


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 3:
Case Management B

Topics:

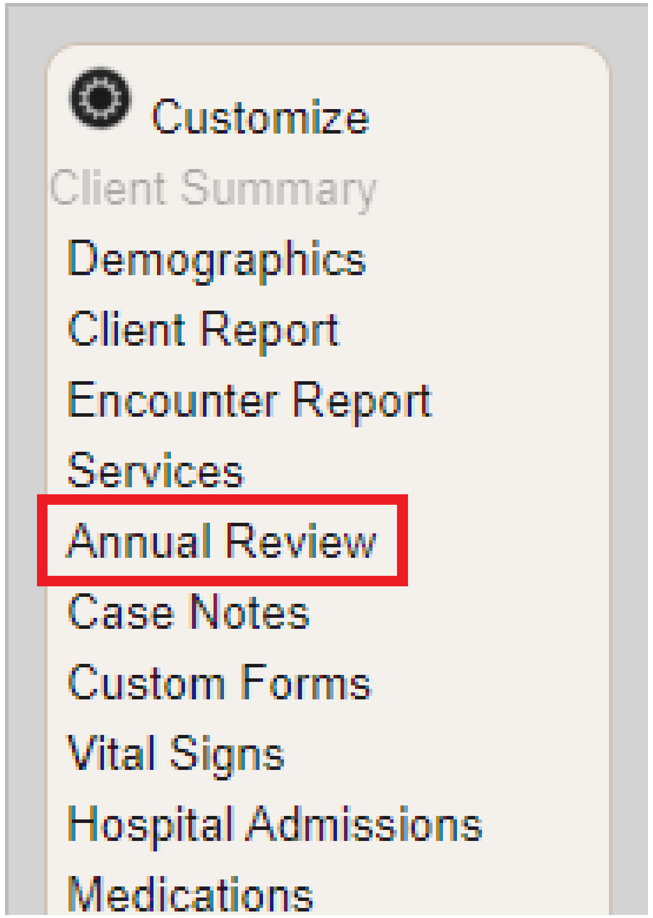
- Document/Form Uploading
- Specialty tabs (Contacts/ROI, Attachments)
- Forms Completion

Welcome!

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

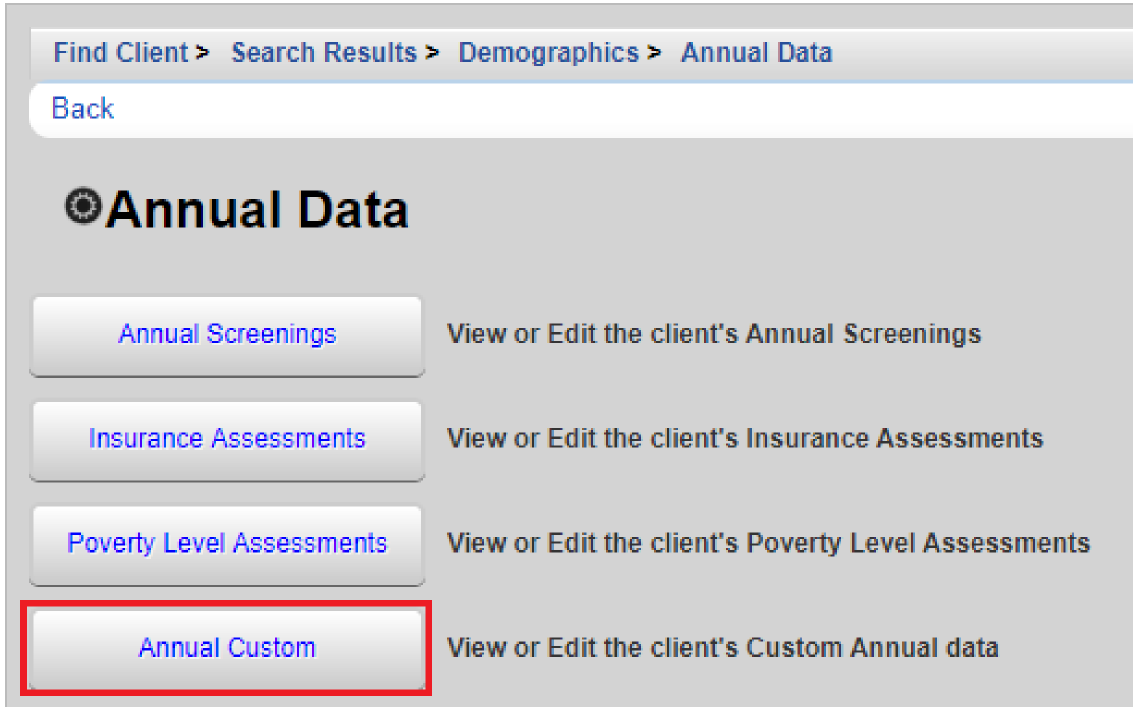
Document Uploading – Regional Model

- Navigate to the client’s record.
- Click Annual Review on the client main menu.



