



Oregon
Health
Authority



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

Level 3 - Restricted



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

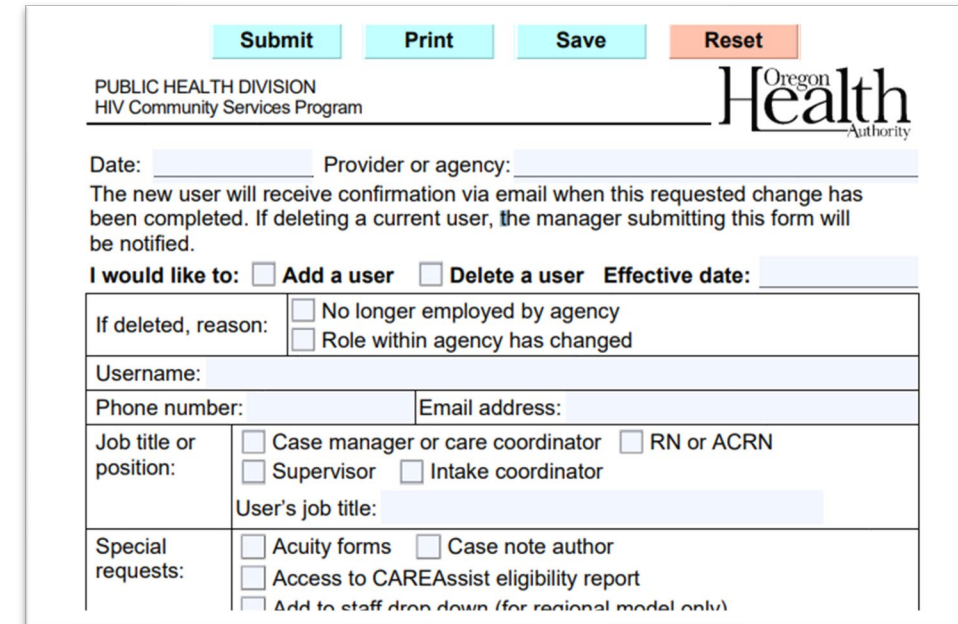
- CW6 has new features including:
 - Search fields
 - Drop down menus
- Scroll bar on the righthand side of the page.
- CW6 has “breadcrumbs” to track your steps in the database.
- Clients will open in new tabs – don’t forget to close out when finished!
- Top bar will show client name, DOB, and last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

The screenshot displays the CW6 web application interface. The browser window has two tabs: 'CW6 - lyantz' and 'CW6 - Pan, Peter'. The address bar shows the URL 'careware.oregon.gov/careware/rs/ClientInformation.htm'. The top navigation bar includes the HRSA logo, a breadcrumb trail 'Training > Pan, Peter (Birthdate: 8/4/1986, Last service:)', and the jProgr logo. A left sidebar contains a 'Customize' section with a list of menu items: Client Summary, Demographics, Client Report, Encounter Report, Services, Annual Review, Case Notes, Custom Forms, Vital Signs, Hospital Admissions, Medications, Labs, Screenings, Screening Labs, Immunizations, Diagnoses, Sharing Requests, and Referrals. The main content area is titled 'Demographics' and includes a 'Back' button. Below the title are several tabs: 'Personal Info', 'Change URN', 'Contact Information', 'Race/Ethnicity', and 'HIV Risk Factors'. The 'Personal Info' tab is active, displaying client details: 'Client ID: Training 5 Name: Pan, Peter Gender: Male DOB: 08/04/1986', 'PTPN0804861U', and '555 Tinkerbell Lane Madras, OR 97888 9718888888'. A red arrow points to the right side of the page, indicating a scroll bar. A 'Go To Top' link is visible in the top right corner of the main content area.



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.



