closed Date: 

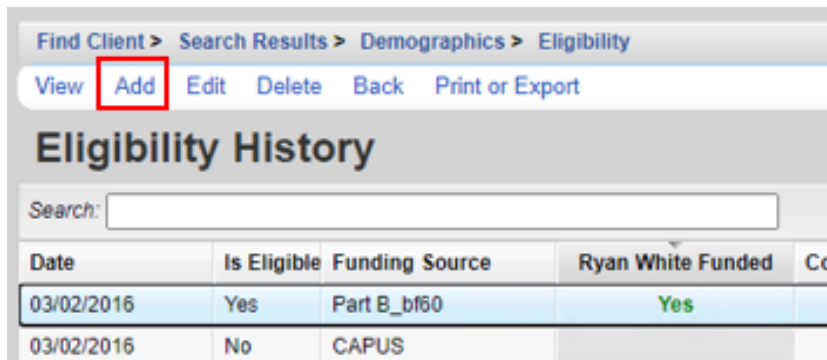
Date of Death: 

Select the appropriate Enrollment Status from the drop down menu. This field is agency-specific.

For example, a client may have an Enrollment Status of "Relocated" at Crescent Care but "Active" at Southwest Louisiana AIDS Council.

ELIGIBILITY

01 Click **Add**



Find Client > Search Results > Demographics > Eligibility

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

Eligibility History

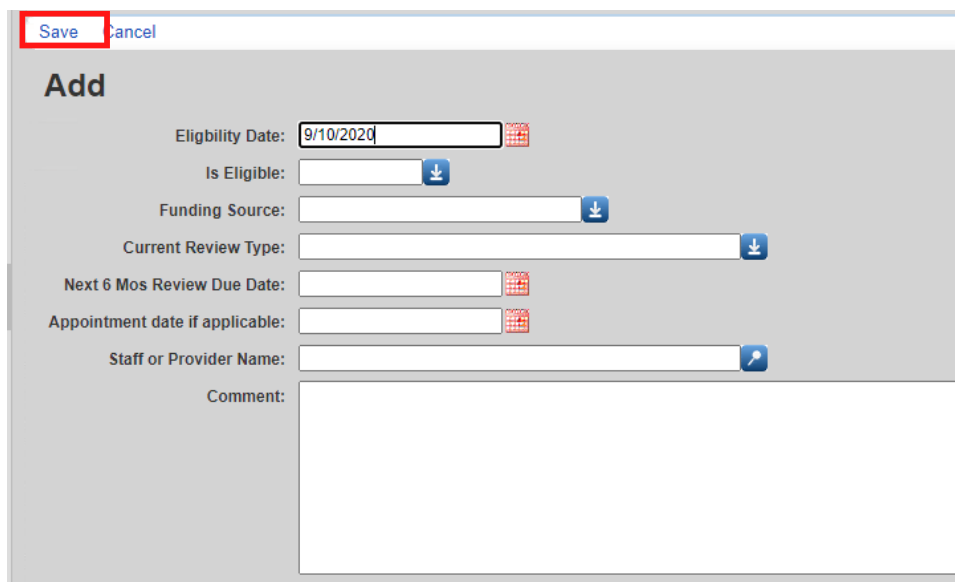
Search:

Date	Is Eligible	Funding Source	Ryan White Funded	Co
03/02/2016	Yes	Part B_bf60	Yes	
03/02/2016	No	CAPUS		

02 Complete the fields below and click **SAVE**


- Eligibility Date
- Is Eligible?
- Funding Source
- Current Review Type
- Next 6 Mos Review Due Date
- Appointment Date if Applicable
- Staff or Provider Name
- Comment


Note: Current Review Type, Next 6 Mos Review Due Date, Appointment Date if Applicable and Staff or Provider Name are new fields and should be completed for each eligibility record.





Add


Save Cancel


Eligibility Date: 


Is Eligible: 

Funding Source: 

Current Review Type: 

Next 6 Mos Review Due Date: 

Appointment date if applicable: 

Staff or Provider Name: 

Comment:

A new record needs to be added for each Funding Source the client is eligible for.

Eligibility Records should be added:

- At the time of Enrollment
- At the time of Disenrollment
- Every 6 months when a client is actively enrolled

HIV STATUS

HIV Status

HIV Status:

HIV-positive (AIDS status unknown)

↓

HIV+ Date:

2/2/2012

Estimated?:

☐

AIDS Date:

Estimated?:

☐

COMMON NOTES

Common Notes are available to any agency that serves the client.

When you change information in one of the client's shared fields (e.g. address), put a notification in this box. Example: "12/1/2011 OT @ Agency: Updated address"

Common Notes

Common Notes:

8/12/2020 RP @SHHP: Case Notes are seen across domains.

12/1/15 MW @ SHP: merged duplicate client record

10/15/15 JS @ CARES: updated client address and emergency contacts

9/1/15 MW @ SHP: updated client address. Client moved to Lafayette.

PROVIDER NOTES

The Provider Notes field can be used to collect additional information about the client. The information in this field is only available to the agency entering the data.

Provider Notes

Provider Notes:

8/12/2020 RP: These notes are only seen at your agency. |

CLIENT INFORMATION

Client Information	
Other Case Management Program:	<input type="text"/>
Case Management Program:	<input type="text"/>
Case Manager Assigned: Part A:	<input type="text"/>
Case Manager Assigned: Part C:	<input type="text"/>
Case Manager Assigned: Part B:	<input type="text"/>
Case Manager Assigned: Part D:	<input type="text"/>
Case Manager Assigned: Housing:	<input type="text"/>
SSN:	<input type="text"/>
Primary Language:	<input type="text"/>
Secondary Language:	<input type="text"/>
Non-logo mailing only:	<input type="checkbox"/>
Veteran:	<input type="checkbox"/>
Client Consent to Share:	<input type="checkbox"/>
Attachments:	0 Attachments (Access in view mode only)

EMERGENCY CONTACTS

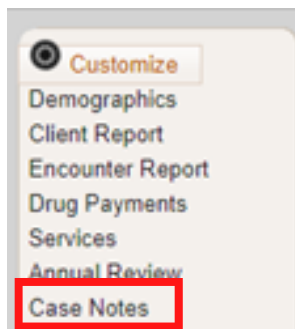
Emergency Contacts	
EmergContact1 Name:	<input type="text"/>
EmergContact1 Relationship:	<input type="text"/>
EmergContact1 Address1:	<input type="text"/>
EmergContact1 Address2:	<input type="text"/>
EmergContact1 City:	<input type="text"/>
EmergContact1 State:	<input type="text"/>
EmergContact1 Zip Code:	<input type="text"/>
EmergContact1 Phone:	<input type="text"/>
EmergContact1 Cell:	<input type="text"/>
EmergContact1 Email:	<input type="text"/>
EmergContact1 Comments:	<input type="text"/>

LAHAP ELIG INFO

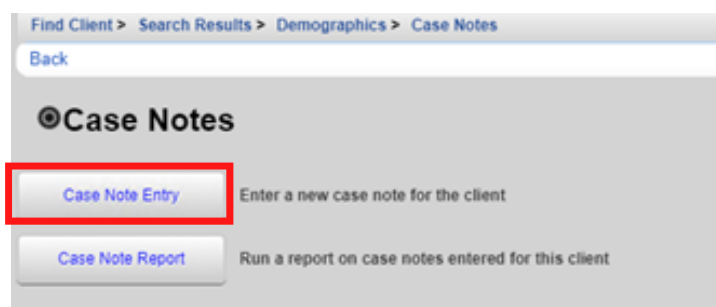
LA HAP Elig Info	
Date Ramsell Data Generated:	<input type="text"/>
Member ID_Ramsell:	<input type="text"/>
Most Recent LA HAP Enrollment Status:	<input type="text"/>
Most Recent LA HAP Group:	<input type="text"/>
Most Recent LA HAP Plan:	<input type="text"/>
Most Recent LA HAP Eligibility Start Date:	<input type="text"/>
Most Recent LA HAP Eligibility End Date:	<input type="text"/>
Most Recent LA HAP Plan Start Date:	<input type="text"/>
Most Recent LA HAP Plan End Date:	<input type="text"/>
Most Recent LA HAP Priv Ins Status:	<input type="text"/>
Most Recent LA HAP Priv Ins Type:	<input type="text"/>
Most Recent LA HAP Medicare Status:	<input type="text"/>
Most Recent LA HAP Application First Received Date:	<input type="text"/>
Most Recent LA HAP Application Completed Date:	<input type="text"/>

CASE NOTES

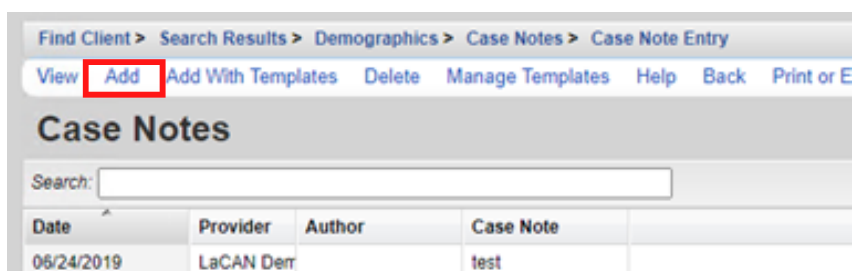
01 Select **Case Notes** from the main menu.



