



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



MODULE 2:

Case Management A

Topics:

- Add/append case notes
- Add/edit services
- Rapid service entry
- Annual review data
- Shared data
- Add/delete labs
- Referrals



Welcome!

The CAREWare 6 website is:

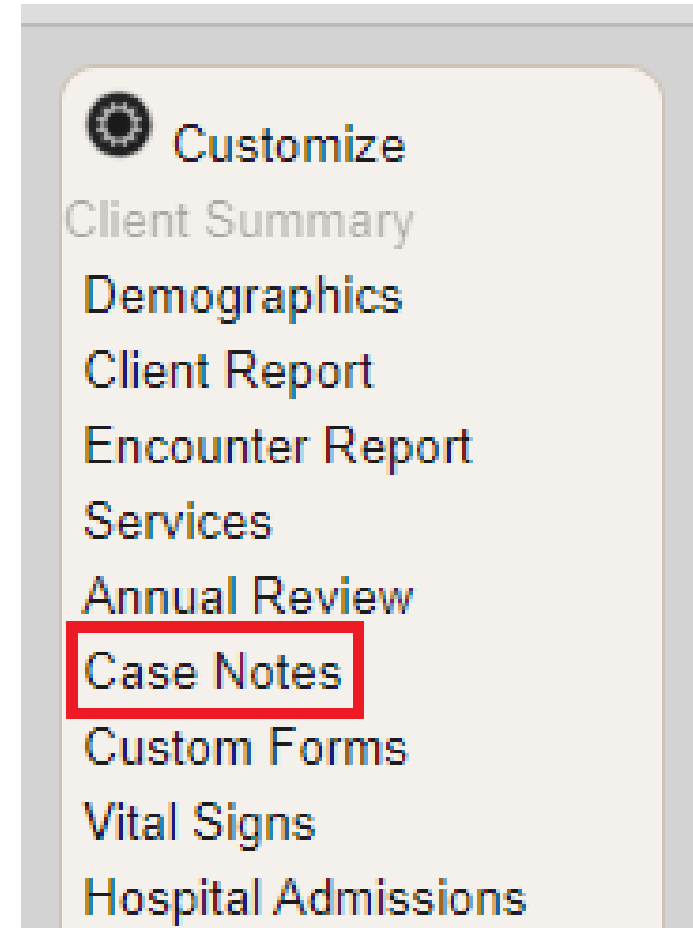
<https://careware.oregon.gov/careware/rs/index.htm>





Adding Case Notes

- To enter a case note, navigate to a client record.
- Click Case Notes from the client main menu.





Adding Case Notes with Templates cont.

- To enter a Case Note using a case note template.
 - Templates are required when documenting psychosocial screening, nursing assessment, MCM or CC triage, or Acuity changes.
 - See OHA Program Guidance or your Agency Supervisor for more information on mandatory/required case note templates.
- Click Case Note Entry.

Find Client > Search Results > Demographics > Case Notes

[Back](#)

Case Notes

Case Note Entry	Enter a new case note for the client
Case Note Report	Run a report on case notes entered for this client





Adding Case Notes with Templates cont.

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 Export

Case Notes

Search:

Date	Provider	Author	Case Note
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Adding Case Notes with Templates cont.

Search for the template of choice and check the box in the Select column. Click Continue Add With Templates.

Find Client > Search Results > Demographics > Case Notes > Case Note Entry > Add With Templates

[Continue Add With Templates](#) [Back](#) [Print or Export](#)

Case Note Template Manager

Search:

Select	Name	Text
☒	EFA Food - P	EFA Food CW service: EFA-Food Voucher; COVID EFA-Food Voucher The purpose of this EFA Food card/voucher that cannot be cor 1. Describe the client's specific purpose/use of this service ((if

Adding Case Notes with Templates cont.

- Enter the Date.
- Check Add Service box if you want to open the Service tab after completing the case note.
- Select a Case Note Author from the list if applicable.
- Enter text of Case Note.
- End note by typing your name and title.
- Spell Check if desired.
- Click Save.

Find Client > Search Results > Demographics > Case Notes > Case Note Entry > Add With Templates > Continue

[Save](#) [Apply EFA Food - P](#) [Back](#)

Continue Add With Templates

Date:

Add Service: ☐

Author:

Case Note:

EFA Food
CW service: EFA-Food Voucher; COVID EFA-Food Voucher

The purpose of this EFA Food card/voucher that cannot be converted to cash is for the purchase of food products and groceries (including hygiene products) necessary to maintain health for the client with an emergent need in a short-term manner. (COVID only: to support social distancing by providing home-delivered meals, meal services, food, to purchase hygiene products including Personal Protective Equipment (PPE) such as gloves or face coverings, and/or household cleaning supplies for





Adding Case Notes cont.

- To enter a Case Note without using a case note template:
- Click Case Note Entry.

The screenshot shows a web application interface for managing case notes. At the top, a breadcrumb trail reads: [Find Client](#) > [Search Results](#) > [Demographics](#) > [Case Notes](#). Below this is a [Back](#) button. The main heading is **Case Notes**, preceded by a gear icon. There are two primary buttons: [Case Note Entry](#) and [Case Note Report](#). The [Case Note Entry](#) button is highlighted with a red rectangular border. To the right of the [Case Note Entry](#) button is the text 'Enter a new case note for the client'. To the right of the [Case Note Report](#) button is the text 'Run a report on case notes entered for this client'.



Adding Case Notes cont.

Click Add.

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

[View](#) [Add](#) [Add With Templates](#) [Delete](#) [Manage Templates](#) [Help](#) [Back](#) [Print or Export](#)

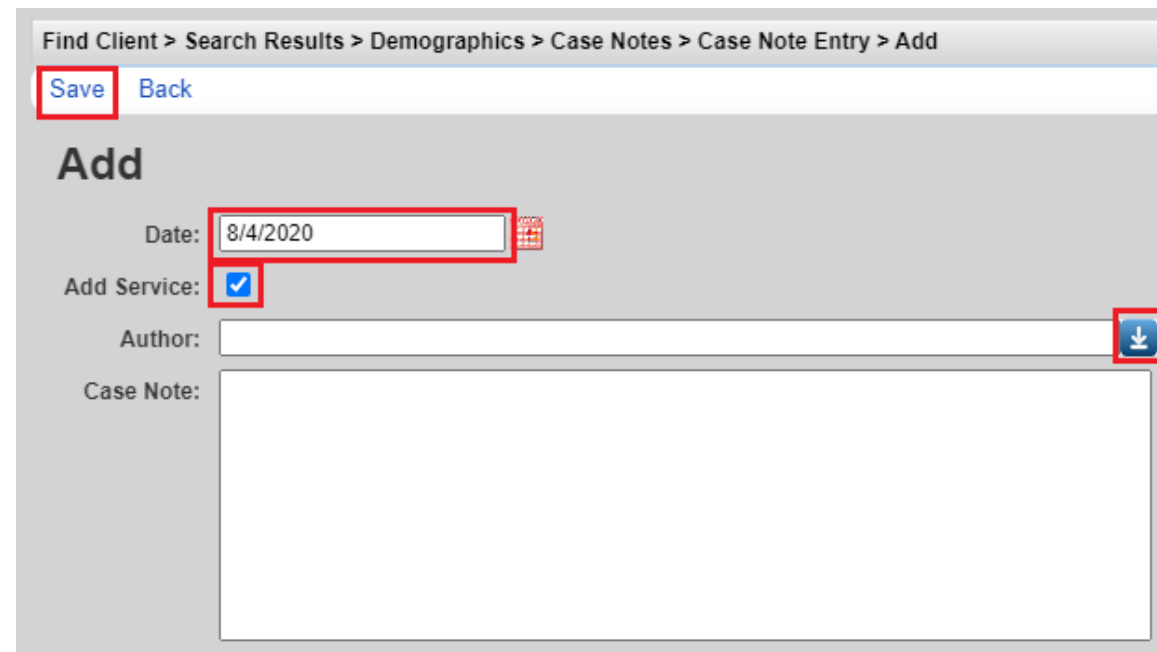
Case Notes

Search:

Date	Provider	Author	Case Note
------	----------	--------	-----------

Adding Case Notes cont.

- Enter the Date.
- Check Add service box if you want to open Service tab after completing the case note.
- Select a Case Note Author from the drop-down list if applicable.
- Enter text of Case Note.
- End note by typing your name and title.
- Spell Check if desired.
- Click Save.