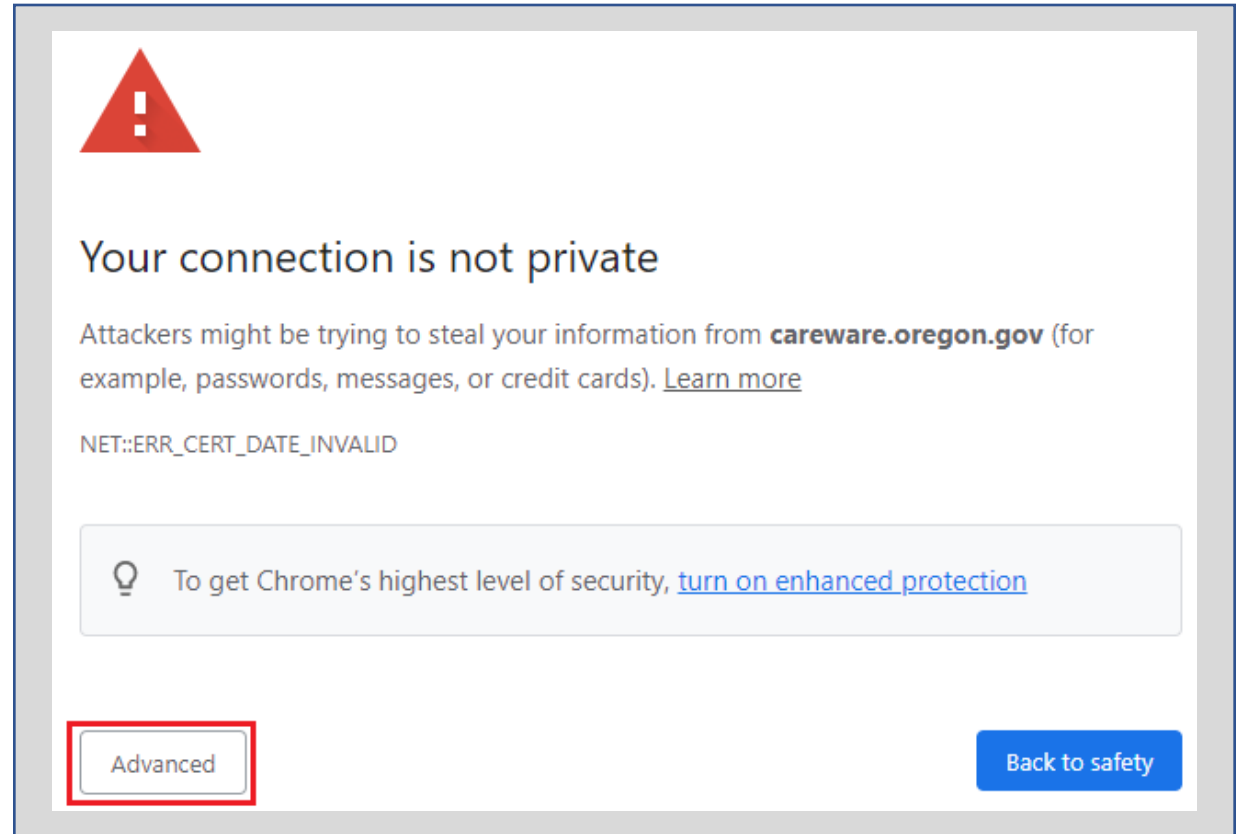
The screenshot shows a web form titled "PUBLIC HEALTH DIVISION HIV Community Services Program" with the Oregon Health Authority logo. At the top are buttons for "Submit", "Print", "Save", and "Reset". The form includes fields for "Date:" and "Provider or agency:". A notice states: "The new user will receive confirmation via email when this requested change has been completed. If deleting a current user, the manager submitting this form will be notified." Below this is a section "I would like to:" with checkboxes for "Add a user" and "Delete a user", followed by an "Effective date:" field. A table-like section for "If deleted, reason:" contains two checkboxes: "No longer employed by agency" and "Role within agency has changed". Below this are fields for "Username:", "Phone number:", and "Email address:". A "Job title or position:" section includes checkboxes for "Case manager or care coordinator", "RN or ACRN", "Supervisor", and "Intake coordinator", along with a "User's job title:" field. Finally, a "Special requests:" section has checkboxes for "Acuity forms", "Case note author", "Access to CAREAssist eligibility report", and "Add to staff drop down (for regional model only)".





Privacy Message

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





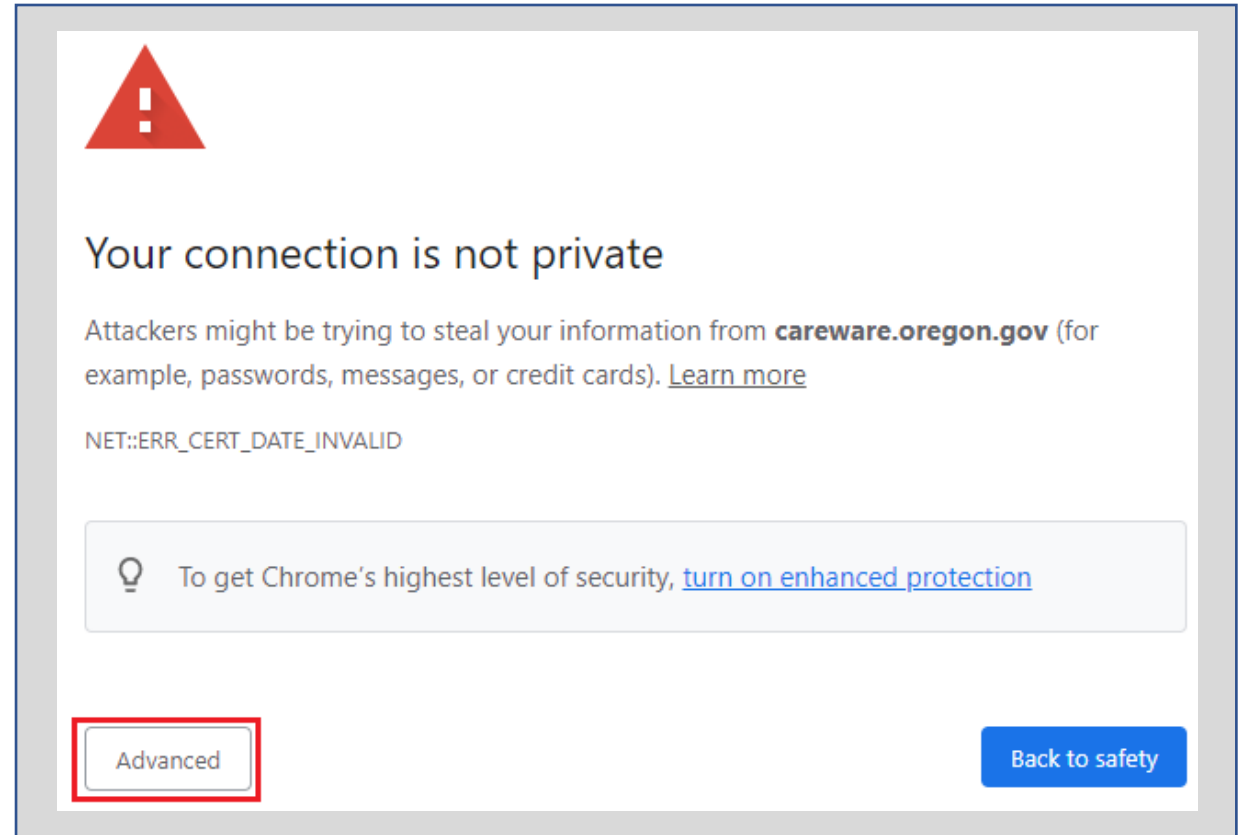
Privacy Message cont.

- 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.