02 Select **Case Note Entry**.



03 Select **Add**.



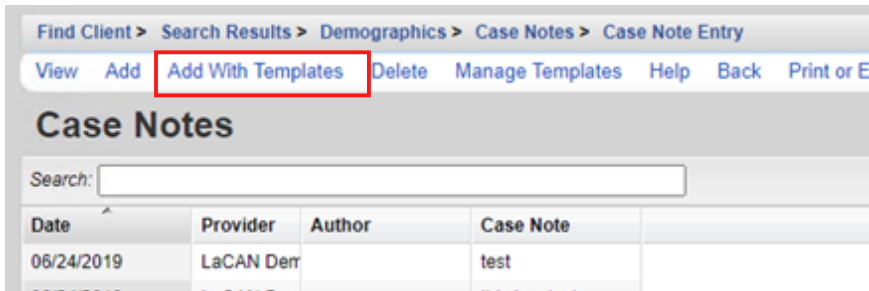
04 Enter the Case Note date, Author, and case note text and click **Save**.

A screenshot of the 'Add' form in the application. At the top left, there are 'Save' and 'Back' buttons. The 'Save' button is highlighted with a red rectangular box. Below the buttons is the heading 'Add'. The form contains several fields: 'Date' with the value '9/10/2020' and a calendar icon; 'Add Service' with a checked checkbox; 'Author' with the value 'test1, test2'; and 'Case Note' with a text area containing the placeholder 'Enter your text here.'.

Note: If you want to add a service associated with the note, select **Add Service**.

CASE NOTES TEMPLATE

01 Click **Add With Templates**.



Find Client > Search Results > Demographics > Case Notes > Case Note Entry

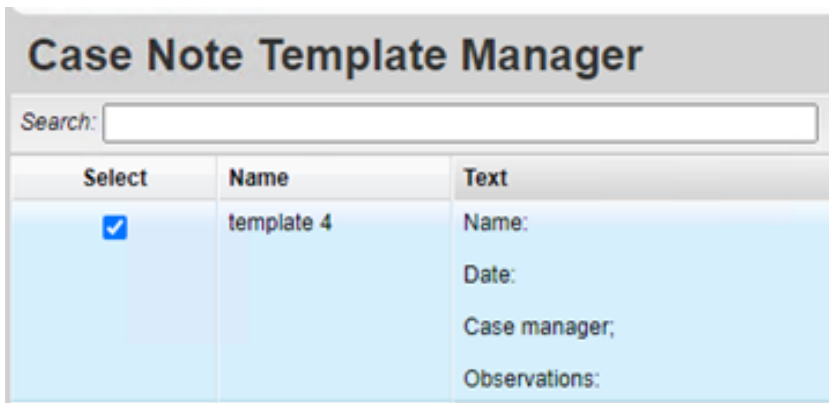
View Add **Add With Templates** Delete Manage Templates Help Back Print or E

Case Notes

Search:

Date	Provider	Author	Case Note
06/24/2019	LaCAN Derr		test

02 Check the box next to the template you would like to use and click **Continue Add With Templates**.

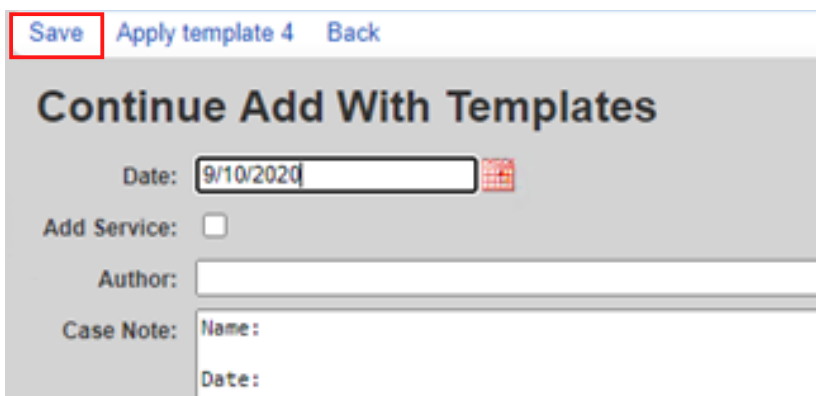


Case Note Template Manager

Search:


Select	Name	Text
<input checked="" type="checkbox"/>	template 4	Name: Date: Case manager; Observations:

03 Enter the Date of the Service, Author, and complete the Case Note in the format you have selected and click **Save**.



Save Apply template 4 Back

Continue Add With Templates

Date: 

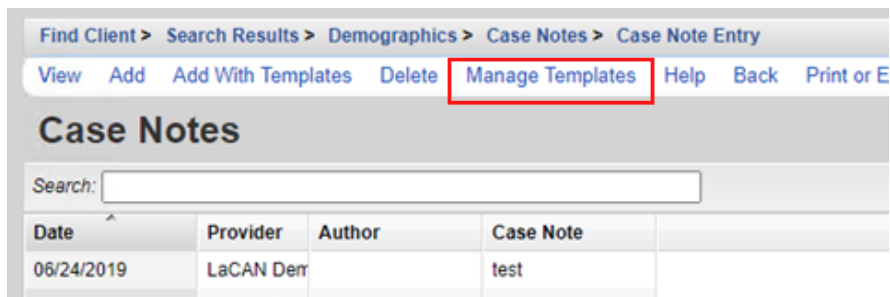
Add Service: ☐

Author:

Case Note: Name:
Date:

ADDING A NEW TEMPLATE

01 Click **Manage Templates**.



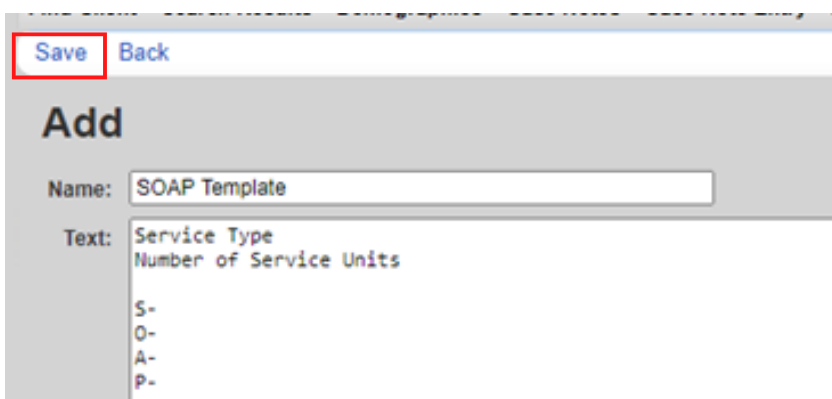
The screenshot shows a web application interface for 'Case Notes'. At the top, there is a breadcrumb trail: 'Find Client > Search Results > Demographics > Case Notes > Case Note Entry'. Below this is a navigation bar with buttons: 'View', 'Add', 'Add With Templates', 'Delete', 'Manage Templates' (highlighted with a red box), 'Help', 'Back', and 'Print or E'. The main heading is 'Case Notes'. Below the heading is a search bar labeled 'Search:'. Underneath the search bar is a table with columns: 'Date', 'Provider', 'Author', and 'Case Note'. The first row of data shows '06/24/2019', 'LaCAN Dem', and 'test'.

02 Click **Add**.



The screenshot shows the 'Case Note Template Manager' interface. At the top, there is a navigation bar with buttons: 'View', 'Add' (highlighted with a red box), 'Delete', 'Back', and 'Print or Export'. The main heading is 'Case Note Template Manager'. Below the heading is a search bar labeled 'Search:'. Underneath the search bar is a table with columns: 'Name' and 'Text'. The first row of data shows 'template 4' and a text block containing 'Name:', 'Date:', 'Case manager;', and 'Observations:'. The second row shows 'test templ' and 'Date:'.

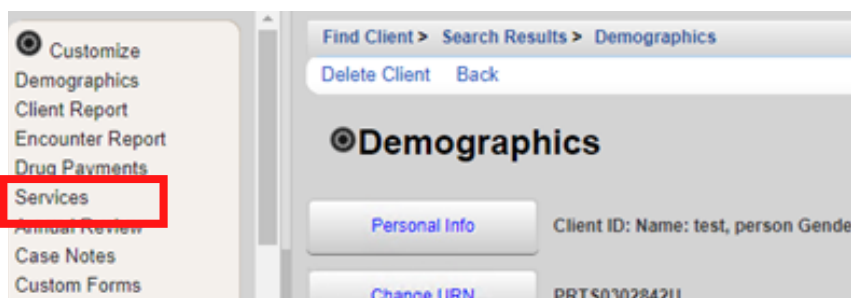
03 Create a name for your Template, type out template format you would like to use and click **Save**.



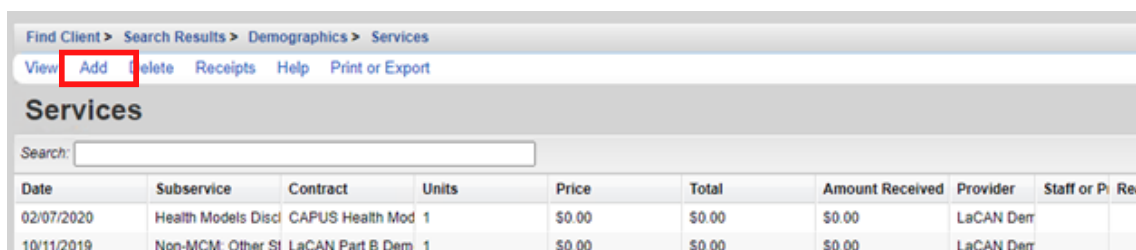
The screenshot shows the 'Add' form for creating a new template. At the top, there is a navigation bar with buttons: 'Save' (highlighted with a red box) and 'Back'. The main heading is 'Add'. Below the heading is a form with two fields: 'Name' and 'Text'. The 'Name' field contains 'SOAP Template'. The 'Text' field contains the following text: 'Service Type', 'Number of Service Units', 'S-', 'O-', 'A-', and 'P-'.