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

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

Add

Date:

Add Service: ☒

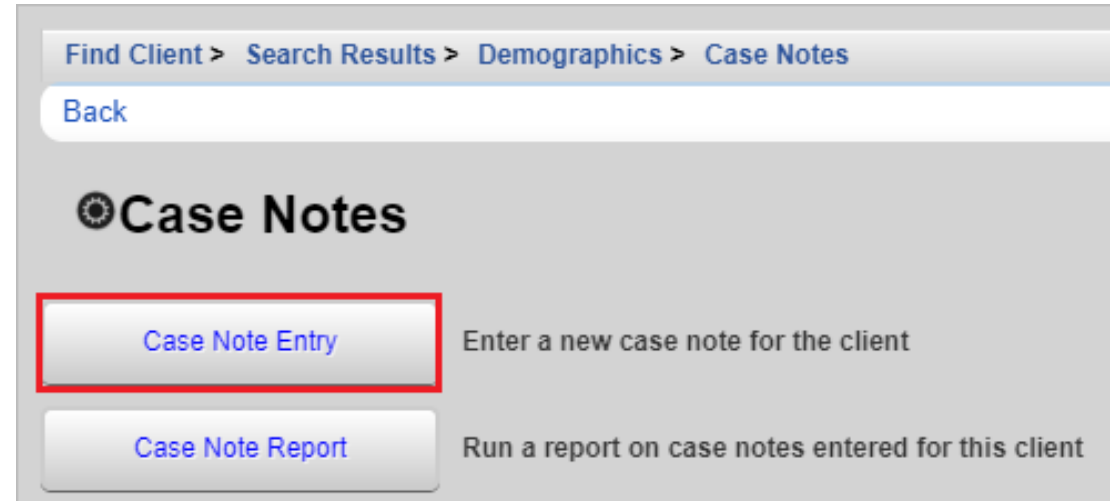
Author:

Case Note:



Appending Case Notes

- Case notes can be appended after saving if an error has been made.
- Case notes should only be deleted if entered into the wrong client record.
 - The local super user at your agency can edit and delete case notes.
- Click Case Note Entry.



The screenshot shows a web application interface for managing case notes. At the top, a breadcrumb trail reads: [Find Client](#) > [Search Results](#) > [Demographics](#) > [Case Notes](#). Below this is a [Back](#) button. The main heading is **Case Notes**, preceded by a gear icon. There are two primary buttons: [Case Note Entry](#) and [Case Note Report](#). The [Case Note Entry](#) button is highlighted with a red rectangular border. To the right of the [Case Note Entry](#) button is the text "Enter a new case note for the client". To the right of the [Case Note Report](#) button is the text "Run a report on case notes entered for this client".



Appending Case Notes cont.

Select the Case Note to be appended. Click View.

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

View Add Add With Templates Delete Manage Templates Help Back Print or Export

Case Notes

Search:

Date	Provider	Author	Case Note
08/04/2020	Polk County		This is a case note
08/04/2020	Polk County		EFA Food CW service: EFA–Food Voucher; COVID EF



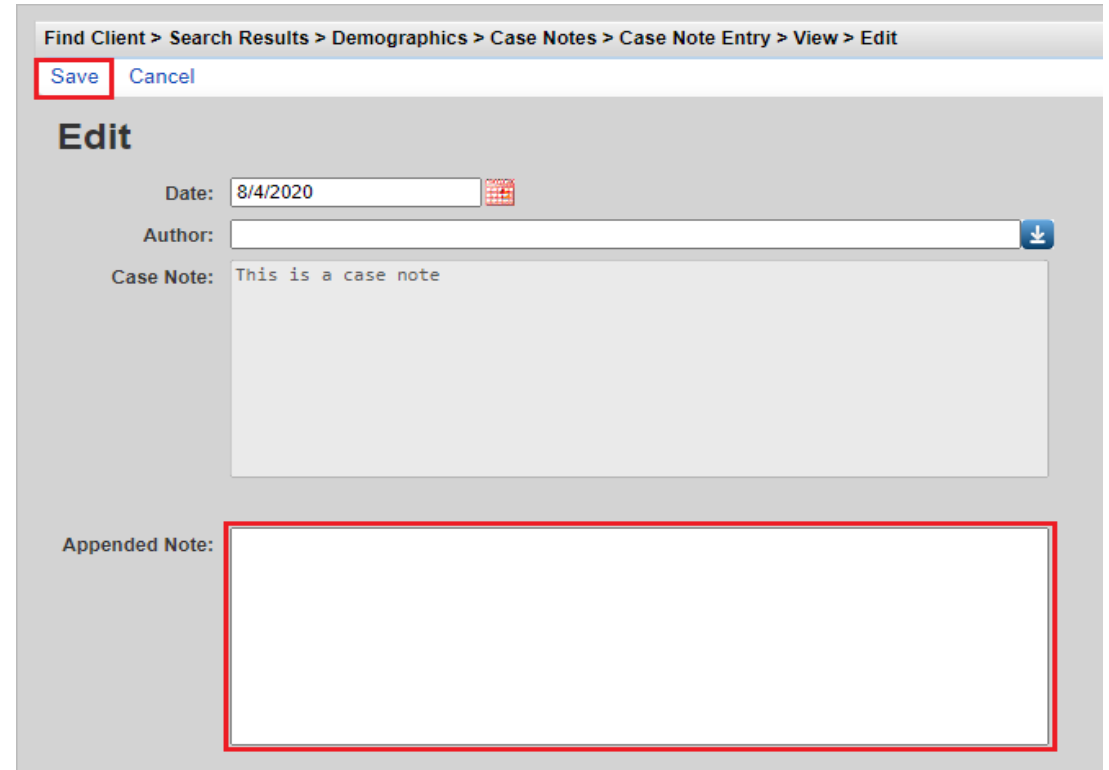
Appending Case Notes cont.

Click Edit.

The screenshot shows a web interface with a top navigation bar containing two buttons: 'Edit' (highlighted with a red box) and 'Back'. Below the navigation bar is a section titled 'View'. This section contains three input fields: a 'Date' field with the value '8/4/2020' and a calendar icon, an 'Author' field, and a 'Case Note' field containing the text 'This is a case note'. Below these fields is an 'Appended Note' field, which is currently empty.

Appending Case Notes cont.

- Enter text into the Appended Note field.
- Click Save.



The screenshot shows a web application interface for editing case notes. At the top, a breadcrumb trail reads: "Find Client > Search Results > Demographics > Case Notes > Case Note Entry > View > Edit". Below this, there are two buttons: "Save" (highlighted with a red box) and "Cancel". The main section is titled "Edit" and contains the following fields:

- Date:** A text field containing "8/4/2020" with a calendar icon to its right.
- Author:** A text field with a dropdown arrow icon on the right.
- Case Note:** A large text area containing the text "This is a case note".
- Appended Note:** A large, empty text area at the bottom, outlined with a red box, intended for entering new text.



A Note about Case Notes

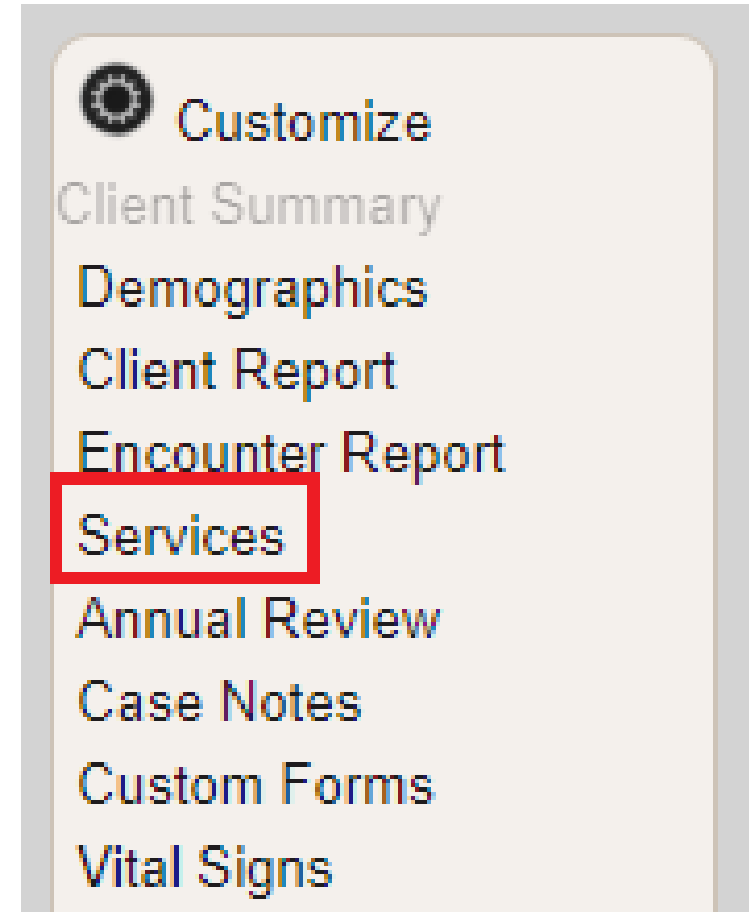
If two case notes have the same date, they may appear in different order at different times. If you want to indicate the order the case notes were written, indicate the time the case note was written in the body of the case note.





