Oregon Health Authority

END HIV

Intro to CAREWare 6

Training modules

For purposes of these modules, “Care Coordinator” will refer to all persons providing a case management function

1. CAREWare Basics
2. Case Management 1
3. Case Management 2
4. Reports
5. Specialty Reports (optional)
6. Administrative Training (for Administrative staff only)

*Training modules 1-4 are meant to be watched in order

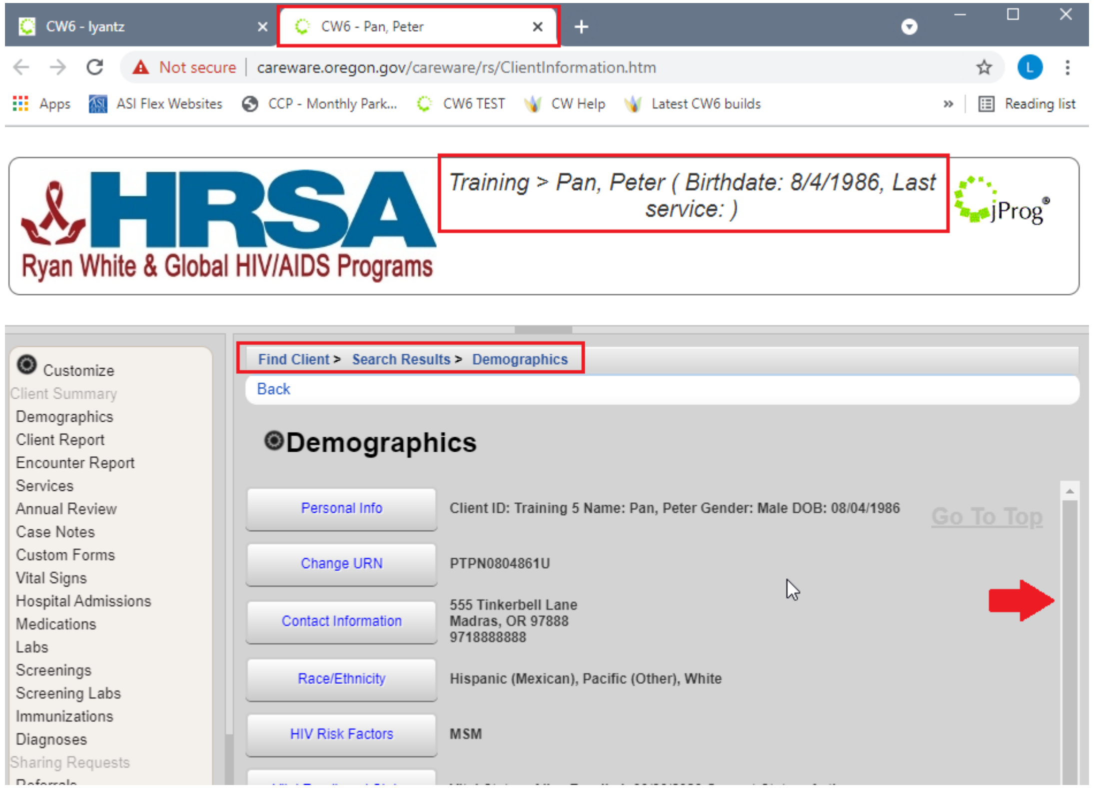
MODULE 1: CAREWare Basics

Topics:

- The basics of CW6
- Accessing the CW6 website
- Log-in and password
- Add a client/find a client
- Client demographic data
- Add/view common notes
- Add/view provider notes

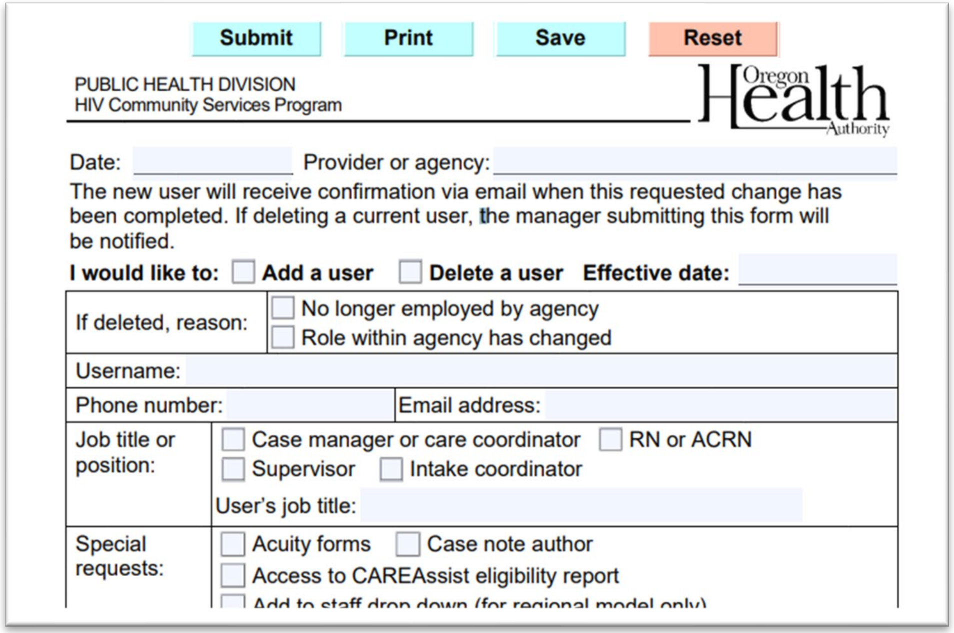
CW 6: The Basics

- CW6 has new features including:
  - Search fields
  - Drop down menus
- Scroll bar on the righthand side of the page.
- CW6 has “breadcrumbs” to track your steps in the database.
- Clients will open in new tabs – don’t forget to close out when finished!
- Top bar will show client name, DOB, and last service.



CW 6 Website & Database Access

- CW 6 Website: https://careware.oregon.gov/careware/rs/index.htm
- New users must complete the [CAREWare Add/Delete Form and Confidentiality Agreement](#) to gain access to the site.
- Current users must complete a new Confidentiality Agreement on an annual basis. OHA will reach out to users when needed.



Submit Print Save Reset

PUBLIC HEALTH DIVISION
HIV Community Services Program

Oregon Health Authority

Date: Provider or agency:

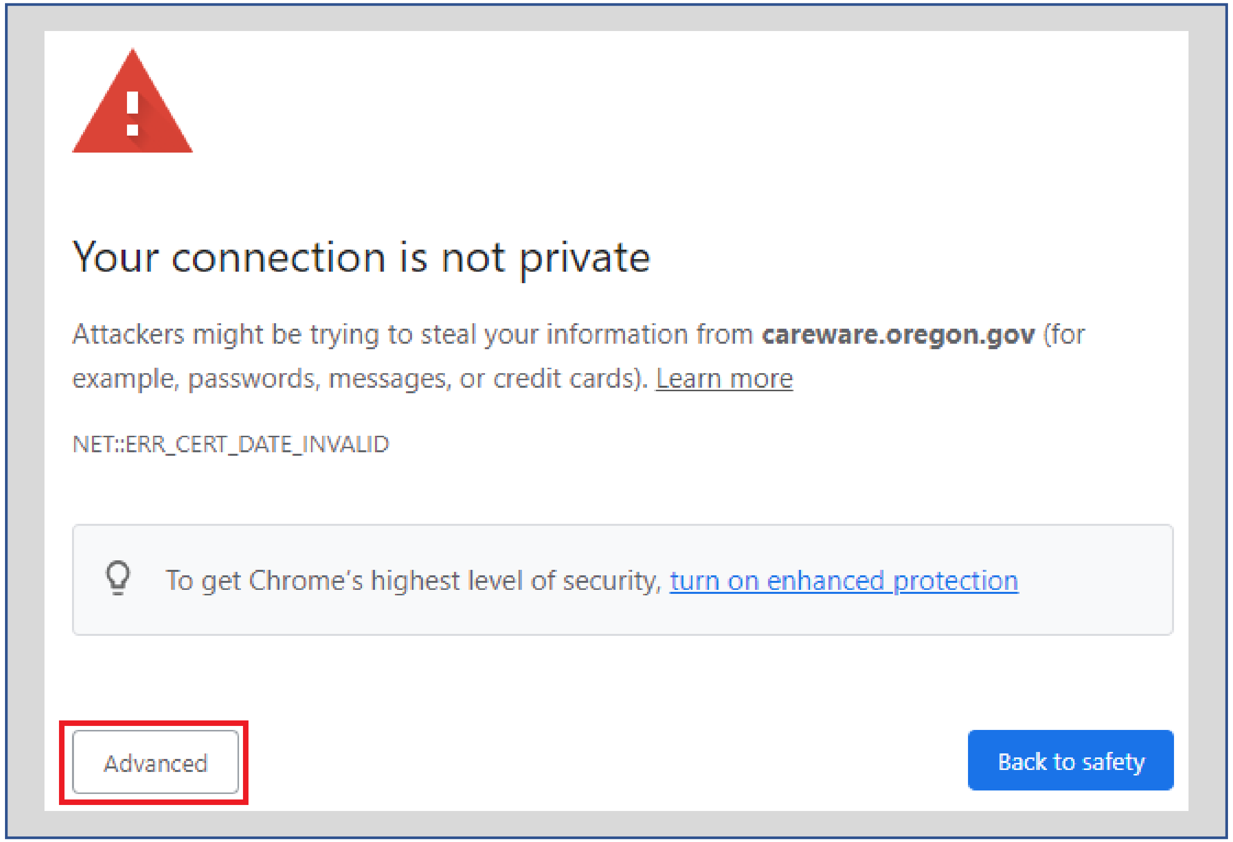
The new user will receive confirmation via email when this requested change has been completed. If deleting a current user, the manager submitting this form will be notified.