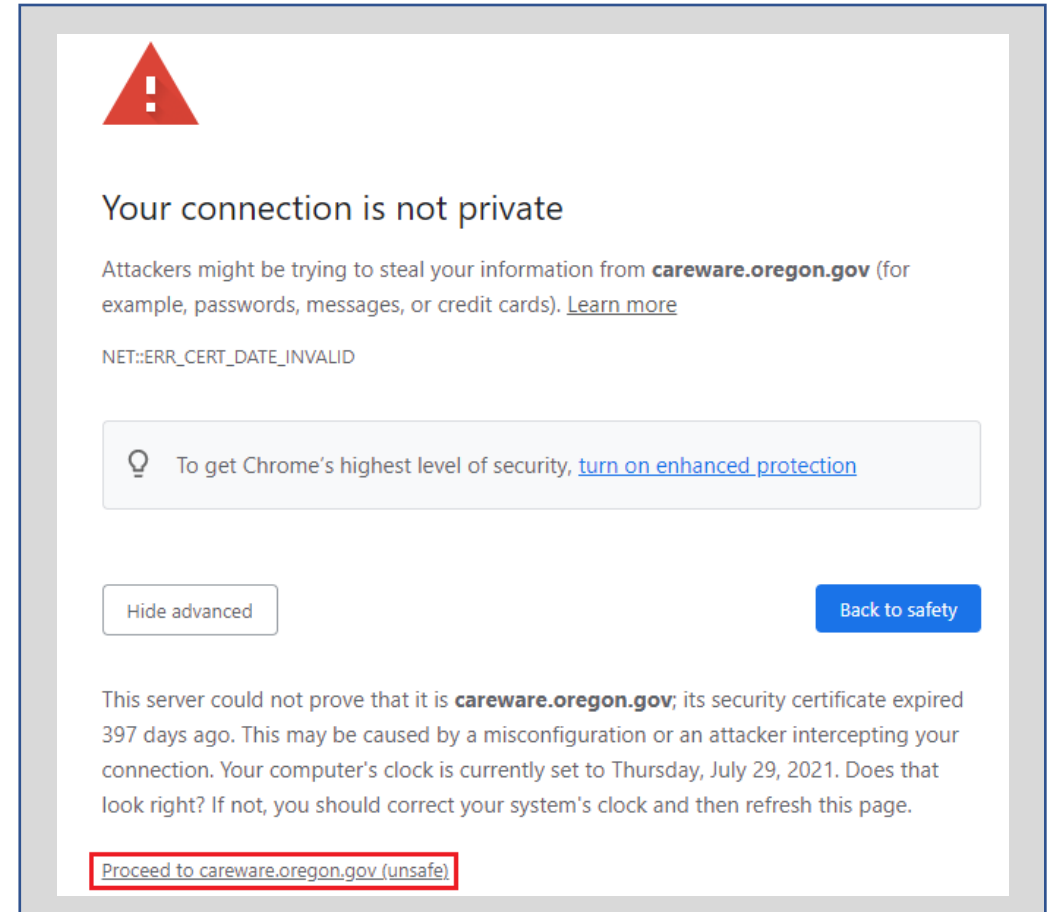
Privacy Message cont.

To navigate past this page, click Advanced.



Privacy Message cont.

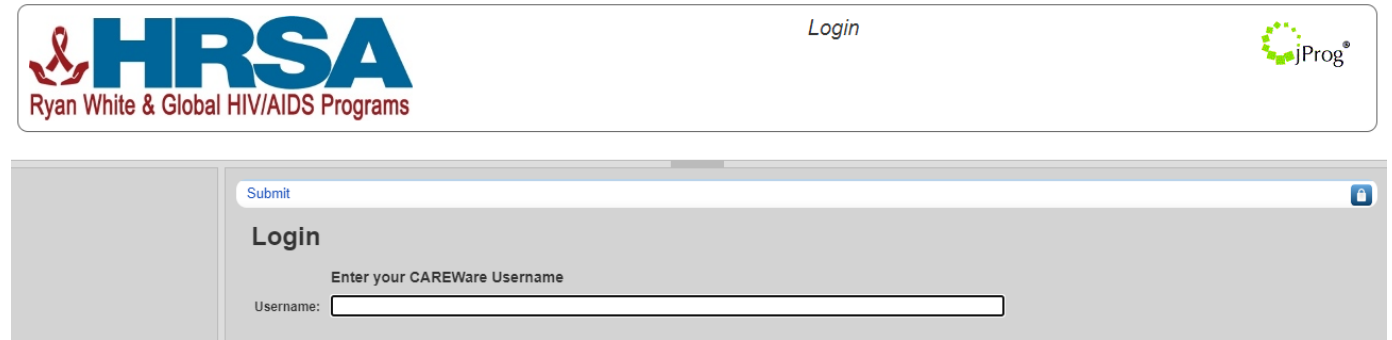
Text will appear below. Click
Proceed to careware.oregon.gov.





Privacy Message cont.

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



The screenshot shows the HRSA (HIV Ryan White & Global HIV/AIDS Programs) login interface. At the top, there is a header bar with the HRSA logo on the left, the word "Login" in the center, and the jProg logo on the right. Below the header, there is a login form with a "Submit" button at the top. The form is titled "Login" and contains a prompt "Enter your CAREWare Username". Below this prompt, there is a label "Username:" followed by a text input field. A small lock icon is visible in the top right corner of the form area.





Logging In

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

Enter your CW password
and click Submit.

This screenshot shows the top portion of the CW 6 website login interface. At the top left, there is a blue 'Submit' button enclosed in a red rectangular box. Below this, the word 'Login' is displayed in a large, bold, black font. Underneath 'Login', the text 'Enter your CAREWare Username' is shown in a smaller black font. To the left of the username input field is the label 'Username:'. The input field itself is a white rectangle with a thin black border, and it is highlighted with a red rectangular box.