Adding Client Services

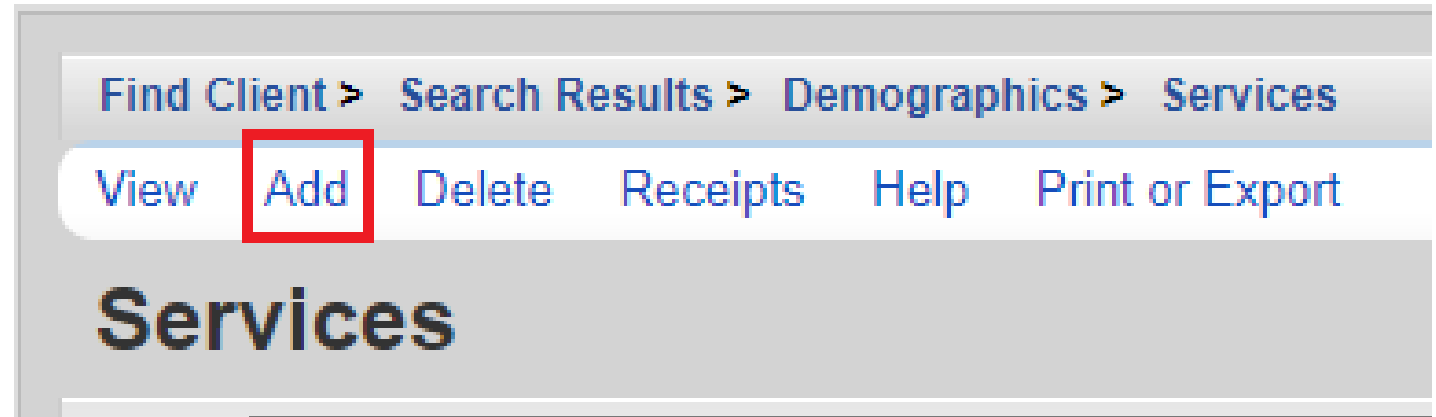
- To enter a new service into CAREWare, navigate to the client record.
- Click Services on the main menu.





Adding Client Services

Click Add.



Adding Client Services cont.

- Enter the Date of service, not the date of data entry.
- Select the service in the Service Name drop-down menu, or type in the first few letters of the service name and CAREWare will display matching services within the list.

Find Client > Search Results > Demographics > Services

[Save](#) [Save And Add](#) [Add Receipt](#) [Back](#)

Add Service

Client: Cutie Pie

Date: 07/29/2021

Contract: OHA FY 20-21 TRAINING ONLY

Service Category: Case Management (non-medical)

Service Name: Intake Coordination General (IC)

Units: 1

Price: 0.00 \$

Total: 0.00 \$

Regional Project Staff1:





Adding Client Services cont.

- The next screen will show the Contract associated with the selected subservice name.
- Enter the quantity of Units provided; CAREWare will default to 1.
- Enter the Price of the unit if applicable; CAREWare will calculate the Total
- Add Service Comment if needed.
- Select the Care Coordinator associated with the service.
- Click Save.

Note: Additional service fields may be required to be completed depending upon the provider or subservice.



Adding Client Services cont.

Find Client > Search Results > Demographics > Services

[Save](#) [Save And Add](#) [Add Receipt](#) [Back](#)

Add Service

Client:

Date: 

Contract: 

Service Category: 

Service Name: 

Units:

Price: \$

Total: \$

Regional Project Staff1: 





Editing Client Services

- Select the service to edit in the Services list.
- Click View.

Find Client > Search Results > Demographics > Services

View Add Delete Receipts Help Print or Export

Services

Search:

Date	Subservice	Contract	Units
07/15/2020	Non-RN Attempt Clt	Non RW Funded FY	1



Editing Client Services cont.

Click Edit on the next screen and make the needed changes.

Find Client > Search Results > Demographics > Services > View

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

View

Provider: Polk County Health Department

Date: 7/15/2020

Service Name: Non-RN Attempt Clt. Contact

Click Save.

Find Client > Search Results > Demographics > Services > View > Edit

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

Edit

Provider: Polk County Health Department





Deleting Client Services

Select the service to be deleted,
then click Delete.

Find Client > Search Results > Demographics > Services

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

Services

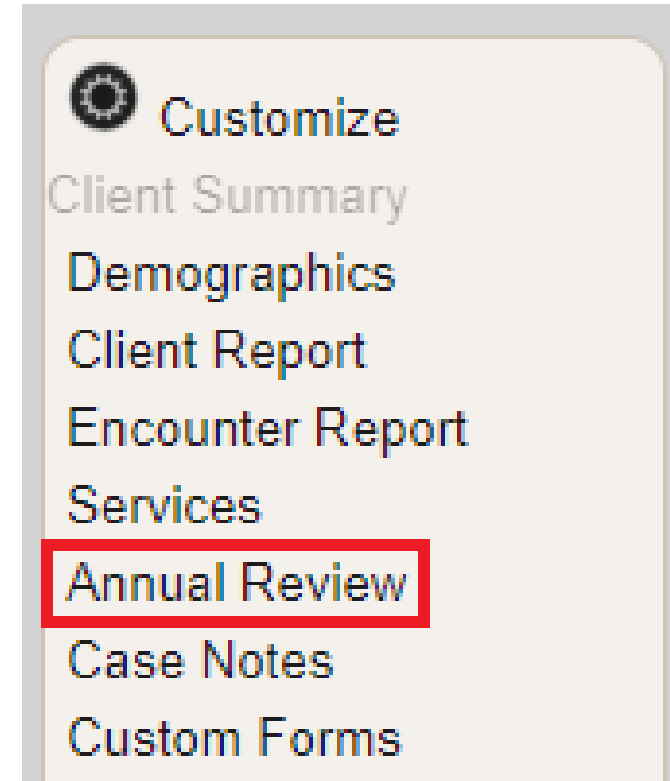
Search:

Date	Subservice	Contract	Units
07/15/2020	Non-RN Attempt Clt	Non RW Funded FY	1



Annual Review Data

To add client Annual Review data, click Annual Review from the client main menu.





Annual Review Data cont.

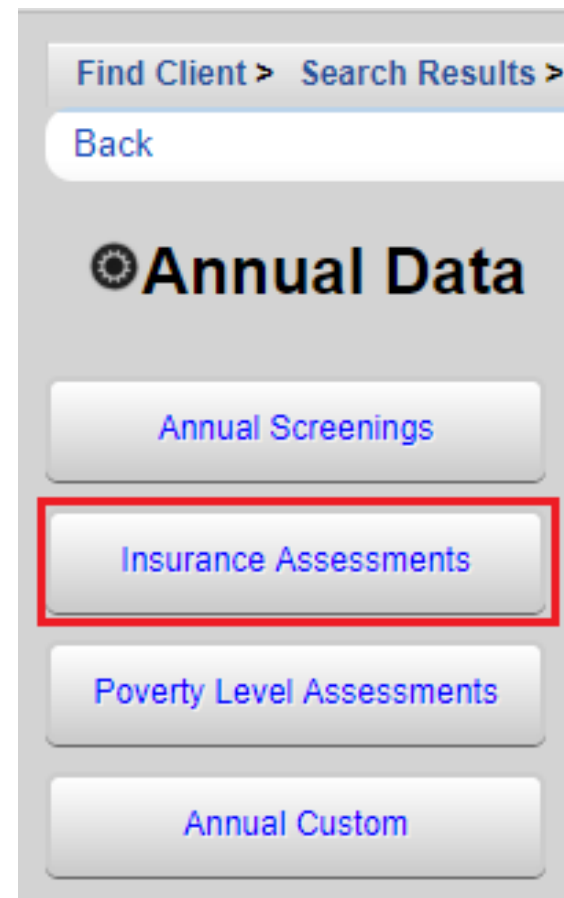
⚙️ Annual Data	
Annual Screenings	View or Edit the client's Annual Screenings
Insurance Assessments	View or Edit the client's Insurance Assessments
Poverty Level Assessments	View or Edit the client's Poverty Level Assessments
Annual Custom	View or Edit the client's Custom Annual data
Quarter 1	View or Edit the client's Custom Quarter 1 data
Quarter 2	View or Edit the client's Custom Quarter 2 data
Quarter 3	View or Edit the client's Custom Quarter 3 data
Quarter 4	View or Edit the client's Custom Quarter 4 data
Annual Review Summary	View or Edit the client's Annual Review Summary data



Annual Review Data cont.