SERVICES

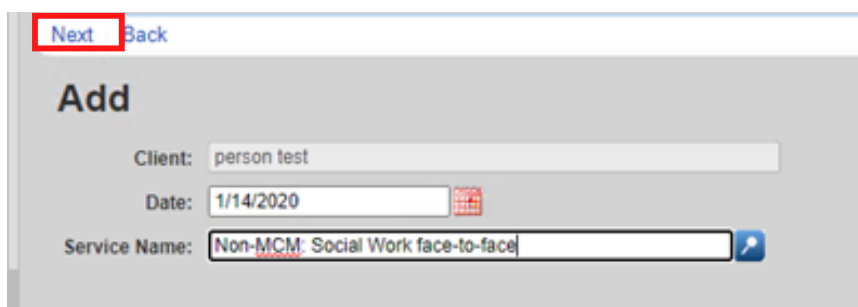
01 Click **Services** from the Menu of Links.



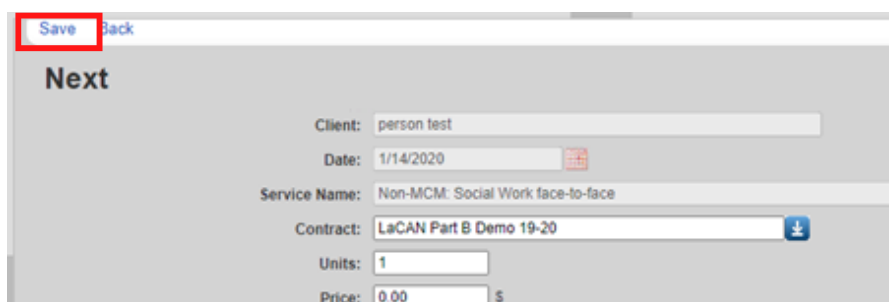
02 The Services screen will now be displayed. Click **Add**.



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



04 Enter the Contract for this service, and any other necessary information, such as Units, Price, total and any fields required for the service. Once complete, click **Save**.



EDITING A SERVICE

- 01 To edit a previously entered service, click on the service you would like to edit and click **View**.



Find Client > Search Results > Demographics > Services

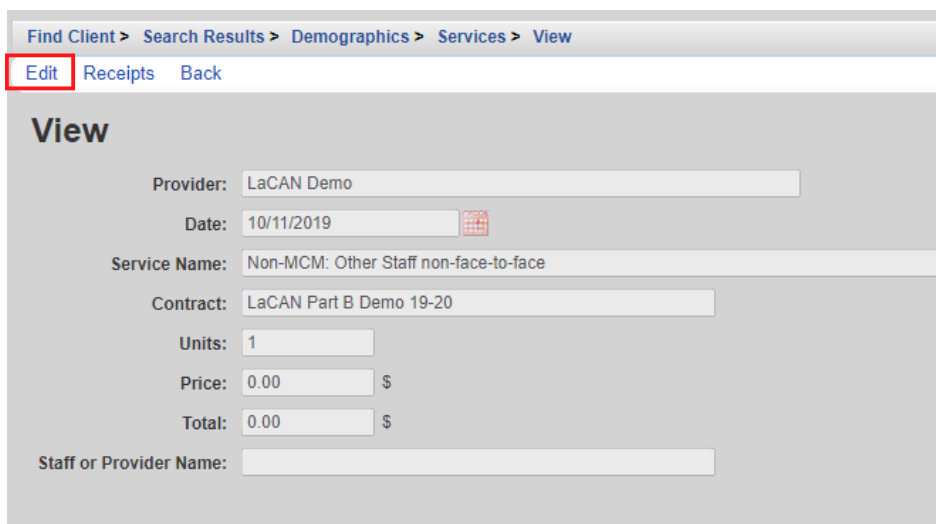
View Add Delete Receipts Help Print or Export

Services

Search:

Date	Subservice	Contract	Units	Price	Total	Amount Received	Provider
02/07/2020	Health Models Disc	CAPUS Health Mod	1	\$0.00	\$0.00	\$0.00	LaCAN C
10/11/2019	Non-MCM: Other St	LaCAN Part B Dem	1	\$0.00	\$0.00	\$0.00	LaCAN C

- 02 Click **Edit**, make any edits you need to, then click **Save**.




Find Client > Search Results > Demographics > Services > View

Edit Receipts Back

View

Provider:

Date: 

Service Name:

Contract:

Units:

Price: \$

Total: \$

Staff or Provider Name:

RAPID SERVICE ENTRY

- 01 Select **Rapid Entry** from the Main Menu



Customize
Add Client
Find Client
Reports
Rapid Entry
Appointments
My Settings
System Information
System Messages
Administrative Options
Switch Providers
Log Off

Rapid Entry
Cancel

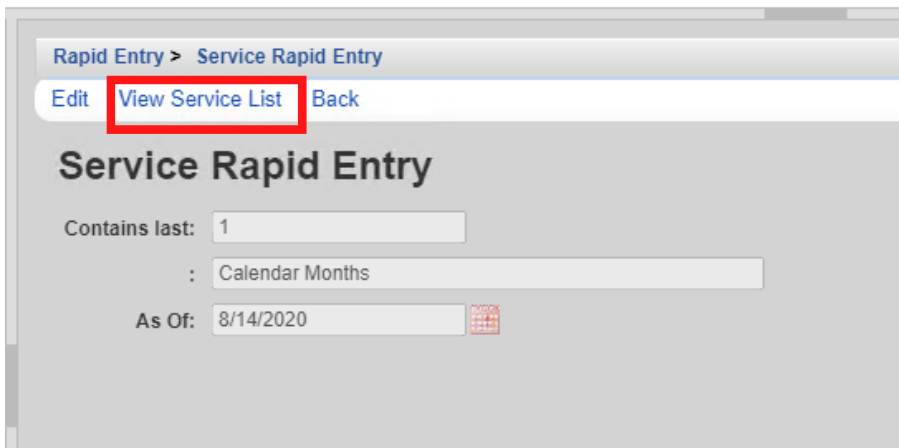
⊙ Rapid Entry

Service Rapid Entry Quickly enter services for one or more clients

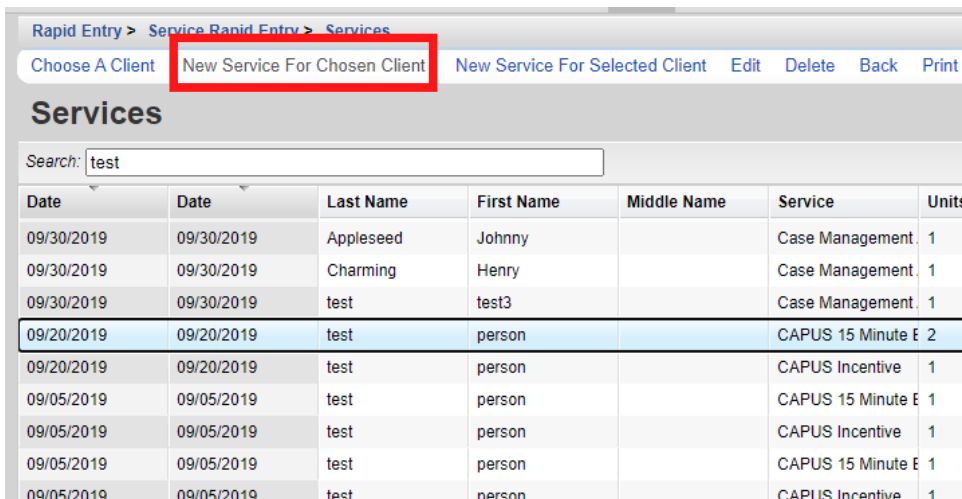
Group Rapid Entry Enter services for clients that match specified report criteria

02 Select **Service Rapid Entry**

03 Click **View Service List**

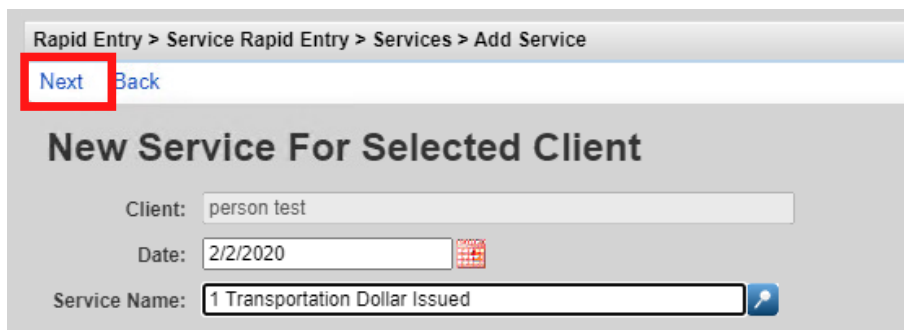


04 Search for the client you are entering the service for and click **New Service for Selected Client**



Date	Date	Last Name	First Name	Middle Name	Service	Units
09/30/2019	09/30/2019	Appleseed	Johnny		Case Management	1
09/30/2019	09/30/2019	Charming	Henry		Case Management	1
09/30/2019	09/30/2019	test	test3		Case Management	1
09/20/2019	09/20/2019	test	person		CAPUS 15 Minute E	2
09/20/2019	09/20/2019	test	person		CAPUS Incentive	1
09/05/2019	09/05/2019	test	person		CAPUS 15 Minute E	1
09/05/2019	09/05/2019	test	person		CAPUS Incentive	1
09/05/2019	09/05/2019	test	person		CAPUS 15 Minute E	1
09/05/2019	09/05/2019	test	person		CAPUS Incentive	1