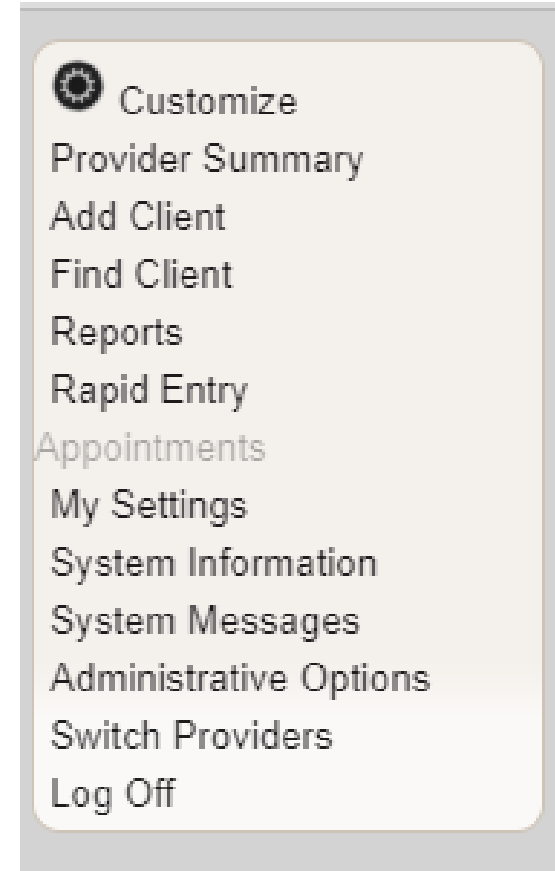
This screenshot shows the bottom portion of the CW 6 website login interface. At the top left, there is a blue 'Submit' button enclosed in a red rectangular box, followed by a blue 'Cancel' button. Below these buttons, the word 'Login' is displayed in a large, bold, black font. Underneath 'Login', the text 'Enter your password' is shown in a smaller black font. To the left of the password input field is the label 'Password:'. The input field itself is a white rectangle with a thin black border, and it is highlighted with a red rectangular box.