Insurance Assessments:

- Click Insurance Assessments.



Annual Review Data cont.

Click Add.

Find Client > Search Results > Demographics > Annual Data > Insurance Assessments

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

Insurance Assessments

Search:

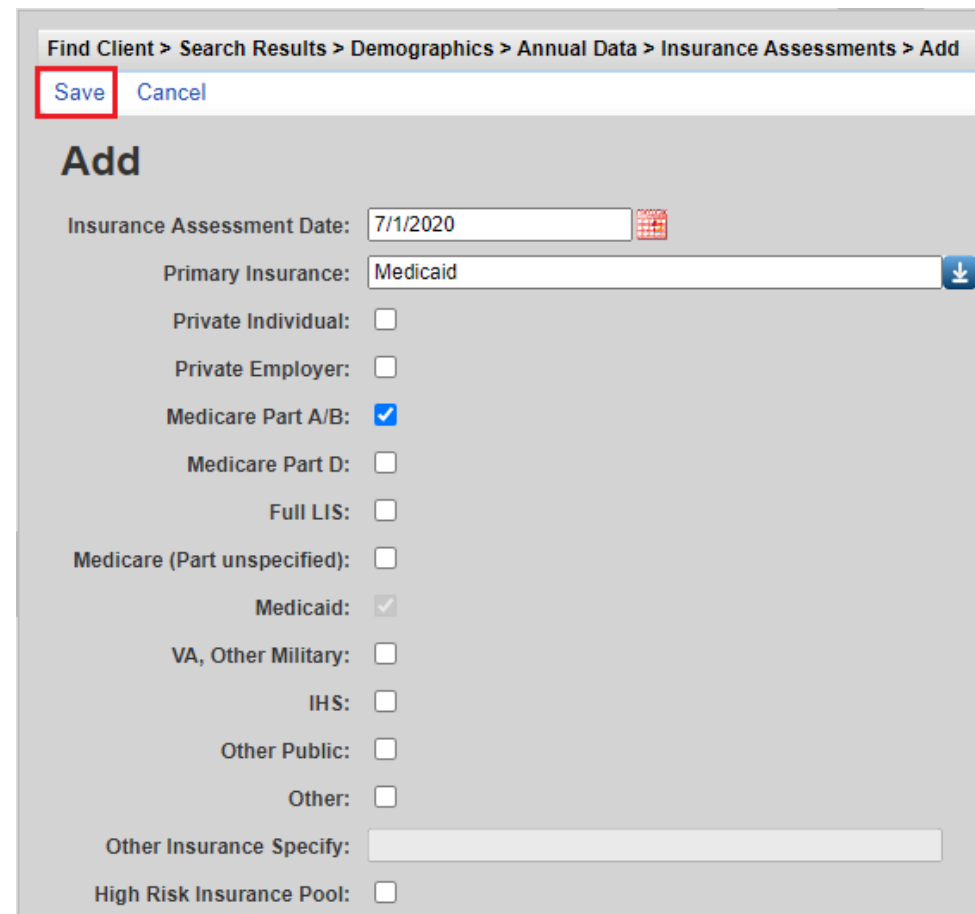
Date	Primary Insurance	Secondary Insurance	Hi
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Annual Review Data cont.

- Enter the Primary Insurance from the drop-down list for the client.
- Enter the Insurance Assessment Date.
 - If the client has more than one insurance plan, check the applicable boxes.
- Click Save.

Please refer to the [CAREWare 6 User Guide](#) for more guidance on insurance types.



The screenshot shows the 'Add' form for Insurance Assessments in CAREWare 6. The breadcrumb trail at the top reads: 'Find Client > Search Results > Demographics > Annual Data > Insurance Assessments > Add'. Below the breadcrumb, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red box. The form fields are as follows:

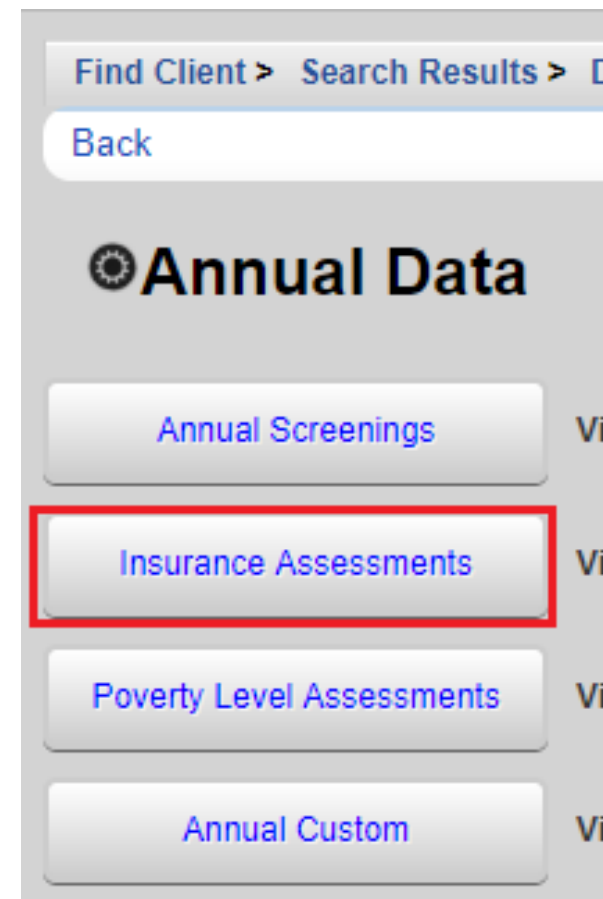
- Insurance Assessment Date: 7/1/2020
- Primary Insurance: Medicaid (dropdown menu)
- Private Individual: ☐
- Private Employer: ☐
- Medicare Part A/B: ☒
- Medicare Part D: ☐
- Full LIS: ☐
- Medicare (Part unspecified): ☐
- Medicaid: ☒
- VA, Other Military: ☐
- IHS: ☐
- Other Public: ☐
- Other: ☐
- Other Insurance Specify:
- High Risk Insurance Pool: ☐



Annual Review Data cont.

Federal Poverty Level:

- Click Poverty Level Assessments.





Annual Review Data cont.

Click Add.

[Find Client](#) > [Search Results](#) > [Demographics](#) > [Annual Data](#) > [Poverty Level Assessments](#)

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

Poverty Level Assessments

Search:

Date	Household Size	Household Income	Individual Income	Federal Poverty Le
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Annual Review Data cont.

- Enter the annual Household Size, Household Income, Individual Income and the Date of data entry.
- Click Save.
- CAREWare will automatically calculate the poverty level from the information provided.

Please refer to the [HIV Community Services Program Support Services Guide](#) for instructions for determining household income and household size.

Find Client > Search Results > Demographics > Annual Data

Save Cancel

Edit

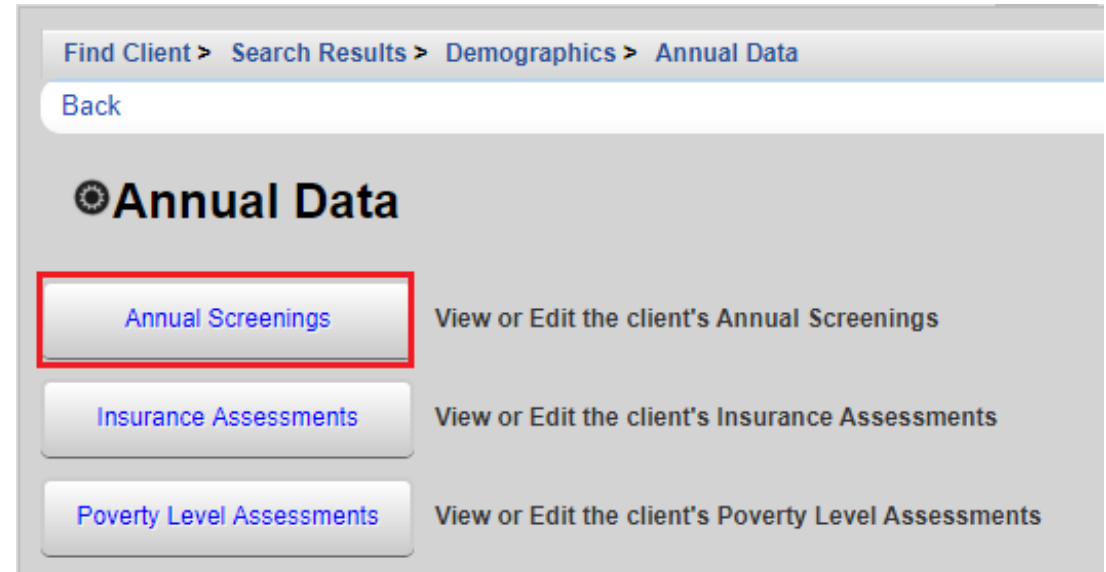
Date:	8/4/2020	
Household Size:	2	
Household Income:	25000.00	\$
Individual Income:	10000.00	\$





Annual Review Data cont.