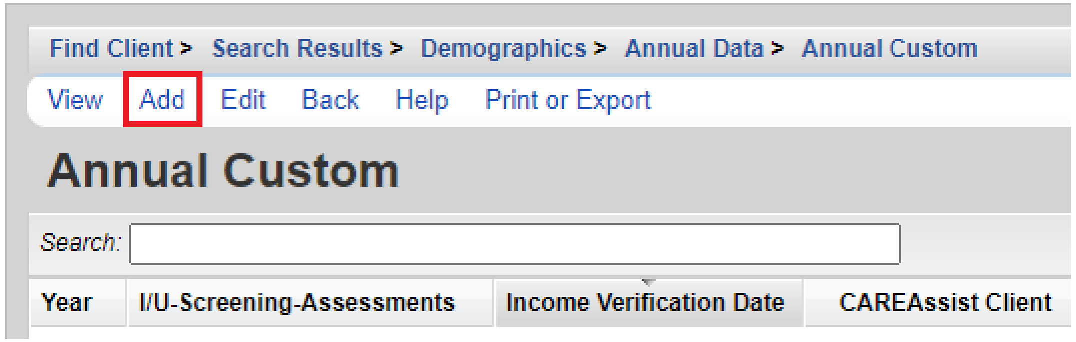
Document Uploading – Regional Model cont.

Next, click Annual Custom.

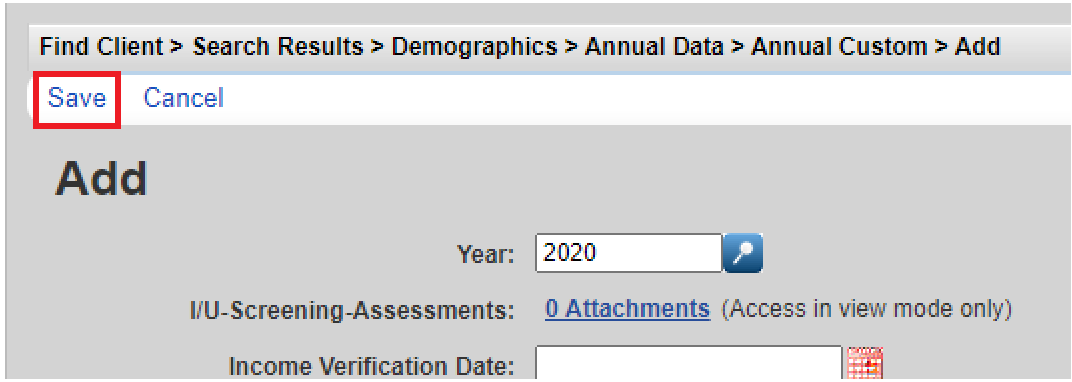


Document Uploading – Regional Model cont.

- If there is not currently the year associated with the data to be added, click Add.

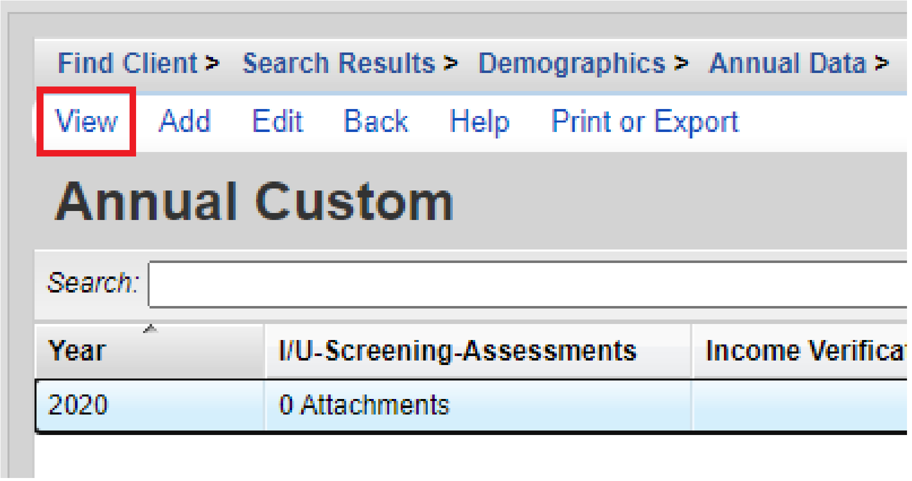


- Enter the Year associated with the attachments. Click Save.



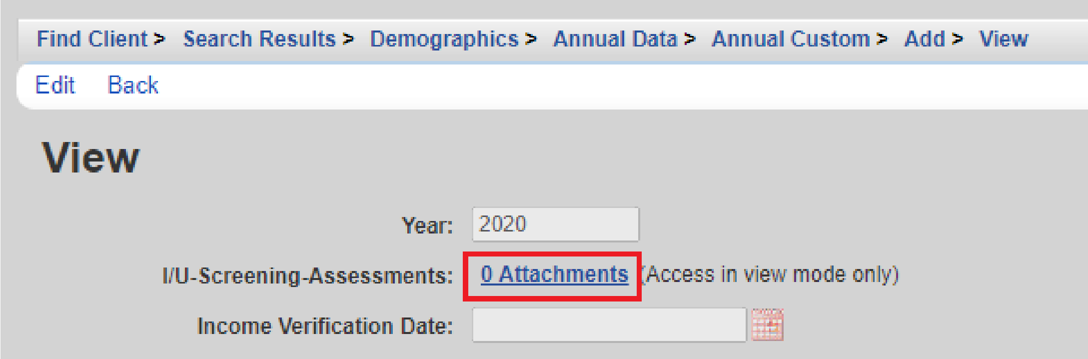
Document Uploading – Regional Model cont.

