


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:

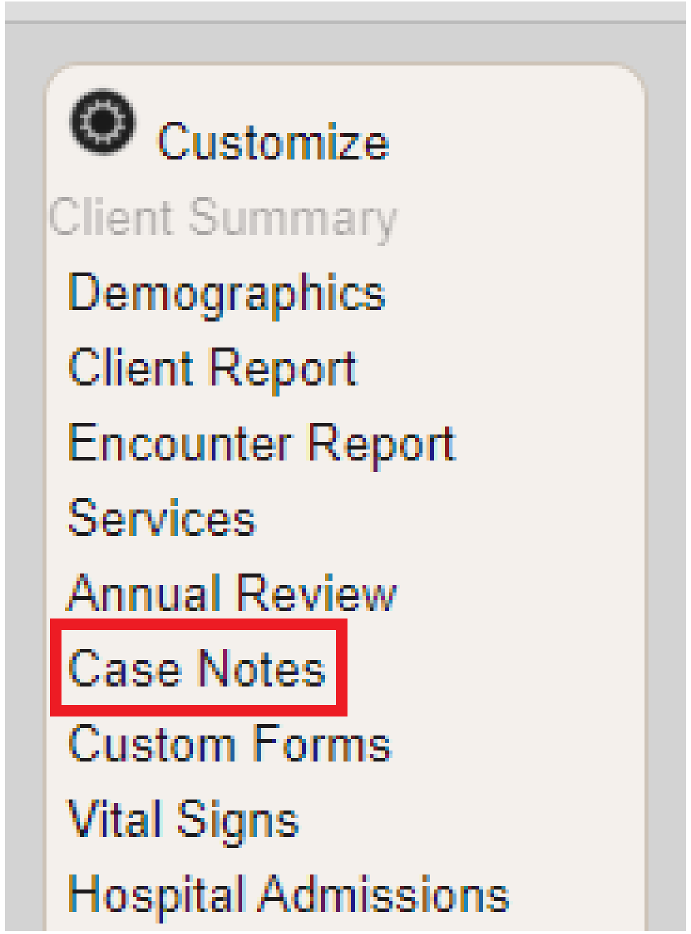
- Add/append case notes
- Add/edit services
- Rapid service entry
- Annual review data
- Shared data
- Add/delete labs
- Referrals

Welcome!

The CAREWare 6 website is:
https://careware.oregon.gov/careware/rs/index.htm

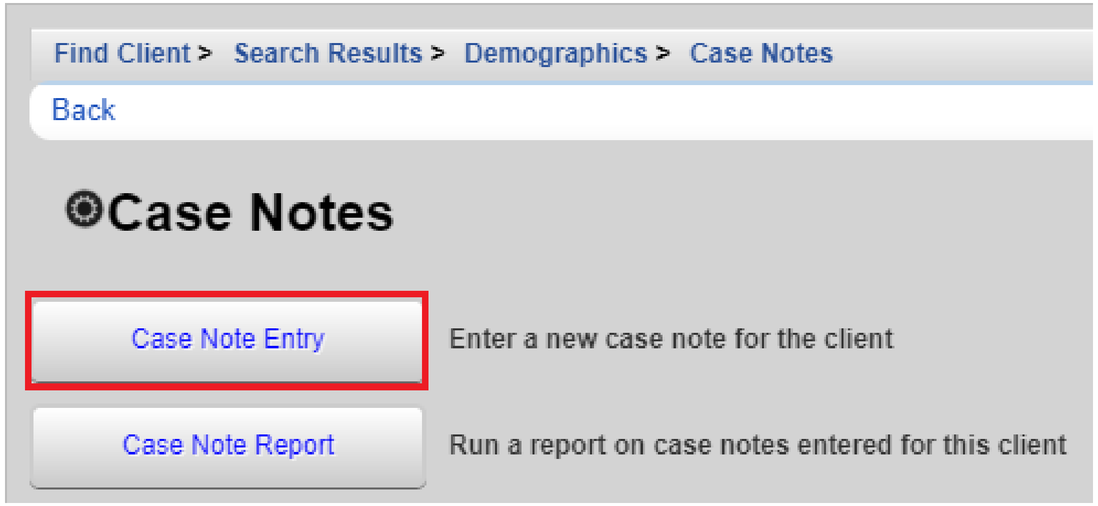
Adding Case Notes

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



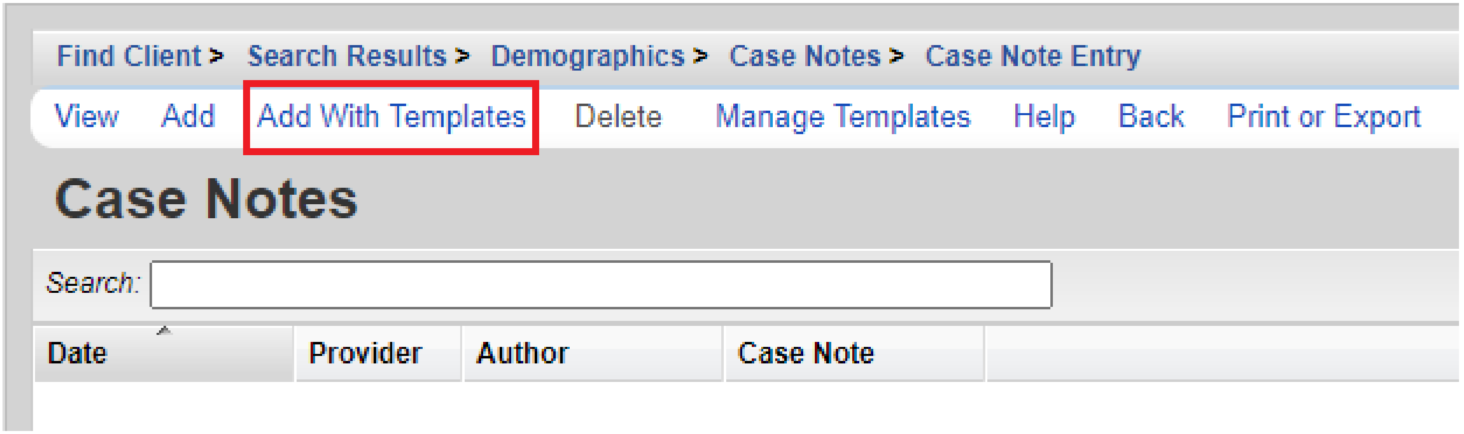
Adding Case Notes with Templates cont.

- 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.



Adding Case Notes with Templates cont.

Click Add With Templates.

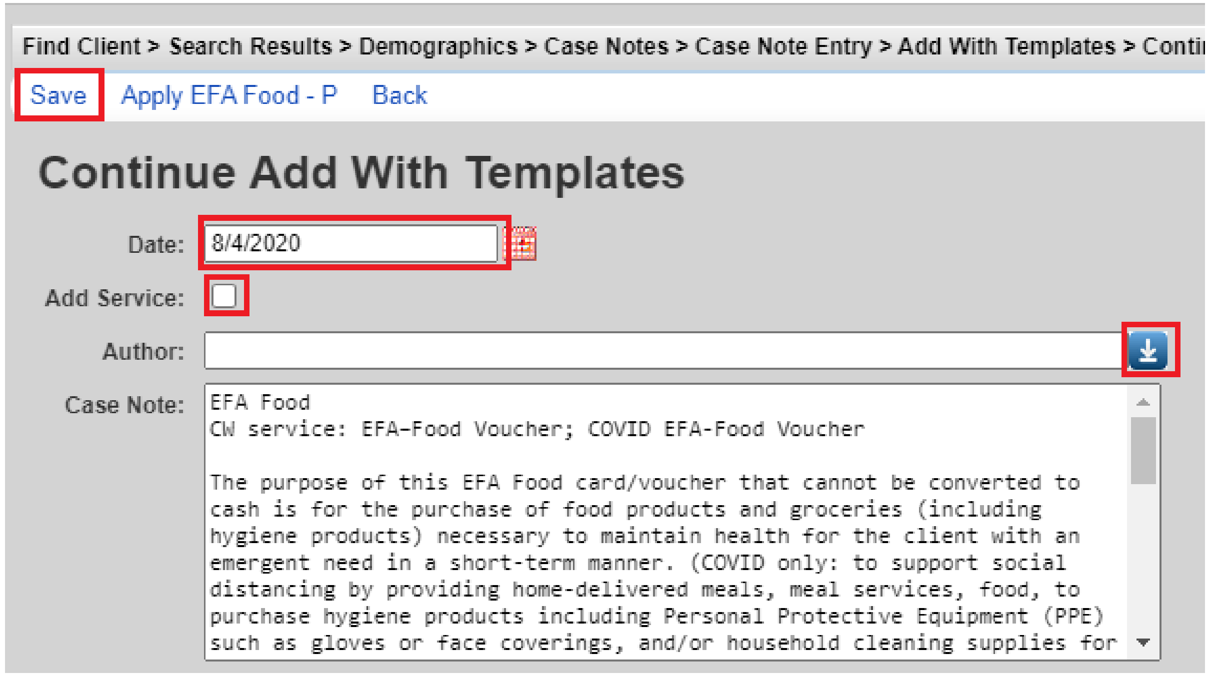


Adding Case Notes with Templates cont.

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

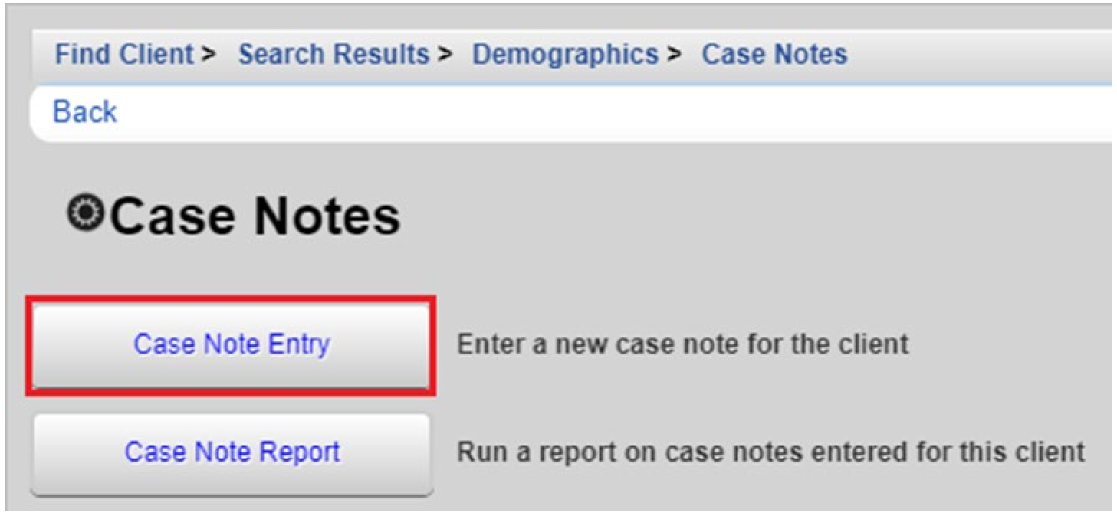
Adding Case Notes with Templates cont.

- 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.



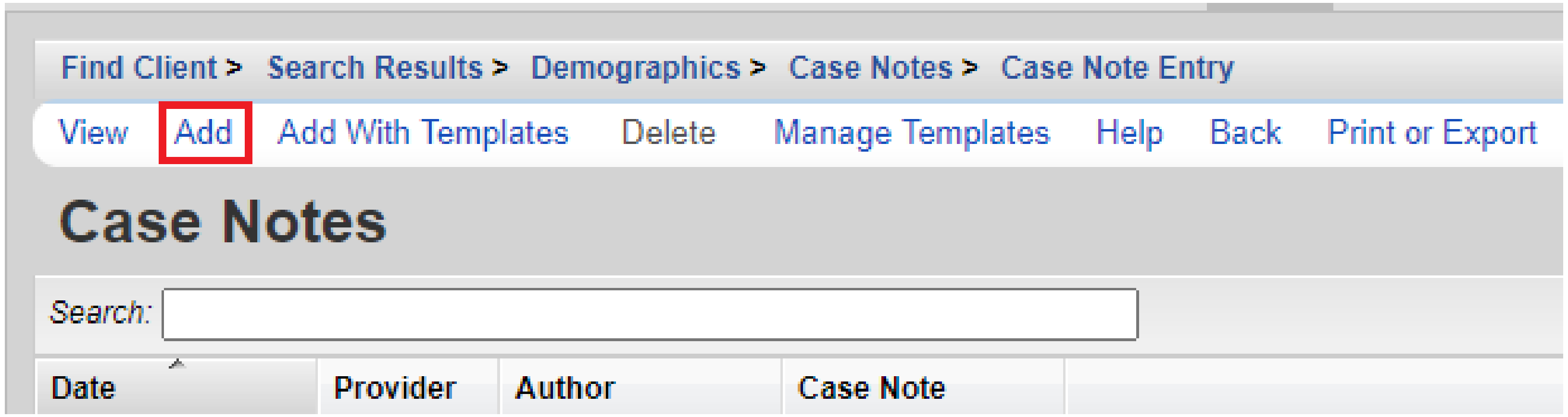
Adding Case Notes cont.

- To enter a Case Note <u>without</u> using a case note template:
- Click Case Note Entry.



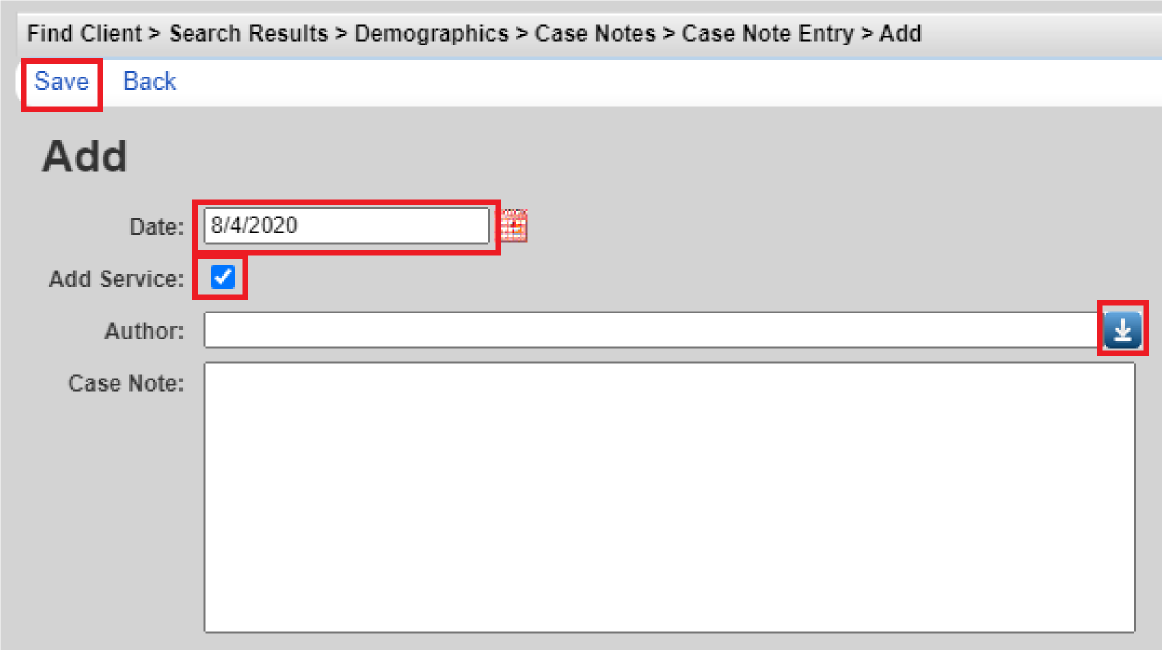
Adding Case Notes cont.

Click Add.