- Annual Screenings:
 - Primary HIV Medical Care, Housing Arrangement, Mental Health and Substance Abuse.
- Click Annual Screenings on the Annual Data screen.





Annual Screenings

Click Add.

Find Client > Search Results > Demographics > Annual Data > Annual Screenings

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

Annual Screenings

Search:

Date	Type	Result	Counsele
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HIV Primary Care

Select Primary HIV Medical Care from the Type drop-down list.

Find Client > Search Results > Demographics > Annual Data > Annual Screenings > Add

Save Cancel

Add

Date: 8/4/2020 

Type: 

Result: HIV Primary Care 

Counseled By: HIV Risk Reduction Counseling 

Housing Arrangement

Mental Health

Substance Abuse



HIV Primary Care cont.

- Enter the source of Primary HIV Medical Care from the Result drop-down list.
 - If the psychosocial and assessment is completed, Unknown should not be used.

Find Client > Search Results > Demographics > Annual Data > Annual Screenings > Add

Save Cancel

Add

Date: 8/4/2020 

Type: HIV Primary Care 

Result: 

Counseled By:

- Emergency Room
- Hospital outpatient center
- No primary source of care
- Other
- Private practice
- Publicly-funded clinic or health dept.
- Unknown

HIV Primary Care cont.

- Enter the Date of data entry.
- Click Save.

Find Client > Search Results > Demographics > Annual Data > Annual Screenings > Add

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

Add

Date: 

Type: 

Result: 

Counseled By:



Housing Arrangement

Select Housing Arrangement from the Type drop-down list.

Find Client > Search Results > Demographics > Annual Data > Annual Screenings > Add

Save Cancel

Add

Date: 8/4/2020 

Type: 

Result: HIV Primary Care 

Counseled By: HIV Risk Reduction Counseling 

Housing Arrangement

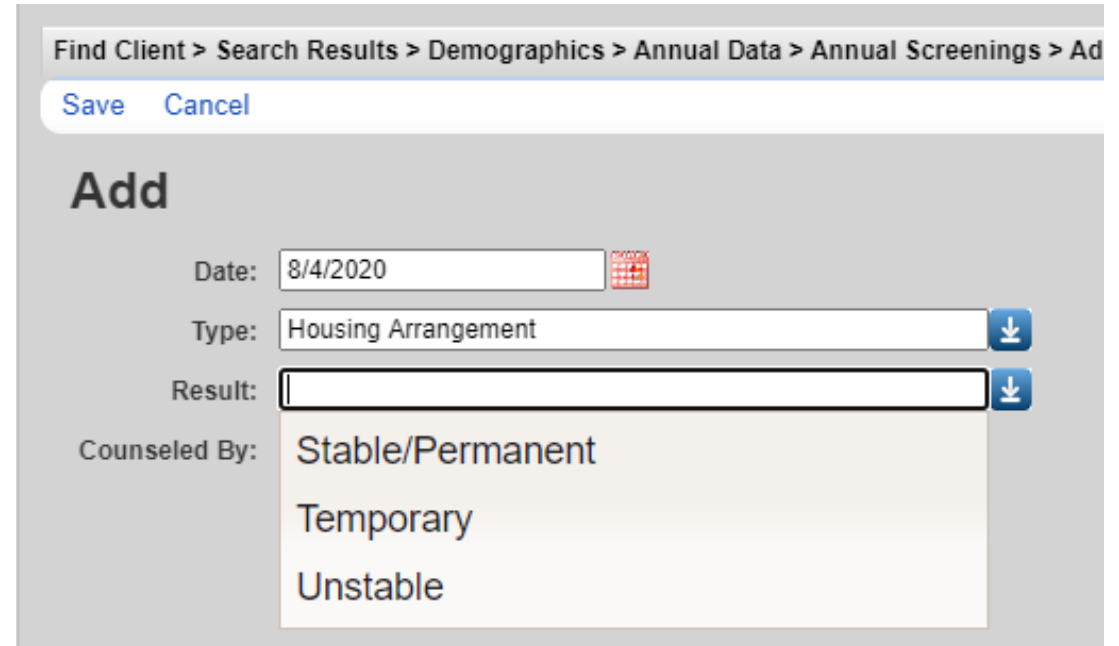
Mental Health

Substance Abuse

Housing Arrangement cont.

- Enter the Housing Arrangement of the client from the Result drop-down list.
- Enter the Date of data entry.
- Click Save.

Please refer to the [CAREWare 6 User Manual](#) for additional guidance and definitions of housing arrangements



The screenshot shows a web application interface for adding a housing arrangement. At the top, a breadcrumb trail reads: "Find Client > Search Results > Demographics > Annual Data > Annual Screenings > Ad". Below this is a "Save Cancel" button bar. The main section is titled "Add". It contains the following fields:

- Date:** A text input field containing "8/4/2020" with a calendar icon to its right.
- Type:** A dropdown menu with "Housing Arrangement" selected and a blue arrow icon to its right.
- Result:** A dropdown menu that is currently empty, with a blue arrow icon to its right.
- Counseled By:** A text input field containing "Stable/Permanent". Below this field, a list of options is displayed: "Temporary" and "Unstable".

Mental Health

Select Mental Health from the Type drop-down list.

Find Client > Search Results > Demographics > Annual Data > Annual Screenings > Add

Save Cancel

Add

Date: 8/4/2020 

Type: 

Result: HIV Primary Care 

Counseled By: HIV Risk Reduction Counseling 

Housing Arrangement

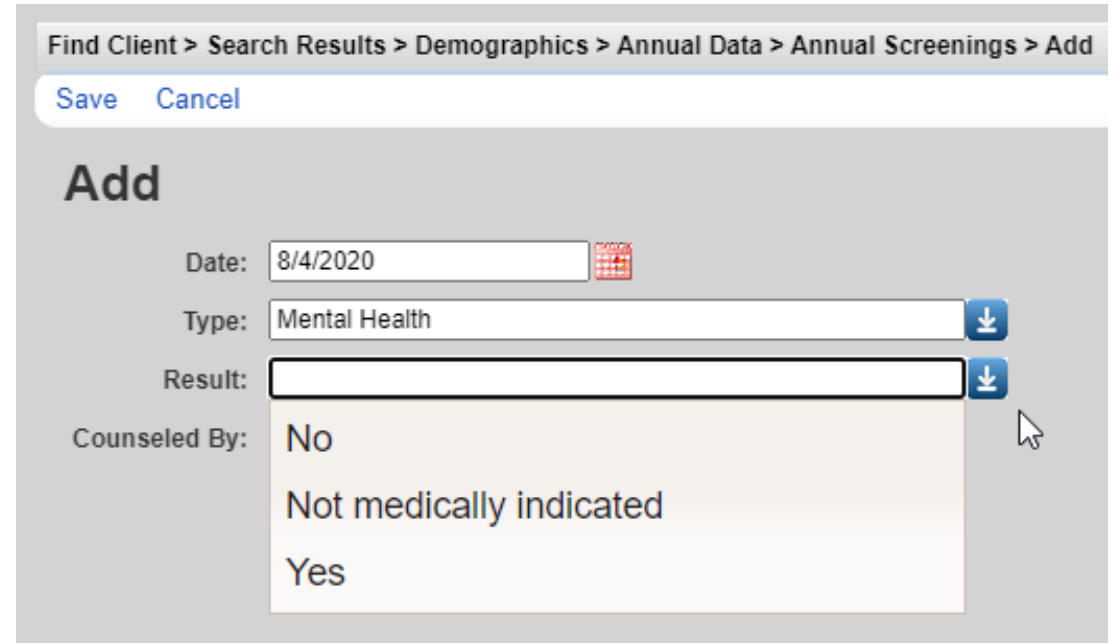
Mental Health

Substance Abuse

Mental Health cont.

- Enter the Mental Health data from the Result drop-down list.
 - Do not use the 'Not medically indicated' option.
- Enter the Date of data entry.
- Click Save.

Please refer to the [CAREWare 6 User Manual](#) for additional guidance and definitions of Mental Health Results.