- If the year is already listed, or after users add the year, select the year row.
- Click View.



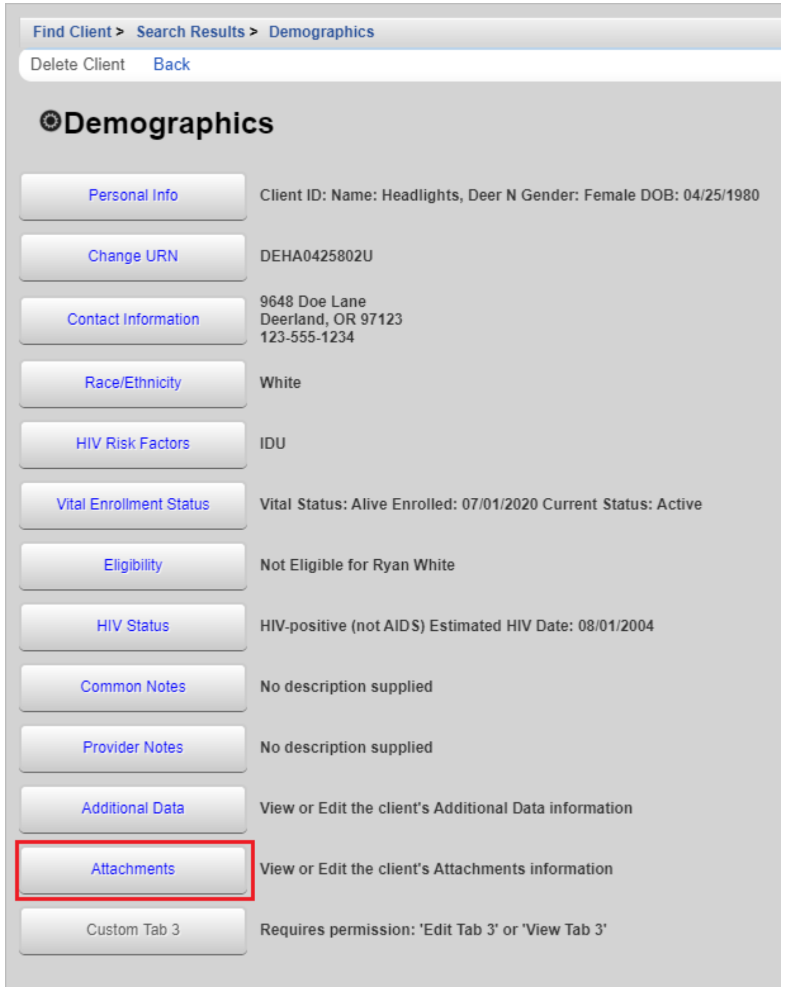
Document Uploading – Regional Model cont.

Click the field's Attachments hyperlink on the View screen.