I would like to: ☐ **Add a user** ☐ **Delete a user** **Effective date:**

If deleted, reason:	☐ No longer employed by agency ☐ Role within agency has changed
Username:	
Phone number:	Email address:
Job title or position:	☐ Case manager or care coordinator ☐ RN or ACRN ☐ Supervisor ☐ Intake coordinator User's job title:
Special requests:	☐ Acuity forms ☐ Case note author ☐ Access to CAREAssist eligibility report ☐ Add to staff drop down (for regional model only)

Privacy Message

Users may receive the following message when trying to access the CAREWare webpage.

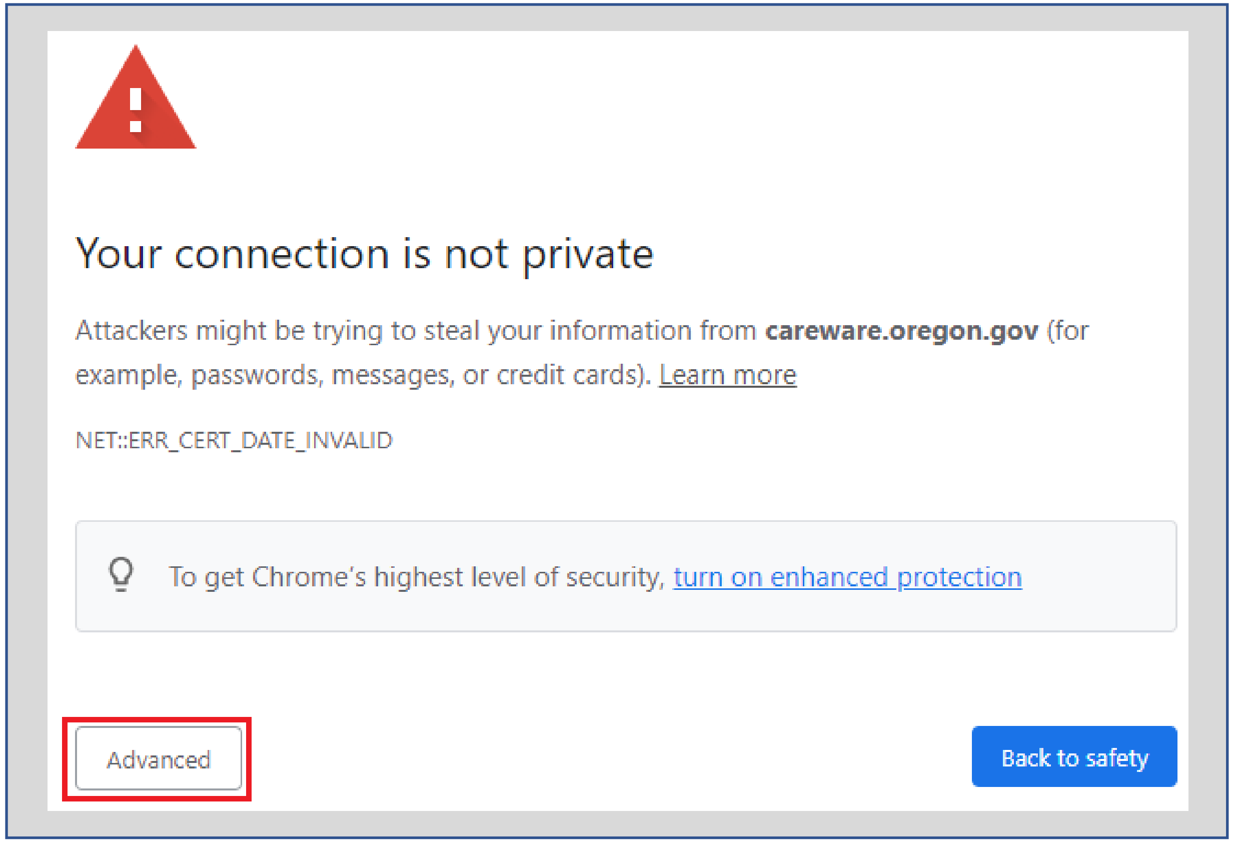


Privacy Message cont.

- This is okay!
- This is a browser prompt. CAREWare is bound by the security network of your agency.
- CAREWare is encrypted end to end and is safe to use.

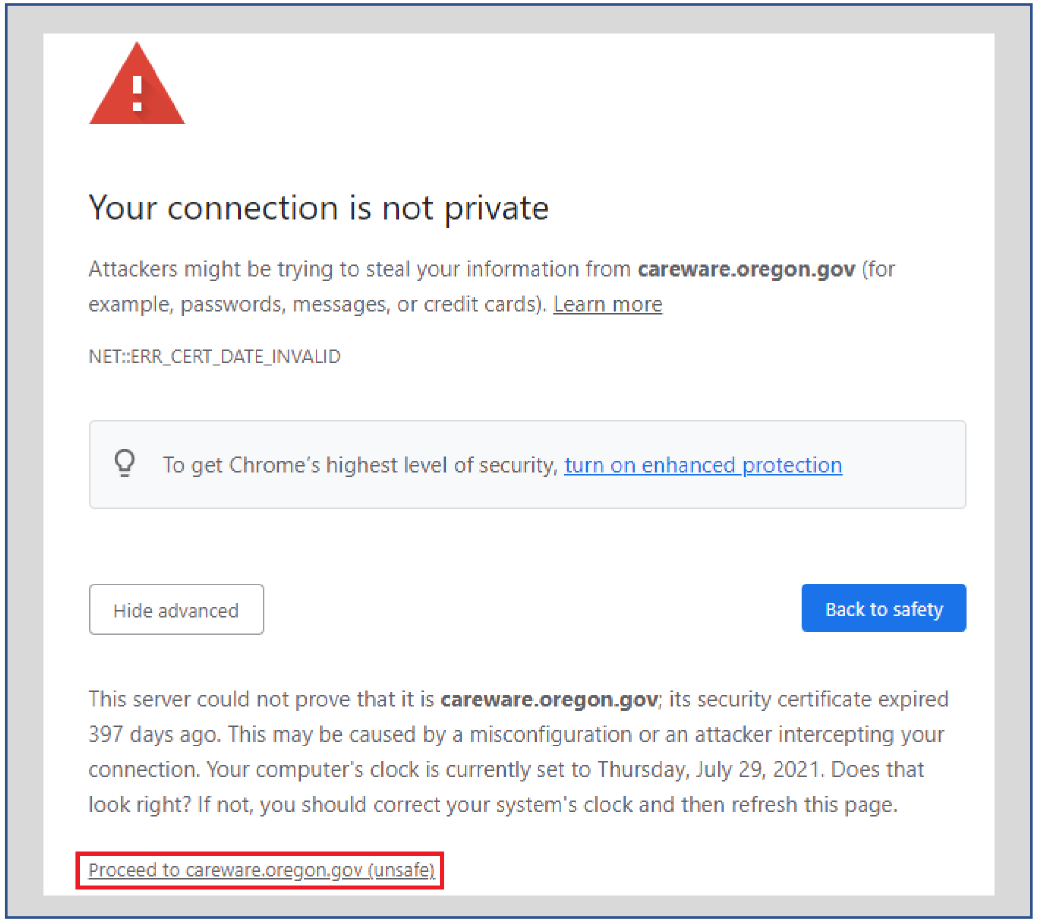
Privacy Message cont.

To navigate past this page, click Advanced.



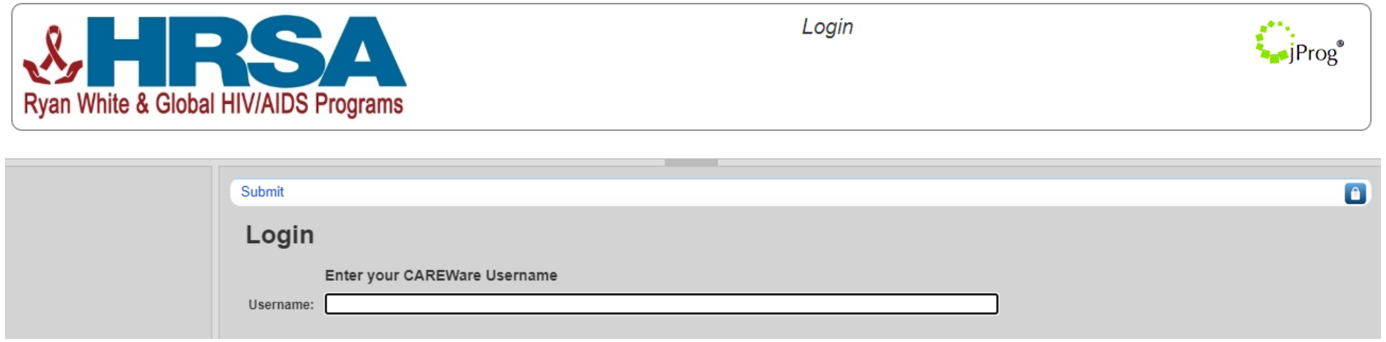
Privacy Message cont.

Text will appear below. Click Proceed to careware.oregon.gov.



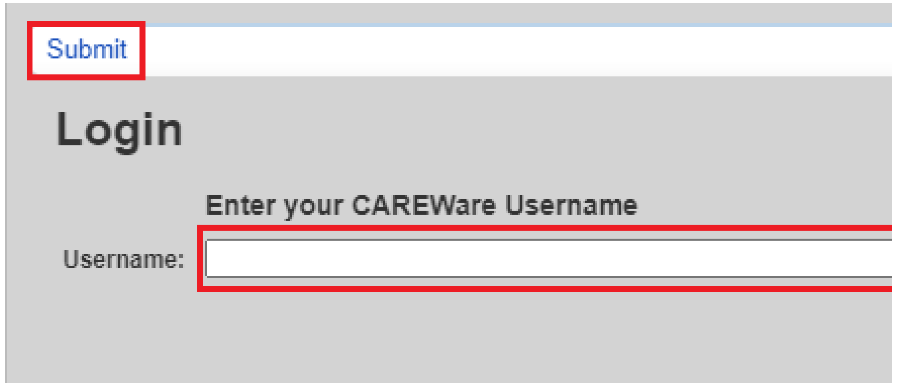
Privacy Message cont.