05 Enter the Date of service and the Service Name then click **Next**.



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

ANNUAL REVIEW

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

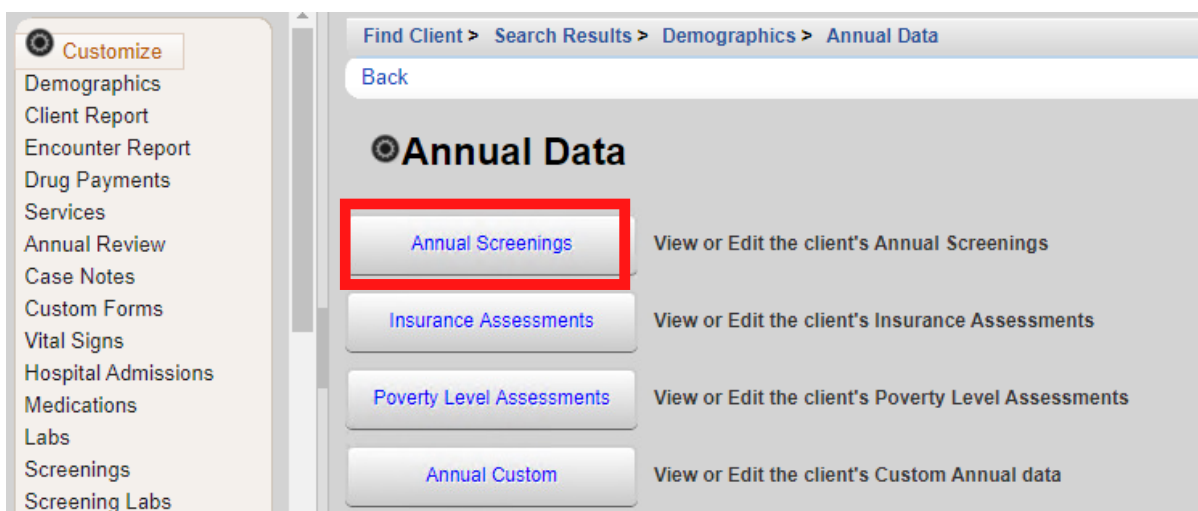
These three fields are RSR-required data elements for clients that received ANY service in the reporting year.

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

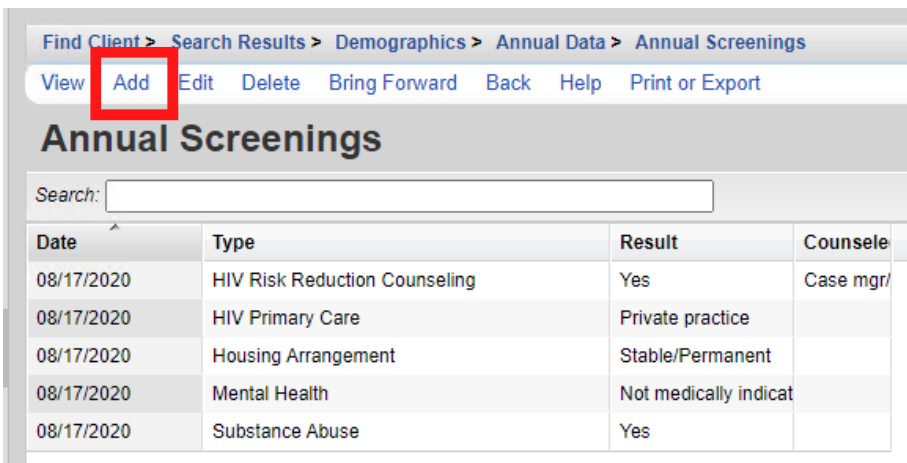
- HIV Risk Reduction Counseling
- Mental Health
- Substance Abuse

ANNUAL SCREENINGS

- 01 Select **Annual Review** from the menu on the left side of the screen. Then Select **Annual Screenings**.



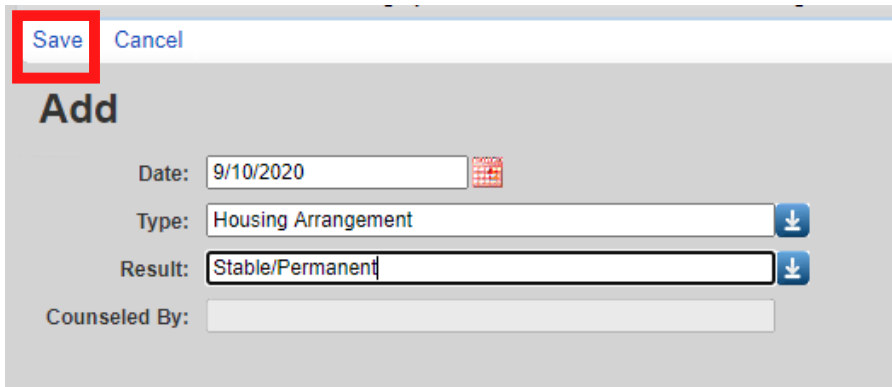
02 On the next page, click **Add**.



The screenshot shows a web application interface for 'Annual Screenings'. At the top, there is a breadcrumb trail: 'Find Client > Search Results > Demographics > Annual Data > Annual Screenings'. Below this is a navigation bar with buttons: 'View', 'Add' (highlighted with a red box), 'Edit', 'Delete', 'Bring Forward', 'Back', 'Help', and 'Print or Export'. The main heading is 'Annual Screenings'. Below the heading is a search bar labeled 'Search:'. A table displays screening data with columns: 'Date', 'Type', 'Result', and 'Counseled By'. The table contains five rows of data for the date 08/17/2020.

Date	Type	Result	Counseled By
08/17/2020	HIV Risk Reduction Counseling	Yes	Case mgr/
08/17/2020	HIV Primary Care	Private practice	
08/17/2020	Housing Arrangement	Stable/Permanent	
08/17/2020	Mental Health	Not medically indicat	
08/17/2020	Substance Abuse	Yes	

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



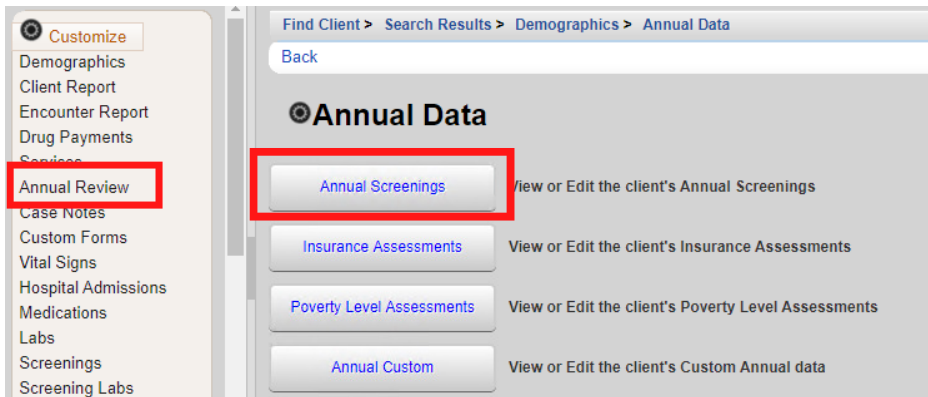
The screenshot shows the 'Add' form in the application. At the top, there are two buttons: 'Save' (highlighted with a red box) and 'Cancel'. The form title is 'Add'. It contains four input fields: 'Date' with the value '9/10/2020' and a calendar icon; 'Type' with a dropdown menu showing 'Housing Arrangement'; 'Result' with a dropdown menu showing 'Stable/Permanent'; and 'Counseled By' with an empty text field.

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

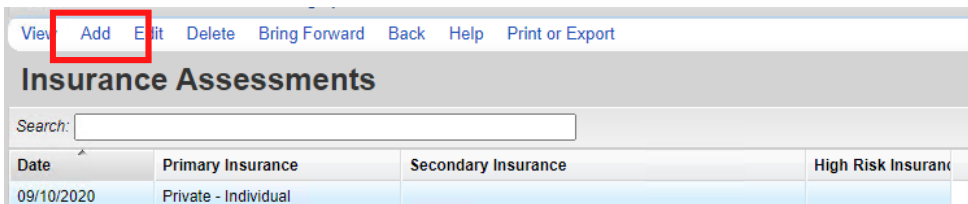
- HIV Risk Reduction Counseling– If the counseling has been provided, select the appropriate authorized counselor who performed it.
- Housing Arrangement - Please refer to HRSA guidelines to determine the difference between stable/permanent, temporary, and unstable.
- Mental Health – Select Yes, No, 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.

INSURANCE ASSESSMENTS

- 01** Select **Annual Review** from the menu on the left side of the screen. Then Select **Insurance Assessments**.



- 02** On the next page, click **Add**.



- 03** 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.

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

The screenshot shows the 'Add' form for Insurance Assessments. The breadcrumb trail at the top reads: 'Find Client > Search Results > Demographics > Annual Data > Insurance Assessments > Add'. The 'Save' button is highlighted with a red box. The form contains the following fields and checkboxes:

- Insurance Assessment Date: 3/6/2019
- Primary Insurance: Medicaid (dropdown menu)
- Private Individual: ☐
- Private Employer: ☐
- Medicare Part A/B: ☐
- Medicare Part D: ☐
- Full LIS: ☐
- Medicare (Part unspecified): ☐
- Medicaid: ☒
- VA, Other Military: ☐
- IHS: ☐
- Other Public: ☐
- Other: ☐
- Other Insurance Specify:
- High Risk Insurance Pool: ☐
- Insurer:

POVERTY LEVEL ASSESSMENTS

- 01 Select **Annual Review** from the menu on the left side of the screen. Then Select **Poverty Level Assessments**.

The screenshot shows the 'Annual Data' section of a software interface. On the left is a sidebar menu with items like 'Demographics', 'Client Report', 'Encounter Report', 'Drug Payments', 'Services', 'Annual Review', 'Case Notes', 'Custom Forms' (highlighted with a red box), 'Vital Signs', 'Hospital Admissions', 'Medications', 'Labs', 'Screenings', and 'Screening Labs'. The main area has a breadcrumb trail: 'Find Client > Search Results > Demographics > Annual Data'. Below this is a 'Back' button and a title 'Annual Data'. There are four buttons: 'Annual Screenings' (with description 'View or Edit the client's Annual Screenings'), 'Insurance Assessments' (with description 'View or Edit the client's Insurance Assessments'), 'Poverty Level Assessments' (with description 'View or Edit the client's Poverty Level Assessments'), and 'Annual Custom' (with description 'View or Edit the client's Custom Annual data'). The 'Annual Custom' button is highlighted with a red box.