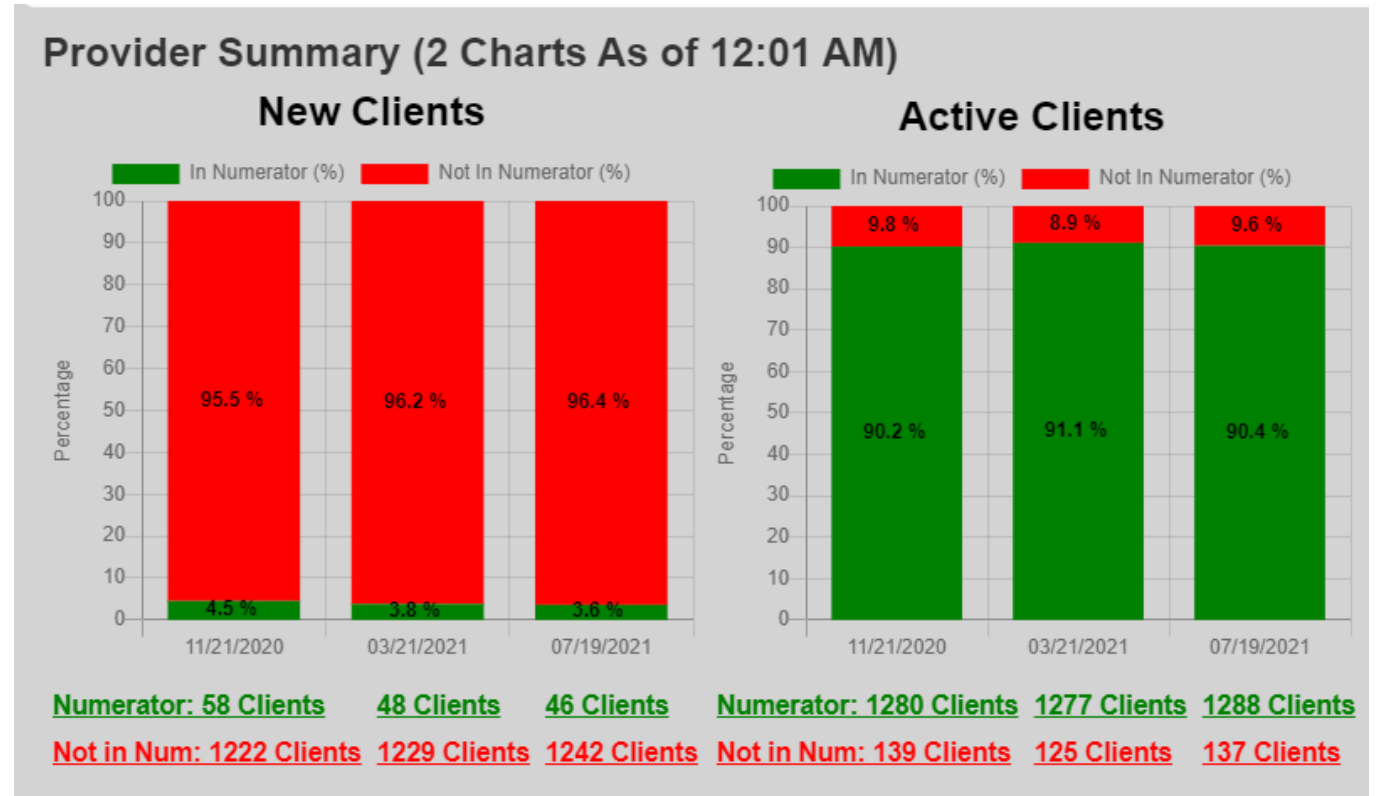
Provider Main Menu

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

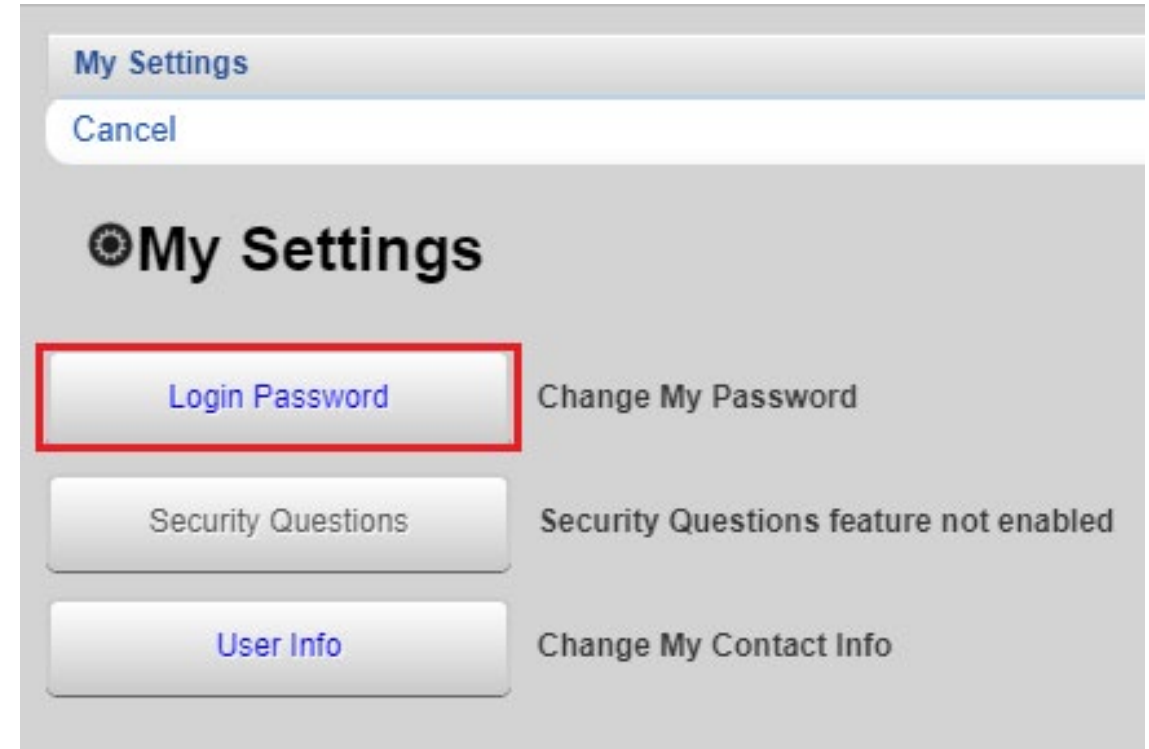
The image on the screen is an example of the Provider Summary, displaying both active clients and new clients.





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.

My Settings > Login Password

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

Login Password

New Password:

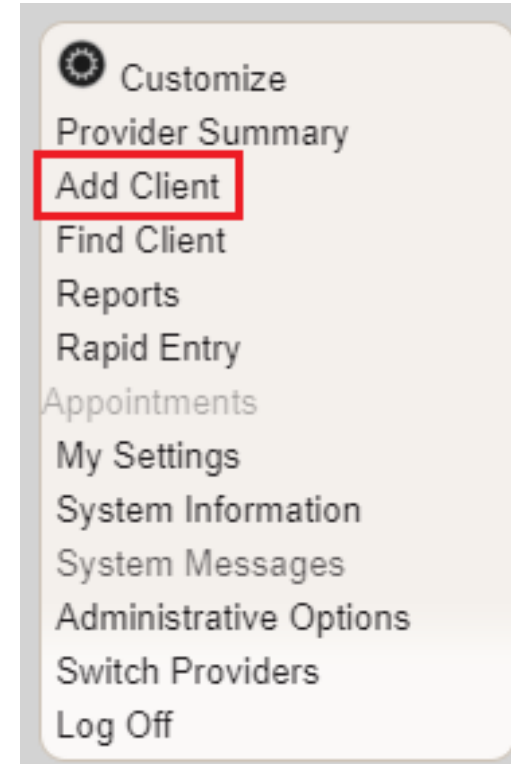
Repeat Password:





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

A screenshot of a web form titled 'Add' in a blue box at the top left. The form has a light gray background and contains the following fields: 'Last Name:' with a text input, 'First Name:' with a text input, 'Middle Name:' with a text input, 'Gender:' with a dropdown menu and a blue download icon, 'Date of Birth:' with a text input and a calendar icon, and 'DOB Estimated?:' with a checkbox. The 'Add' button is highlighted with a red rectangle.

A screenshot of the same 'Add' client form, but with the 'Gender:' dropdown menu open. The dropdown menu is highlighted with a red rectangle and lists the following options: 'Female', 'Male', 'Refused to Report', 'Transgender FtM', 'Transgender MtF', 'Transgender Other', and 'Unknown'. The 'Add' button is still highlighted with a red rectangle.





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.

Client Resolution

[View More Information](#) [Back](#) [Print or Export](#)

**The client you are adding is a possible duplicate.
Resolve the duplicate URNs if it is a new client.**

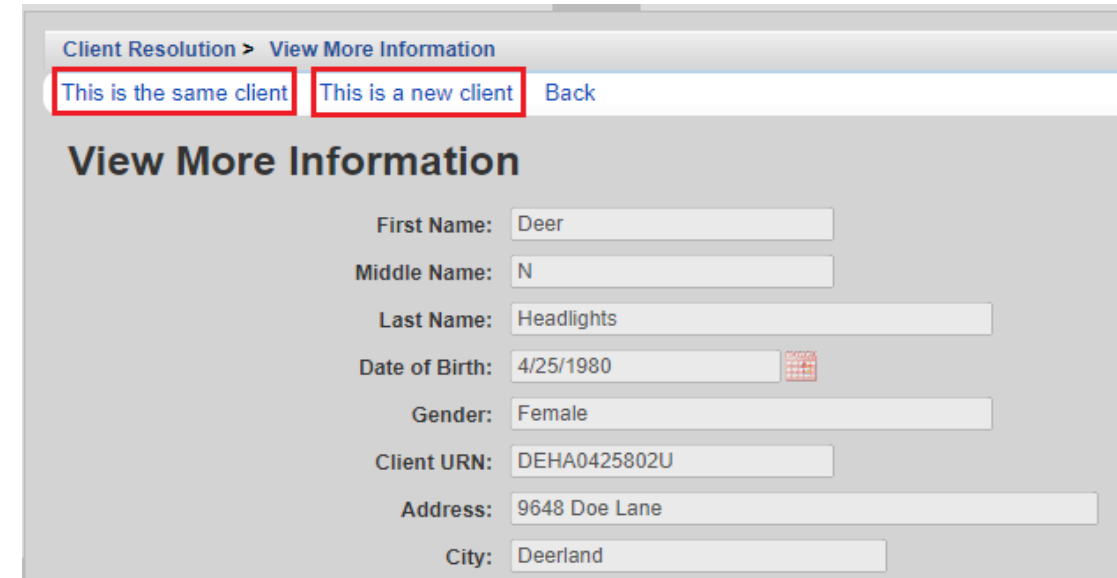
Search:

Last Name	First Name	Client URN
Headlights	Deer	DEHA0425802U



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.



Client Resolution > View More Information

[This is the same client](#) [This is a new client](#) [Back](#)

View More Information

First Name:

Middle Name:

Last Name:

Date of Birth: 

Gender:

Client URN:

Address:

City:

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.

Demographics

Back

Demographics

Personal Info	Client ID: Name: Headlights, Deer Gender: Female DOB: 04/01/1960
Change URN	DEHA0401602U
Contact Information	No description supplied
Race/Ethnicity	No description supplied
HIV Risk Factors	No description supplied
Vital Enrollment Status	Vital Status: Alive Current Status: Active
Eligibility	Not Eligible for Ryan White
HIV Status	Unknown
Common Notes	No description supplied
Provider Notes	No description supplied



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.

Find Client > Search Results > Demographics > Personal Info

Save Cancel

Personal Info

First Name: Deer

Middle Name: N

Last Name: Headlights

Preferred Name:

Preferred Language:

Gender: Female

Date of Birth: 04/25/1980

DOB Estimated?: ☐

Sex At Birth: Female

URN: DEHA0425802U

Encrypted URN: FvKjRV2b

Encrypted UCI: CFB47F04CE797123F0D64B8C7F0D5F325932DCC5U

Client ID: Training 1

Last Service: 7/27/2021

Last Poverty Level: 07/27/2021

CARE Assist Client: ☐

CARE Assist #:

Client Email Address: deerheadlights@testclient.com

Client Email Date: 07/01/2020





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 unchecked 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:

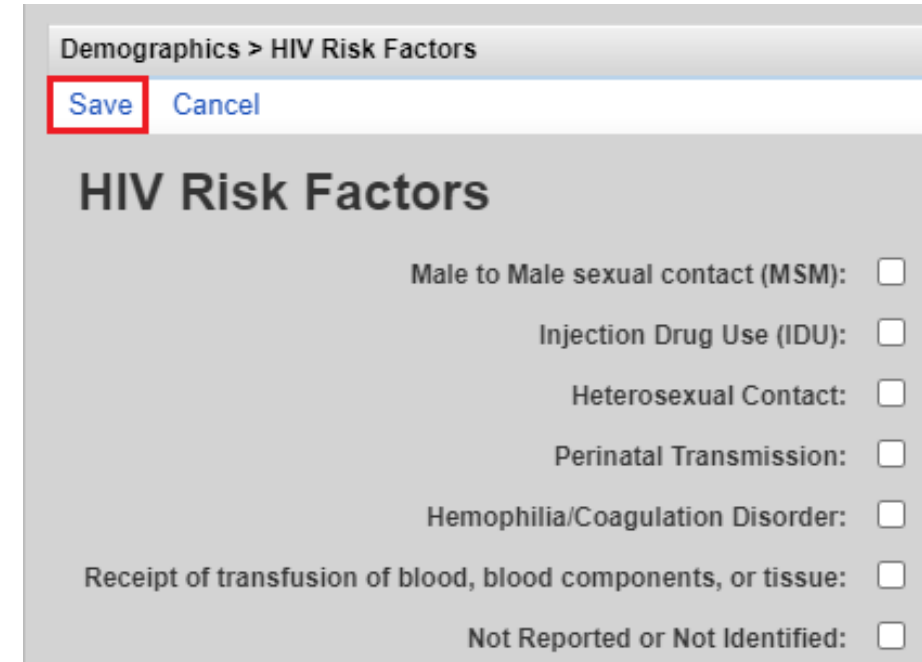
- Sex at Birth
- Gender
- Race
- Ethnicity
- Race/Ethnicity Subgroup





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.



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: ☐





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.

Find Client > Search Results > Demographics > Vital Enrollment Status

Save Cancel

Vital Enrollment Status

Enrollment Status: 

Enrollment Date: Active

Latest Eligibility Status: Inactive/Case Closed

Vital Status: Incarcerated

Case Closed Date: Referred or Discharged

Date of Death: Relocated

Removed





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.

Find Client > Search Results > Demographics > Vital Enrollment Status

Save Cancel

Vital Enrollment Status

Enrollment Status: Active

Enrollment Date: 7/1/2020

Latest Eligibility Status: Not Eligible for Ryan White

Vital Status: Alive

Case Closed Date:

Date of Death:



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.