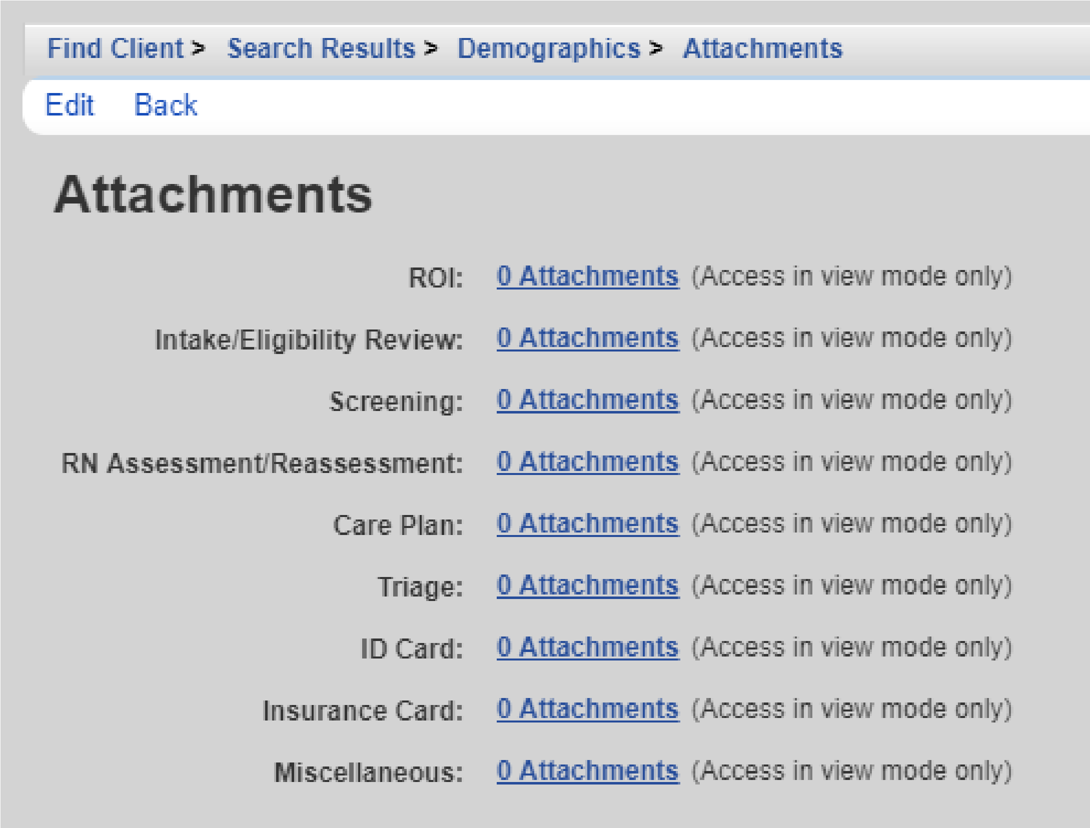
Document Uploading – County Model

- Navigate to the client's record.
- Click on Attachments on the client Demographics page.



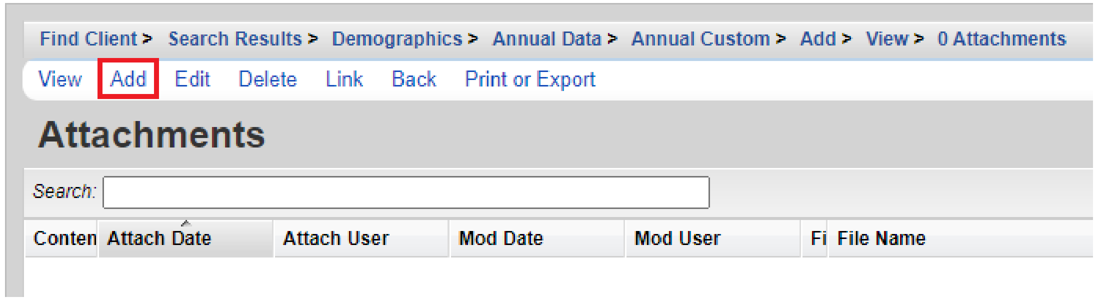
Document Uploading – County Model cont.

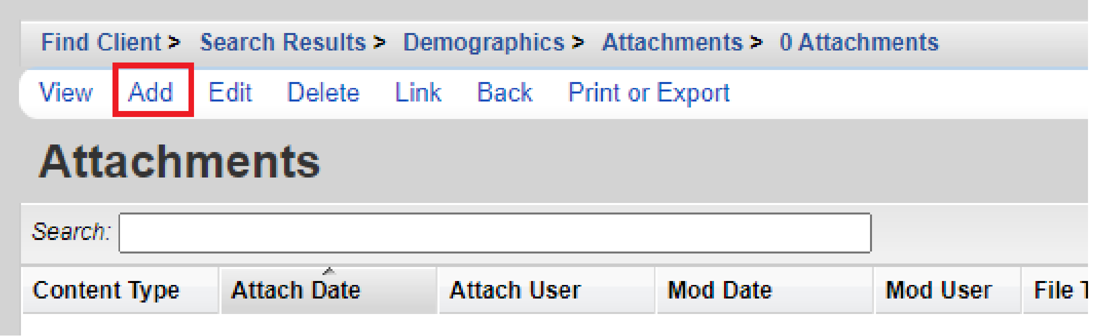
Click on the field's hyperlink to open the Attachments page.



Document Uploading – All Models

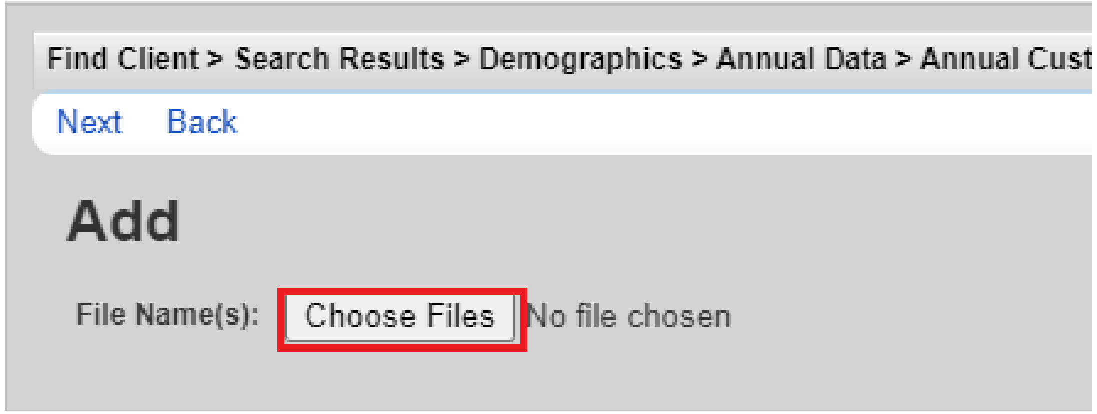
- Once users navigate to the document uploading page based upon their model, the mechanism for uploading documents is the same.
- Click Add.