This should take you to the main CAREWare 6 log in page.

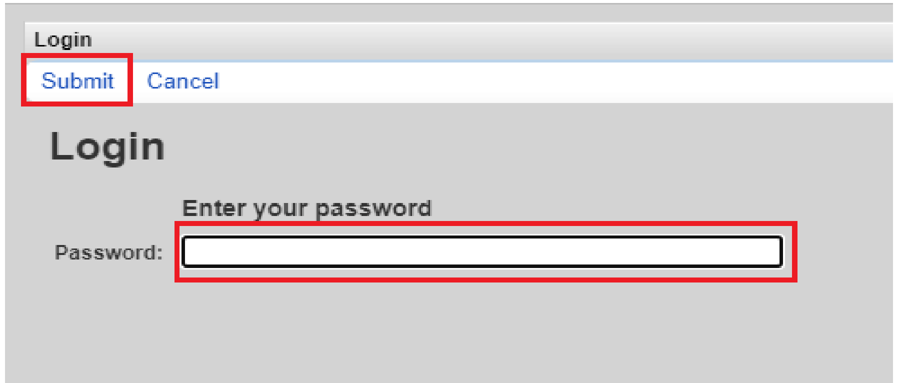


Logging In

Open the CW 6 website. Enter your CW username and click Submit.

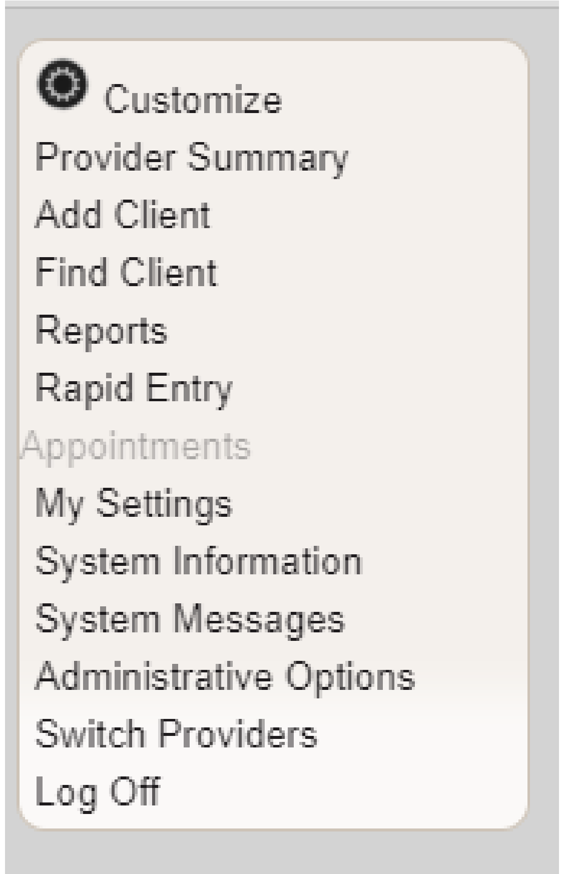


Enter your CW password and click Submit.



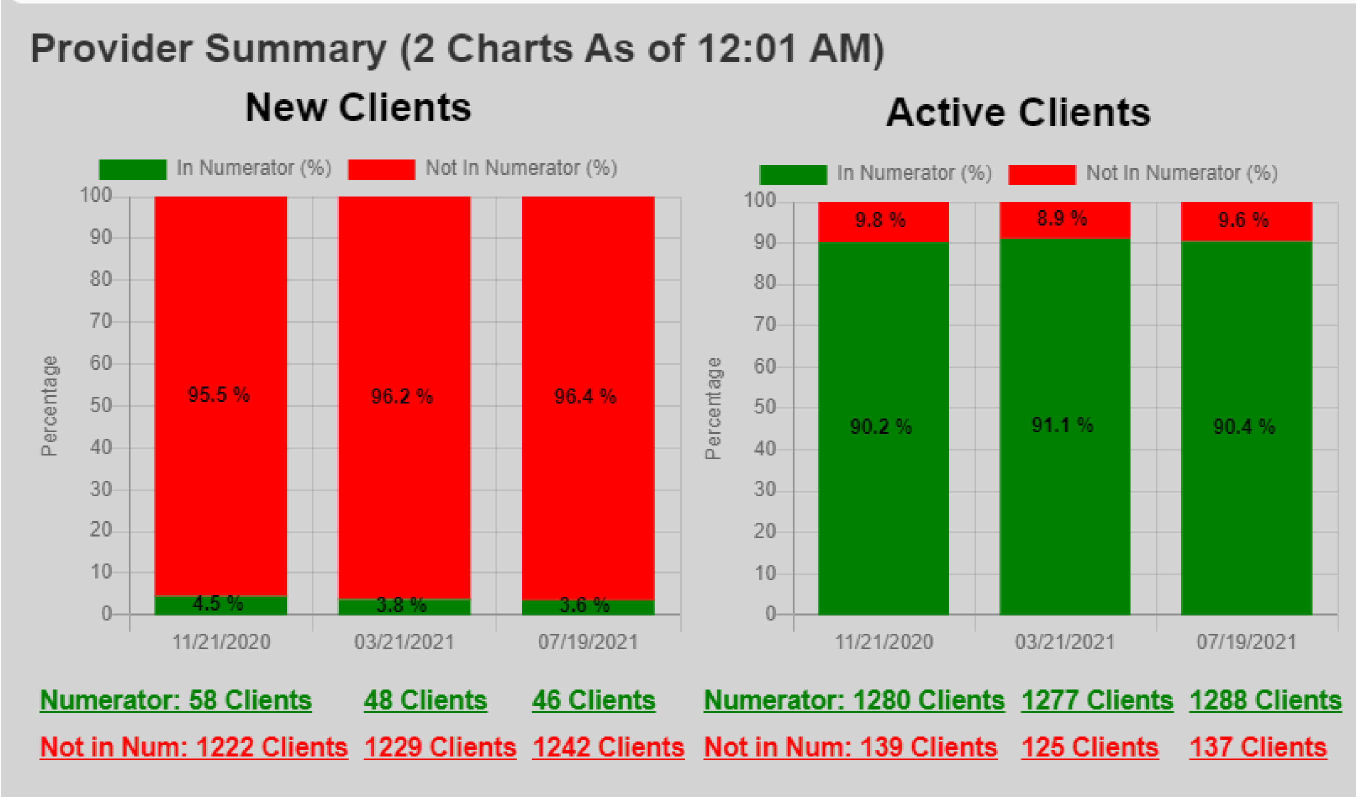
Provider Main Menu

The provider menu contains multiple options, including the provider summary, adding or finding clients, reports, settings, and the link for logging off CAREWare.



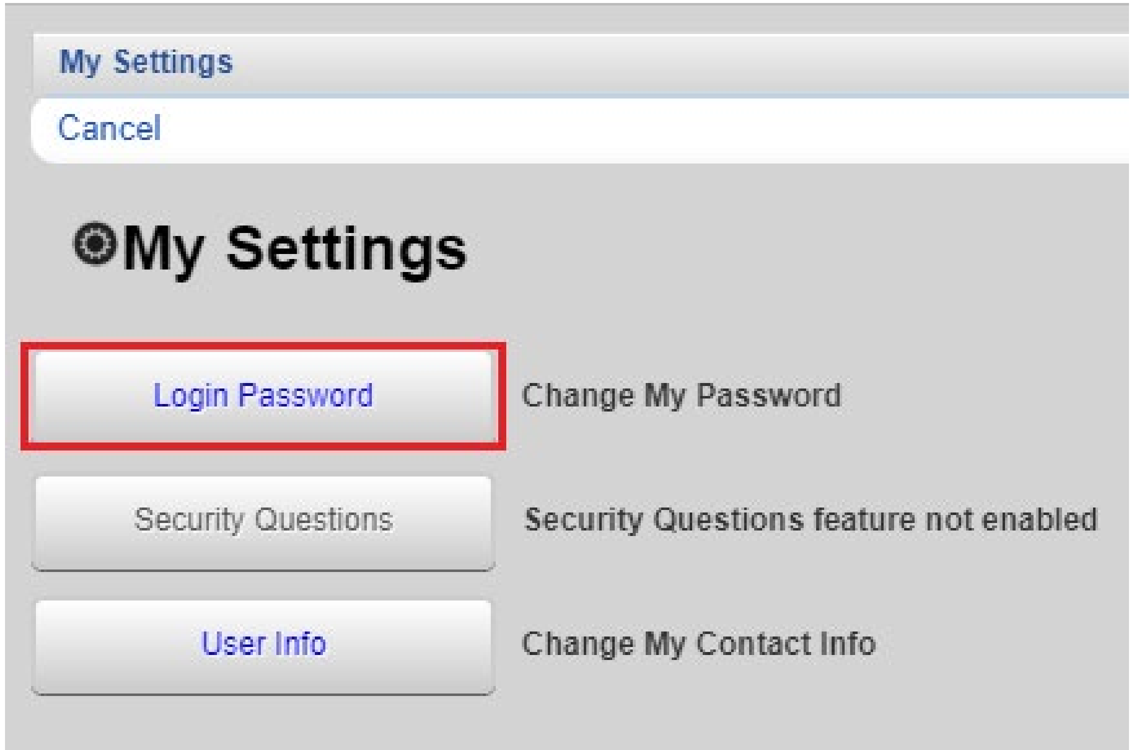
Provider Summary

The image on the screen is an example of the Provider Summary, displaying both active clients and new clients.