The screenshot shows a web application interface for adding annual screening data. At the top, a breadcrumb trail reads: "Find Client > Search Results > Demographics > Annual Data > Annual Screenings > Add". Below this are "Save" and "Cancel" buttons. The main section is titled "Add" and contains the following fields:

- Date:** A text input field containing "8/4/2020" with a calendar icon to its right.
- Type:** A dropdown menu with "Mental Health" selected and a downward arrow button.
- Result:** A dropdown menu that is currently open, showing three options: "No", "Not medically indicated", and "Yes". A mouse cursor is pointing at the "Yes" option.
- Counseled By:** A text input field containing "No".





Substance Abuse

Select Substance Abuse from the Type drop-down list.

Find Client > Search Results > Demographics > Annual Data > Annual Screenings > Add

Save Cancel

Add

Date: 8/4/2020 

Type: 

Result: HIV Primary Care 

Counseled By: HIV Risk Reduction Counseling 

Housing Arrangement

Mental Health

Substance Abuse



Substance Abuse cont.

- Enter the Substance Abuse data from the Result drop-down list.
 - Do not use the 'Not medically indicated' option.
- Enter the Date of data entry.
- Click Save.

Please refer to the [CAREWare 6 User Manual](#) for additional guidance and definitions of Substance Abuse Results.

Find Client > Search Results > Demographics > Annual Data > Annual Screenings > Add

Save Cancel

Add

Date: 8/4/2020 

Type: Substance Abuse 

Result: 

Counseled By: No
Not medically indicated
Yes





Shared Data

- Shared data values can be overwritten by another Part B-funded agency that serves the clients at the same time or after the client is served at your agency
- Annual Review:
 - Primary Insurance
 - Other Insurance
 - Housing Arrangement
 - HIV Primary Care
 - Household Income & Household Size





Shared Data cont.

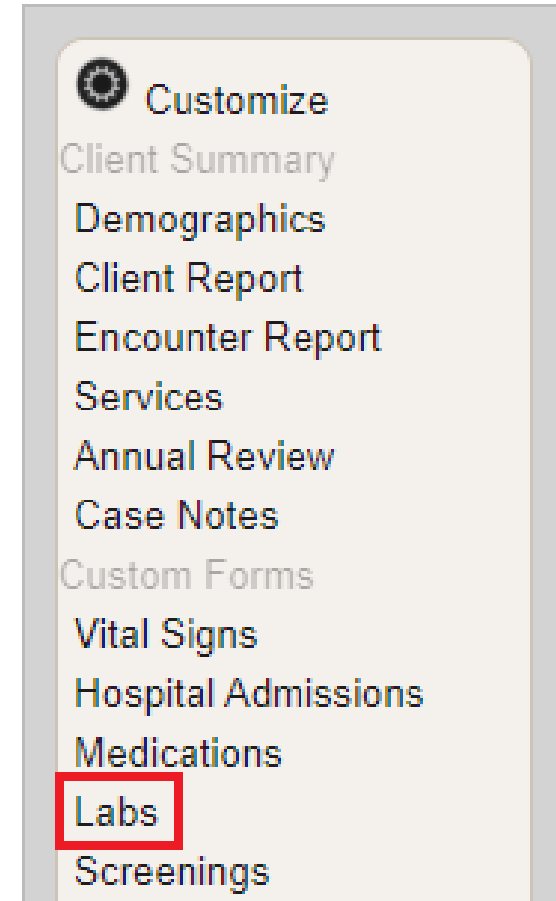
- Demographic
 - Full Legal Name
 - Date of Birth
 - Ethnicity
 - Race
 - Sex at Birth
 - Race/Ethnicity Subgroups
 - Gender
 - Zip Code
 - County
 - Vital Status
 - HIV Risk Factor
 - HIV Status
 - HIV Date
 - AIDS Date





Adding Labs

Click Labs on the client main menu.





Adding Labs cont.

Click Add.

Find Client > Search Results > Demographics > Labs

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

Labs

Search:

Date	Test Name	Test Operator	Test Result	Assay
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Adding Labs cont.

- Type in the first few letters of the test into the *Lab* field. CAREWare will automatically display matches.
- Select the correct test.

Find Client > Search Results > Demographics > Labs > Add

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

Add

Date: |< 2020 Page 1 of 1 >>|

Lab:  viral Load

Test Operator: **Viral Load** 

Test Result:

Assay: 

Comment:

Adding Labs cont.

- Enter the Date the lab was performed (not the date results were received or the date of data entry).
- Enter the Test Operator (e.g. =, <, >) from the drop-down list options.
- Enter the Test Result.
- Enter a Comment if desired.
- Click Save.

Find Client > Search Results > Demographics > Labs > Add

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

Add

Date: 

Lab: 

Test Operator: 

Test Result: (Copies/mL)

Assay: 

Comment:



Viewing Labs

- To filter the labs displaying on the first page of the Labs screen, enter the first few letters of the lab in the Search bar.
- Alternatively, click Test Name column header to sort A→Z or Z→A.

Find Client > Search Results > Demographics > Labs

View Add Delete HL7 Source Help Print or Export

Labs

Search: vi

Date	Test Name	Test Operator	Test Result
------	-----------	---------------	-------------

Deleting Labs

- Select the lab to be deleted in the client's lab history.
- Click Delete.

Find Client > Search Results > Demographics > Labs

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

Labs

Search:

Date	Test Name	Test Operator	Test Result	Assay
06/03/2020	Viral Load	<	20 (Copies/mL)	

- Click Confirm on the pop-up.

Delete Confirm 

Please confirm before deleting the selected record

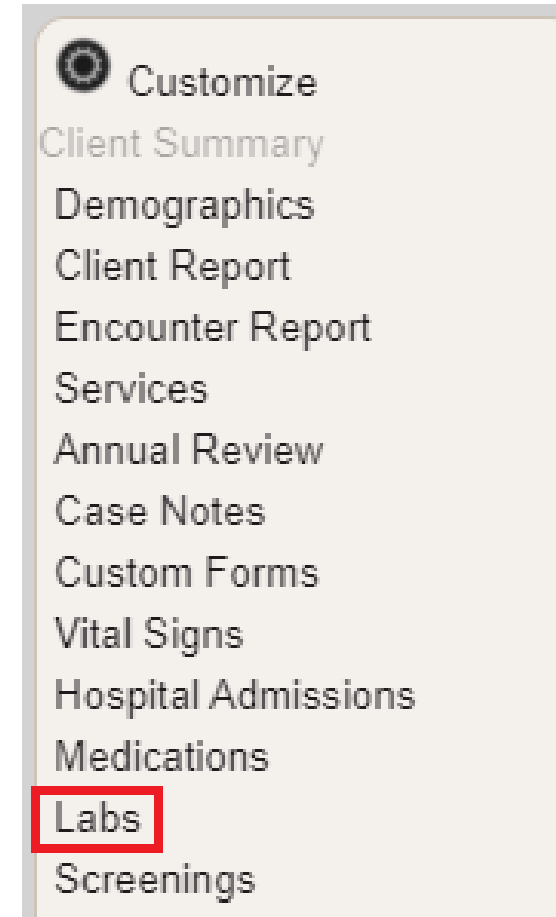
Confirm Cancel





Lab Report

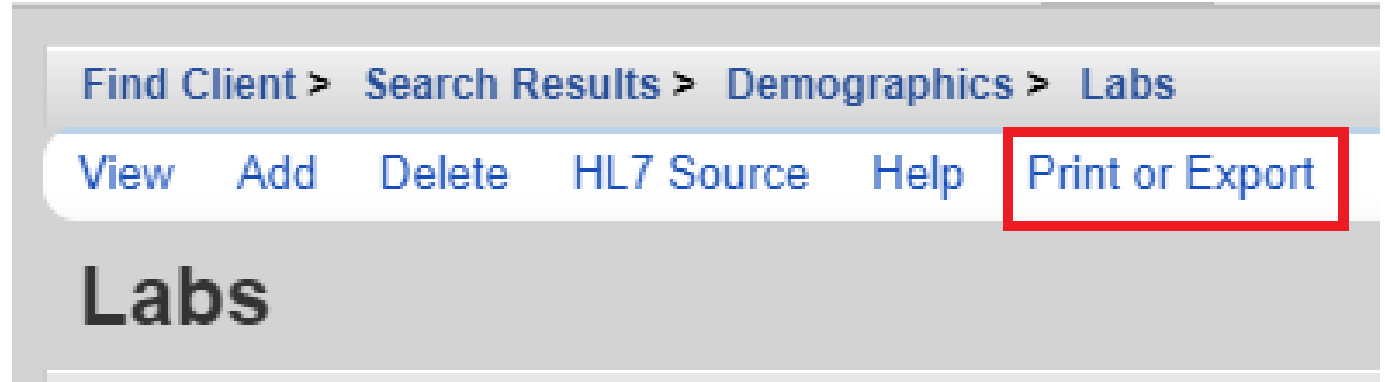
- The Client Lab Report is useful if you would like to print the client labs.
- Navigate to the client main menu.
- Click Labs.