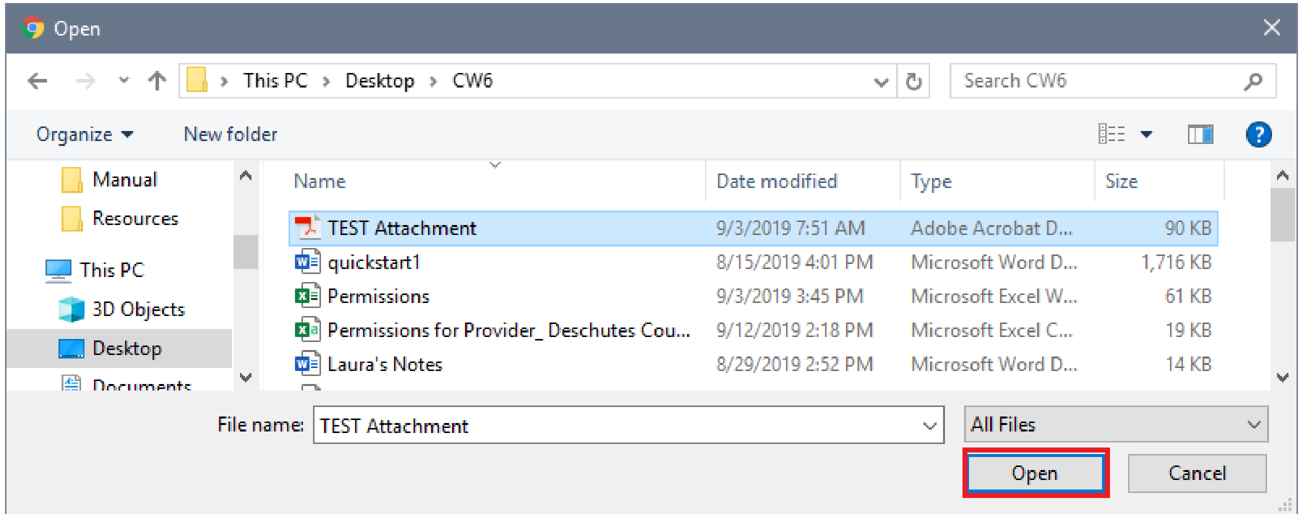
Document Uploading – All Models cont.

Click Choose Files.



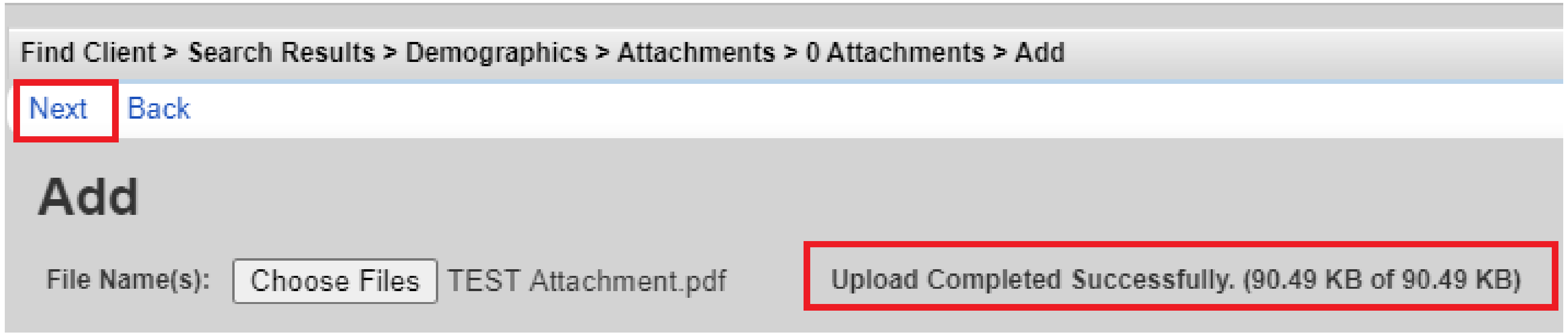
Document Uploading – All Models cont.

Navigate to the file to be uploaded and click Open.