Find Client > Search Results > Demographics > Eligibility

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

Eligibility History

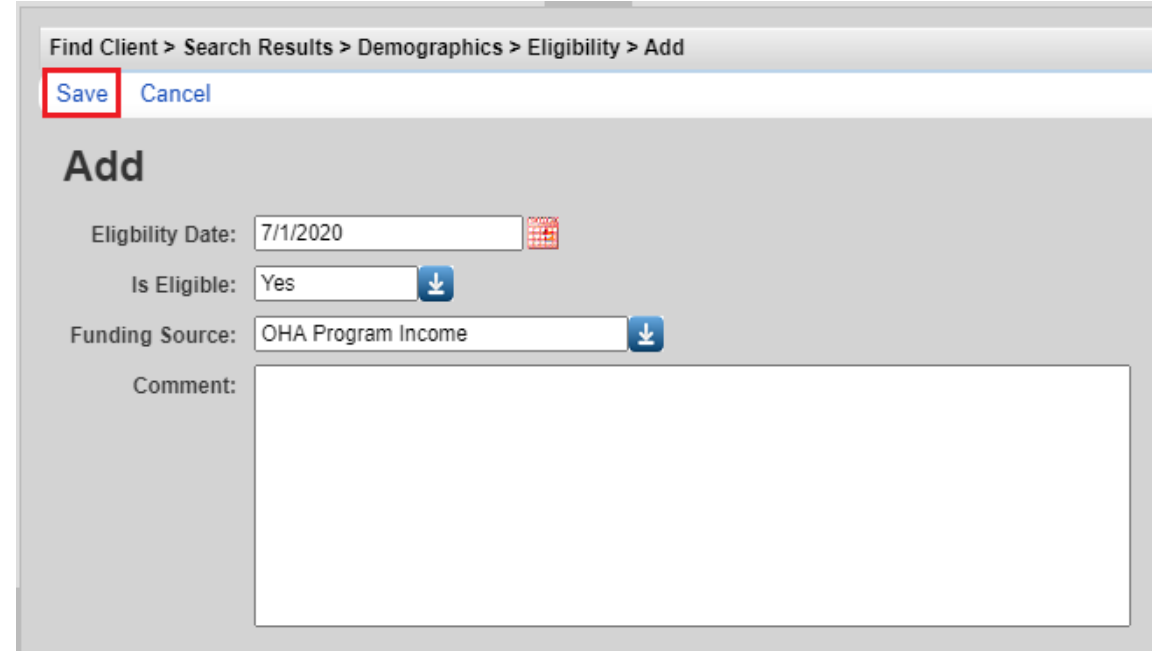
Search:

Date	Is Eligible	Funding Source	Ryan White Funded	Provider	Comment
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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.



The screenshot shows a web application interface for adding an eligibility record. The breadcrumb trail at the top reads: "Find Client > Search Results > Demographics > Eligibility > Add". Below the breadcrumb, there are two buttons: "Save" (highlighted with a red box) and "Cancel". The main section is titled "Add" and contains the following fields:

- Eligibility Date:** A text input field containing "7/1/2020" with a calendar icon to its right.
- Is Eligible:** A dropdown menu with "Yes" selected and a blue arrow icon to its right.
- Funding Source:** A dropdown menu with "OHA Program Income" selected and a blue arrow icon to its right.
- Comment:** A large, empty text area for additional notes.

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.

Find Client > Search Results > Demographics > HIV Status

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

HIV Status

HIV Status: HIV-positive (not AIDS) 

HIV+ Date: 8/1/2004 

Estimated?: ☒

AIDS Date: 

Estimated?: ☐

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.

Demographics

Vital Enrollment Status	Vital Status. Active Current Status. Active
Eligibility	Not Eligible for Ryan White
HIV Status	Unknown
Common Notes	No description supplied
Provider Notes	No description supplied





Common Notes cont.

- Add information into the field.
- Click Save.

Demographics > Common Notes

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

Common Notes

Common Notes:

Add a Common Note

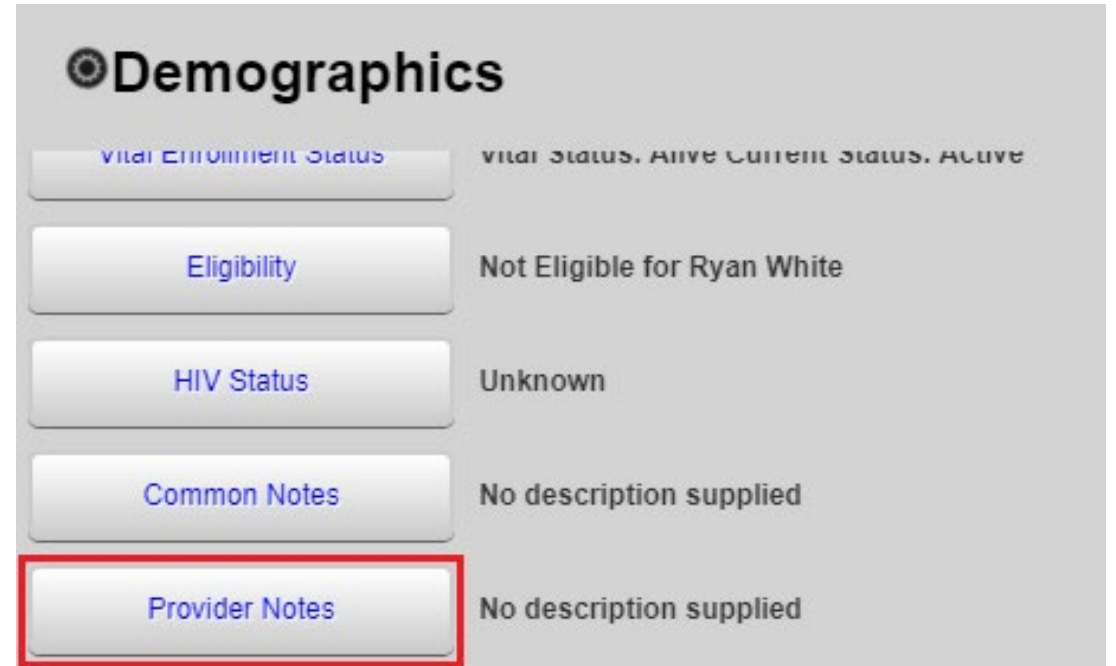
Common uses include: Preferred Name, best phone number, etc.





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.