Lab Report cont.

Click Print or Export.





Lab Report cont.

- Select the format to print the labs .
 - Print Current Page will only print the first page of client labs.
 - Print All Pages will print all the pages of client labs.
 - View Current Page as PDF will only print the first page of client labs into a PDF file.
 - View All Pages as PDF will print all pages of client labs into a PDF file.
 - CSV Export (All Pages) and CSV For Excel (All Pages) will pull all labs into an excel format.

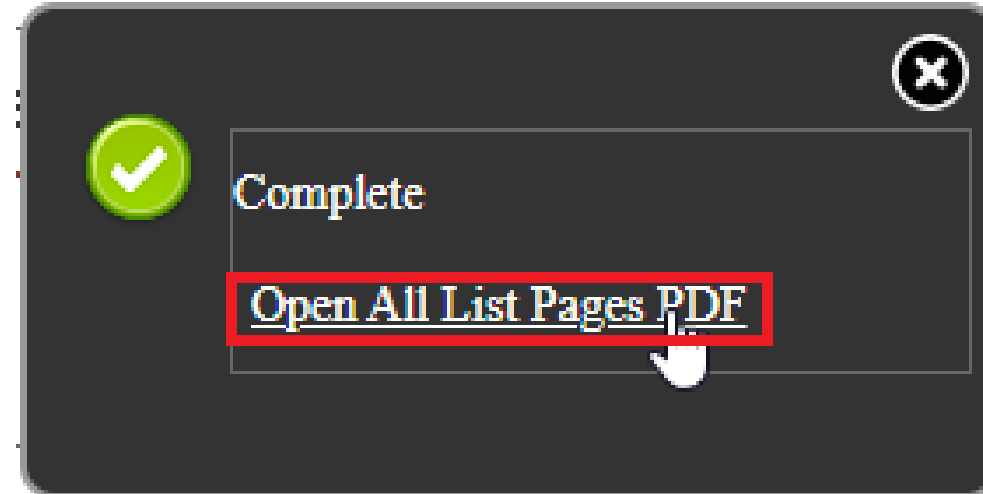


Report Setup

- Print Current Page
- Print All Pages
- View Current Page as a PDF document
- View All Pages as a PDF document
- Printable List Format Options
- CSV Export (All Pages)
- CSV For Excel (All Pages)

Lab Report cont.

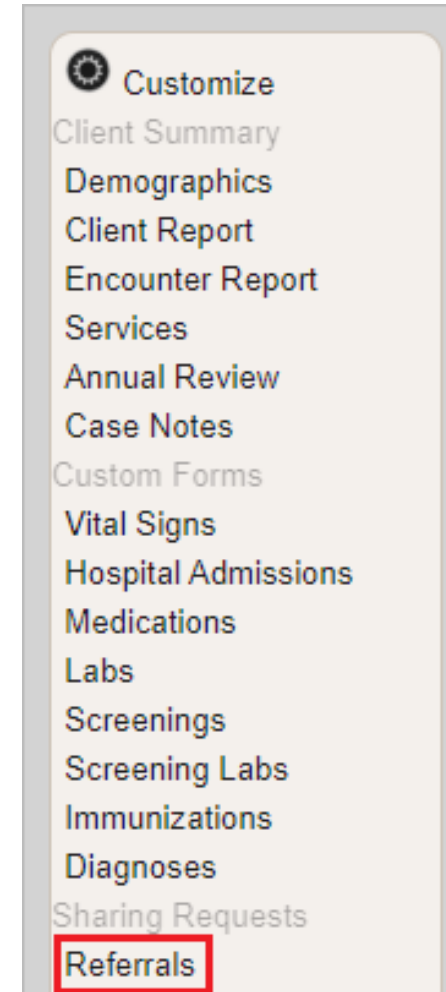
- A pop-up will appear on the right side of the window.
- Click the live link (names will be different based upon the format chosen in the last step).





Adding New Referrals

Click Referrals on the client main menu.





Adding New Referrals cont.

Click Add.

Demographics > Referrals

[View](#) [Add](#) [Delete](#) [Referral Classes](#) [External Provider Setup](#) [Print or Export](#)

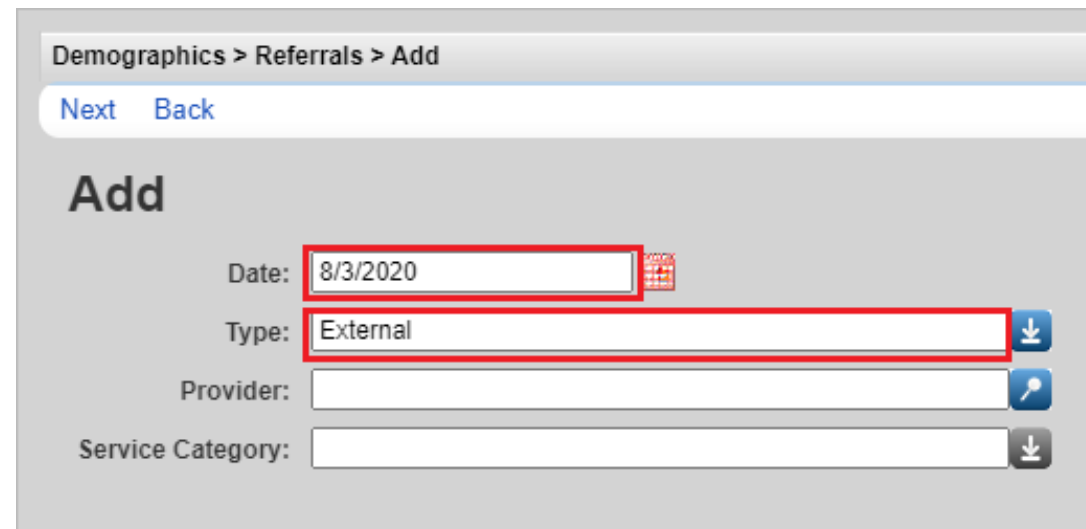
Referrals

Search:

Direction	Referral Date	Provider	Service Category	Status
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Adding New Referrals cont.

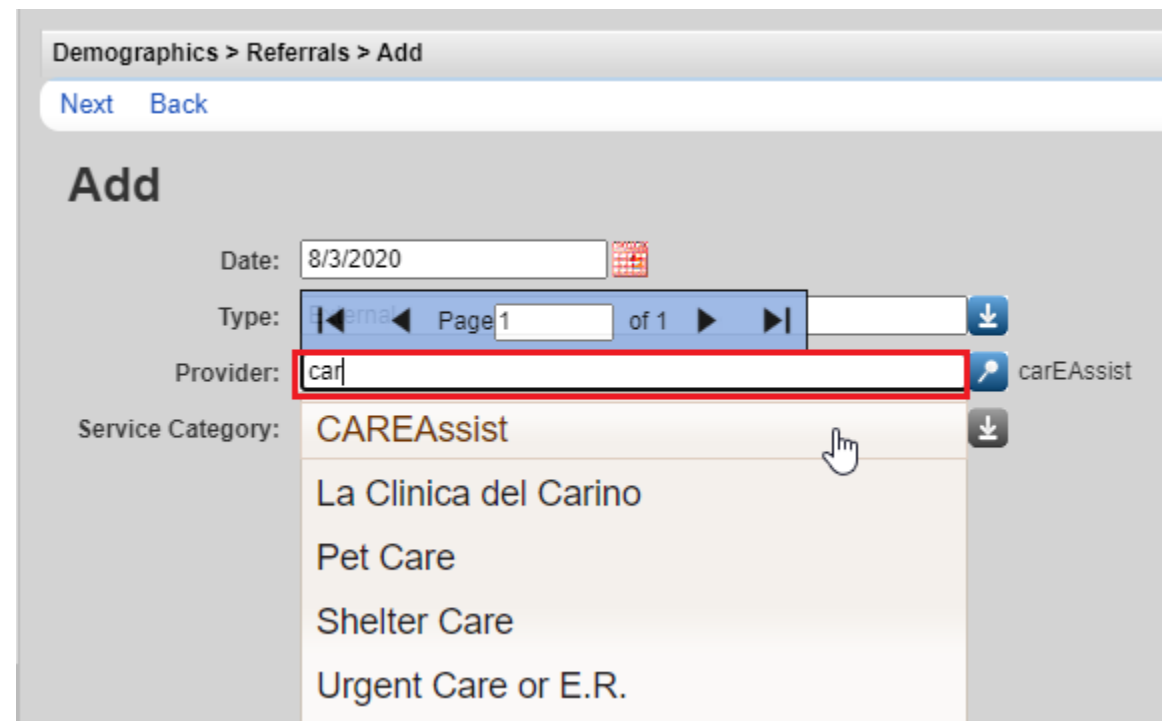
- Enter referral Date.
- Enter referral Type (Internal or External) from the drop-down menu options.
- Care Coordinators are only required to record external referrals.