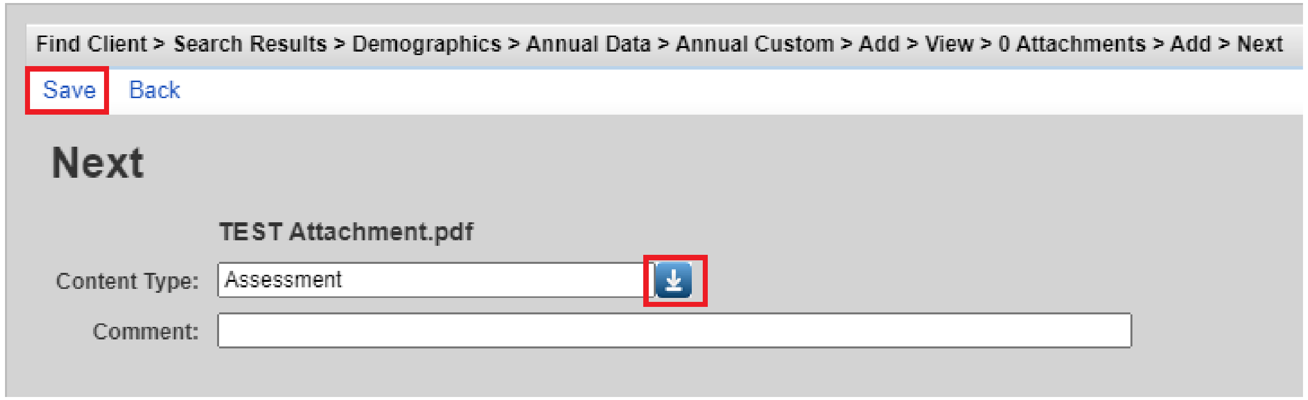
Document Uploading – All Models cont.

- CAREWare will upload the file.
- Click Next.



Document Uploading – All Models cont.

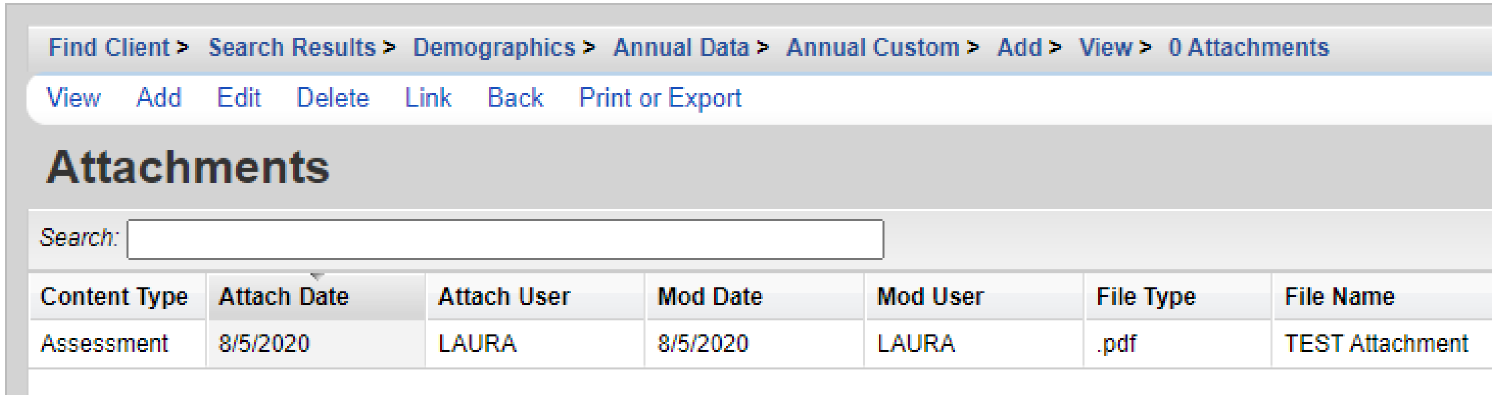
- Select the Content Type from the dropdown list options.
- Click Save.



Document Uploading – Regional Model

The uploaded document will now be visible on the Attachments screen.

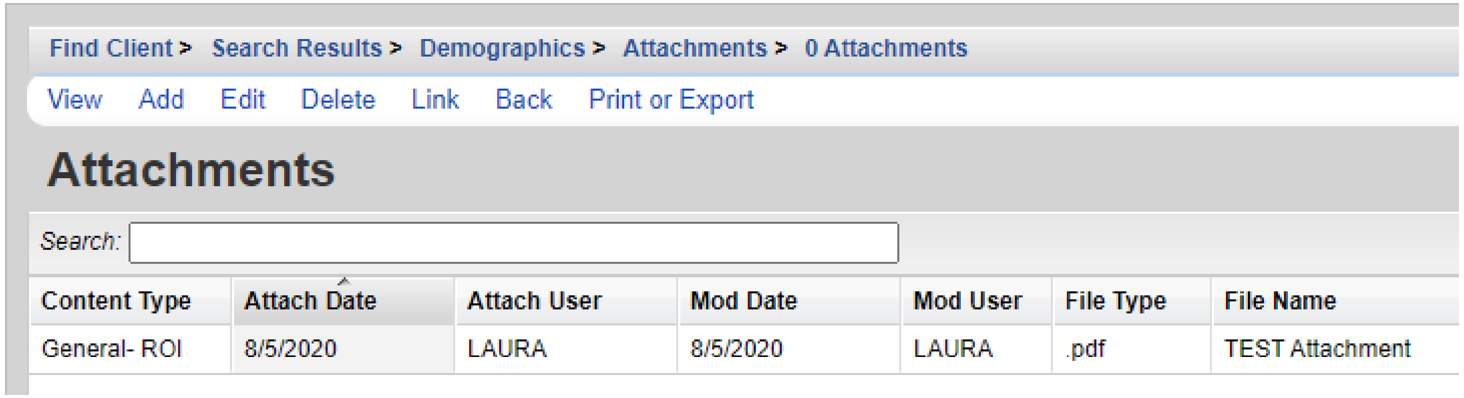
Note the breadcrumbs links showing the navigation to the attachments screen.