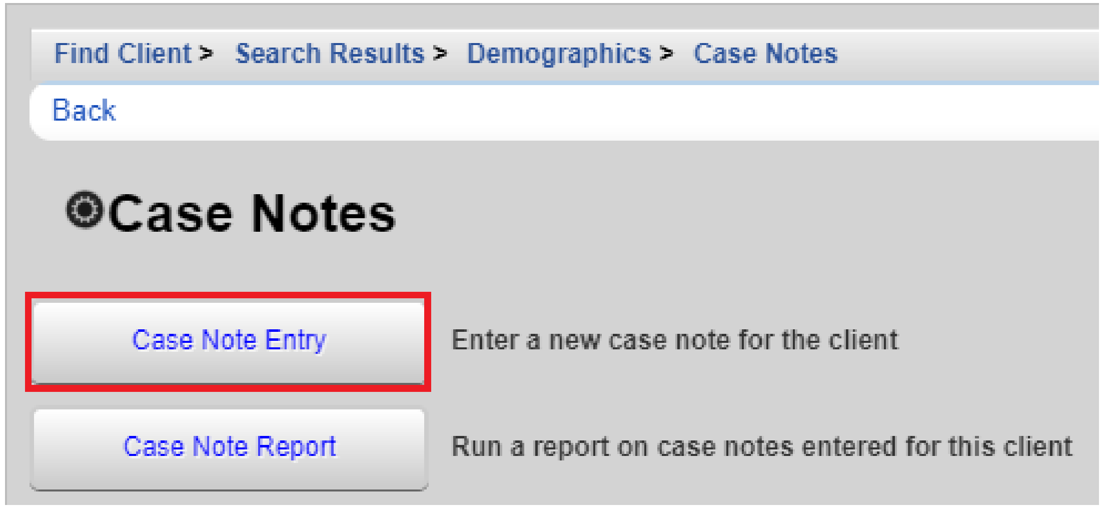
Adding Case Notes cont.

- 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.



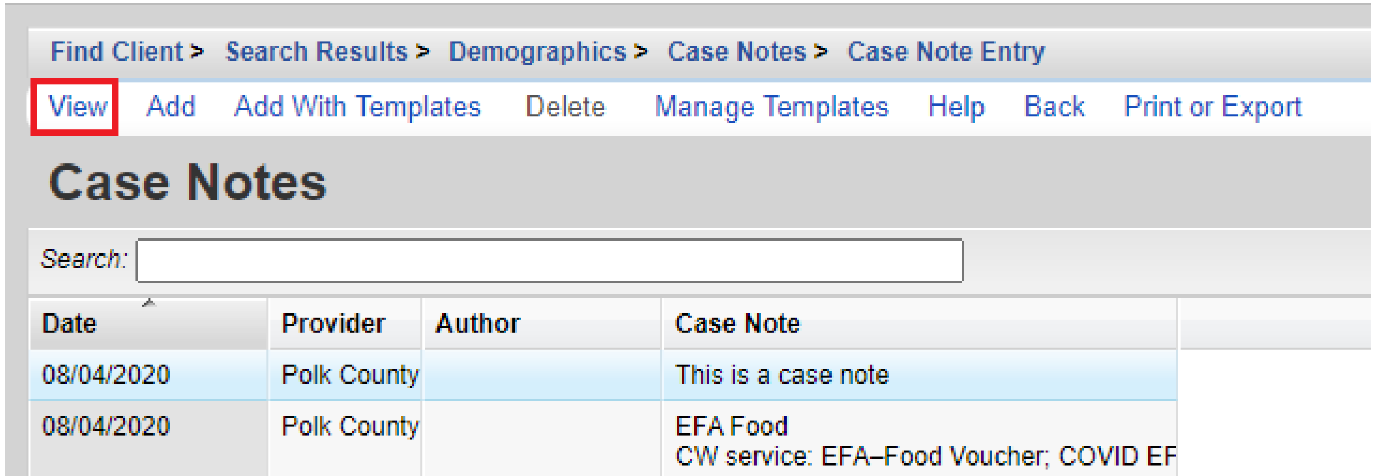
Appending Case Notes

- 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.



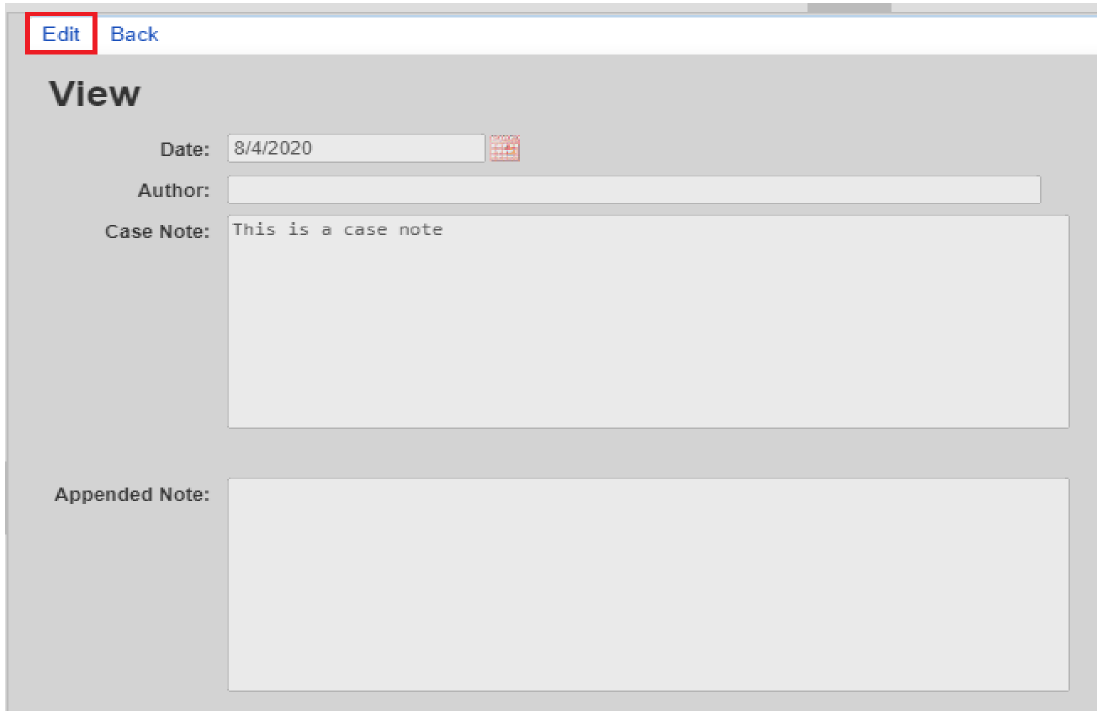
Appending Case Notes cont.

Select the Case Note to be appended. Click View.



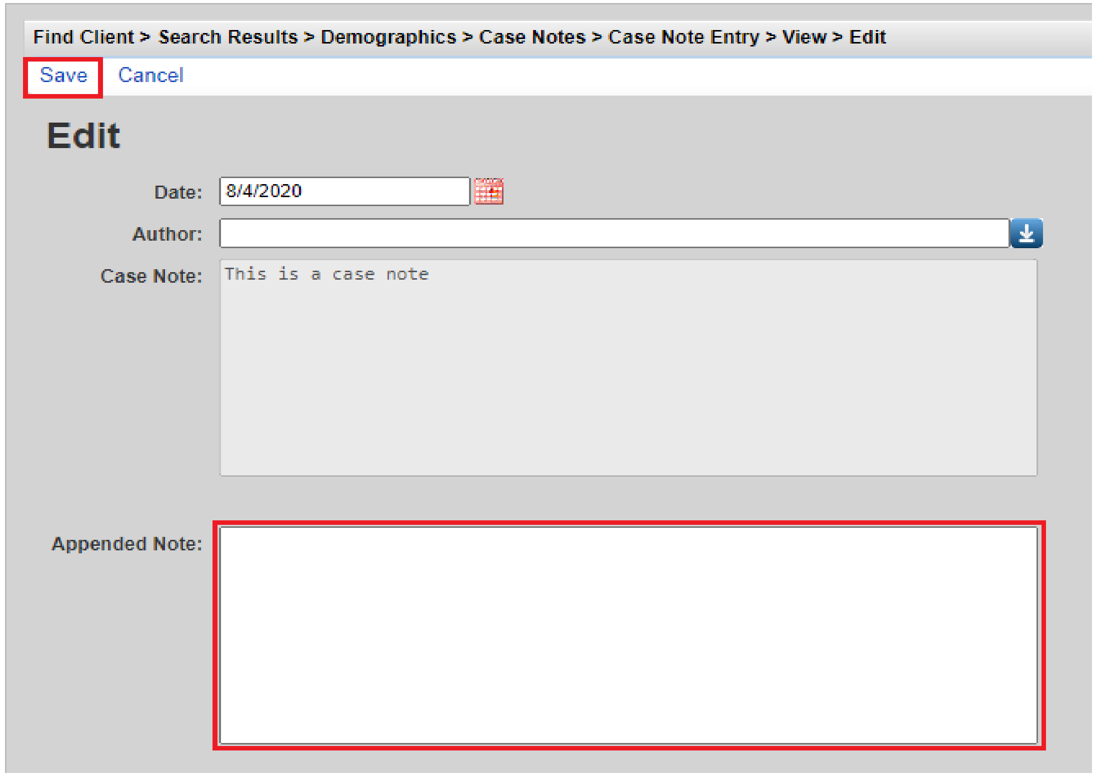
Appending Case Notes cont.

Click Edit.



Appending Case Notes cont.

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

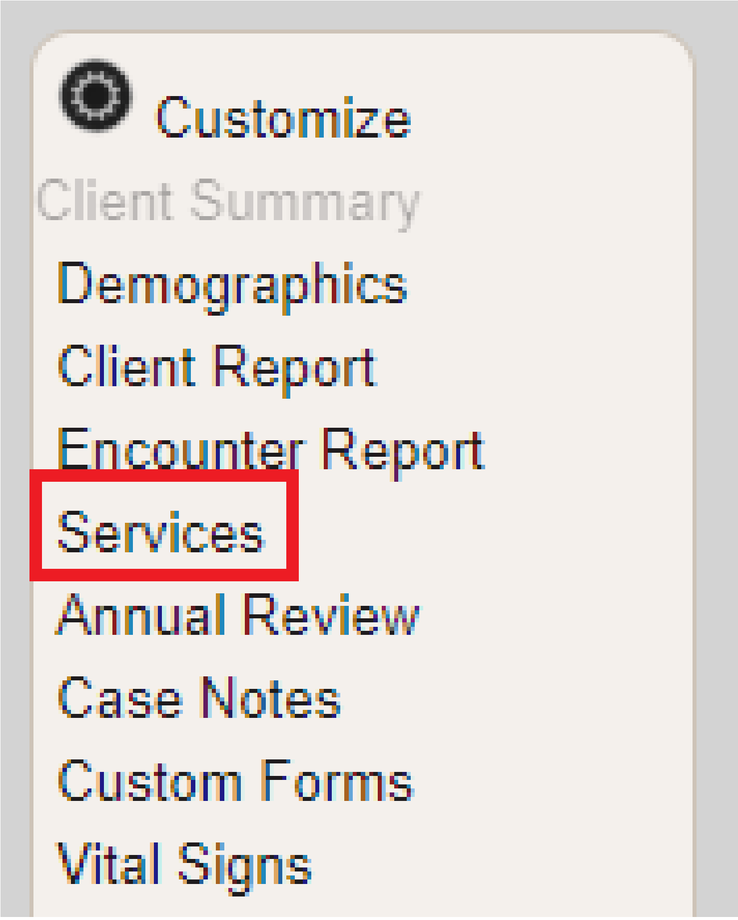


A Note about Case Notes

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.

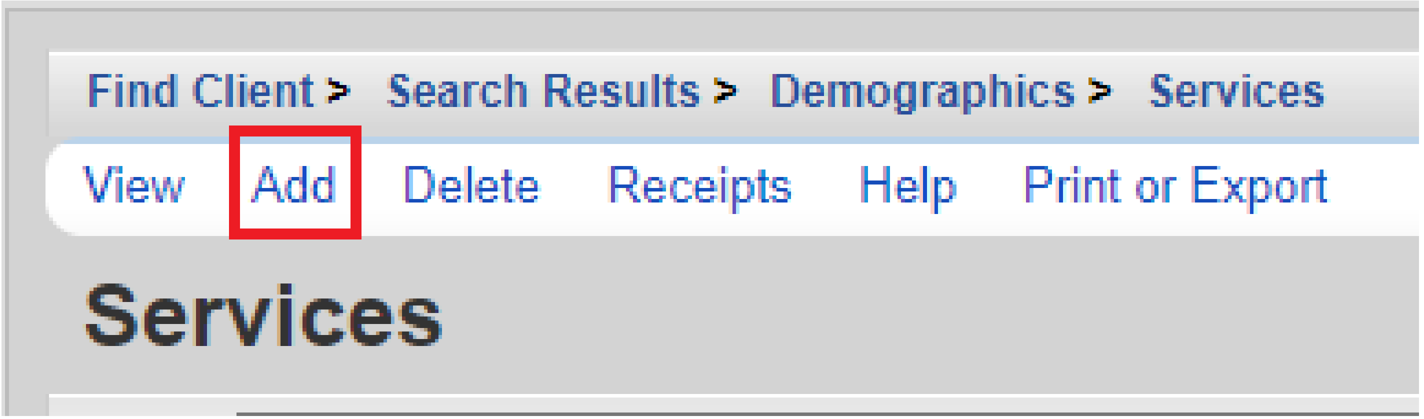
Adding Client Services

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



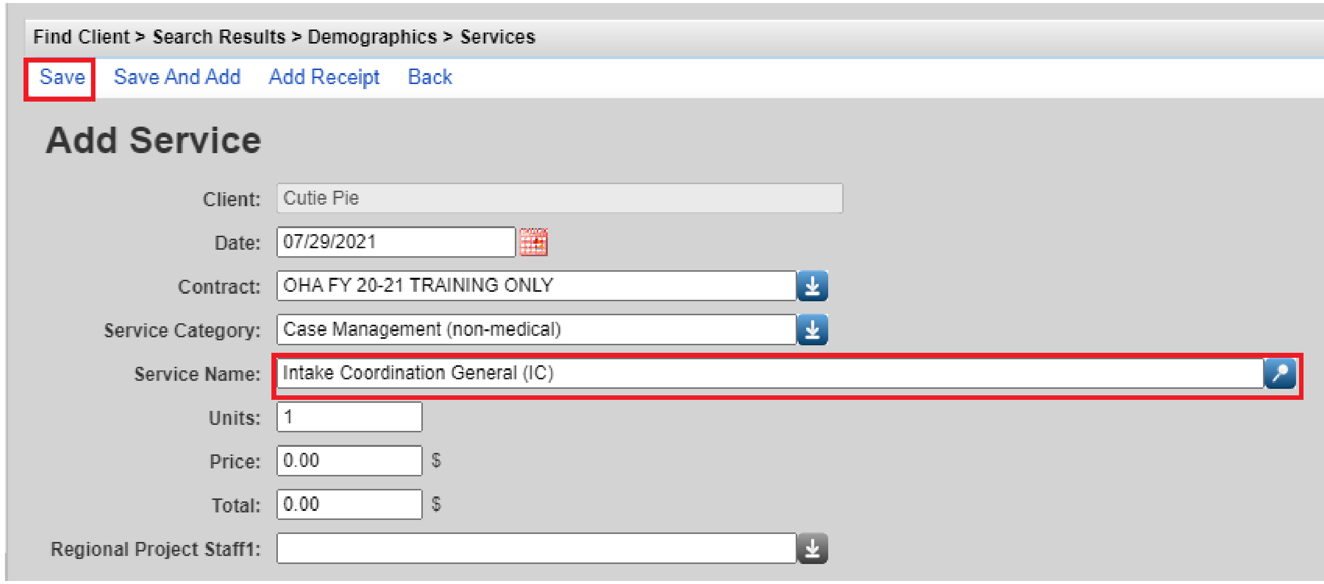
Adding Client Services

Click Add.



Adding Client Services cont.

- Enter the Date of service, <u>not the date of data entry.</u>
- 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.