- 02 On the next page, click **Add**.

The screenshot shows the 'Poverty Level Assessments' section. The breadcrumb trail is 'Find Client > Search Results > Demographics > Annual Data > Poverty Level Assessments'. Below the trail are buttons: 'View', 'Add' (highlighted with a red box), 'Edit', 'Delete', 'Bring Forward', 'Back', 'Help', and 'Print or Export'. The title 'Poverty Level Assessments' is displayed. Below the title is a search bar. A table is shown with the following data:

Date	Household Size	Household Income	Individual Income	Federal Poverty Le
11/16/2020	2	\$10,000	\$0	58%

- 03 Enter Date, Household Size, and Household Income. Click **Save**.

The screenshot shows the 'Add' form for 'Poverty Level Assessments'. The breadcrumb trail is 'Find Client > Search Results > Demographics > Annual Data > P'. At the top are 'Save' (highlighted with a red box) and 'Cancel' buttons. The title 'Add' is displayed. Below the title are input fields for 'Date' (3/6/2019), 'Household Size' (2), 'Household Income' (12000.00), and 'Individual Income' (0.00). Each income field has a dollar sign icon to its right.

Note:
Entry of Individual Income
is optional. It is used in the
Cap on Charges
feature.

BRING FORWARD

If the Household income and size are staying the same at the time of your recertification, you can bring that information forward in a new record.

01 Select **Bring Forward**

Find Client > Search Results > Demographics > Annual Data > Poverty Level Assessments

View Add Edit Delete **Bring Forward** Back Help Print or Export

Poverty Level Assessments

Search:

Date	Household Size	Household Income	Individual Income	Federal Poverty Le
08/17/2019	1	\$13,000	\$13,000	104%
01/31/2018	6	\$34,000	\$0	101%
01/12/2016	1	\$5,000	\$5,000	42%
07/12/2015	1	\$12,000	\$12,000	102%


02 Select the date you are recertifying and click **Save**.

Find Client > Search Results > Demographics > Annual Data > Poverty Level Assessments > Annual Poverty Level Bring Forward

Save Cancel

Annual Poverty Level Bring Forward

Bring forward the latest poverty level assessment record for the chosen date

Bring Forward Date: 

A new record with the Bring Forward date will be created.

Find Client > Search Results > Demographics > Annual Data > Poverty Level Assessments

View Add Edit Delete Bring Forward Back Help Print or Export

Poverty Level Assessments

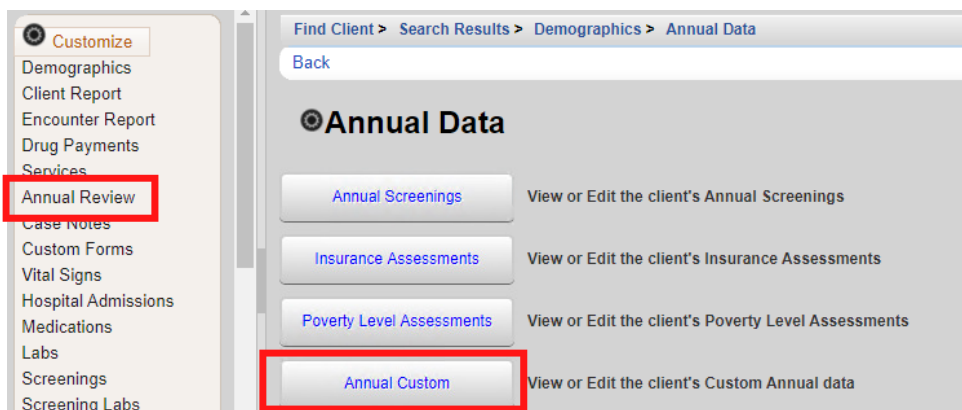
Search:

Date	Household Size	Household Income	Individual Income	Federal Po
08/17/2020	1	\$13,000	\$13,000	102%
08/17/2019	1	\$13,000	\$13,000	104%

ANNUAL CUSTOM

These fields should be completed at the same time as those on the Annual screen. Fields with “NOLA” in them are not required for agencies not funded by New Orleans Part A.

- 01 Select Annual Review from the menu on the left side of the screen. Then Select **Annual Custom**



- 02 On the next page, click **Add**.

The screenshot shows the 'Annual Custom' table. At the top, there is a breadcrumb trail: 'Find Client > Search Results > Demographics > Annual Data > Annual Custom'. Below the breadcrumb is a navigation bar with buttons: View, Add (highlighted with a red box), Edit, Back, Help, and Print or Export. The table has a search bar and the following columns: Year, Education Level, Employment Status, Annual Marital Status, Instructions for Entering Custom Annual Data, Primary Income Source, and Primary Care Source. The table contains data for the years 2019 through 2020. The 2020 row is highlighted.

Year	Education Level	Employment Status	Annual Marital Status	Instructions for Entering Custom Annual Data	Primary Income Source	Primary Care Source
2019				http://new.dhh.louisiana.gov/index.cfm/page/1147		
2018				http://new.dhh.louisiana.gov/index.cfm/page/1147		
2017				http://new.dhh.louisiana.gov/index.cfm/page/1147		
2016				http://new.dhh.louisiana.gov/index.cfm/page/1147		
2015				http://new.dhh.louisiana.gov/index.cfm/page/1147		
2014				http://new.dhh.louisiana.gov/index.cfm/page/1147		
2020	High School/GED	Part time	Married, spouse absent	http://new.dhh.louisiana.gov/index.cfm/page/1147	Wages or Salary	MIC

- 03 Complete the fields, then click **Save**.

The screenshot shows the 'Add' form for entering custom annual data. At the top, there are two buttons: Save (highlighted with a red box) and Cancel. The form contains the following fields: Year (2020), Education Level (High school graduate), Employment Status (Unemployed), Annual Marital Status (Married, spouse absent), Instructions for Entering Custom Annual Data (<http://new.dhh.louisiana.gov/index.cfm/page/1147>), Primary Income Source (Wages or Salary), Primary Care Source (Dr. Hemmingcourt), Number of children in HH (0), Number of HIV+ children in HH (0), Has client been incarcerated? (NO), ADAP Card Date Received by Agency (empty), Date entered PMC in current year (empty), and Part A NOLA Enrollment Status (empty).

MEDICATION

01 From the Demographics screen, select **Medications** from the Menu of Links.

The screenshot shows the 'Demographics' screen. On the left, a sidebar menu lists various options: Customize, Demographics, Client Report, Encounter Report, Drug Payments, Services, Annual Review, Case Notes, Custom Forms, Vital Signs, Hospital Admissions, and Medications. The 'Medications' option is highlighted with a red box. The main content area shows client information: Client ID: Name: test, person Gender: Female DOB: 03/02/1984, PRTS0302842U, and 1263 Street Dr, Townville, LA 12345. Buttons for 'Personal Info', 'Change URN', and 'Contact Information' are visible.

02 Select **Allergies and ART**.

The screenshot shows the 'Client Medications' screen. The 'Allergies and ART' button is highlighted with a red box. The screen displays information about the client's medication history: ART First Prescribed: 04/25/2018, Pre-ART reason: Client refused therapy, No medication allergies recorded, 3 medication records entered, Current Medications: tenofovir (08/21/2020), abacavir (04/25/2018), abacavir (04/25/2018), and No past medications.

03 Select **Edit** to enter allergies and ART information

The screenshot shows the 'Allergies and ART' screen. The 'Edit' button is highlighted with a red box. The screen displays a form for entering allergies and ART information. The 'Allergies' field is empty. The 'ART Prescribed Date' is set to 4/25/2018, and the 'Pre-ART Reason' is 'Client refused therapy'.

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

Find Client > Search Results > Demographics > Client Medications > Allergies and ART > Edit

Save Cancel

Allergies and ART

Allergies:

ART Prescribed Date: 4/25/2018

Pre-ART Reason: Client refused therapy

- Client not ready (as determined by clinician)
- Client refused therapy
- Other extenuating circumstances (e.g. inadequate insurance, ability to pay)
- Treatment not medically indicated per guidelines

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

Back

Client Medications

Allergies and ART ART First Prescribed: 04/25/2018 Pre-ART reason: Client refused therapy No medication allergies recorded

All (Start, Stop, Change) 3 medication records entered

Current Medications tenofovir (08/21/2020), abacavir (04/25/2018), abacavir (04/25/2018)

Past Medications No past medications

- 06 Select **Start** to enter a new client medication.

View **Start** Start Regimen Stop Delete Back Print or Export

All (Start, Stop, Change)

Search:


Medication Name	Abbreviation	Form	Units	Strength (mg)	Dose
tenofovir	TDF		23	300	69
abacavir	ABC	Solution	1	90	90
abacavir	ABC	Solution	1	90	90

07 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

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

Start

Start Date: 

Medication Name:

Units:

Form:

Strength: mg

Frequency:

Med ICD10:

Indication:

OI:

Comment:

Instructions:

LABS

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

Demographics
Client Report
Encounter Report
Drug Payments
Services
Annual Review
Case Notes
Custom Forms
Vital Signs
Hospital Admissions
Medications
Labs
Screenings
Screening Labs
Immunizations

View **Add** Delete HL7 Source Help Print or Export

Labs

Search:

Date	Test Name	Test Operator	Test Result	Assay	Pro
08/07/2017	CD4 Count	=	500 (cells/mm³)		LaC

- 02 Enter the following information (as applicable) and then click **Save**.