The screenshot shows a web application interface for adding a new referral. At the top, a breadcrumb trail reads 'Demographics > Referrals > Add'. Below this are 'Next' and 'Back' navigation links. The main heading is 'Add'. The form contains four fields: 'Date' with the value '8/3/2020' and a calendar icon; 'Type' with the value 'External' and a dropdown arrow icon; 'Provider' with an empty text box and a magnifying glass icon; and 'Service Category' with an empty text box and a dropdown arrow icon. Red rectangular boxes highlight the 'Date' and 'Type' fields.

Adding New Referrals cont.

- Type the first few letters of the referral provider in the Provider field.
- Select the appropriate provider.
- The list will only contain providers that your agency has added.

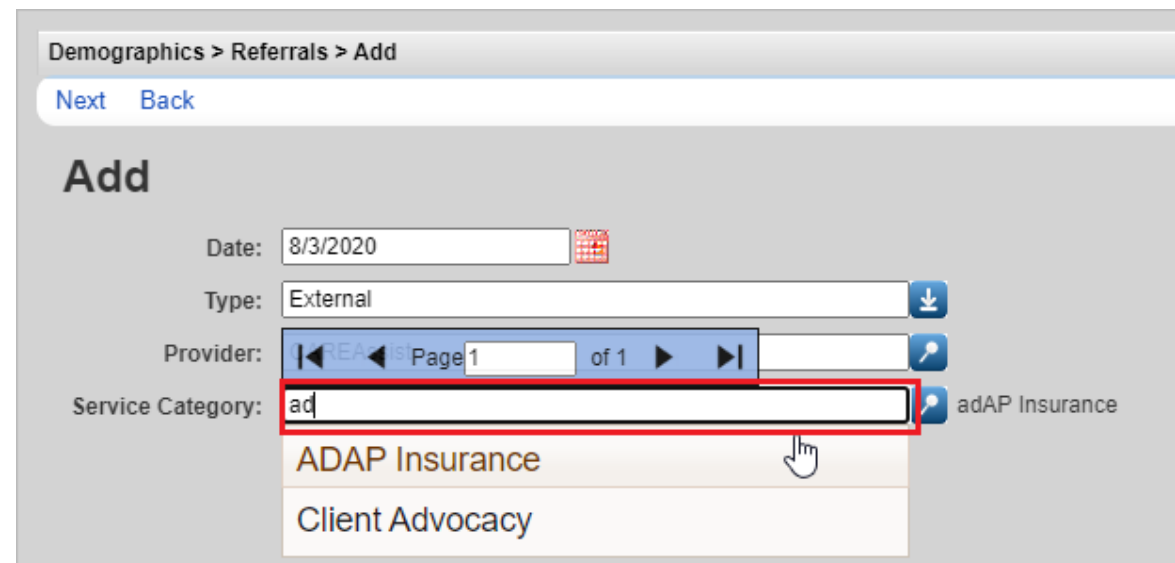


The screenshot shows a web application interface for adding a new referral. The breadcrumb trail at the top reads "Demographics > Referrals > Add". Below this are "Next" and "Back" links. The main heading is "Add". The form contains the following fields:

- Date:** A text box containing "8/3/2020" with a calendar icon to its right.
- Type:** A dropdown menu currently showing "Internal". To its right is a pagination control showing "Page 1 of 1" with navigation arrows and a download icon.
- Provider:** A text box containing "car". This field is highlighted with a red rectangle. To its right is a search icon and the text "carEAssist".
- Service Category:** A dropdown menu with a list of options: "CAREAssist", "La Clinica del Carino", "Pet Care", "Shelter Care", and "Urgent Care or E.R.". A mouse cursor is pointing at the "CAREAssist" option. To the right of the list is a download icon.

Adding New Referrals cont.

- Type the first few letters of the service type in the Service Category field.
- This list is HRSA approved service categories and cannot be edited by local agencies or OHA.



Demographics > Referrals > Add

Next Back

Add

Date: 8/3/2020

Type: External

Provider: |< REA is Page 1 of 1 >|

Service Category: ad

ADAP Insurance

Client Advocacy

adAP Insurance

Adding New Referrals cont.

Click Next.

Demographics > Referrals > Add

[Next](#) [Back](#)

Add

Date: 

Type: 

Provider: 

Service Category: 

Adding New Referrals cont.

- Select the referral Status from the drop-down menu.
 - Please refer to the [CAREWare 6 User Manual](#) for definitions of referral statuses.
- Ignore the Class field.
- Add a Comment if desired.
- Click Save.

Demographics > Referrals > Add > Next

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

Next

Referral Date: 8/3/2020 

From Provider: HIV Alliance

Provider: CAREAssist

Direction: Outgoing

Category Label: ADAP Insurance

Status: Pending 

Complete Date: 

Silent: ☐

Class: 

Comments:



Adding New Referrals cont.

- Referrals required to be documented in CAREWare include:
 - CAREAssist
 - Oral Health Care
 - Mental Health Services
 - Medical Nutrition Therapy
 - Substance Abuse Services Outpatient
 - Housing
 - Employment
 - Tobacco Cessation
 - Food Banks



Editing Referrals

Once the referral Status is no longer pending, select the referral from the Referrals list and click View.

Demographics > Referrals

[View](#) [Add](#) [Delete](#) [Referral Classes](#) [External Provider Setup](#) [Print or Export](#)

Referrals

Search:

Direction	Referral Date	Provider	Service Category	Status
Outgoing	08/03/2020	CAREAssist	ADAP Insurance	Pending



Editing Referrals cont.

Click Edit.

Demographics > Referrals > View

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

View

Referral Date: 8/3/2020 

From Provider: HIV Alliance

Provider: CAREAssist

Direction: Outgoing

Category Label: ADAP Insurance

Status: Pending

Complete Date: 

Silent: ☐

Class:

Comments:

Editing Referrals cont.

- Change the referral Status field, add the Complete Date.
- Click Save.

Demographics > Referrals > View > Edit

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

Edit

Referral Date: 8/3/2020 

From Provider: HIV Alliance

Provider: CAREAssist

Direction: Outgoing

Category Label: ADAP Insurance

Status: Completed 

Complete Date: 

Silent: ☐

Class: 

Comments:

Deleting Referrals

- Referrals should only be deleted if they were entered into the incorrect client record.
- Select the referral entry on the Referrals screen.
- Click Delete.

Demographics > Referrals

[View](#) [Add](#) [Delete](#) [Referral Classes](#) [External Provider Setup](#) [Print or Export](#)

Referrals

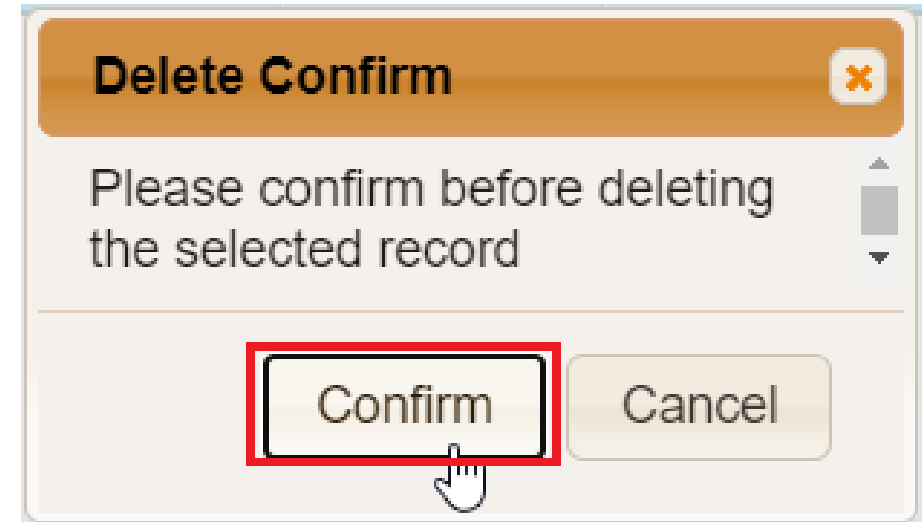
Search:

Direction	Referral Date	Provider	Service Category	Status
Outgoing	08/03/2020	CAREAssist	ADAP Insurance	Completed



Deleting Referrals cont.

Click Confirm on the pop-up window.





Thank you

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

[CAREWare 6 User Support Website](#)