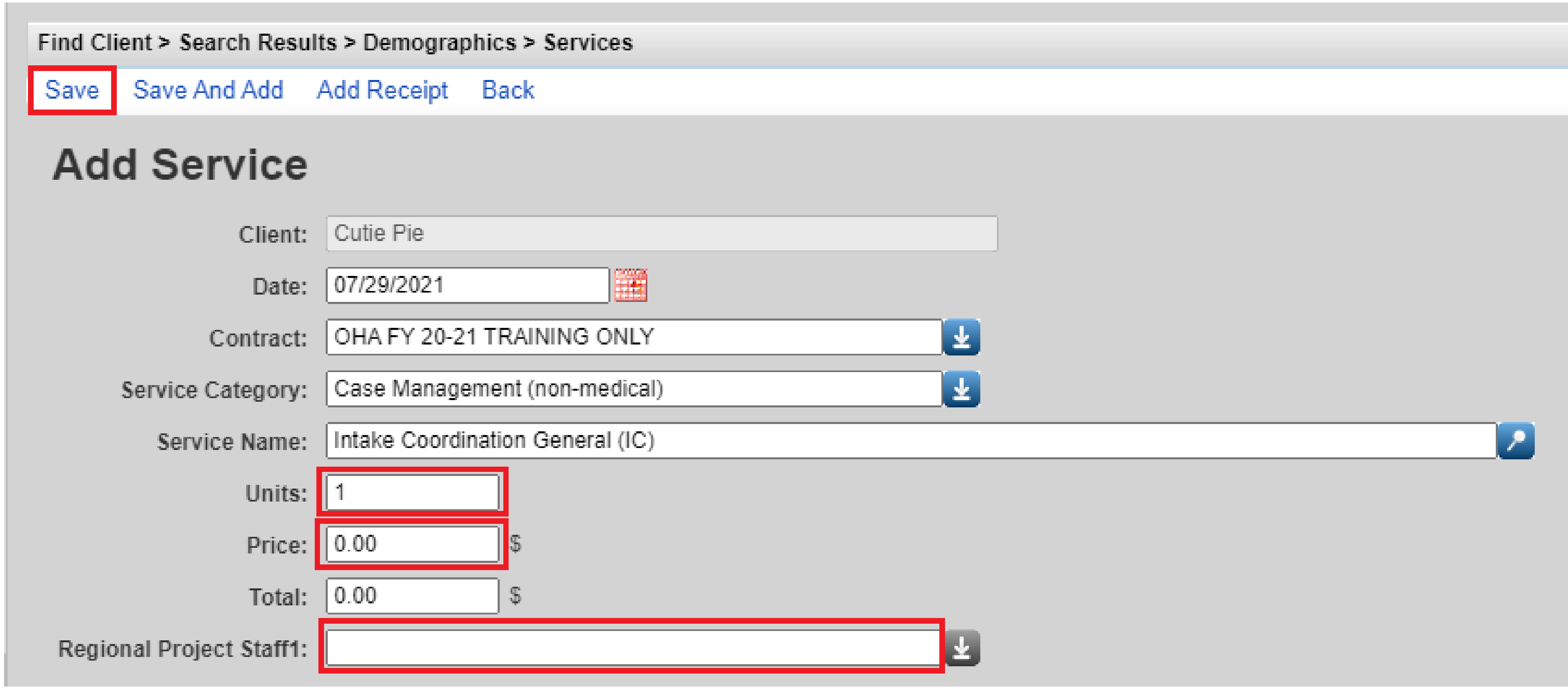


Adding Client Services cont.

- 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.

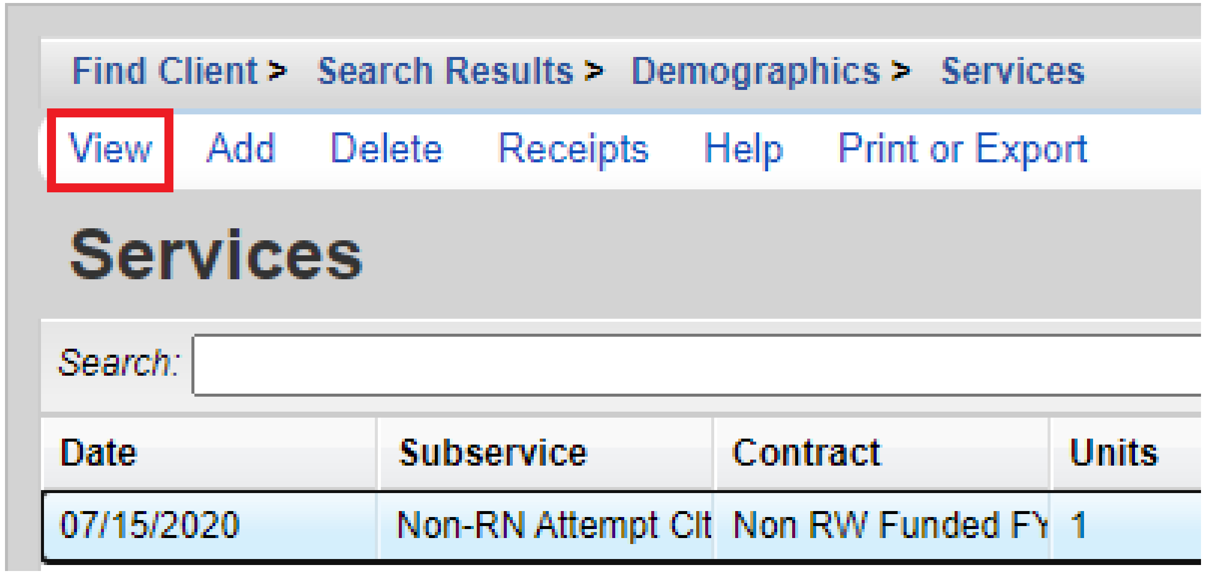
Note: Additional service fields may be required to be completed depending upon the provider or subservice.

Adding Client Services cont.



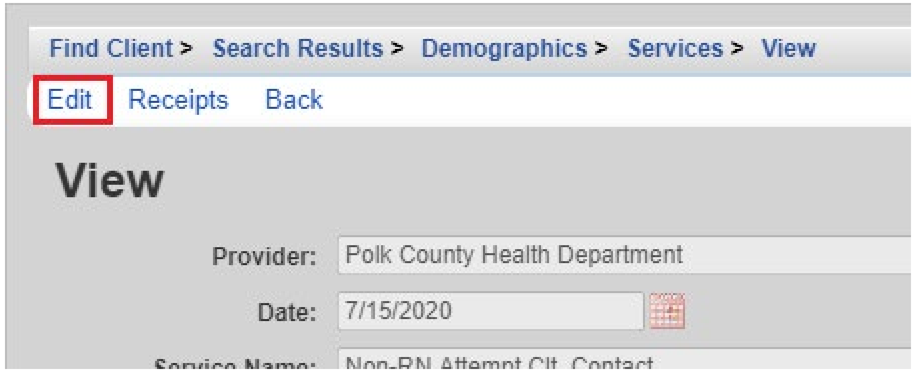
Editing Client Services

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

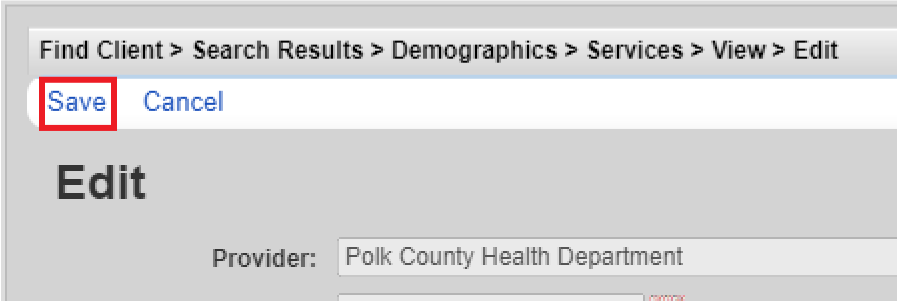


Editing Client Services cont.

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

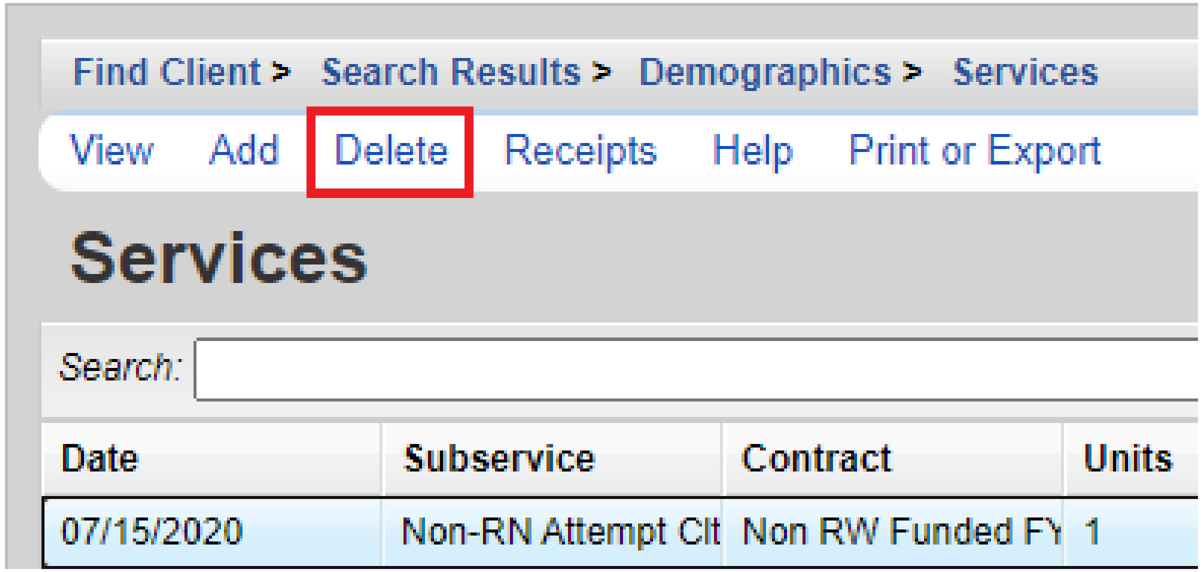


Click Save.



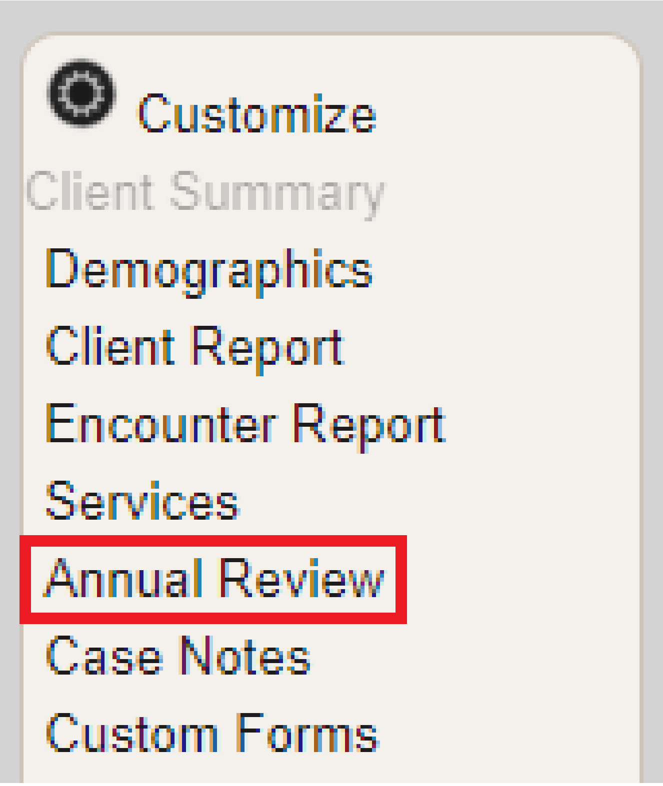
Deleting Client Services

Select the service to be deleted, then click Delete.



Annual Review Data

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



Annual Review Data cont.

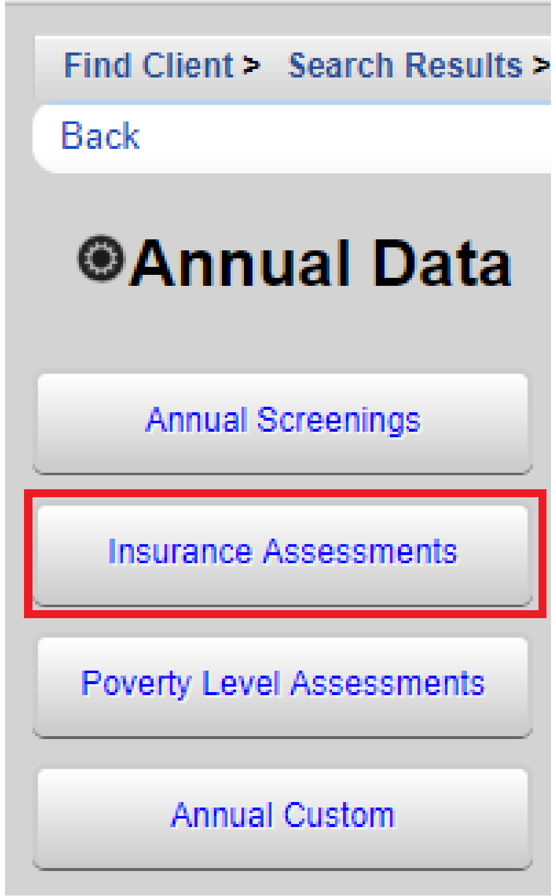
Annual Data

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.

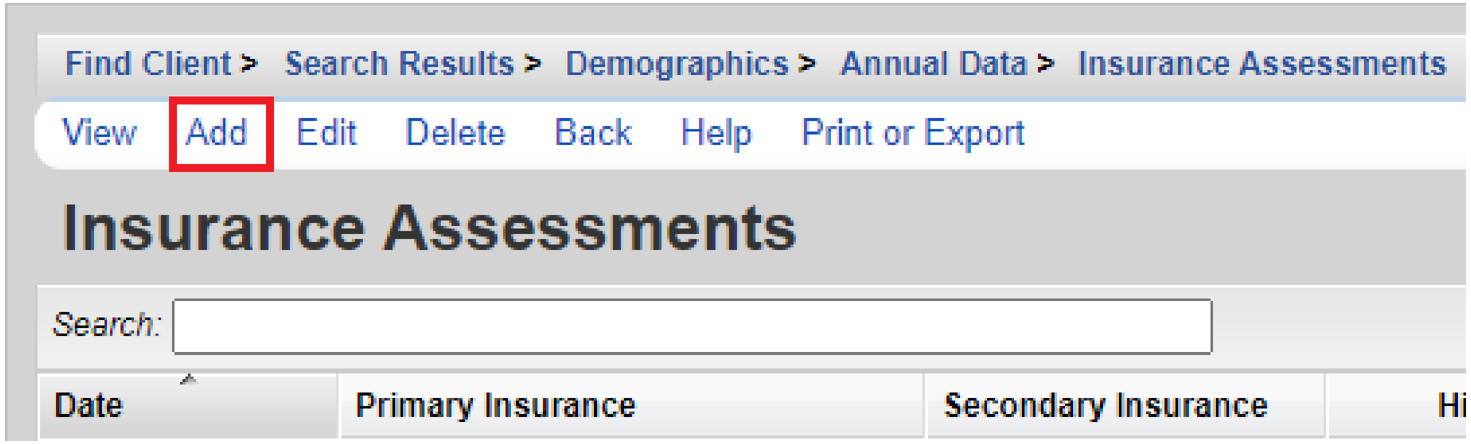
Insurance Assessments:

- Click Insurance Assessments.



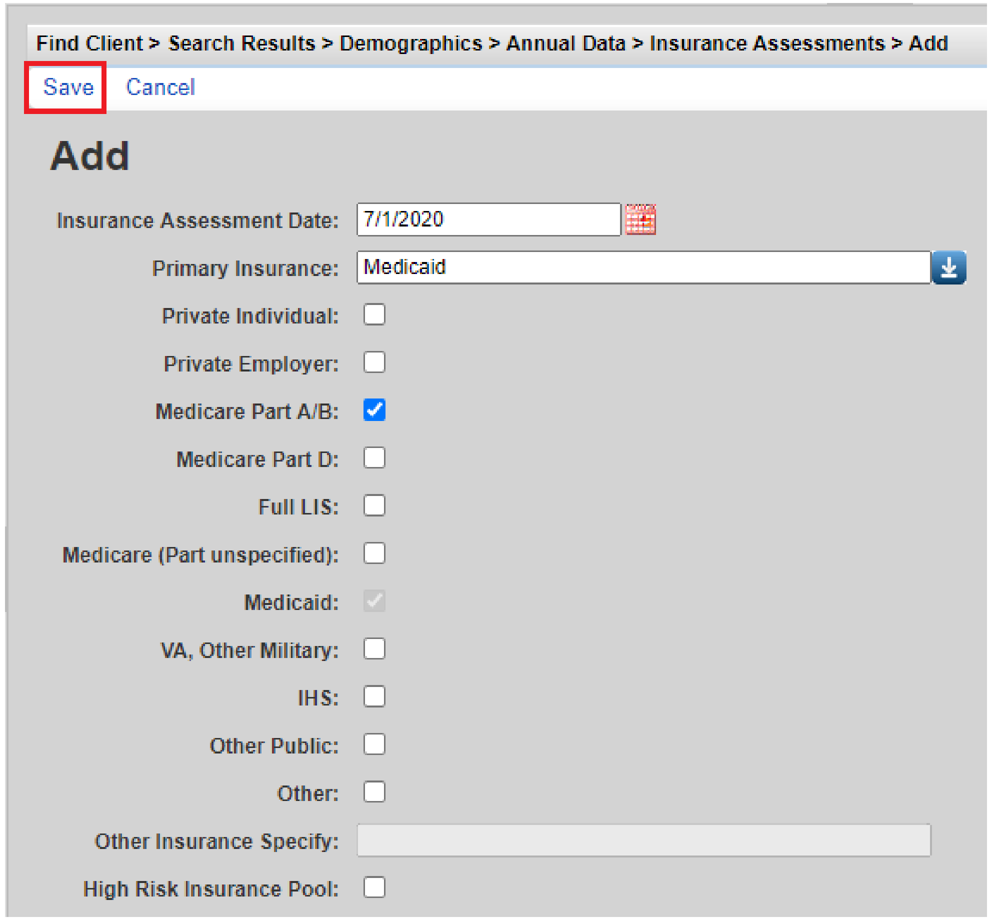
Annual Review Data cont.