- Date
- Lab
- Test Operator
- Test Result
- Assay
- Comment

Save Back

Add

Date:

Lab:

Test Operator:

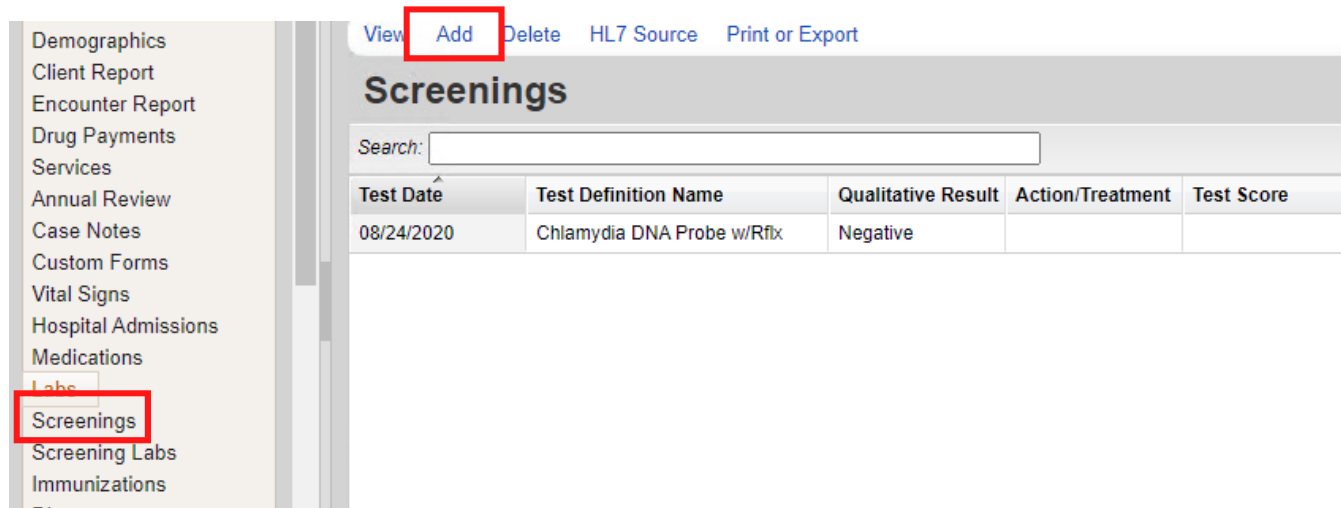
Test Result:

Assay:

Comment:

SCREENINGS

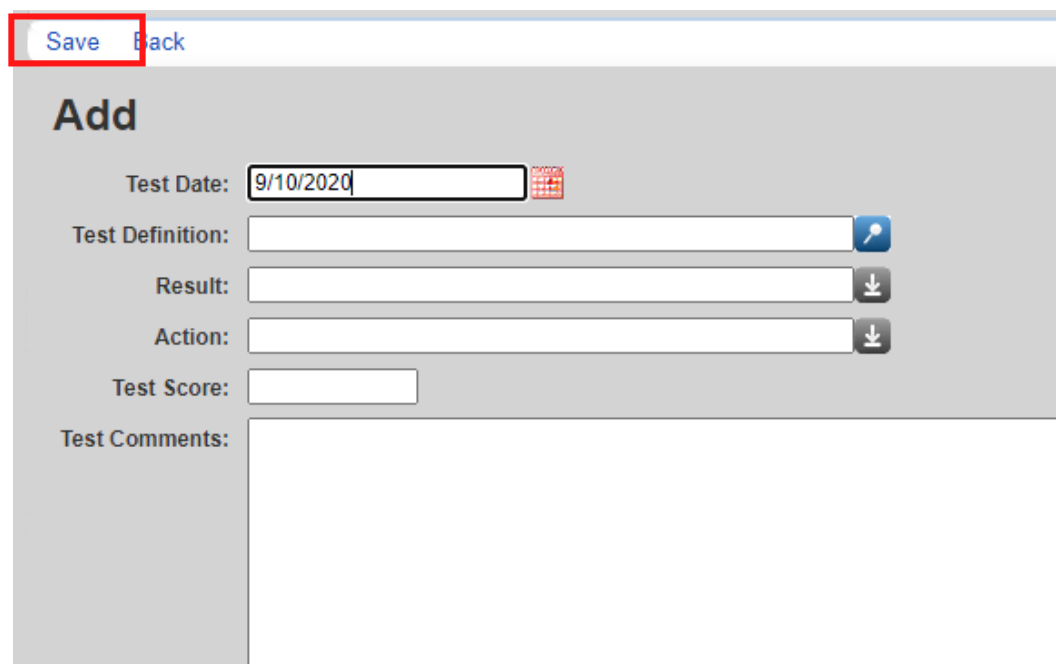
- 01 From the Demographics screen, select Screenings from the Menu of Links. On the Screenings screen, click **Add**.



The screenshot shows the 'Screenings' interface. On the left is a sidebar menu with items: Demographics, Client Report, Encounter Report, Drug Payments, Services, Annual Review, Case Notes, Custom Forms, Vital Signs, Hospital Admissions, Medications, Labs, **Screenings**, Screening Labs, and Immunizations. The 'Screenings' item is highlighted with a red box. At the top of the main content area, there is a navigation bar with buttons: View, **Add**, Delete, HL7 Source, and Print or Export. The 'Add' button is highlighted with a red box. Below the navigation bar is a search bar labeled 'Search:'. Underneath is a table with the following data:

Test Date	Test Definition Name	Qualitative Result	Action/Treatment	Test Score
08/24/2020	Chlamydia DNA Probe w/Rflx	Negative		

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

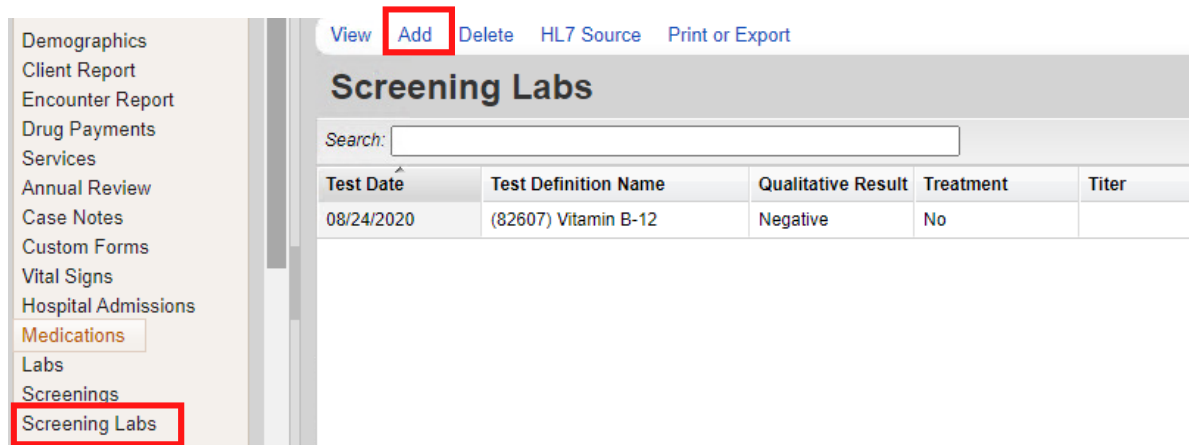


The screenshot shows the 'Add' form for Screenings. At the top, there is a navigation bar with buttons: **Save** and Back. The 'Save' button is highlighted with a red box. Below the navigation bar is the 'Add' form. The form has the following fields:

- Test Date: 9/10/2020
- Test Definition: [Text input field]
- Result: [Text input field]
- Action: [Text input field]
- Test Score: [Text input field]
- Test Comments: [Text area]

SCREENING LABS

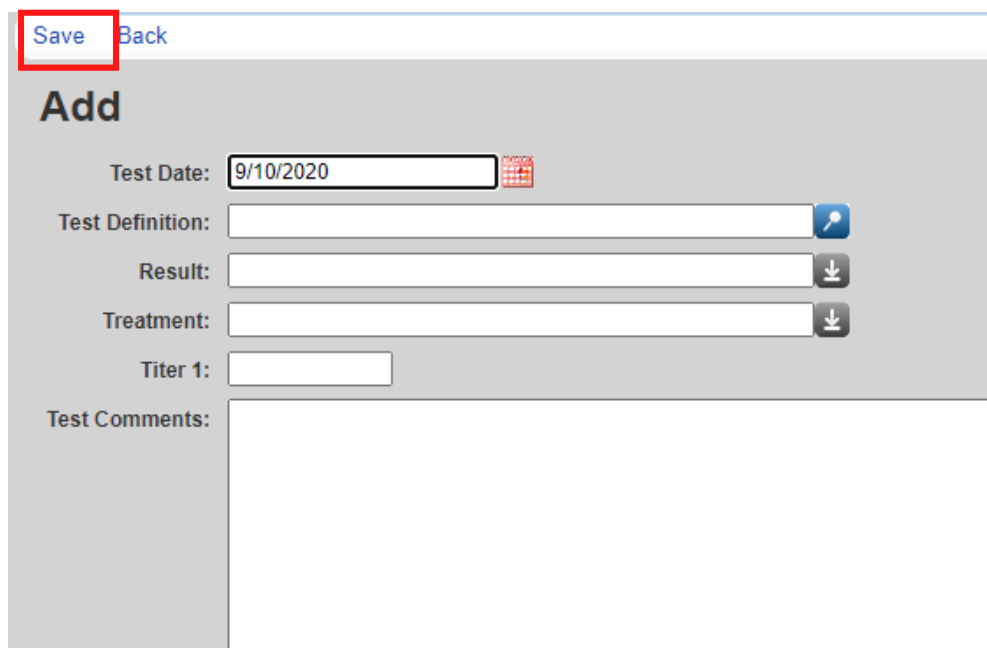
- 01 From the Demographics screen, select Screenings from the Menu of Links. On the Screening Labs screen, click **Add**.