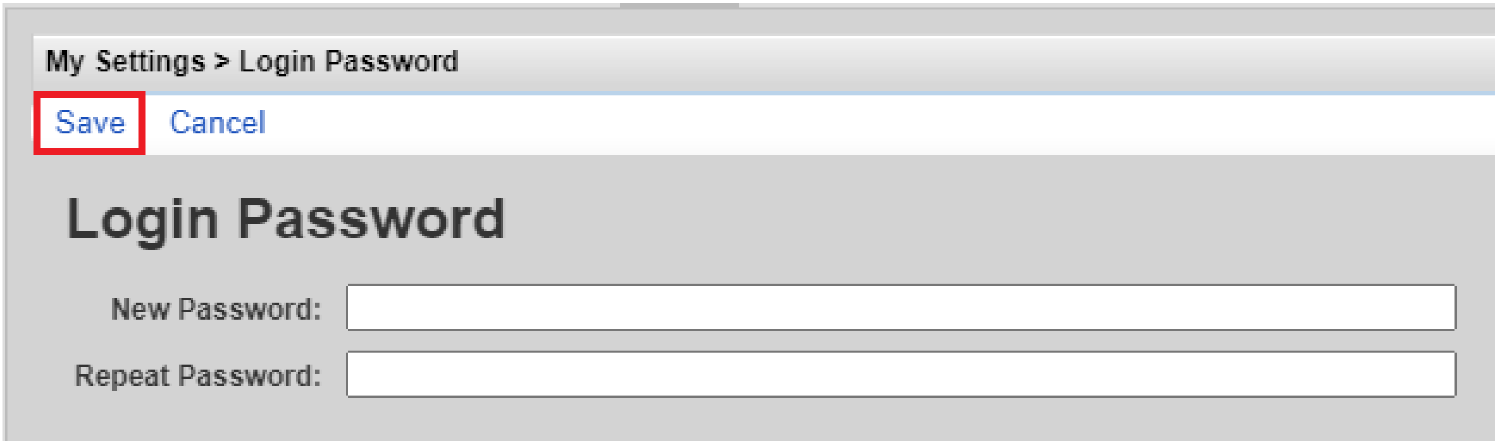
Changing your CW Password

Users can change their password by clicking My Settings from the main menu, then clicking Login Password.



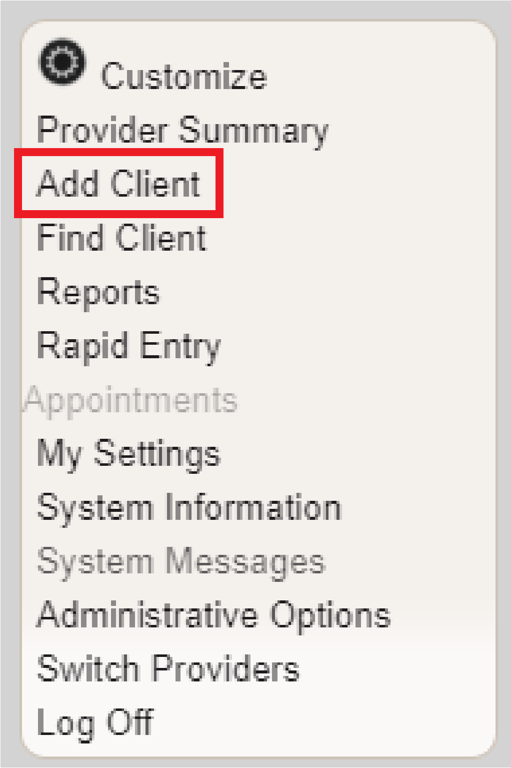
Changing your CW Password cont.

A new screen will prompt the user to enter a new password twice. Click Save when completed.



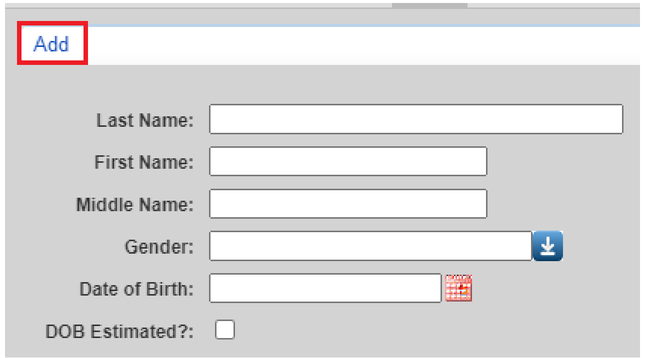
Adding a New Client

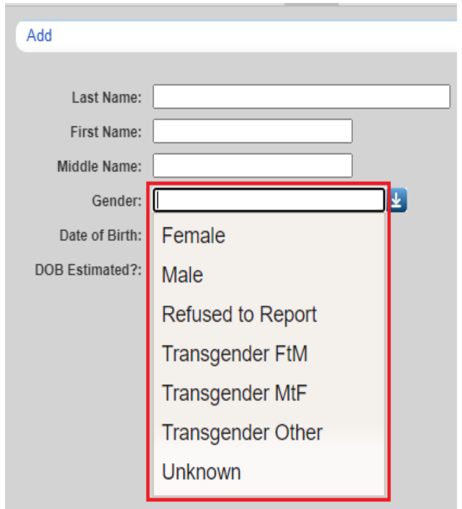
Click Add Client from the main menu.



Adding a New Client cont.

- Enter client's entire name as it appears on legal documents.
- Enter client's Gender based on their self-report.
- Enter client's Date of Birth.
- Click Add.





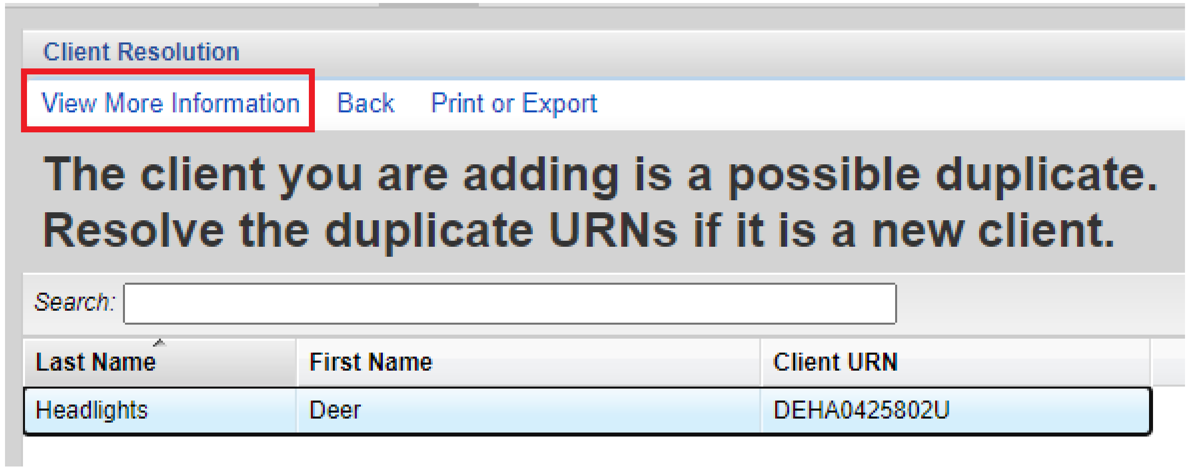
Please refer to the CW6 User Guide for additional guidance on client demographic information

Duplicate or Transfer Clients

- If a client has already been served in the Oregon Part B case management system, a CAREWare record already exists in the database.
- If a client is new to the agency, Care Coordinators must add the client in the same manner as a client new to the Part B network.
- CAREWare will identify potential matches for clients already in the system.

Duplicate or Transfer Clients cont.

- After entering the client information on the Add Client screen, CAREWare will identify potential matches for clients already in the system.
- Select the client and click View More Information to determine if this client record matches your agency's client.



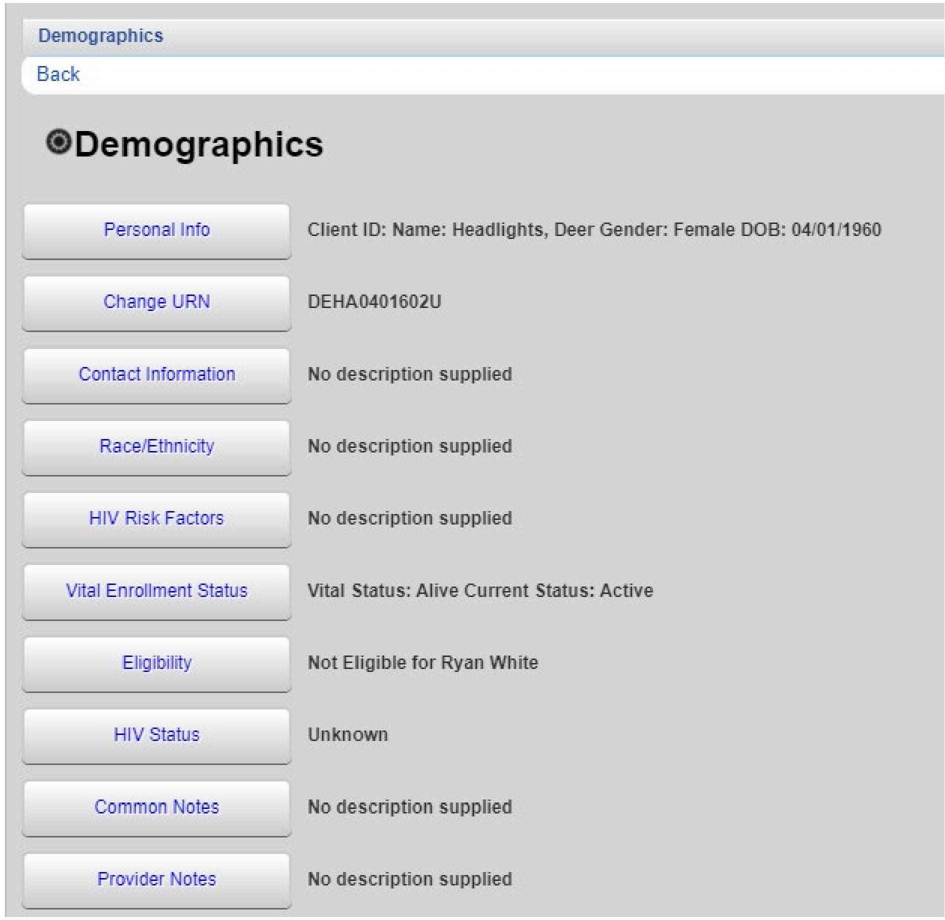
Duplicate or Transfer Clients cont.

