CAREWARE 6
WHAT IS 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
Upon logging into 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 or Breadcrumb Trails allow users to keep track and maintain awareness of their locations within CAREWare 6. In this example: Find Client > Search Results > Demographics is considered the Breadcrumb Trail.
If the items in the Breadcrumb trail are blue (as in the example), 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.
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**.

<table>
<thead>
<tr>
<th>Show</th>
<th>Menu Item</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Add Client</td>
</tr>
<tr>
<td></td>
<td>Administrative Optic</td>
</tr>
<tr>
<td></td>
<td>Appointments</td>
</tr>
<tr>
<td></td>
<td>Find Client</td>
</tr>
<tr>
<td></td>
<td>My Settings</td>
</tr>
<tr>
<td></td>
<td>Rapid Entry</td>
</tr>
<tr>
<td></td>
<td>Reports</td>
</tr>
<tr>
<td></td>
<td>Switch Providers</td>
</tr>
</tbody>
</table>
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.
01  Open your browser and enter lacan.ixn.com

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

![Login page](image)

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

![Login page](image)
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.

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

WHAT WILL CHANGE WITH TWO-FACTOR AUTHENTICATION?

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.

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

https://louisianahealthhub.org/careware-submission-form/
HOW TO ADD A CLIENT
Select **Add Client** from the main menu and a new tab will open in your browser.

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**.

**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.
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.”

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

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

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

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.
### Personal Info

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>person</td>
</tr>
<tr>
<td>Middle Name</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td>test</td>
</tr>
<tr>
<td>Preferred Language</td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td>Female</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>3/2/1984</td>
</tr>
<tr>
<td>DOB Estimated?</td>
<td>No</td>
</tr>
<tr>
<td>Sex At Birth</td>
<td>Female</td>
</tr>
<tr>
<td>URN</td>
<td>PRTS0302842U</td>
</tr>
<tr>
<td>Encrypted URN</td>
<td>Hgu8aigWU</td>
</tr>
<tr>
<td>Encrypted UCI</td>
<td>10D8A7C556FFEC6515DB572E7BE99OC1B981A61DU</td>
</tr>
<tr>
<td>Client ID</td>
<td></td>
</tr>
<tr>
<td>Last Service</td>
<td>8/14/2020</td>
</tr>
<tr>
<td>Last Poverty Level</td>
<td>08/17/2019</td>
</tr>
</tbody>
</table>

Note: The Personal Info section includes the date of Last Service and Last Poverty Level.
Note: The Change URN section allows the URN to be edited if needed.
Contact Information

Address: 1263 Street Dr
City: Townville
State: Louisiana
County: Orleans
Zip Code: 12345
Phone: 123-456-7890
Incl. 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): 

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

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.
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.
01 Click Add

Find Client > Search Results > Demographics > Eligibility

View  Add  Edit  Delete  Back  Print or Export

Eligibility History

Search:

<table>
<thead>
<tr>
<th>Date</th>
<th>Is Eligible</th>
<th>Funding Source</th>
<th>Ryan White Funded</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/02/2016</td>
<td>Yes</td>
<td>Part B_b160</td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>

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

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

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.
HIV Status

- HIV Status: HIV-positive (AIDS status unknown)
- HIV+ Date: 2/2/2012
- Estimated?: No
- AIDS Date: 
- Estimated?: No
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”
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.
CLIENT INFORMATION

Client Information

Other Case Management Program:  
Case Management Program:  
Case Manager Assigned: Part A:  
Case Manager Assigned: Part C:  
Case Manager Assigned: Part B:  
Case Manager Assigned: Part D:  
Case Manager Assigned: Housing:  
SSN:  
Primary Language:  
Secondary Language:  
Non-logo mailing only:  
Veteran:  
Client Consent to Share:  
<table>
<thead>
<tr>
<th>Emergency Contacts</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>EmergContact1 Name:</td>
<td></td>
</tr>
<tr>
<td>EmergContact1 Relationship:</td>
<td></td>
</tr>
<tr>
<td>EmergContact1 Address1:</td>
<td></td>
</tr>
<tr>
<td>EmergContact1 Address2:</td>
<td></td>
</tr>
<tr>
<td>EmergContact1 City:</td>
<td></td>
</tr>
<tr>
<td>EmergContact1 State:</td>
<td></td>
</tr>
<tr>
<td>EmergContact1 Zip Code:</td>
<td></td>
</tr>
<tr>
<td>EmergContact1 Phone:</td>
<td></td>
</tr>
<tr>
<td>EmergContact1 Cell:</td>
<td></td>
</tr>
<tr>
<td>EmergContact1 Email:</td>
<td></td>
</tr>
<tr>
<td>EmergContact1 Comments:</td>
<td></td>
</tr>
</tbody>
</table>
# LA HAP Elig Info

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Ramsell Data Generated:</td>
<td></td>
</tr>
<tr>
<td>Member ID_Ramsell:</td>
<td></td>
</tr>
<tr>
<td>Most Recent LA HAP Enrollment Status:</td>
<td></td>
</tr>
<tr>
<td>Most Recent LA HAP Group:</td>
<td></td>
</tr>
<tr>
<td>Most Recent LA HAP Plan:</td>
<td></td>
</tr>
<tr>
<td>Most Recent LA HAP Eligibility Start Date:</td>
<td></td>
</tr>
<tr>
<td>Most Recent LA HAP Eligibility End Date:</td>
<td></td>
</tr>
<tr>
<td>Most Recent LA HAP Plan Start Date:</td>
<td></td>
</tr>
<tr>
<td>Most Recent LA HAP Plan End Date:</td>
<td></td>
</tr>
<tr>
<td>Most Recent LA HAP Priv Ins Status:</td>
<td></td>
</tr>
<tr>
<td>Most Recent LA HAP Priv Ins Type:</td>
<td></td>
</tr>
<tr>
<td>Most Recent LA HAP Medicare Status:</td>
<td></td>
</tr>
<tr>
<td>Most Recent LA HAP Application First Received Date:</td>
<td></td>
</tr>
<tr>
<td>Most Recent LA HAP Application Completed Date:</td>
<td></td>
</tr>
</tbody>
</table>
CASE NOTES
01 Select **Case Notes** from the main menu.