The screenshot shows the 'Screening Labs' interface. On the left is a sidebar menu with items: Demographics, Client Report, Encounter Report, Drug Payments, Services, Annual Review, Case Notes, Custom Forms, Vital Signs, Hospital Admissions, Medications, Labs, Screenings, and Screening Labs (highlighted with a red box). At the top of the main area are buttons: View, Add (highlighted with a red box), Delete, HL7 Source, and Print or Export. Below these is a search bar and a table with the following data:

Test Date	Test Definition Name	Qualitative Result	Treatment	Titer
08/24/2020	(82607) Vitamin B-12	Negative	No	

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



The screenshot shows the 'Add' form for Screening Labs. At the top left are buttons: Save (highlighted with a red box) and Back. The form fields are: Test Date (with a calendar icon and value 9/10/2020), Test Definition (with a magnifying glass icon), Result (with a dropdown arrow), Treatment (with a dropdown arrow), Titer 1, and Test Comments (a large text area).

CUSTOM SUBFORMS

Any Custom Subforms that were in used in CAREWare 5 will be in CAREWare. The process of adding or editing a record on a Custom Subform will be the same regardless of which Custom Subform you are using.

Counseling and Testing
Pregnancy History
Orders
HOPWA (Household Beneficiaries)
SHP Corrections - RETIRED TAB
SPNS Videoconf Assessment Form
SPNS Videoconf Personal Needs Tool
SPNS Videoconf Intake Follow Up Form
LPCC Videoconf Assessment
LPCC Videoconf Personal Needs Tool
LPCC Videoconf Intake Follow Up Form

Find Client > Search Results > Demographics
Delete Client Back

Demographics

Personal Info Client ID: Name: test, person Gender: Female

Change URN PRTS0302842U

Contact Information 1263 Street Dr
Townville, LA 12345

Race/Ethnicity American Indian, Asian (Filipino)

ADDING A SUBFORM

- 01 From the Demographics screen, select the subform you would like to use from the Menu of Links.
- 02 Click **Add**.

Find Client > Search Results > Demographics > HOPWA (Household Beneficiaries)
View **Add** Delete Print or Export

Customize the List Appearance


Search:

Entry Date	Name	HOPWA Gender	Race	HOPWA Date of Birth	Hispanic	Beneficiary
------------	------	--------------	------	---------------------	----------	-------------


- 03 Complete the fields for the subform and click **Save**.


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


Add

Entry Date: 

Name:


HOPWA Date of Birth: 

HOPWA Gender: 

Race: 

Hispanic: ☐

Beneficiary is HIV Positive: ☐

Most Recent HOPWA Year Beneficiary Valid For: 

EDITING A SUBFORM

- 01 From the Demographics screen, select the subform you would like to use from the Menu of Links.
- 02 Click to highlight the subform record you would like to edit and Click **View**.

[View](#) [Add](#) [Delete](#) [Print or Export](#)

Save


Search:

Entry Date	Name	HOPWA Gender	Race	HOPWA Date of Birth
08/04/2019	Test Daughter	Female	Multi-Racial	04/04/2004


- 03 Make any changes you wish to make and click **Edit**.

[Edit](#) [Back](#)

View

Entry Date: 

Name:

HOPWA Date of Birth: 

HOPWA Gender:

Race:

Hispanic: ☐

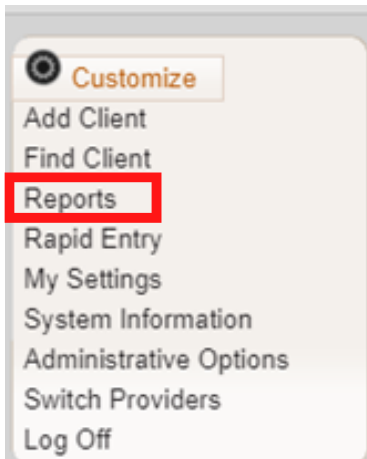
Beneficiary is HIV Positive: ☐

Most Recent HOPWA Year Beneficiary Valid For:

REPORTS

FINANCIAL REPORT

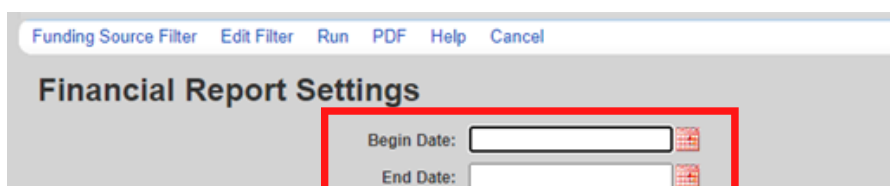
01 Select **Reports** from the main menu.



02 Select **Financial Report** from the Reports Menu.



03 Select your Date Span.



04 Click **Funding Source Filter**.

The screenshot shows the 'Financial Report Settings' window. The 'Funding Source Filter' tab is highlighted with a red box. The window contains the following elements:

- Buttons: Edit Filter, Run, PDF, Help, Cancel
- Fields: Begin Date, End Date
- Text: Funding Sources: No Funding Source Filter Applied.
- Checkboxes: Include Subservice Detail?, Include Provider Information?, Pull Amount Received from receipts in the date span?, Apply Filter:

05 Select your funding source(s) and click **Save**.

The screenshot shows the 'Funding Source Filter' window. The 'Save' button is highlighted with a red box. The window contains the following elements:

- Buttons: Save, Cancel, Print or Export
- Search: part B
- Table:

Select	Funding Source
<input type="checkbox"/>	MAI - Part B
<input type="checkbox"/>	Part A - BR TGA
<input checked="" type="checkbox"/>	Part B_bf60
<input type="checkbox"/>	Part B_COVID
<input type="checkbox"/>	Part F, Part B MAI

Note: The Funding Source list will only display up to 20 funding sources per page. If you do not see the source you are looking for, try using the search box to find the funding source.

06 Check any boxes that apply;

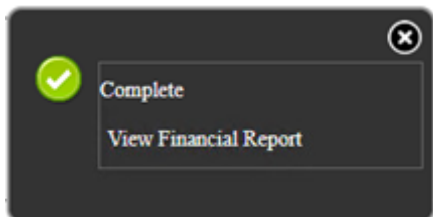
- Include Subservice Detail?
- Include Provider Information?
- Pull amount Received from receipts in the Date Span?
- Apply Filter

07 Click **Run**.

The screenshot shows the 'Financial Report Settings' window. The 'Run' button is highlighted with a red box. The window contains the following elements:

- Buttons: Funding Source Filter, Edit Filter, Run, PDF, Help, Cancel
- Fields: Begin Date: 9/1/2019, End Date: 9/1/2020
- Text: Funding Sources: Part B_bf60
- Checkboxes: Include Subservice Detail? (checked), Include Provider Information?, Pull Amount Received from receipts in the date span?, Apply Filter:

08 When the report is complete click **View Financial Report**.



Your financial report will display like this:

Financial Report

Sunday, September 1, 2019 through Tuesday, September 1, 2020

Report Criteria:

Providers:

LaCAN Demo

Funding Sources:

Part B_bf60

Group By Providers:

False

Include Subservice Detail:

True

Receipts In Period:

False

LaCAN Demo

Assessments	Clients:	Units:	Total:	Amount Received:
Case Management Acuity Scale	3	3	\$0.00	\$0.00
AssessmentsTotals:	3	3	\$0.00	\$0.00
Case Management (non-medical)	Clients:	Units:	Total:	Amount Received:
Non-MCM: Other Staff non-face-to-face	1	1	\$0.00	\$0.00

09 To view as PDF: Click **PDF**.

Funding Source Filter Edit Filter Run **PDF** Help Cancel

Financial Report Settings

Begin Date: 9/1/2019

End Date: 9/1/2020

Funding Sources: Part B_bf60

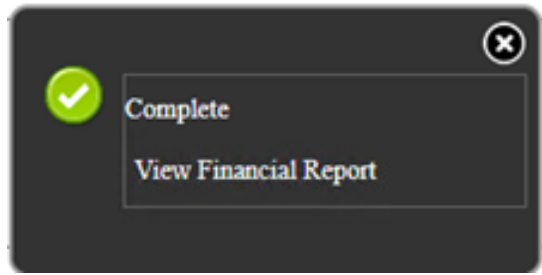
Include Subservice Detail?: ☒

Include Provider Information?: ☐

Pull Amount Received from receipts in the date span?: ☐

Apply Filter: ☐

10 When the report is complete click [View Financial Report](#).



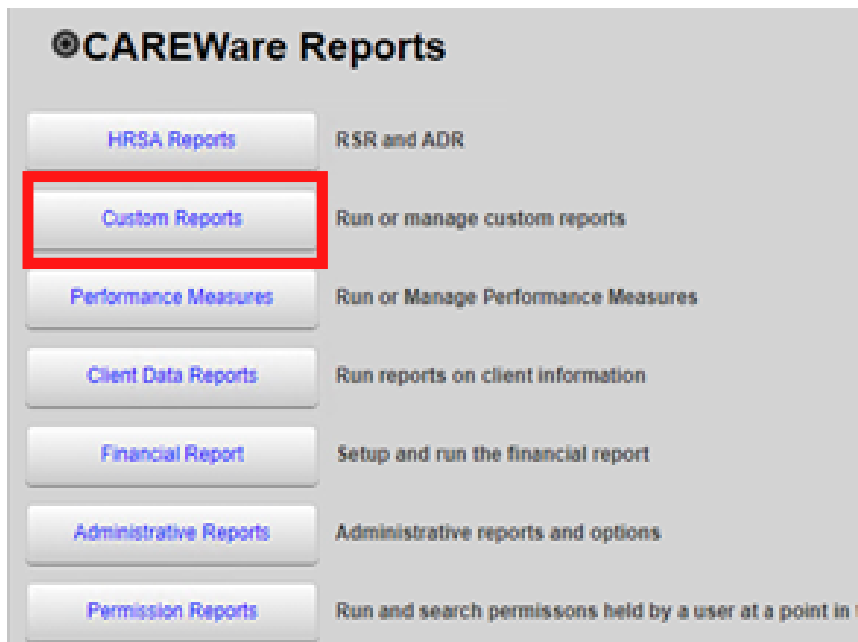
The report will then display as a PDF file.