Click Add.



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.



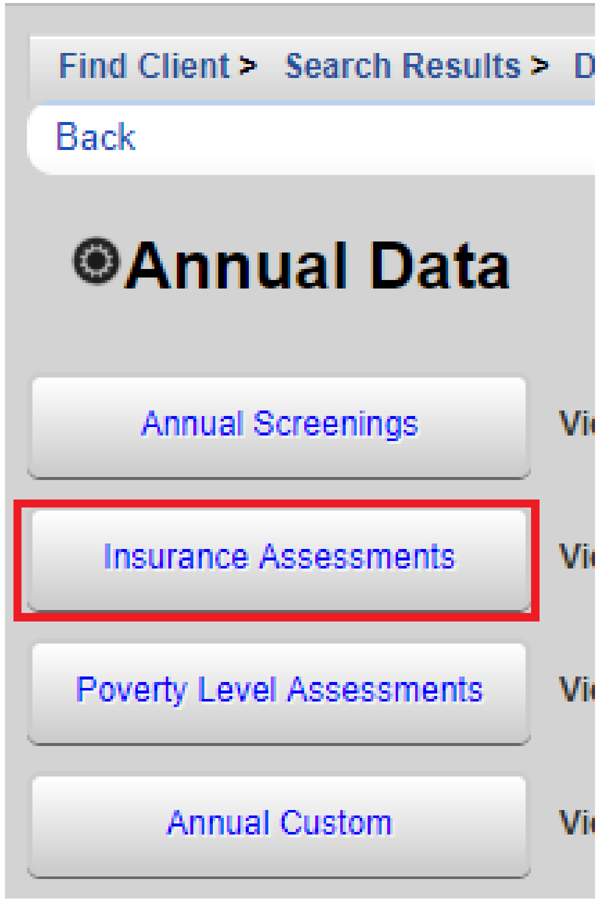
Please refer to the [CAREWare 6 User Guide]() for more guidance on insurance types.

END HIV

Annual Review Data cont.

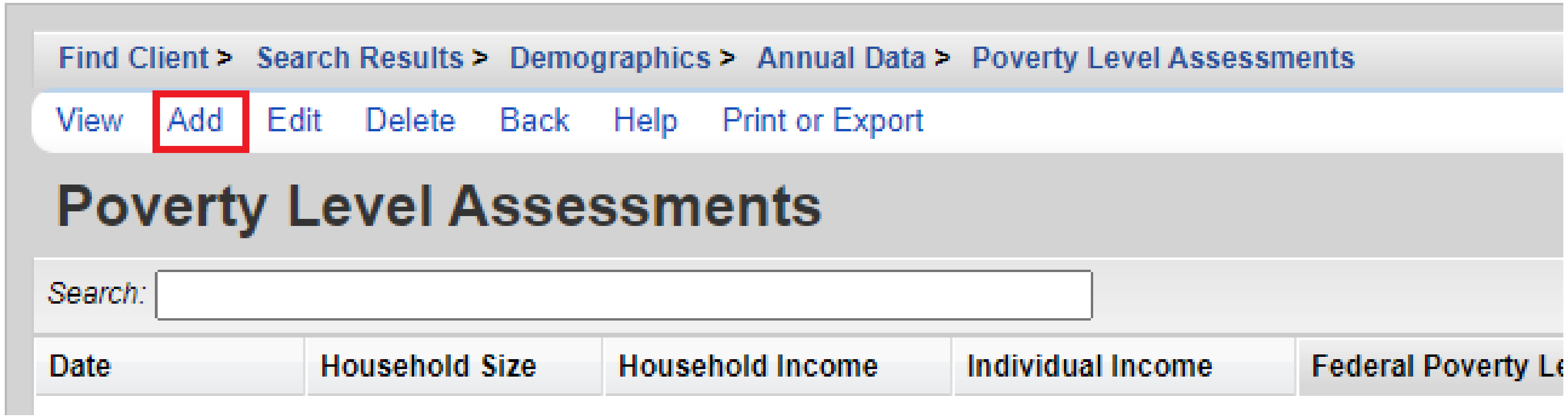
Federal Poverty Level:

- Click Poverty Level Assessments.



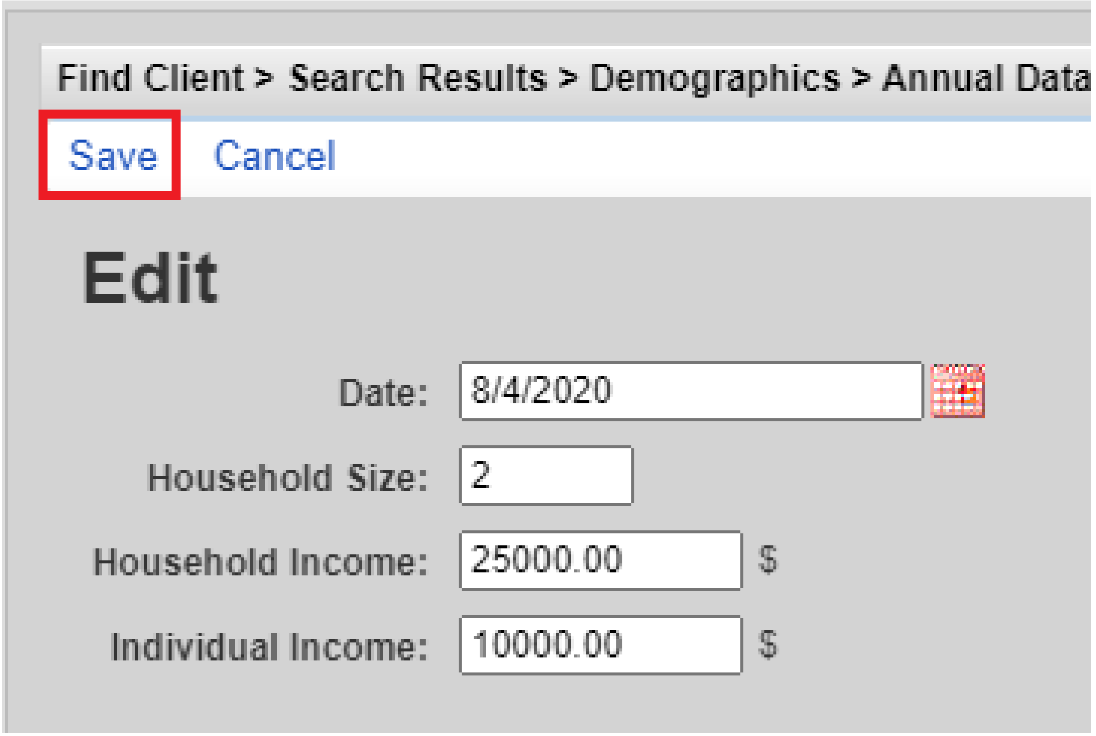
Annual Review Data cont.

Click Add.



Annual Review Data cont.

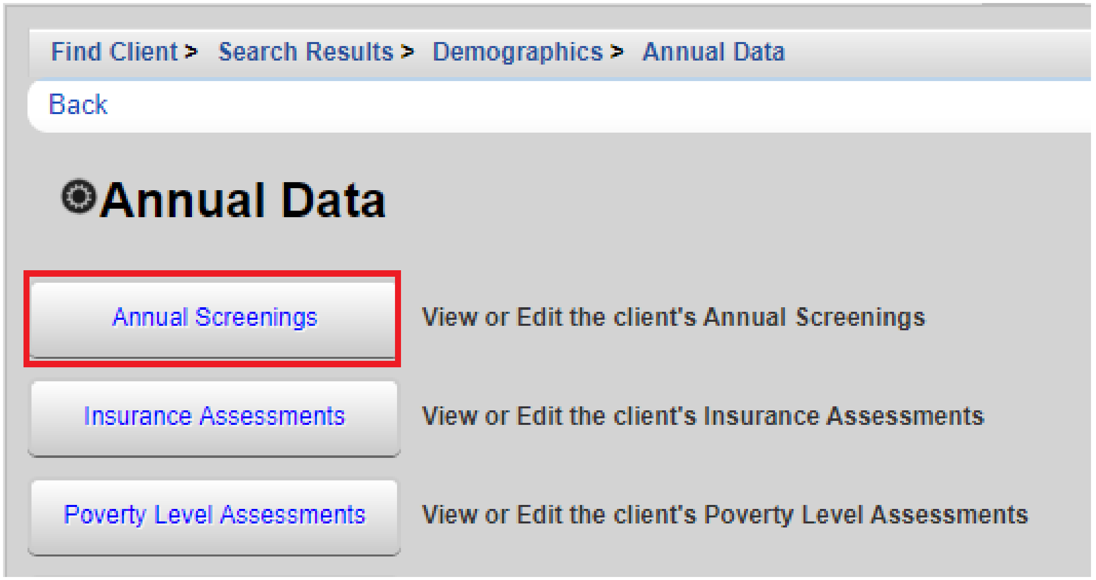
- Enter the annual Household Size, Household Income, Individual Income and the Date of data entry.
- Click Save.
- CAREWare will automatically calculate the poverty level from the information provided.



Please refer to the HIV Community Services Program Support Services Guide for instructions for determining household income and household size.

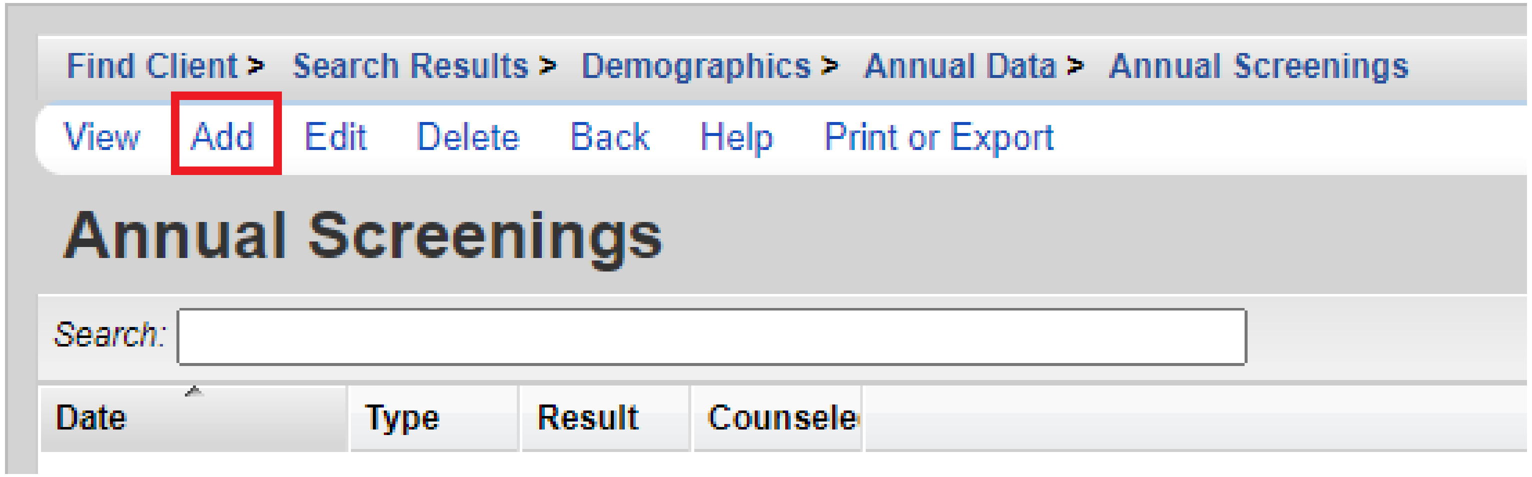
Annual Review Data cont.

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



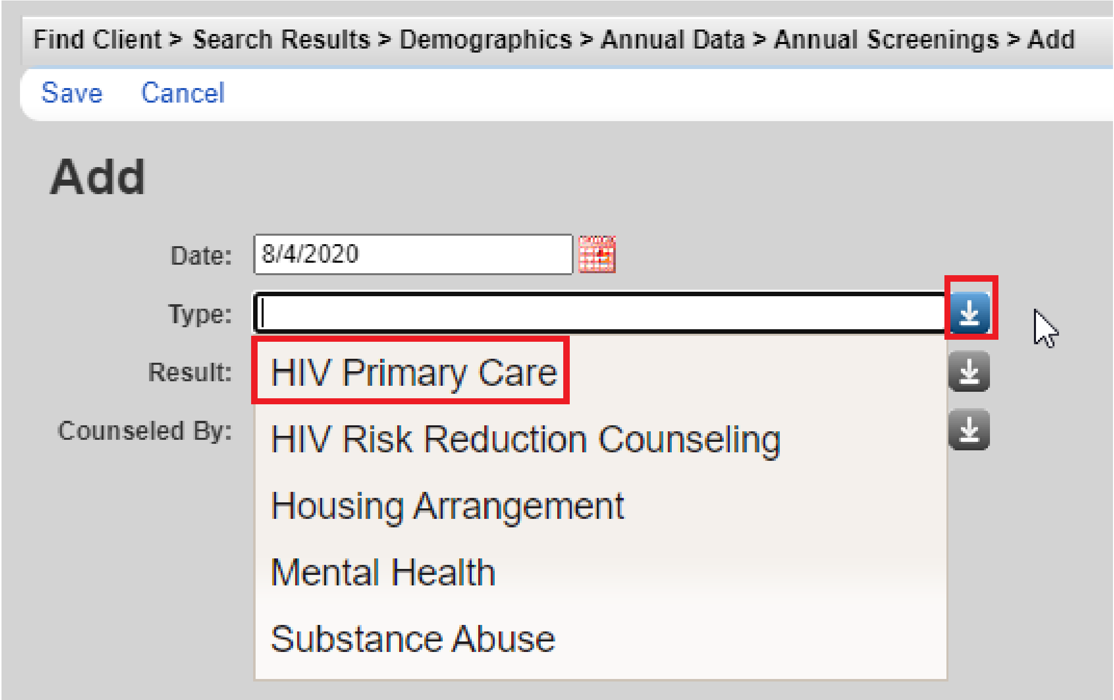
Annual Screenings

Click Add.