- Review the address, race and ethnicity to determine if this is the same client you are attempting to add.
  - If it is, click This is the same and continue.
  - If it is not, click This is a new client and continue.

If you have any questions about a potential duplicate client, or if you accidentally create a duplicate client, please contact HIV Community Services.

Client Demographic Data

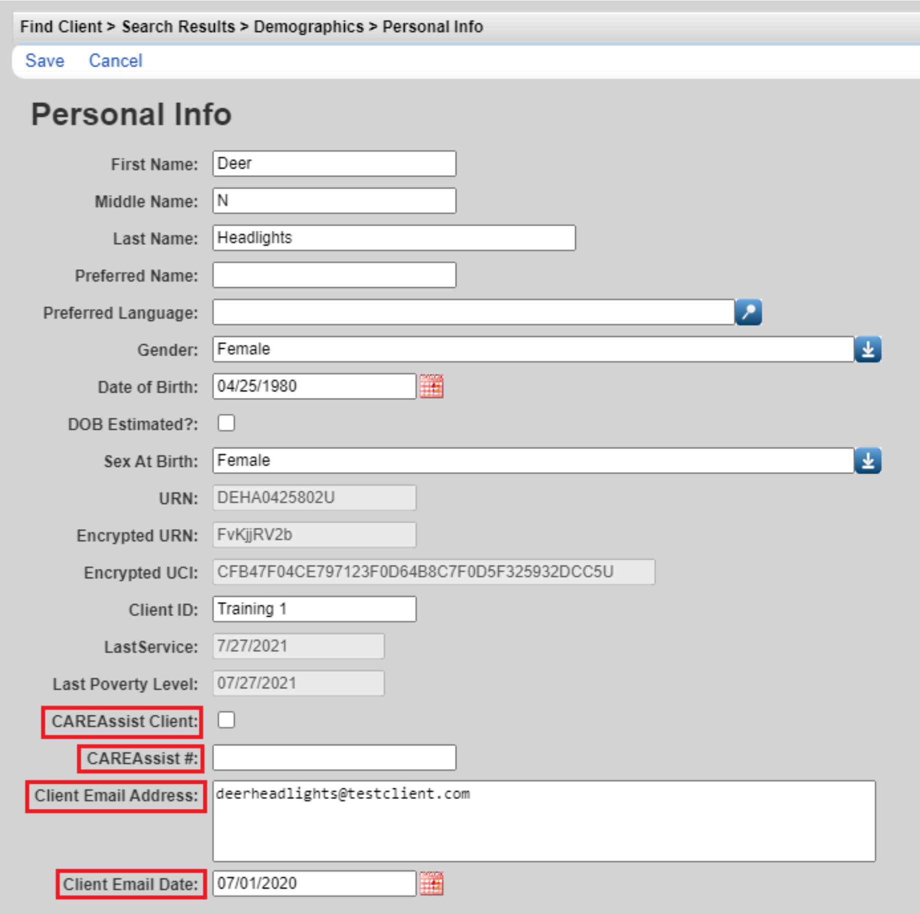
After finding or adding a client, the client's file will open to the Demographics screen.



Client Demographic Data

Enter the following fields:

- Personal Info:
  - Preferred Language: Enter the client's self-reported preferred language.
  - Sex at Birth: Enter the client's self-reported sex at birth.
  - Client ID: This field is for use at the local level. If the agency uses an internal client or chart number, enter it in this field. A client may have different values in the field at different agencies.
  - Email address.



Client Demographic Data cont.

- Contact information: Enter the client's Address, City, State, County, ZIP code, Phone, Phone Type, Mailing Address, City, State, ZIP Code, and Alternate Phone (if applicable).
  - "Oregon" must be selected from the dropdown menu in the State field before selecting the appropriate County.
  - Include in mailing label reports?
    - Check this box to include this client in the mailing labels report If the client consents to receiving mail at their provided mailing address.
    - This field is <u>unchecked</u> by default.
- Race/Ethnicity: Enter the client's self-reported race and ethnicity.
  - Race/Ethnicity Subgroup (if applicable) – If a client reports Hispanic/Latino, Asian or Native Hawaiian/Pacific Islander, additional information is required.

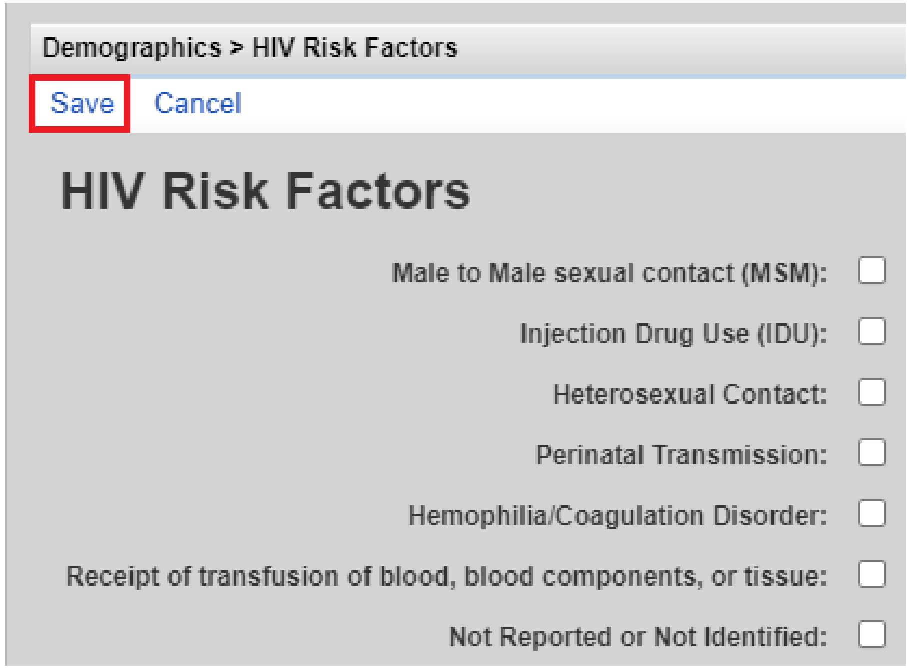
Client Self-Report

Several fields in CAREWare are considered client self-report. The data entered into these fields should be based on the client's self-identified data. These fields are:

- Sex at Birth
- Gender
- Race
- Ethnicity
- Race/Ethnicity Subgroup

HIV Risk Factors

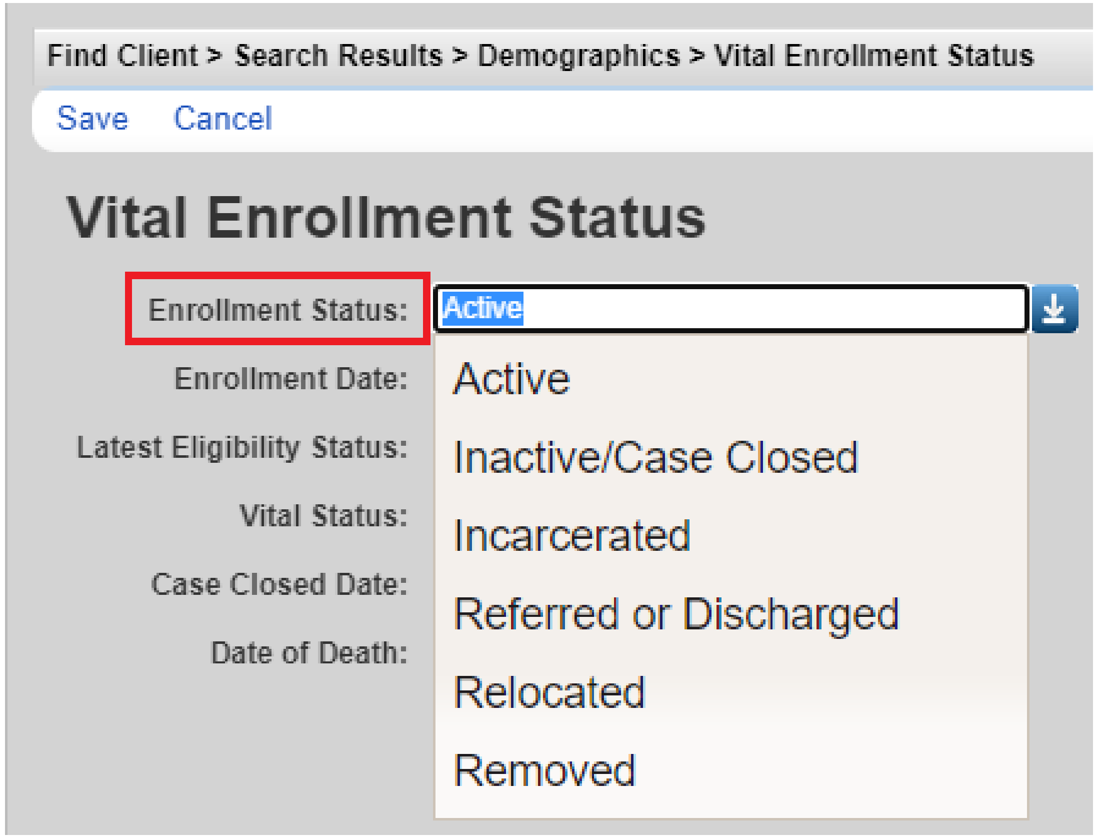
- Enter the client's self-identified HIV risk factor(s) from the dropdown menu.
- Please refer to the CW6 User Guide for definitions of HIV Risk Factors.