Financial Report					
Sunday, September 1, 2019 through Tuesday, September 1, 2020					
Report Criteria:					
Providers:	LaCAN Demo				
Funding Sources:	Part B_bf60				
Group By Providers:	False				
Include Subservice Detail:	True				
Receipts In Period:	False				
LaCAN Demo					
Assessments	Clients:	Units:	Total:	Amount Received:	Not Received:
Case Management Acuity Scale	3	3	\$0.00	\$0.00	\$0.00
AssessmentsTotals:	3	3	\$0.00	\$0.00	\$0.00
Case Management (non-medical)	Clients:	Units:	Total:	Amount Received:	Not Received:
Non-MCM Other Staff non-face-to-face	1	1	\$0.00	\$0.00	\$0.00
Non-MCM Social Work face-to-face	1	1	\$0.00	\$0.00	\$0.00
Case Management (non-medical)Totals:	2	2	\$0.00	\$0.00	\$0.00
Food Bank/Home-delivered Meals	Clients:	Units:	Total:	Amount Received:	Not Received:

CREATING CUSTOM REPORTS

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

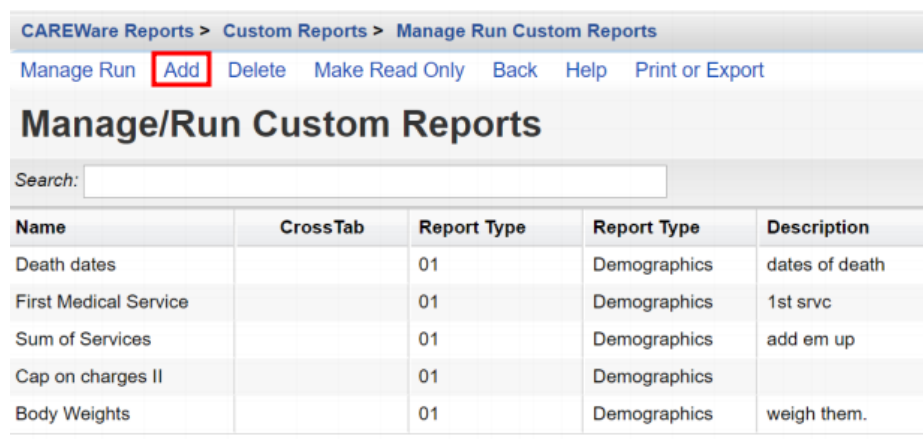
02 Select **Custom Reports** from the link menu.



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



04 Select **Add**.



- 05 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)

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Add

Save [Back](#)

Add

Setup Details

Report Name:

Report Type:

Is Crosstab: ☐

Description:

Use Totals: ☒

Header/Footer Format

Font Name:

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

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

[Back](#)

◎Clients by Race and Gender

Run Report	Start Date : 03/27/2018, End Date : 03/27/2019, Clients with services, Report Display as : Open in New Window
Report Layout	Clients by Race and Gender, Demographics
Field Selection	No fields selected
Report Filter	Report Filter is empty

07 Select **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	Column Width (in)	Totals	Sort	Sort Priority	Status
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08 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**.

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

Use Field Back Print or Export

Report Fields

Search: **Name**

Field Name	Keywords	Previous Field Name	Description
Medications by indication	Demographics	Client Meds By Ind.	Returns full medication name for selected indication
Current Regimen	Demographics	Current Regimen	Returns a list of ARV medications in a current regimen
First Name	Demographics	First Name	
Last Name	Demographics	Last Name	
Last Service In Contract	Demographics	Last Service In Contract	Returns name of service category
Middle Name	Demographics	Middle Name	
Name	Demographics	Name	
Physician name	Demographics	Phys. Name	
Preferred Name (Clin. Custom)		Preferred Name (Clin. Custom)	Culturally Sensitive Name requested by the client

09 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

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

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

Use Field

Select Field:

Column Header:

Sort:

Sort Priority:

Header Column Format

Column Width: inches

Column Header Font Name:

Bold: ☐

Italic: ☐

Underline: ☐

Font Size:

Font Color:

Data Column Format

Font Name:

Bold: ☐

Italic: ☐

Underline: ☐

Font Size:

Font Color:

Field Justification:

- 10 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).

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

[Back](#)

Name

[View Select Field](#) Name; Demographics

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.

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	Column Width (in)	Totals	Sort	Sort Priority	Status
Name	Name	1.44	Group By		0	Complete
Race/Ethnicity	Race/Ethnicity	1.44	Group By		0	Complete
Gender	Gender	0.88	Group By		0	Complete

11 Click **Report Filter**.

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

Back

Clients by Race and Gender

Run Report Start Date : 03/27/2018, End Date : 03/27/2019, Clients with services, Report Display as : Open in New Window

Report Layout Clients by Race and Gender, Demographics

Field Selection No fields selected

Report Filter Report Filter is empty

12 Click **Add**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Report Filter

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

Report Filter

Search:

Operator	Paren.	Field Name	Is Not	=	>=
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13 Enter "Gender" in the Search box to limit available Field Names. Chose the appropriate Field Name and select **Use Field**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Report Filter > Add

Use Field Back Print or Export

Report Fields

Search: Gender

Field Name	Keywords	Previous Field Name	Description
ADR Gender		ADR Gender	
Gender	Demographics	Gender	

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

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Report Filter > Add > Criterion Details

Save Back

Use Field

Field Name: Gender

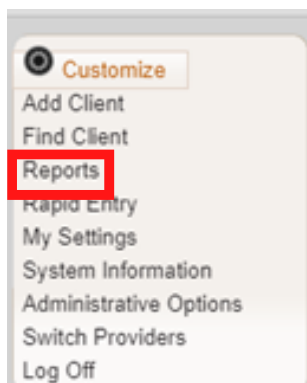
Is Not: ☐

=: Female

Null: ☐

RUNNING A CUSTOM REPORT

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



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



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



04 Select **Run Report**.

- 05 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)

The screenshot shows the 'Run Report' form in the CAREWare Reports system. The breadcrumb trail at the top is 'CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Run Report'. Below the breadcrumb, there are three links: 'Edit' (highlighted with a red box), 'Run Report', and 'Back'. The main heading is 'Run Report'. Under the 'Parameters' section, the following fields are visible: 'Date From' (3/27/2018), 'Date Through' (3/27/2019), 'Clinical Review Year' (2019), and 'Output Display' (Open in New Window). Below these are four checkboxes: 'Show New Clients only' (unchecked), 'Show Clients with Service only' (checked), 'Show Specifications' (unchecked), and 'Sum Numeric Fields' (unchecked). At the bottom, under 'Domain Sharing Settings', there is one checkbox: 'Show Shared Service Records' (unchecked).

- 06 Click **Run Report** and then click **View** [name of report] (in this example, View Clients by Race and Gender).

The screenshot shows the 'Run Report' form with a success message overlay. The breadcrumb trail is 'CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Run Report'. Below the breadcrumb, there are three links: 'Edit', 'Run Report' (highlighted with a red box), and 'Back'. The main heading is 'Run Report'. Under the 'Parameters' section, the following fields are visible: 'Date From' (1/1/2019), 'Date Through' (12/31/2019), 'Clinical Review Year' (2019), and 'Output Display' (Open in New Window). Below these are four checkboxes: 'Show New Clients only' (unchecked), 'Show Clients with Service only' (checked), 'Show Specifications' (unchecked), and 'Sum Numeric Fields' (unchecked). At the bottom, under 'Domain Sharing Settings', there are four checkboxes: 'Show Shared Service Records' (unchecked), 'Show Shared Clinical Records' (unchecked), 'Show Shared Custom Subform Records' (unchecked), and 'Show Shared Case Notes' (unchecked). A dark gray overlay box with a green checkmark and a close button (X) is positioned on the right side. The text inside the overlay box reads 'Report generation complete.' and 'View Clients by Race and Gender' (highlighted with a red box).

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

<u>Name:</u>	<u>Race/Ethnicity:</u>	<u>Gender:</u>
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

RYAN WHITE SERVICES (RSR) REPORT REQUIRED FIELDS

DEMOGRAPHICS

- Vital Status
- Date of Birth
- Race
 - Asian Subgroup
 - Native Hawaiian or Pacific Islander Subgroup
- Ethnicity
 - Hispanic Subgroup
- Sex at Birth
- Gender
- HIV Status
- HIV Risk Factor
- HIV Diagnosis Year

ANNUAL REVIEW

- Poverty Level
- Housing Status
- Insurance

FOR AGENCIES PROVIDING OUTPATIENT AMBULATORY HEALTH SERVICES

- First Ambulatory Care Date
- Last CD4 Test Results
- Last
- Viral Load Results
- Prescribed ART?
- Screened Syphilis
- Pregnant?

NEED CAREWARE HELP?

LACAN WEBSITE

For more information about CAREWare 6 or to access Trainings and Resources, visit the LaCAN Website

<https://louisianahealthhub.org/careware/>

HELP DESK

If you are experiencing issues with CAREWare or need to ask a question please create a ticket with the LaCAN Helpdesk

[Create a Helpdesk Ticket](#)

When creating a ticket please be sure to include

- Your Name
- CAREWARE User Name
- Agency
- Phone
- Email
- Web Browser
- Issue Type
- If reporting error, paste the text of the error from CW
- Description of issue or error. Do not include any client PHI or user passwords.