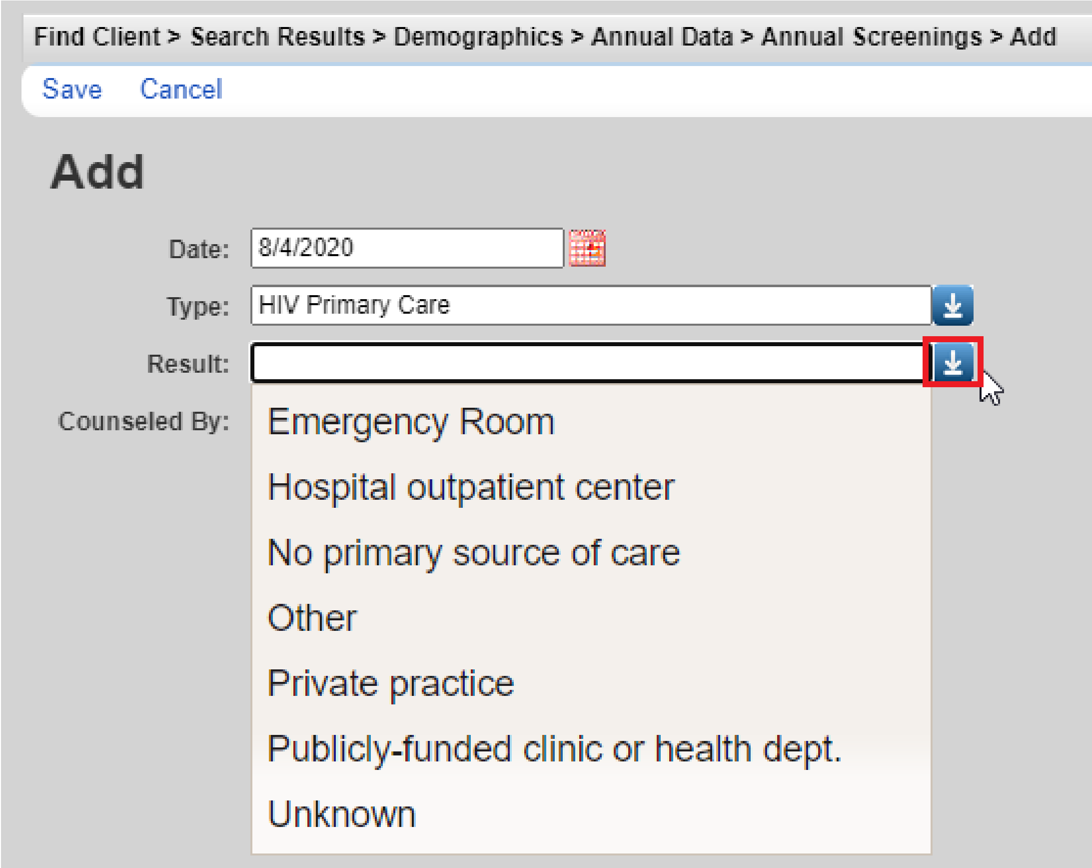
HIV Primary Care

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



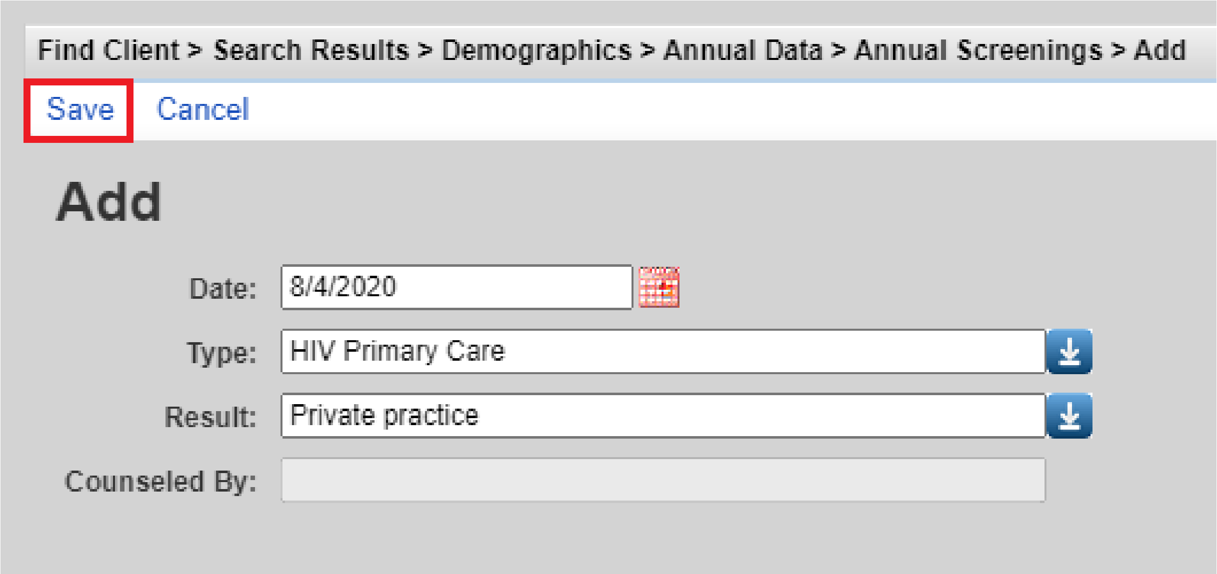
HIV Primary Care cont.

- 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.



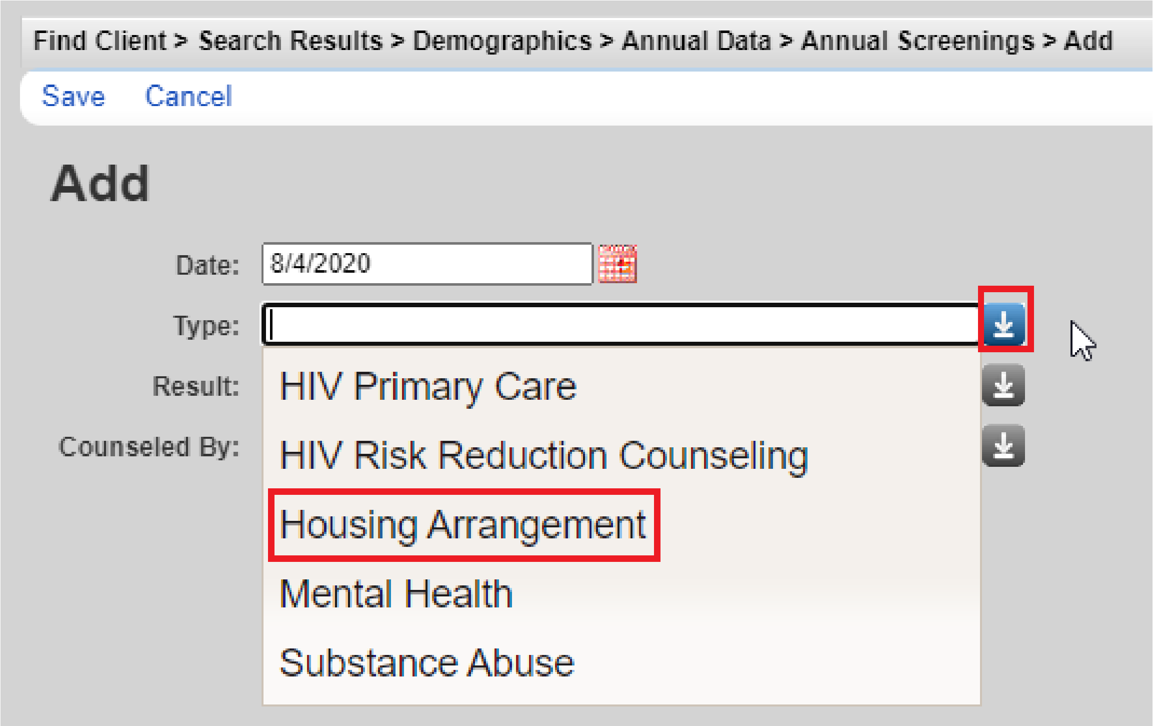
HIV Primary Care cont.

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



Housing Arrangement

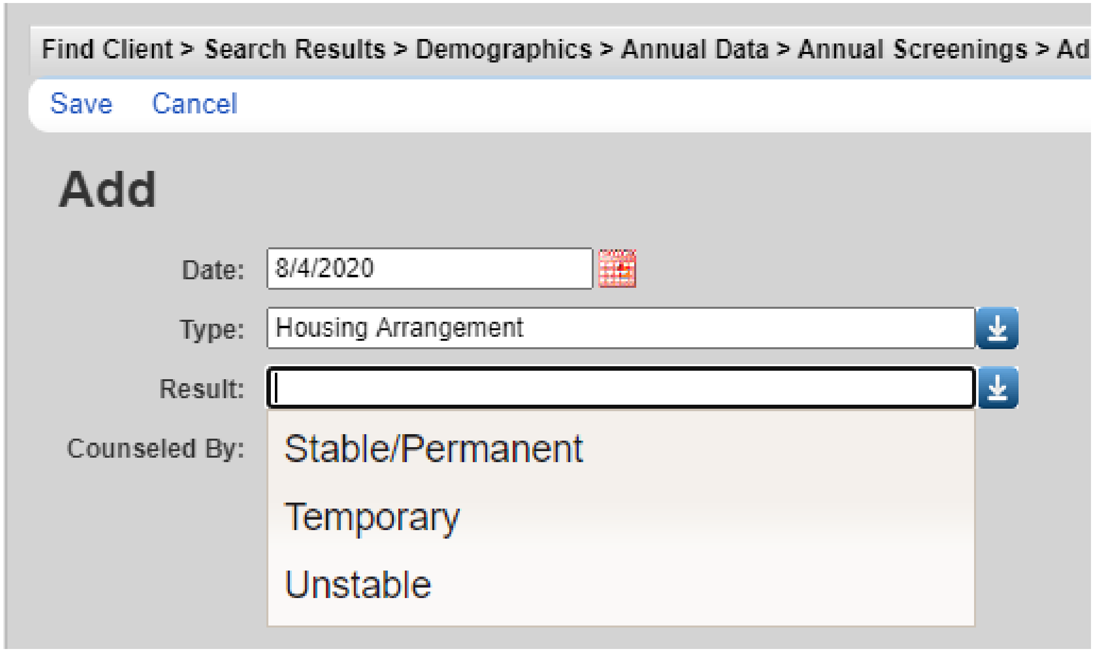
Select Housing Arrangement from the Type drop-down list.



Housing Arrangement cont.

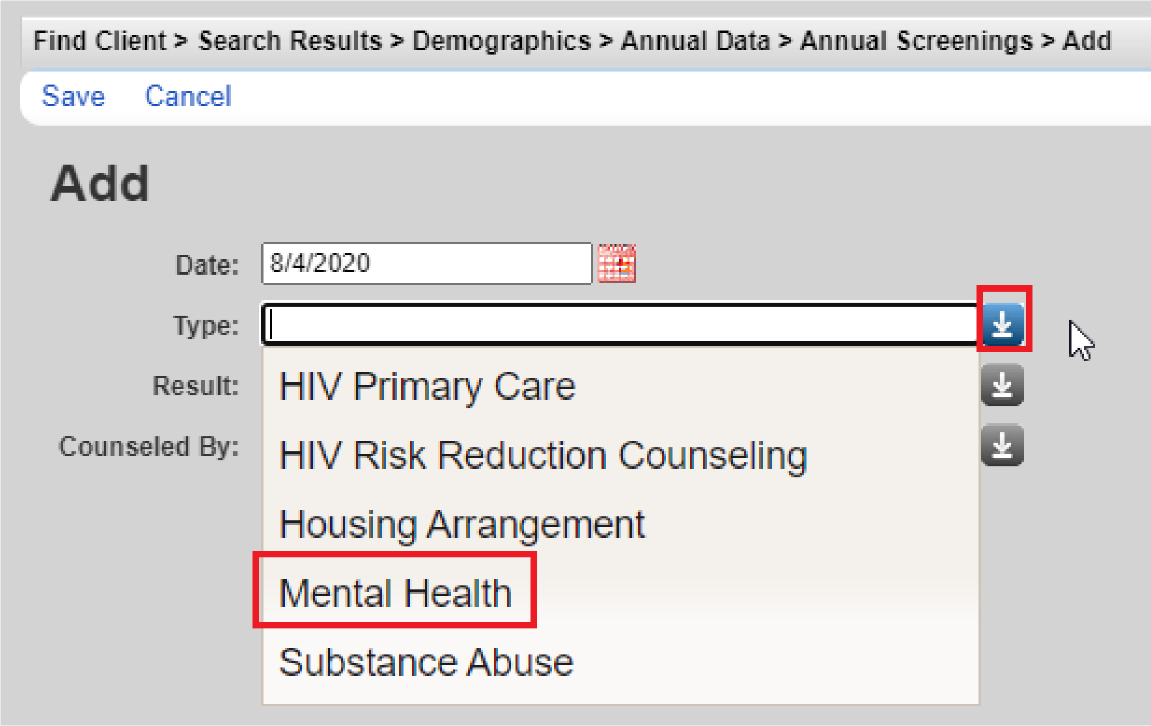
- Enter the Housing Arrangement of the client from the Result drop-down list.
- Enter the Date of data entry.
- Click Save.

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



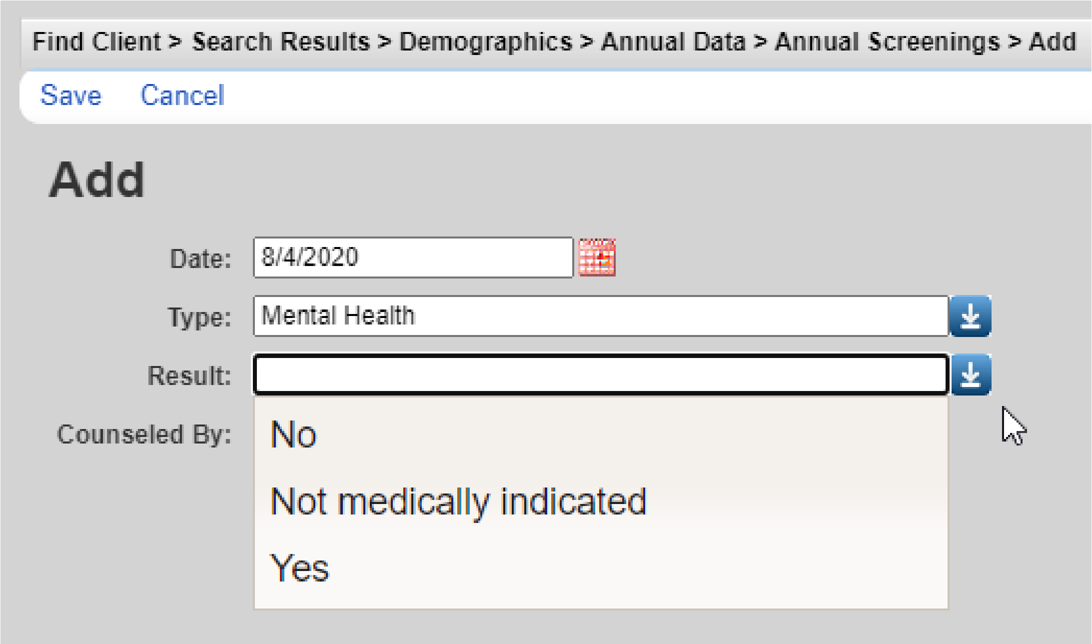
Mental Health

Select Mental Health from the Type drop-down list.



Mental Health cont.

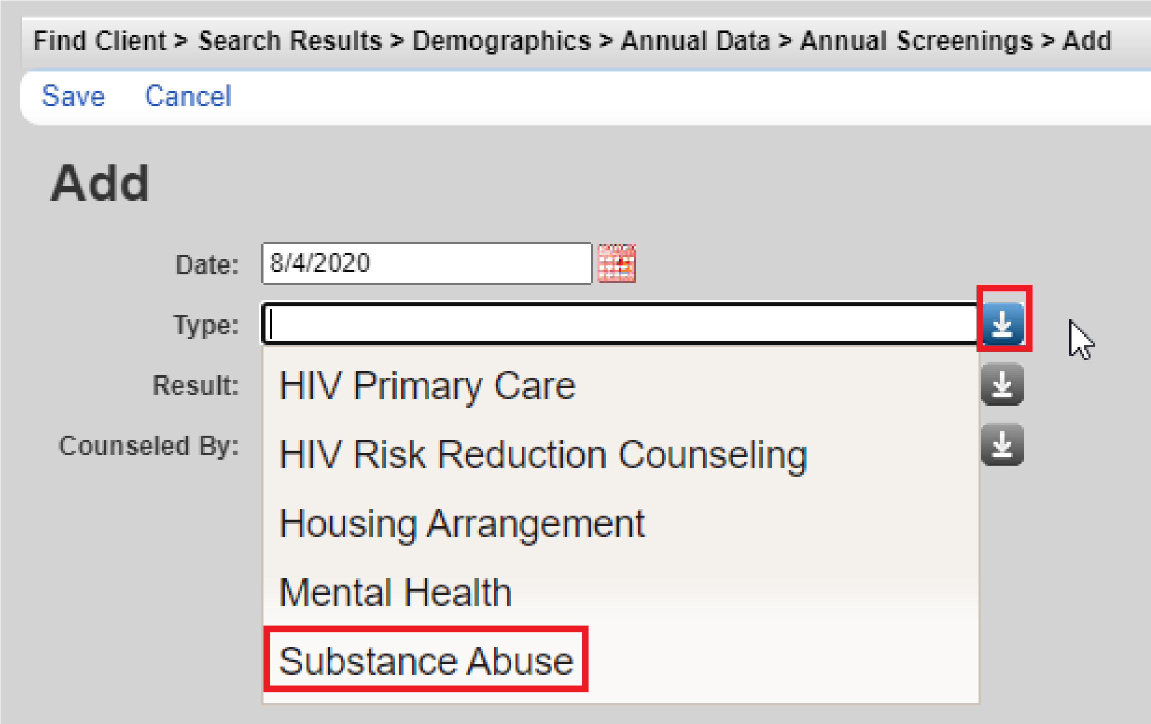
- Enter the Mental Health data from the Result drop-down list.
  - Do not use the ‘Not medically indicated’ option.
- Enter the Date of data entry.
- Click Save.