Vital Enrollment Status

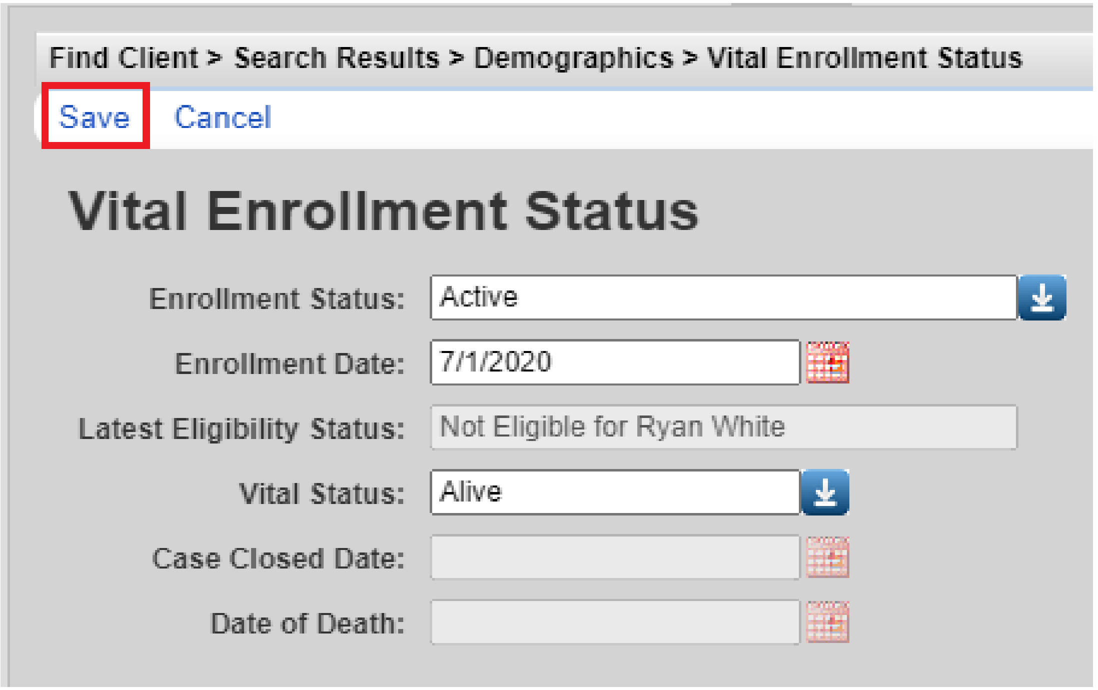
Enrollment Status:

- Select the appropriate enrollment status from the dropdown menu.
- This field is agency specific. For example, a client may have an Enrollment Status of “Relocated” in Polk County but “Active” in EOCIL.
- Please refer to the CW6 User Guide for definitions of Enrollment Status.



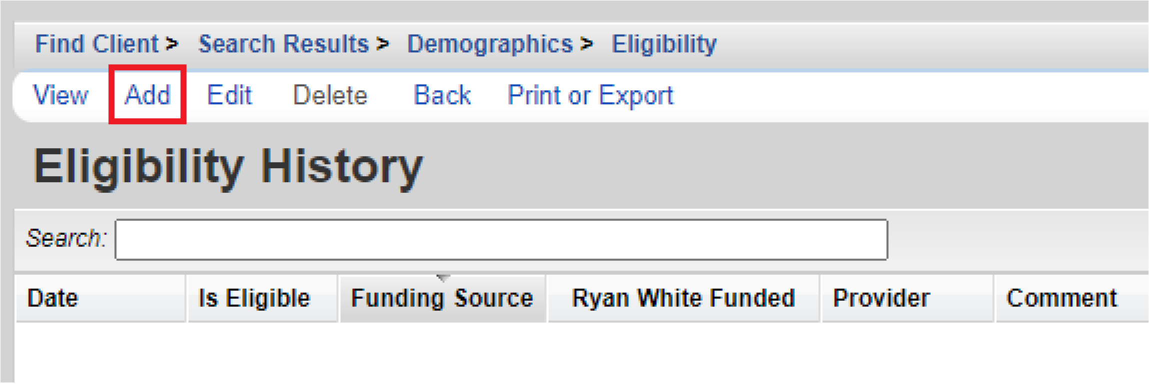
Vital Enrollment Status cont.

- Enrollment Date: The official enrollment date will be the date informed consent was received.
- Vital Status: Select the from the dropdown menu; do not use the option "Unknown"; this is a shared data field for all agencies serving the client.
- Case Closed Date: Enter the case closed date if the client has an enrollment status other than Active.
- Date of Death: Enter the date of death if the client is deceased.
- Click Save.



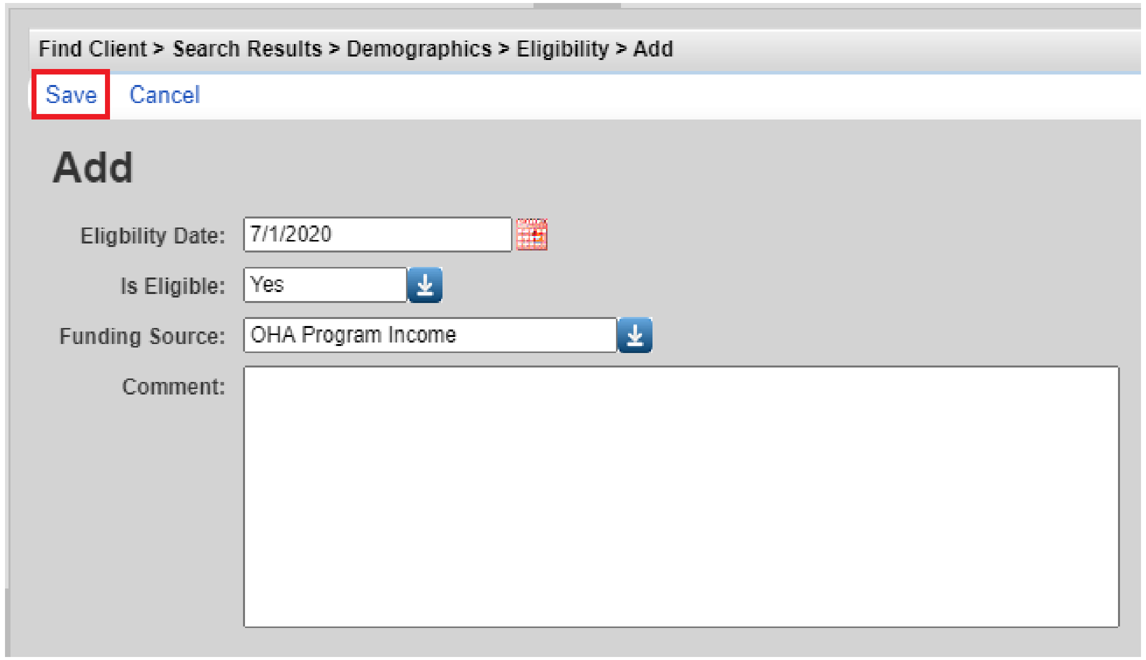
Eligibility Status

- Eligibility Status is only used for federal reporting purposes and is not tied to the 12-month eligibility process in any way.
- When a new client is added to CAREWare, an Eligibility Record needs to be added.
    - Click Add.



Eligibility cont.

- Eligibility Date: Enter the date the client was activated in your agency's domain.
- Is Eligible: Choose "Yes."
- Funding Source: Refer to OHA program guidance and/or agency management for which Funding Source to choose.
- Click Save.



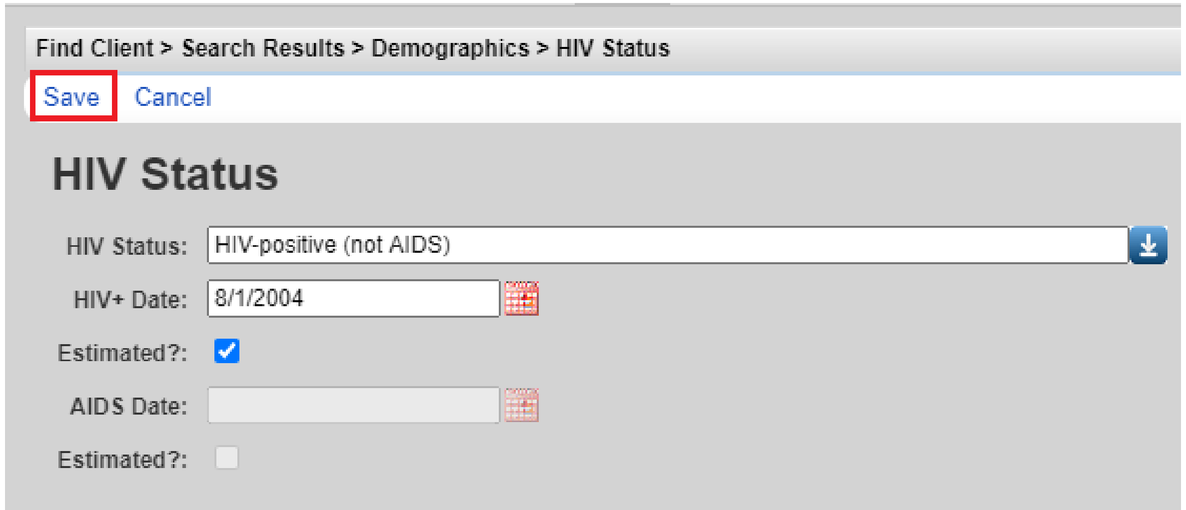
HIV Alliance staff must add an eligibility record with the funding source **Part B** for new clients as of 1/1/2021.