Document Uploading – County Model

The uploaded document will now be visible on the Attachments screen.

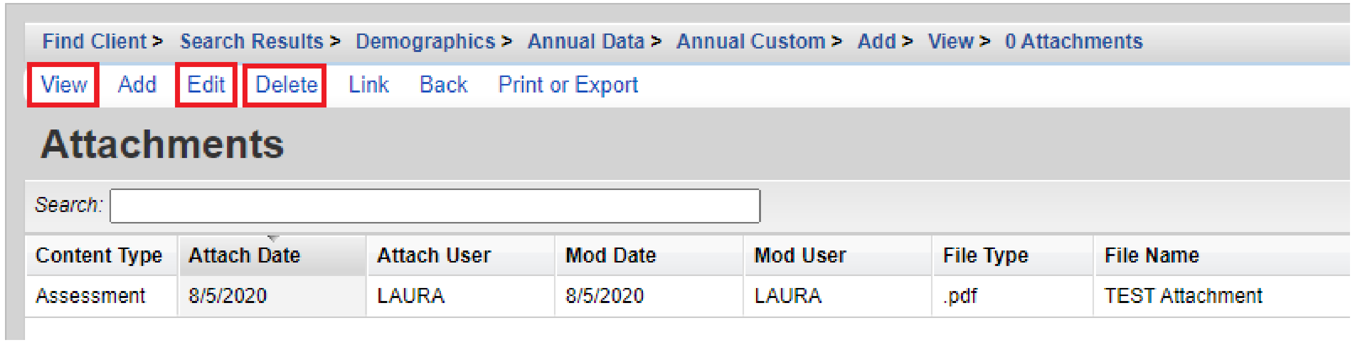
Note the breadcrumbs links showing the navigation to the attachments screen.

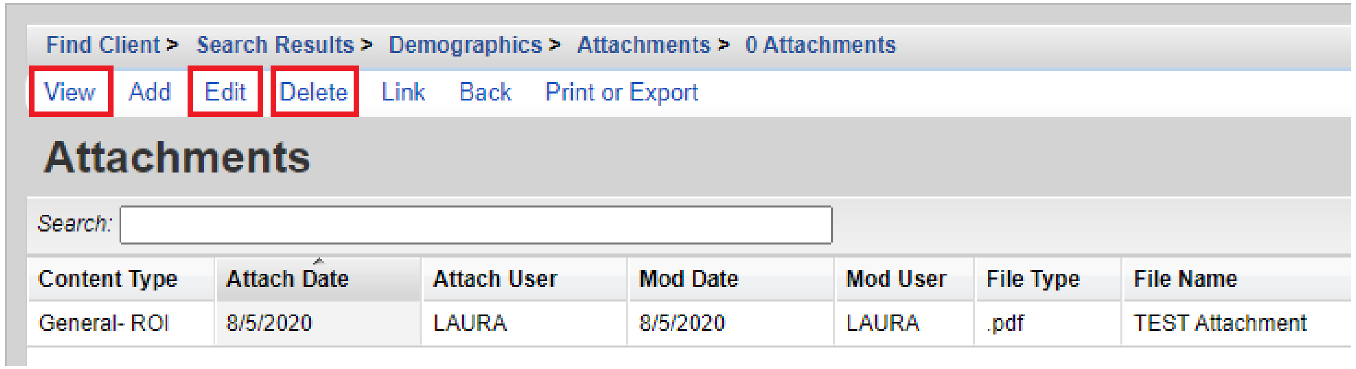


Viewing, Editing, or Deleting Documents

- To view, edit or delete a document, select the document on the Attachments screen.
- Click Add, Edit or Delete.