Please refer to the CAREWare 6 User Manual for additional guidance and definitions of Mental Health Results.

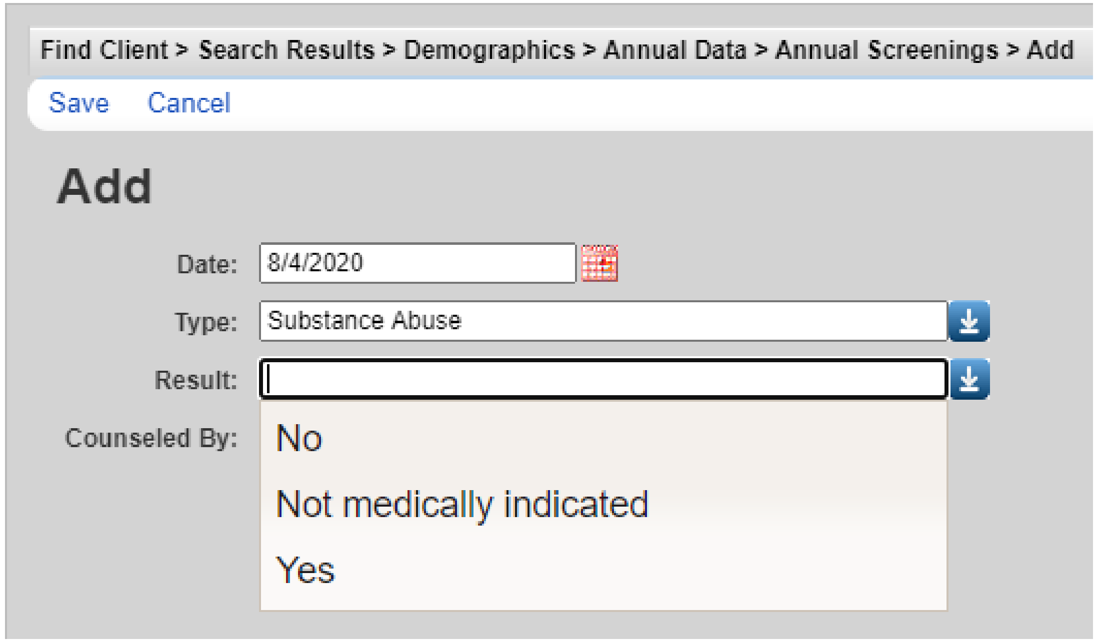
Substance Abuse

Select Substance Abuse from the Type drop-down list.



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.

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

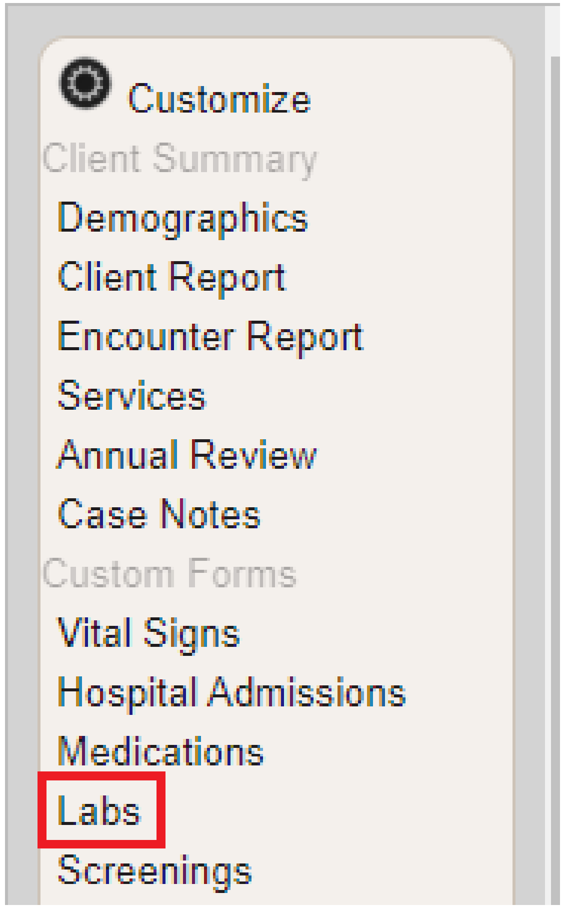
- Annual Review:
    - Primary Insurance
    - Other Insurance
    - Housing Arrangement
    - HIV Primary Care
    - Household Income & Household Size

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

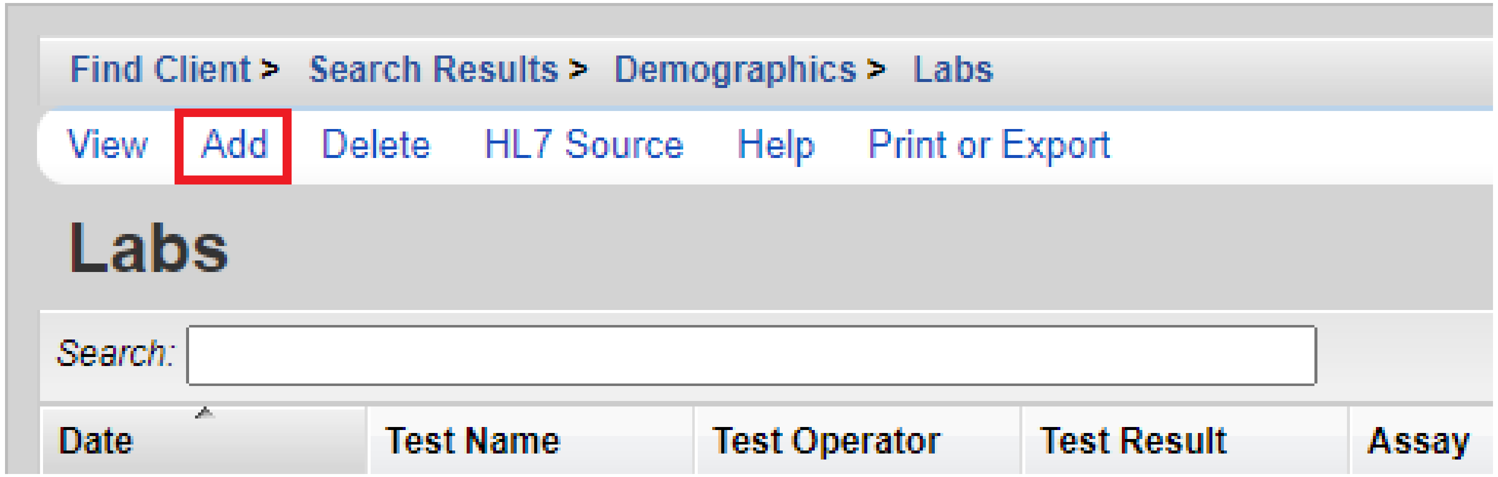
Adding Labs

Click Labs on the client main menu.



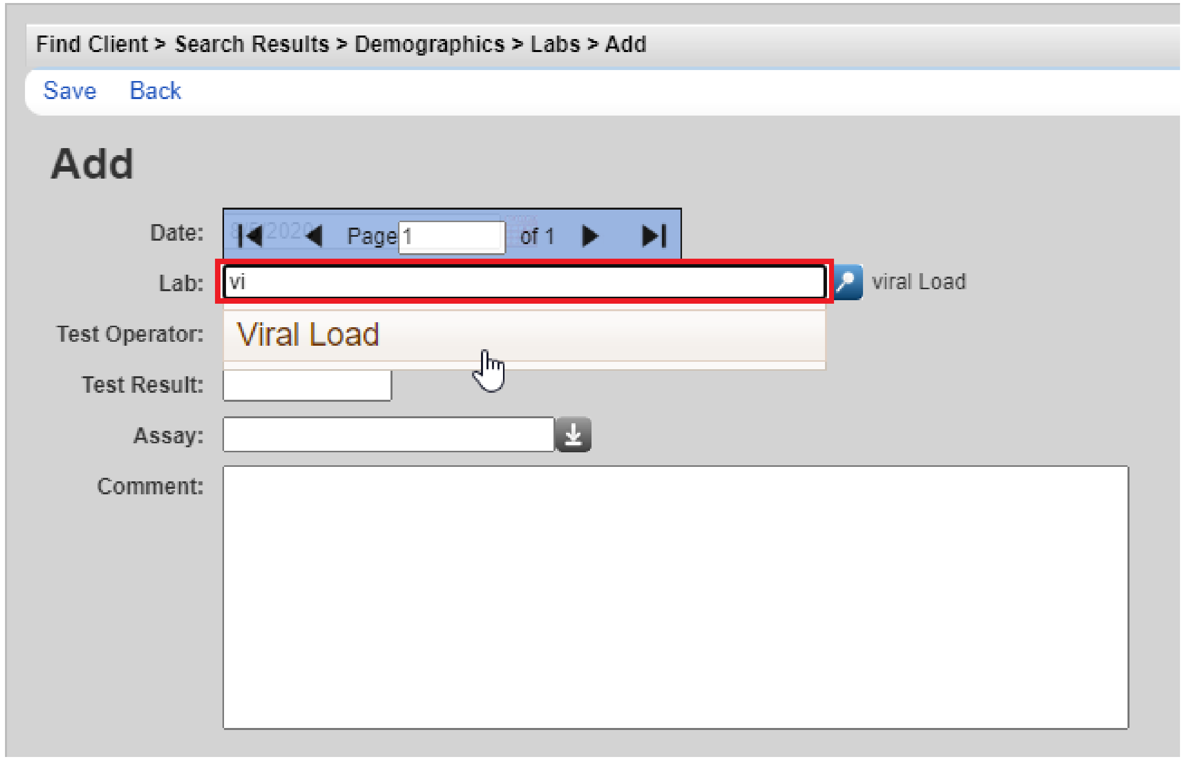
Adding Labs cont.

Click Add.



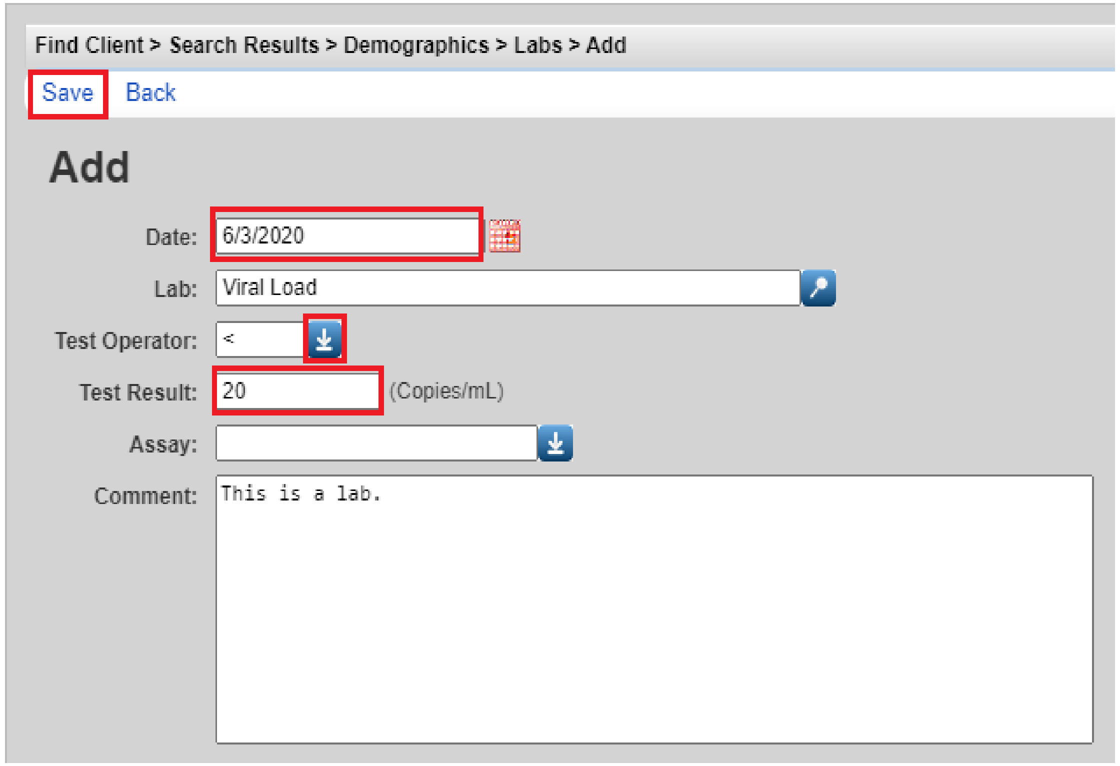
Adding Labs cont.

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



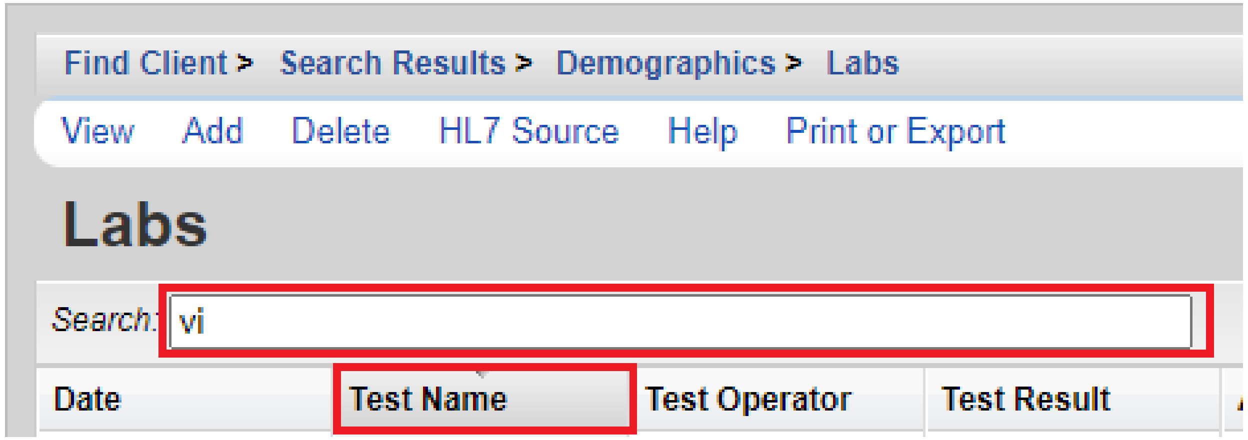
Adding Labs cont.

- 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.



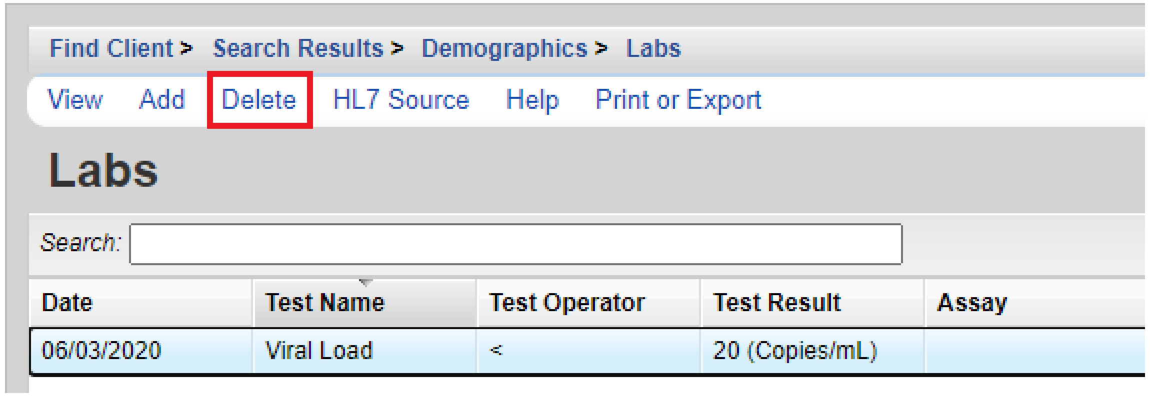
Viewing Labs

- 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.