A note about Eligibility Records

If the client's Eligibility on the Demographics states "Not Eligible for Ryan White," this does not change the services the agency may provide. This statement only indicates how the agency is funded. The HIV Community Services Program uses a combination of Ryan White funds and other funding to support HIV services.

HIV Status

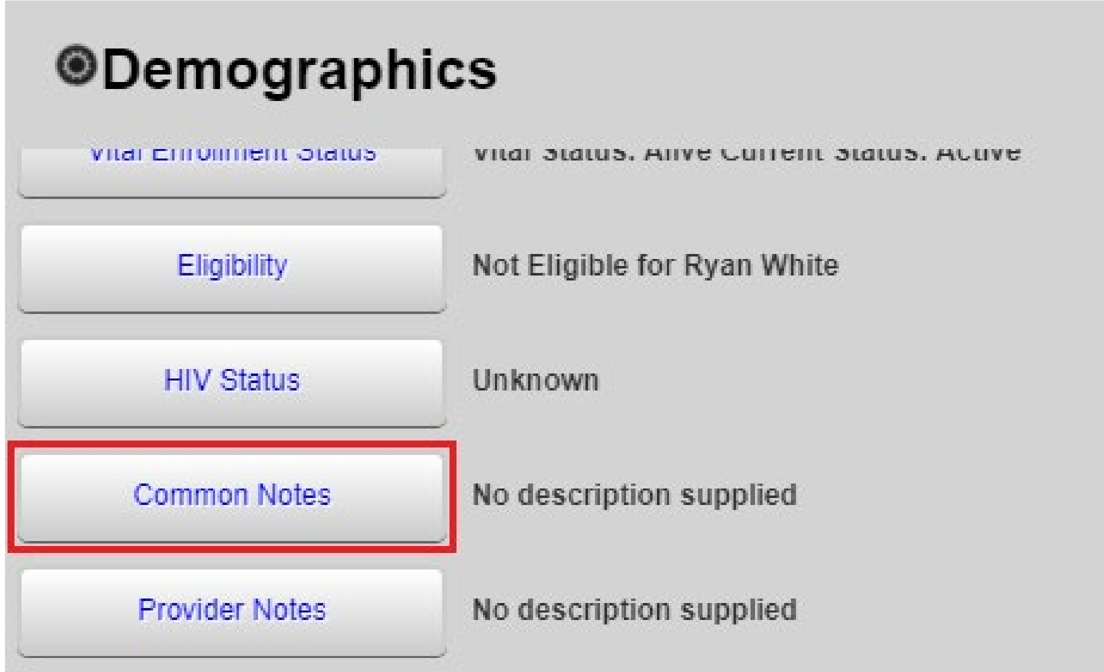
- Select the client's current HIV status from the dropdown list.
- Enter the HIV+ Date, and the AIDS Date if necessary.
- Use the Estimated? check box if needed.
- Click Save.



Please refer to the CW6 User Guide for definitions on HIV Status if needed.

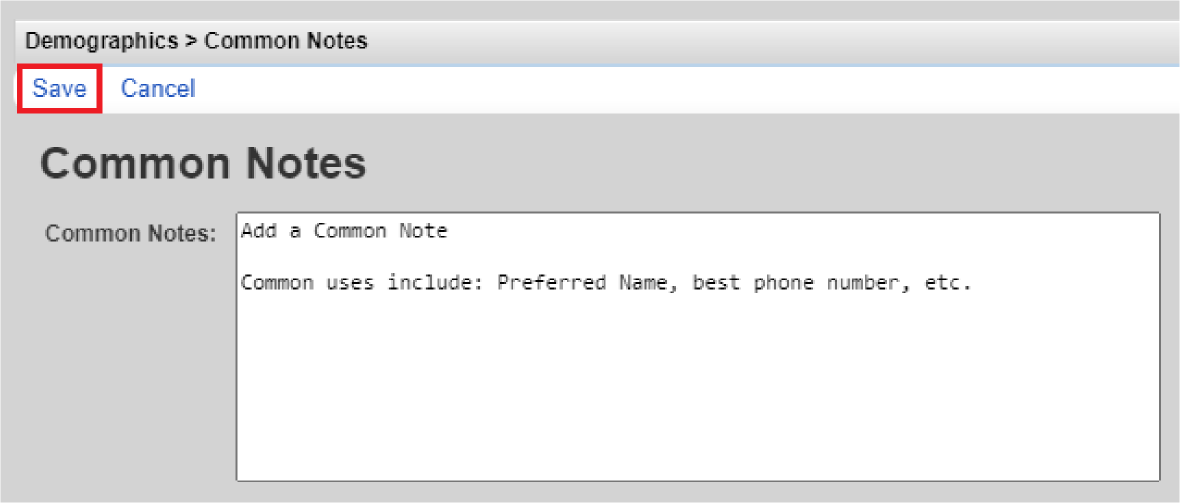
Common Notes

- Used to gather additional client information.
- Common Notes are visible to any agency that serves the client.
- To add or edit Common Notes, click Common Notes from the main demographics page.



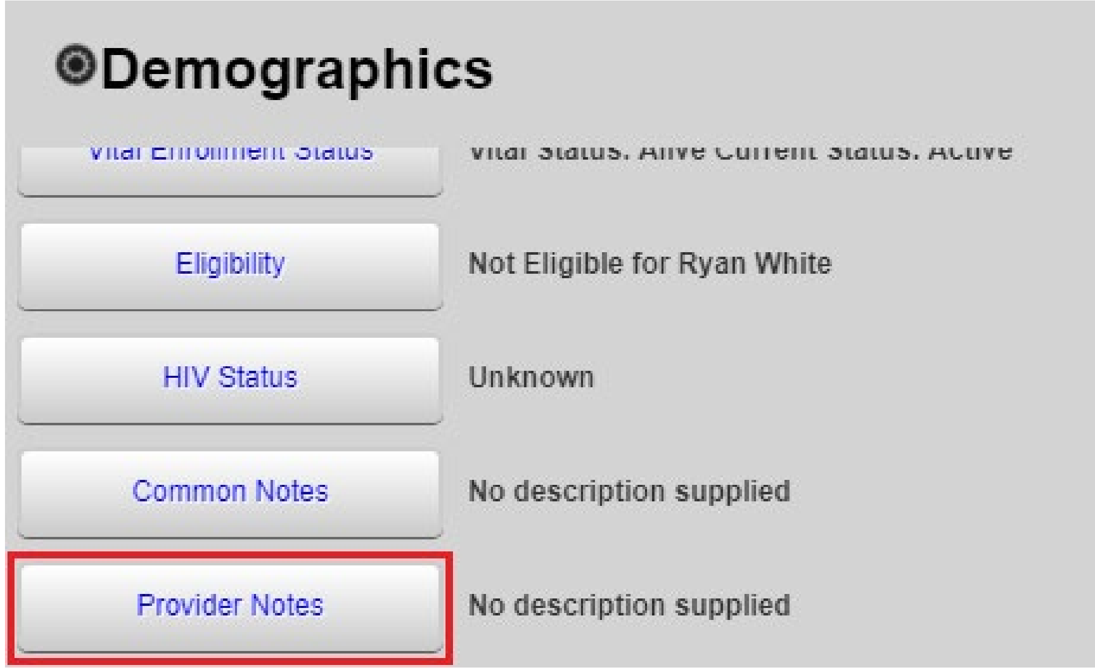
Common Notes cont.

- Add information into the field.
- Click Save.



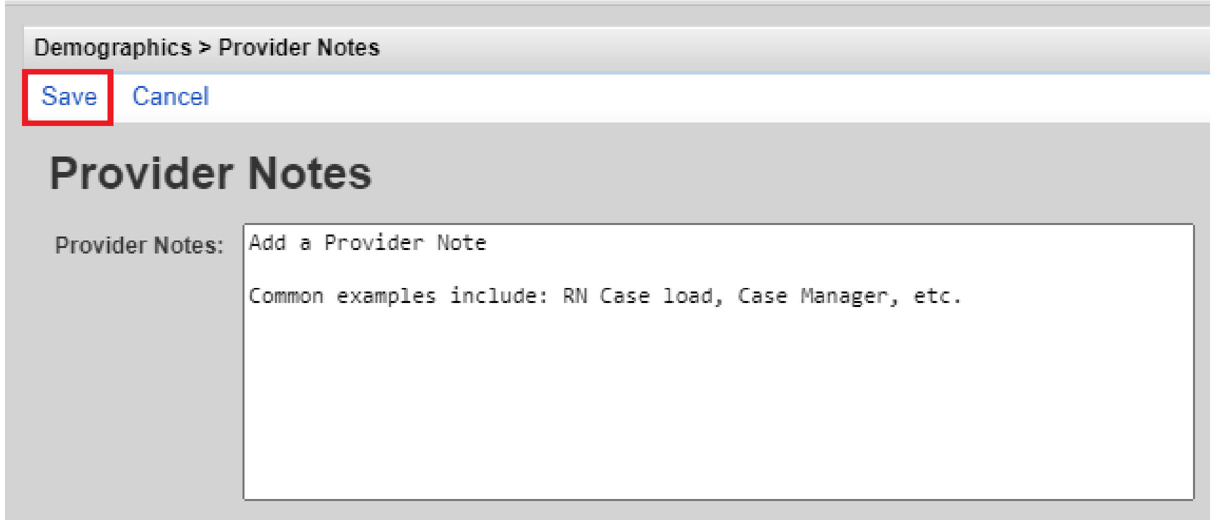
Provider Notes

- Used to gather additional client information.
- Provider Notes are only visible to the agency entering this data.
- To add or edit Provider Notes, click Provider Notes from the main demographics page.