02 Select **Case Note Entry**.
03 Select Add.

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

04 Enter the Case Note date, Author, and case note text and click Save.
01 Click **Add With Templates**.

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

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

02 Click Add.

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

![Add](image)

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**.

![Save](image)
To edit a previously entered service, click on the service you would like to edit and click **View**.

Click **Edit**, make any edits you need to, then click **Save**.
RAPID SERVICE ENTRY
01 Select **Rapid Entry** from the Main Menu

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**

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

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

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

02 On the next page, click Add.

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

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

A new record with the Bring Forward date will be created.
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 Enter Date, Household Size, and Household Income. Click Save.
Complete the fields, then click **Save**.
MEDICATION
01 From the Demographics screen, select **Medications** from the Menu of Links.

02 Select **Allergies and ART**.
03 Select **Edit** to enter allergies and ART information.

04 After making the desired edits, click **Save** and then **Back** (see previous screenshot) to return to the Client Medications screen.
05 From the Client Medications screen, select All (Start Stop, Change).

06 Select Start to enter a new client medication.
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 (Antiretroviral Therapy)
- OI – opportunistic infection (as applicable)
- Comment – optional
- Instructions – optional
01  From the Demographics screen, select **Labs** from the Menu of Links. On the Labs screen, click **Add**.

![Labs screen](image)

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

- Date
- Lab
- Test Operator
- Test Result
- Assay
- Comment
SCREENINGS
From the Demographics screen, select **Screenings** from the Menu of Links. On the Screenings screen, click **Add**.

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

- Test Date
- Test Definition, (TST - TB skin test)
- Result
- Action
- Test Score
- Test Comments
SCREENING LABS
01 From the Demographics screen, select **Screening Labs** from the Menu of Links. On the Screening Labs screen, click **Add**.

![Screening Labs screen](image)

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

- Test Date
- Test Definition
- Result
- Treatment
- Titer 1
- Test Comments

![Add screen](image)
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.
01 From the Demographics screen, select the subform you would like to use from the Menu of Links.

02 Click **Add**.

03 Complete the fields for the subform and click **Save**.
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**.
05 Select your funding source(s) and click **Save**.

06 Check any boxes that apply:
- Include Subservice Detail?
- Include Provider Information?
- Pull amount Received from receipts in the Date Span?
- Apply Filter

**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.

07 Click **Run**.
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 B460
- **Group By Providers:** False
- **Include Subservice Detail:** True
- **Receipts In Period:** False

---

**LaCAN Demo**

<table>
<thead>
<tr>
<th>Service Category</th>
<th>Clients</th>
<th>Units</th>
<th>Total</th>
<th>Amount Received</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessments</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Case Management Acuity Scale</td>
<td>3</td>
<td>3</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Assessments Totals</td>
<td>3</td>
<td>3</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Case Management (non-medical)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-MCM: Other Staff non-face-to-face</td>
<td>1</td>
<td>1</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
To view as PDF: Click PDF.

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, TRICARE
- Group By Providers: False
- Include Subservice Detail: True
- Receipts in Period: False

#### LaCAN Demo

<table>
<thead>
<tr>
<th>Assessments</th>
<th>Clients</th>
<th>Units</th>
<th>Total</th>
<th>Amount Received</th>
<th>Net Received</th>
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</thead>
<tbody>
<tr>
<td>Case Management Acuity Scale</td>
<td>3</td>
<td>3</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Assessments Totals</td>
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<td>3</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Case Management (non-medical)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-MCM Other Staff non-face-to-face</td>
<td>1</td>
<td>1</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
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<tr>
<td>Non-MCM Social Work face-to-face</td>
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<td>1</td>
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<td>2</td>
<td>2</td>
<td>$0.00</td>
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<td>$0.00</td>
</tr>
<tr>
<td>Food Bank Items delivered Meals</td>
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<td></td>
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<td></td>
</tr>
</tbody>
</table>
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**.
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)**
06 After clicking save, you will be on the custom report's menu. Select **Field Selection**.

07 Select **Add**.
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.
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
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).

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.
11 Click Report Filter.

12 Click Add.
Enter “Gender” in the Search box to limit available Field Names. Choose the appropriate Field Name and select **Use Field**.

Select Female from drop-down box. Click **Save**.
01 Select **Reports** from the Main Menu

![](Image1)

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

![](Image2)
01  Select **Manage/Run Custom Reports** from the link menu.

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

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

The report will appear in a new tab within your browser.
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

# For Agencies Providing Outpatient Ambulatory Health Services

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

# Annual Review

- Poverty Level
- Housing Status
- Insurance
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.
FOR MORE INFORMATION OR QUESTIONS ABOUT CAREWARE VISIT:

https://louisianahealthhub.org/careware/