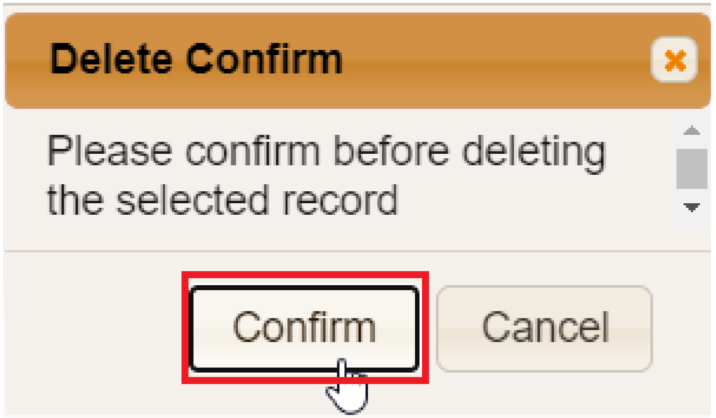


Deleting Labs

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

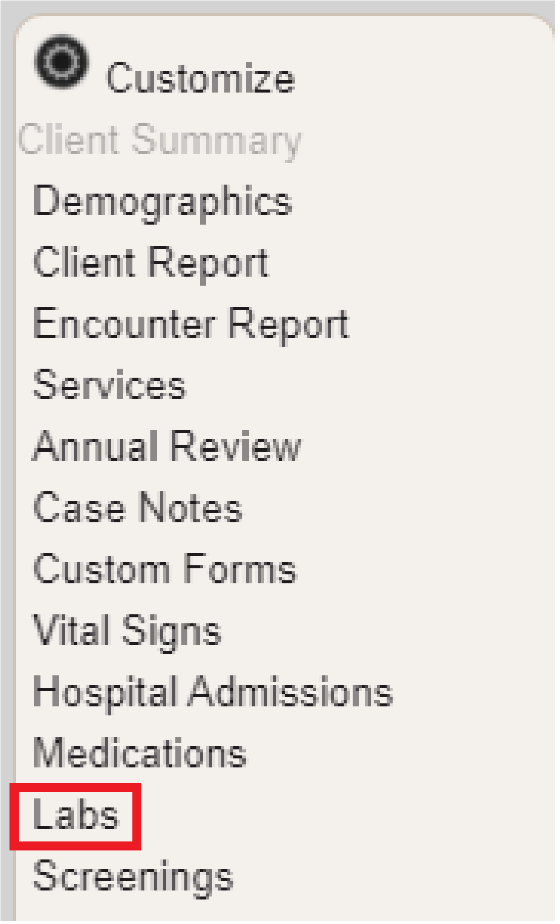


- Click Confirm on the pop-up.



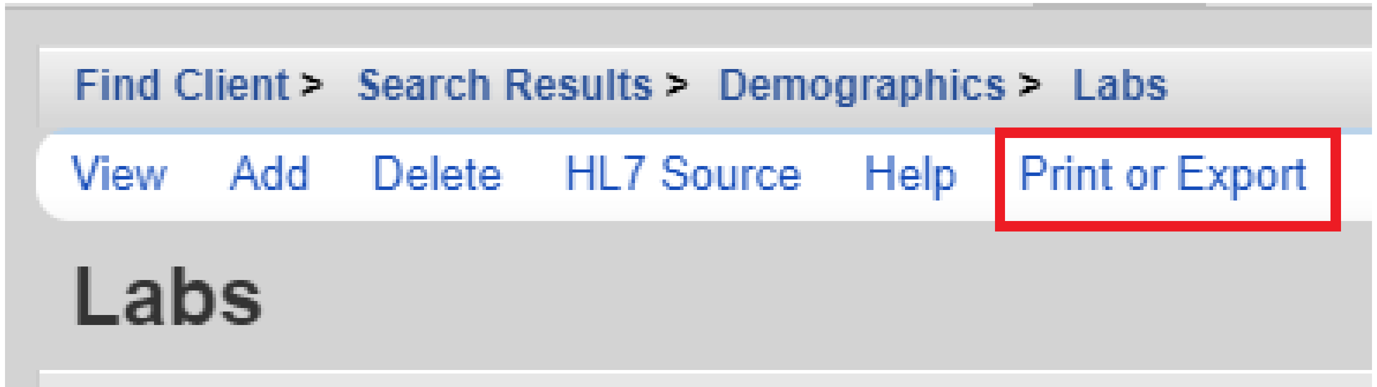
Lab Report

- 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.

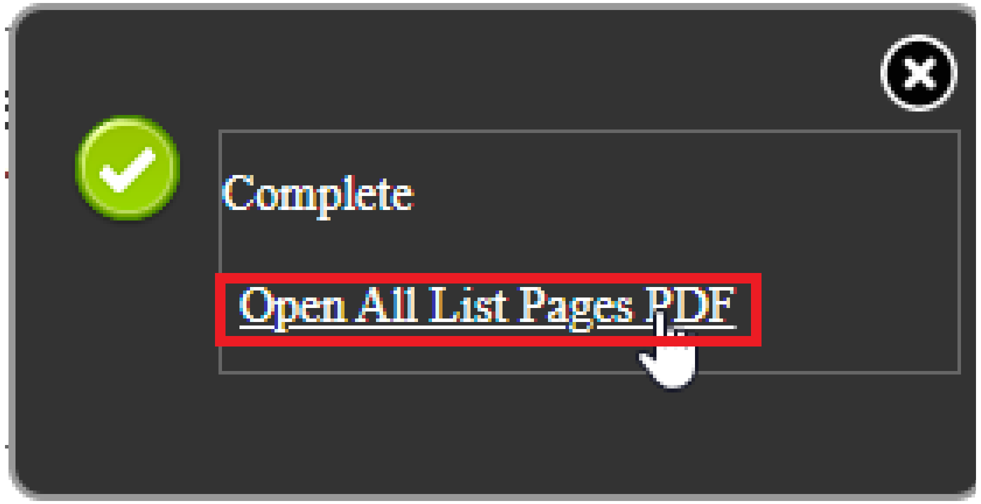


Lab Report cont.

- 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.

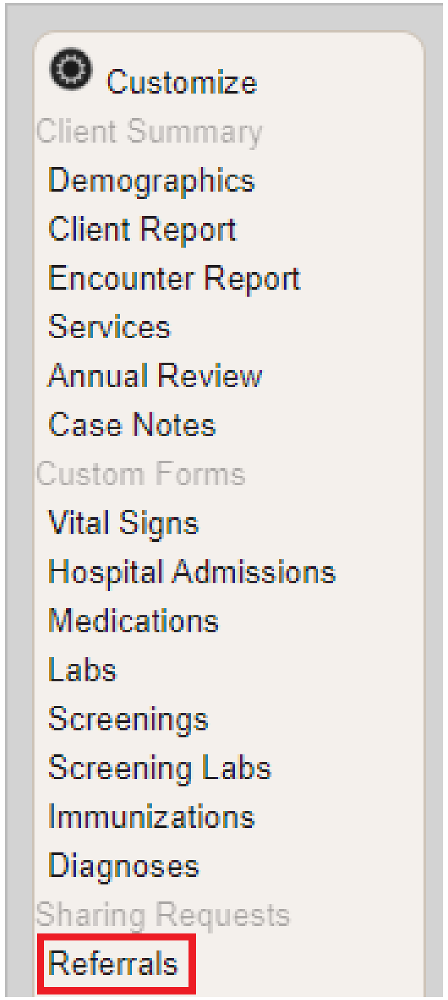
Lab Report cont.

- 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).



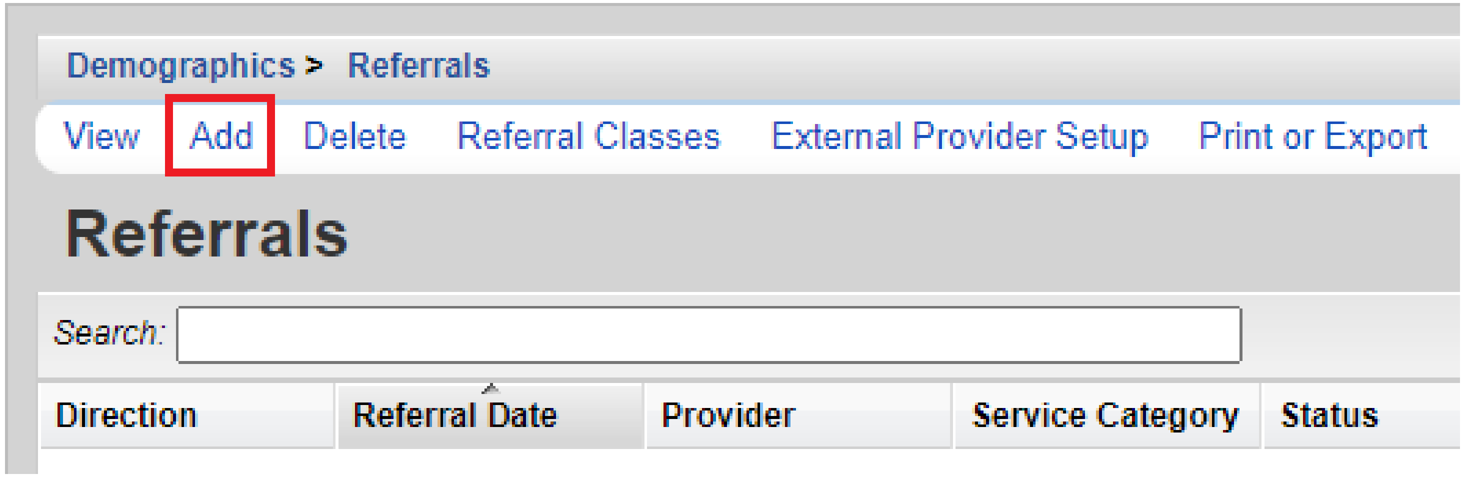
Adding New Referrals

Click Referrals on the client main menu.



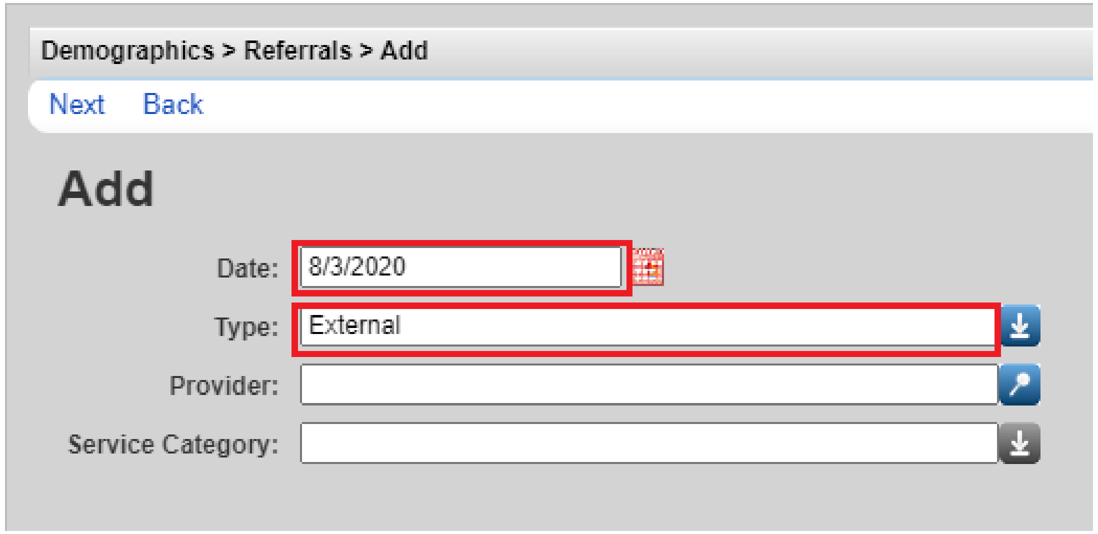
Adding New Referrals cont.

Click Add.



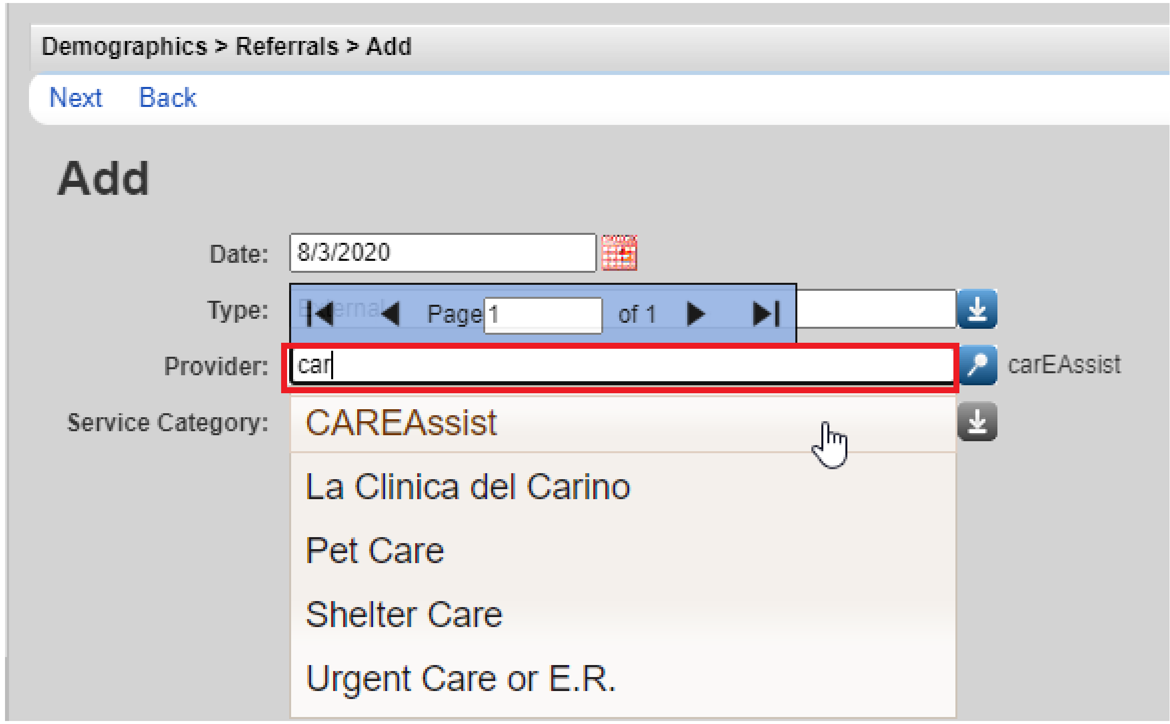
Adding New Referrals cont.

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



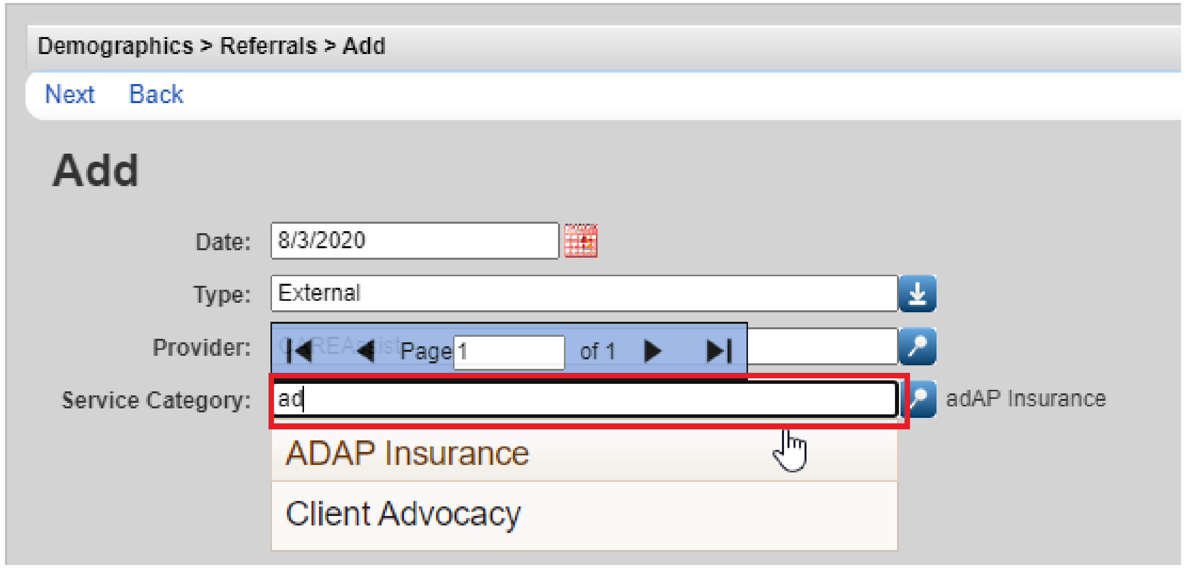
Adding New Referrals cont.

- 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.