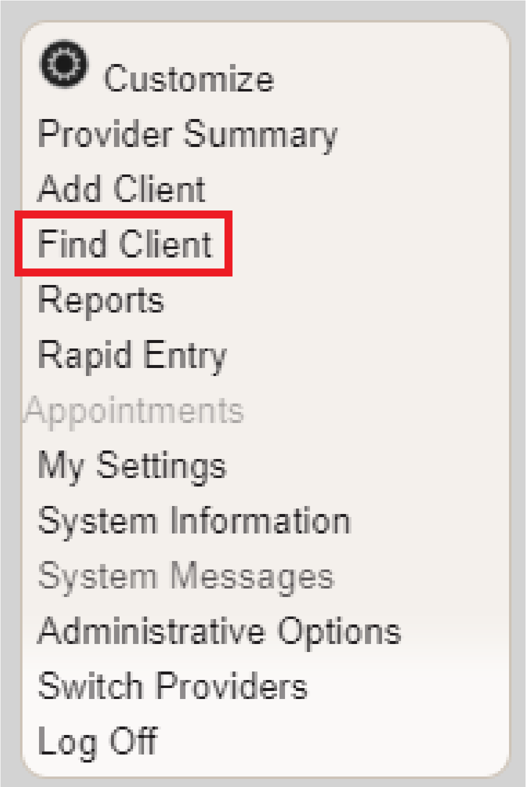
Provider Notes, cont.

- Add information into the field.
- Click Save.



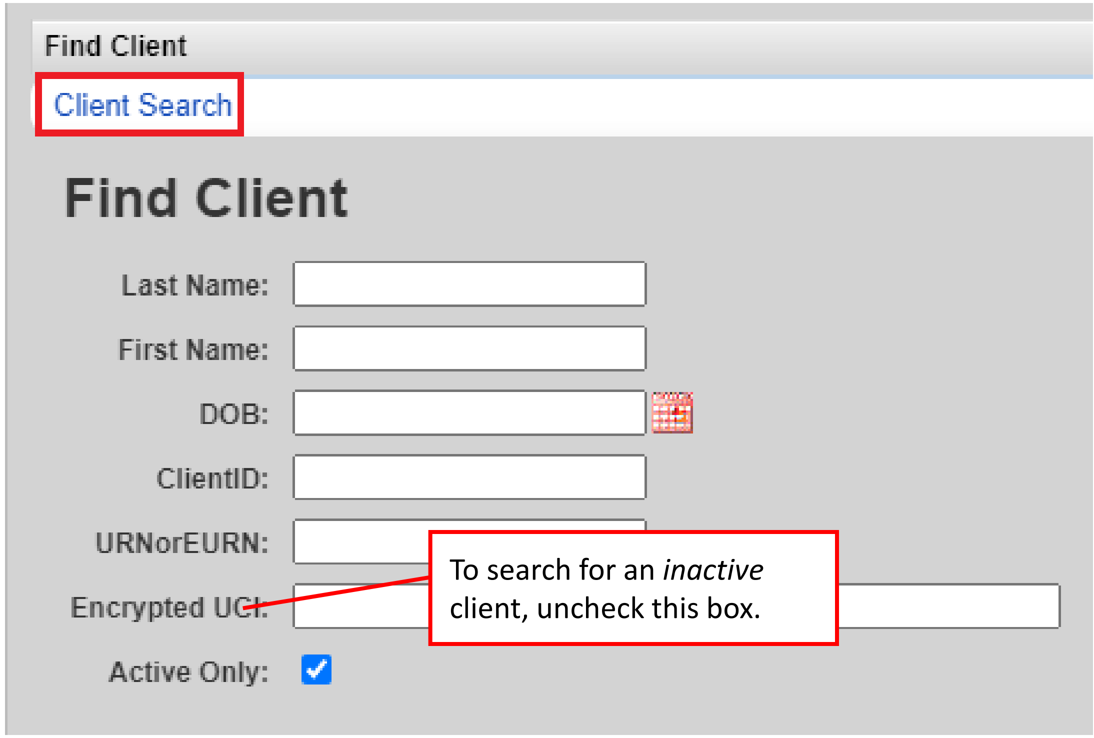
Finding a Client

Click Find Client from the main menu.



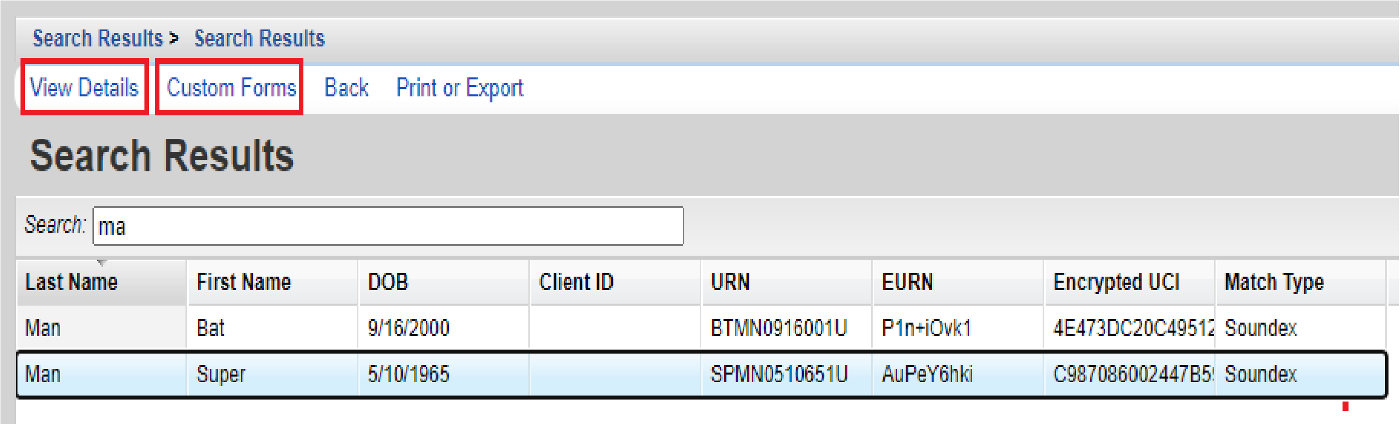
Finding a Client cont.

- Enter search text into any of the fields: Last Name, First Name, DOB, Client ID or URN and click Client Search.
- Users can search using the first few letters of the client's first or last name.
- If the caseload is small, users can search by using the * (wildcard) symbol in any field.



Finding a Client cont.

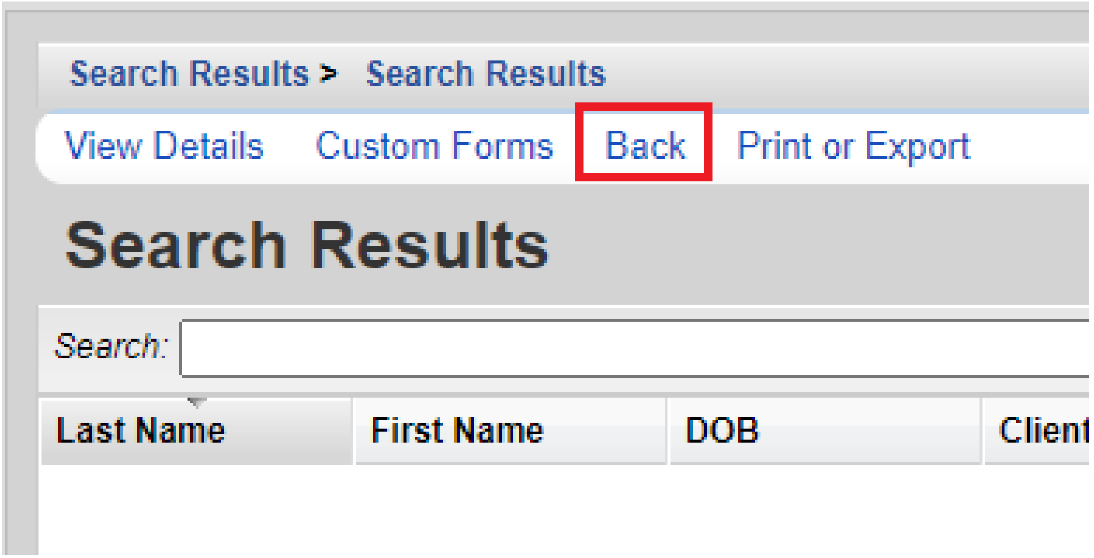
- The results screen will display a list of clients who match the search criteria.
- Select the client of interest, then click View Details to open the client record.



Last Name	First Name	DOB	Client ID	URN	EURN	Encrypted UCI	Match Type
Man	Bat	9/16/2000		BTMN0916001U	P1n+iOvk1	4E473DC20C4951	Soundex
Man	Super	5/10/1965		SPMN0510651U	AuPeY6hki	C987086002447B5	Soundex

Finding a Client cont.

If the client of interest does not appear on the search list, click Back to modify the search criteria.



Thank you

Please complete all the CAREWare 6 training modules appropriate for your role and download a copy of the CAREWare 6 User Manual.

[CAREWare 6 User Support Website]