Demographics

Vital Enrollment Status	Vital Status. Active Current Status. Active
Eligibility	Not Eligible for Ryan White
HIV Status	Unknown
Common Notes	No description supplied
Provider Notes	No description supplied





Provider Notes, cont.

- Add information into the field.
- Click Save.

Demographics > Provider Notes

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

Provider Notes

Provider Notes:

Add a Provider Note

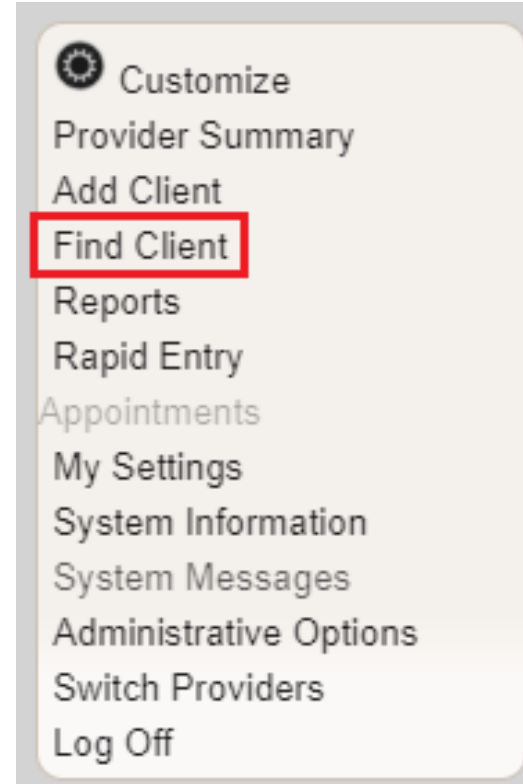
Common examples include: RN Case load, Case Manager, etc.





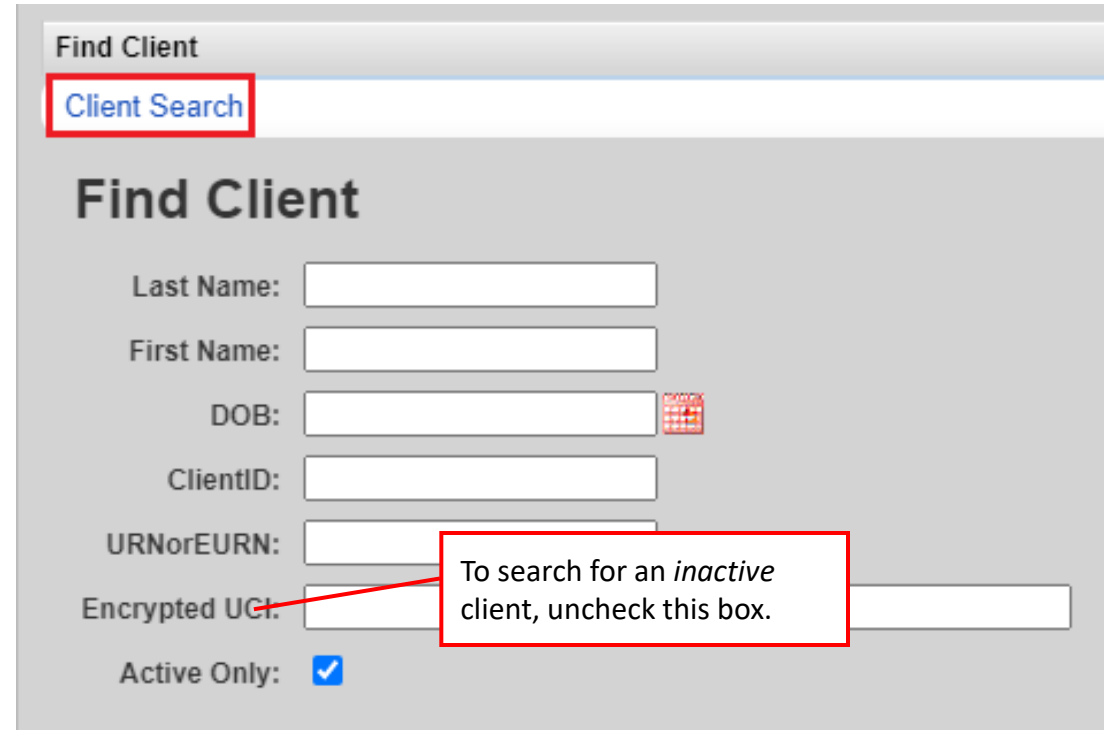
Finding a Client

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.



The screenshot shows a web interface titled "Find Client". At the top, there is a tab labeled "Client Search" which is highlighted with a red rectangular box. Below the tab, the main heading "Find Client" is displayed. The form contains several input fields: "Last Name:", "First Name:", "DOB:" (with a calendar icon), "ClientID:", "URNorEURN:", and "Encrypted UCI:". Below these fields is a checkbox labeled "Active Only:" which is currently checked with a blue checkmark. A red callout box points to this checkbox with the text: "To search for an *inactive* client, uncheck this box."



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.

Search Results > Search Results

[View Details](#) [Custom Forms](#) [Back](#) [Print or Export](#)

Search Results

Search:

Last Name	First Name	DOB	Client ID	URN	EURN	Encrypted UCI	Match Type
Man	Bat	9/16/2000		BTMN0916001U	P1n+iOvk1	4E473DC20C49512	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.

The screenshot shows a web interface for search results. At the top, there is a breadcrumb trail: "Search Results > Search Results". Below this, there is a row of four buttons: "View Details", "Custom Forms", "Back", and "Print or Export". The "Back" button is highlighted with a red rectangular border. Below the buttons, the heading "Search Results" is displayed in a large, bold font. Underneath the heading, there is a search input field with the placeholder text "Search:". Below the search field, there is a table with four columns: "Last Name", "First Name", "DOB", and "Client".

Last Name	First Name	DOB	Client
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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](#)