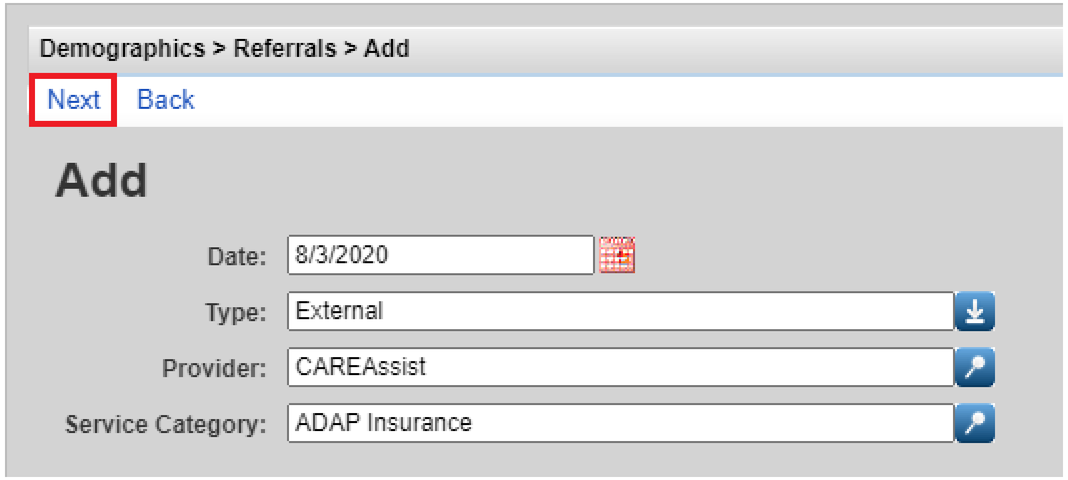
Adding New Referrals cont.

- 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.



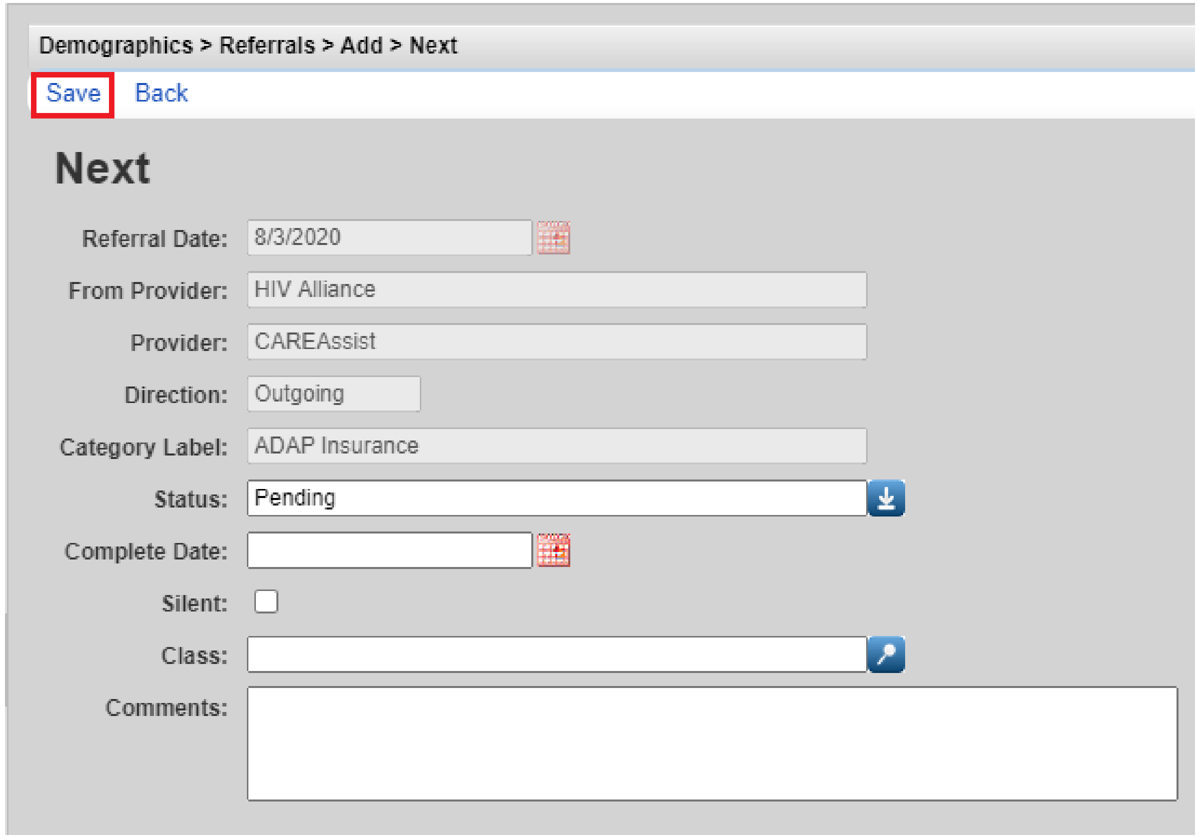
Adding New Referrals cont.

Click Next.



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.

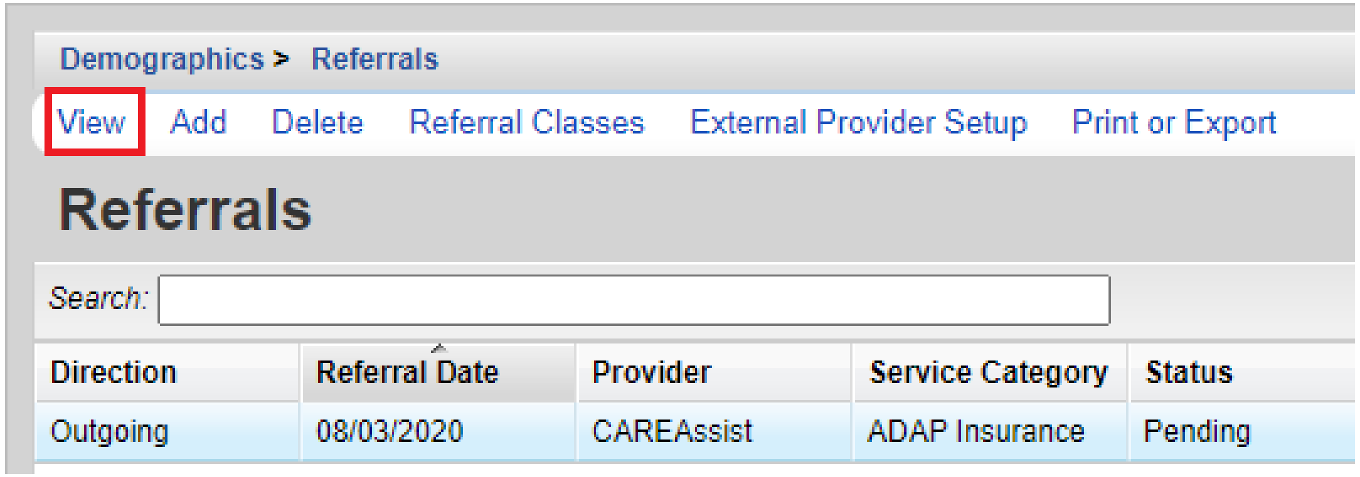


Adding New Referrals cont.

- 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

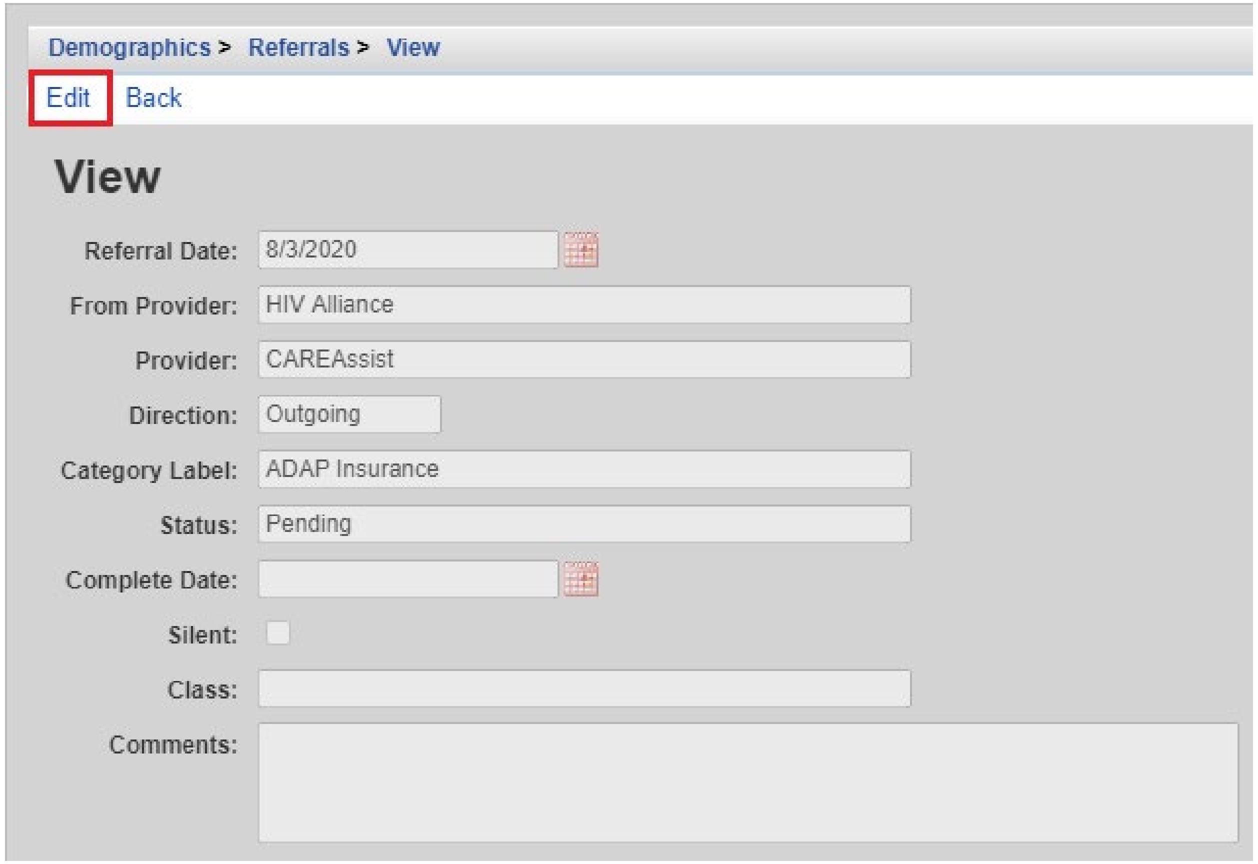
Editing Referrals

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



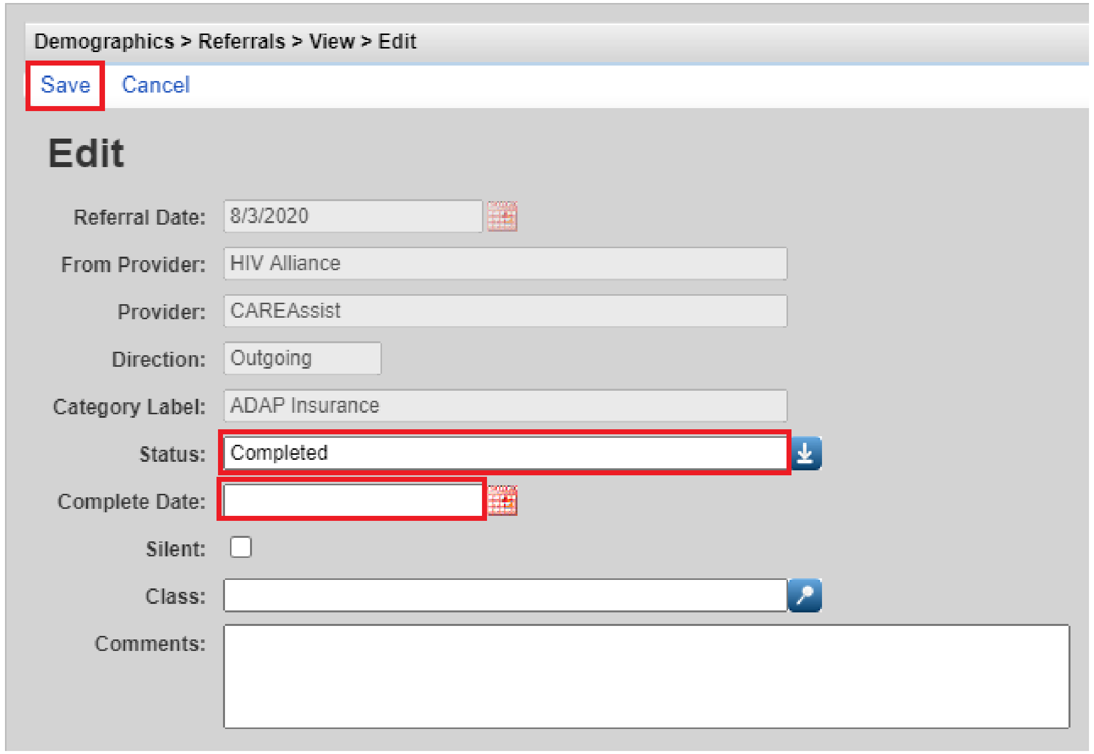
Editing Referrals cont.

Click Edit.



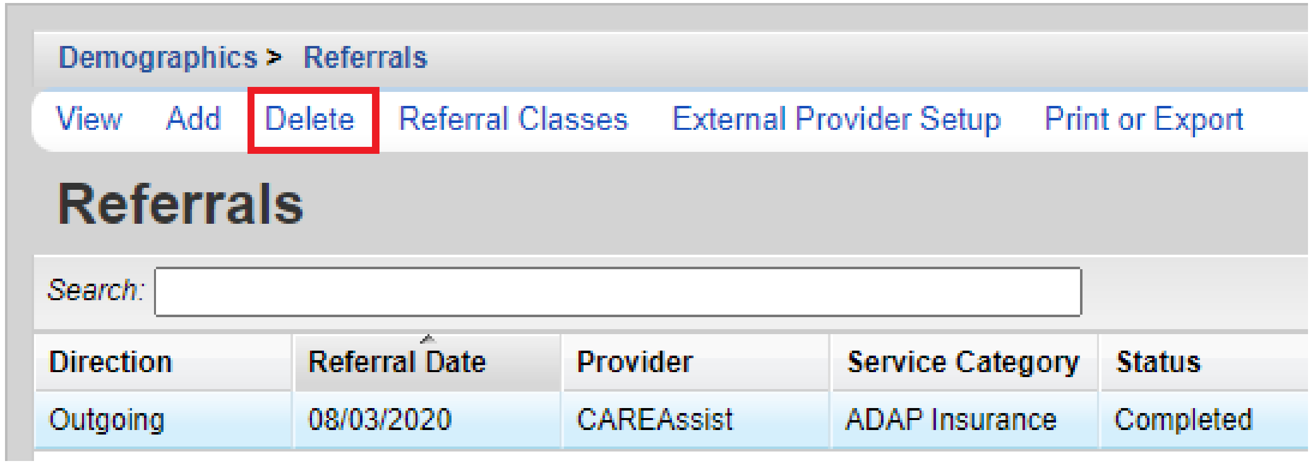
Editing Referrals cont.

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



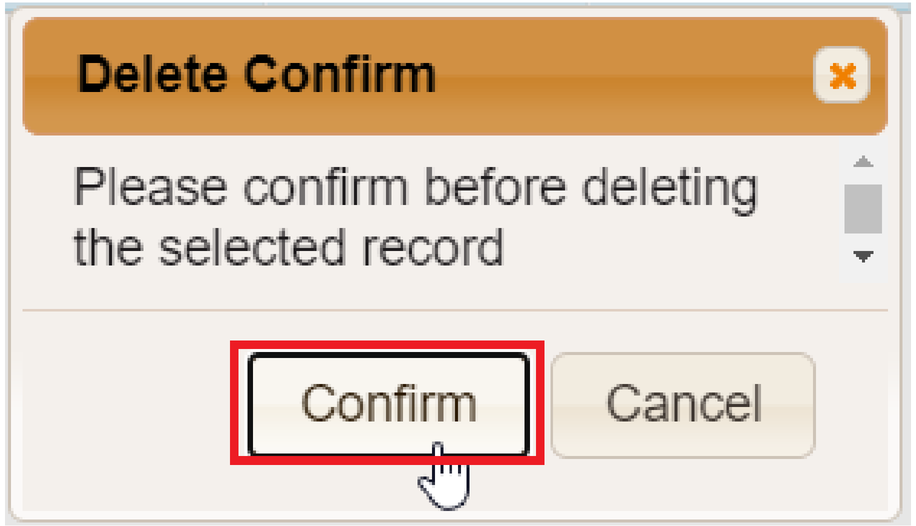
Deleting Referrals

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



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