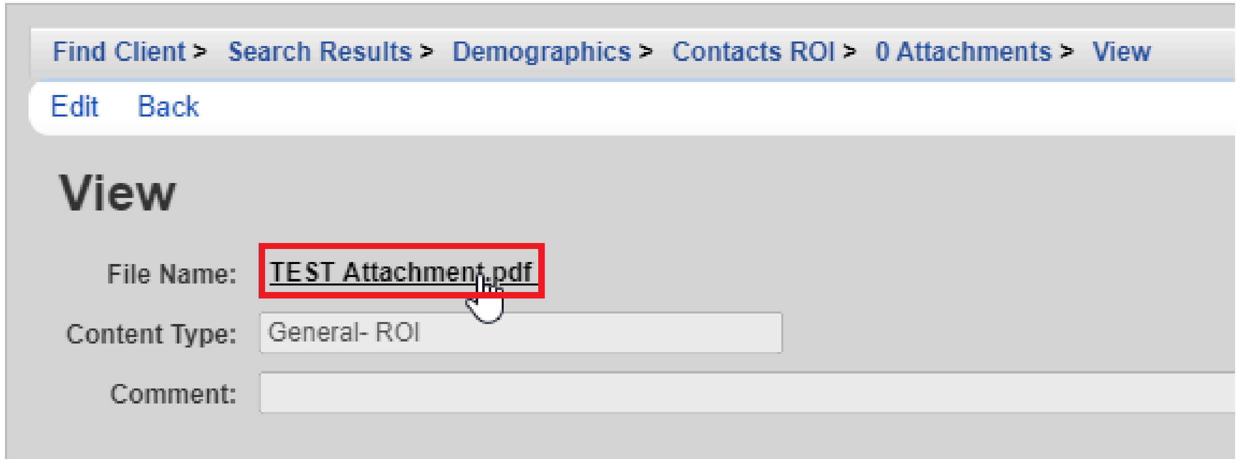
Note the breadcrumbs links showing the navigation to the attachments screen.





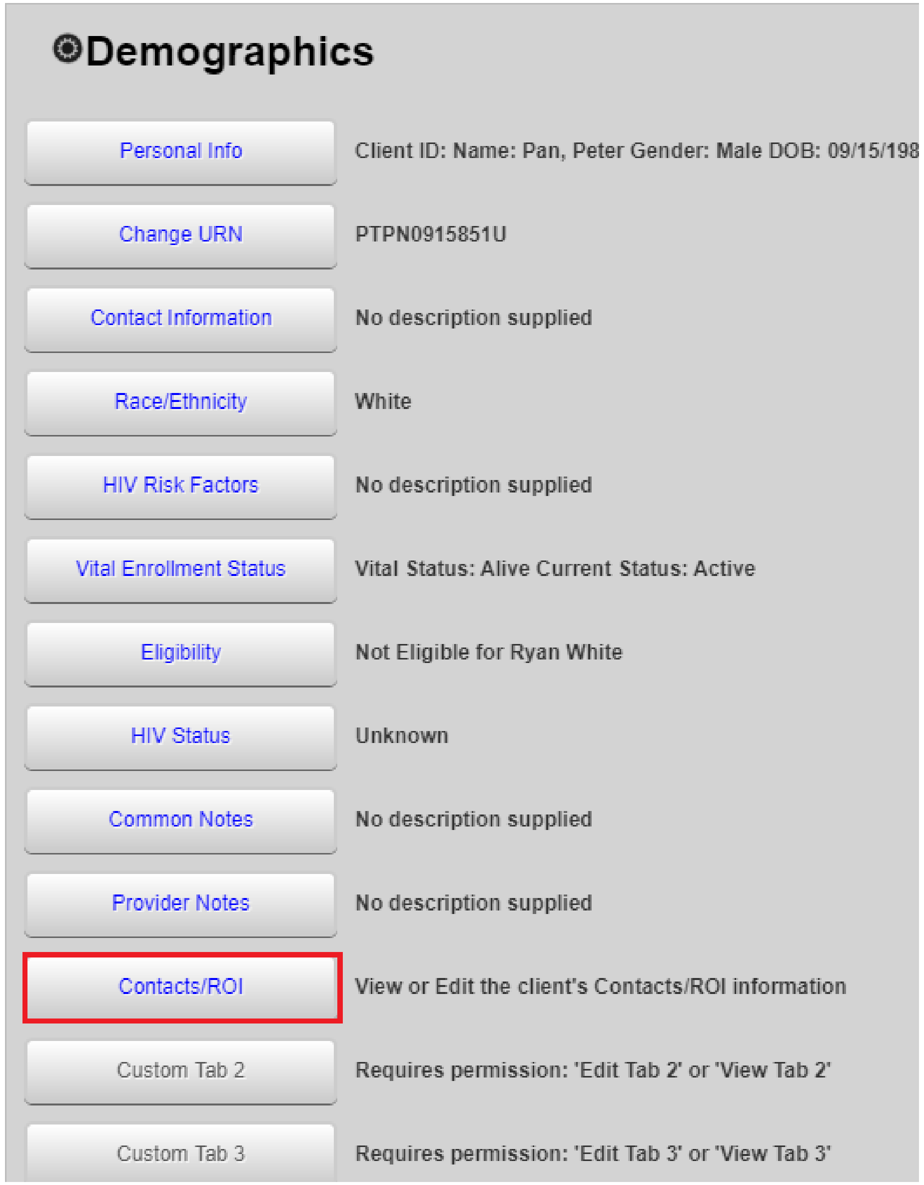
Viewing Attachments

- Click the File Name (this is a hyperlink).
- The attachment will open in a new browser tab.



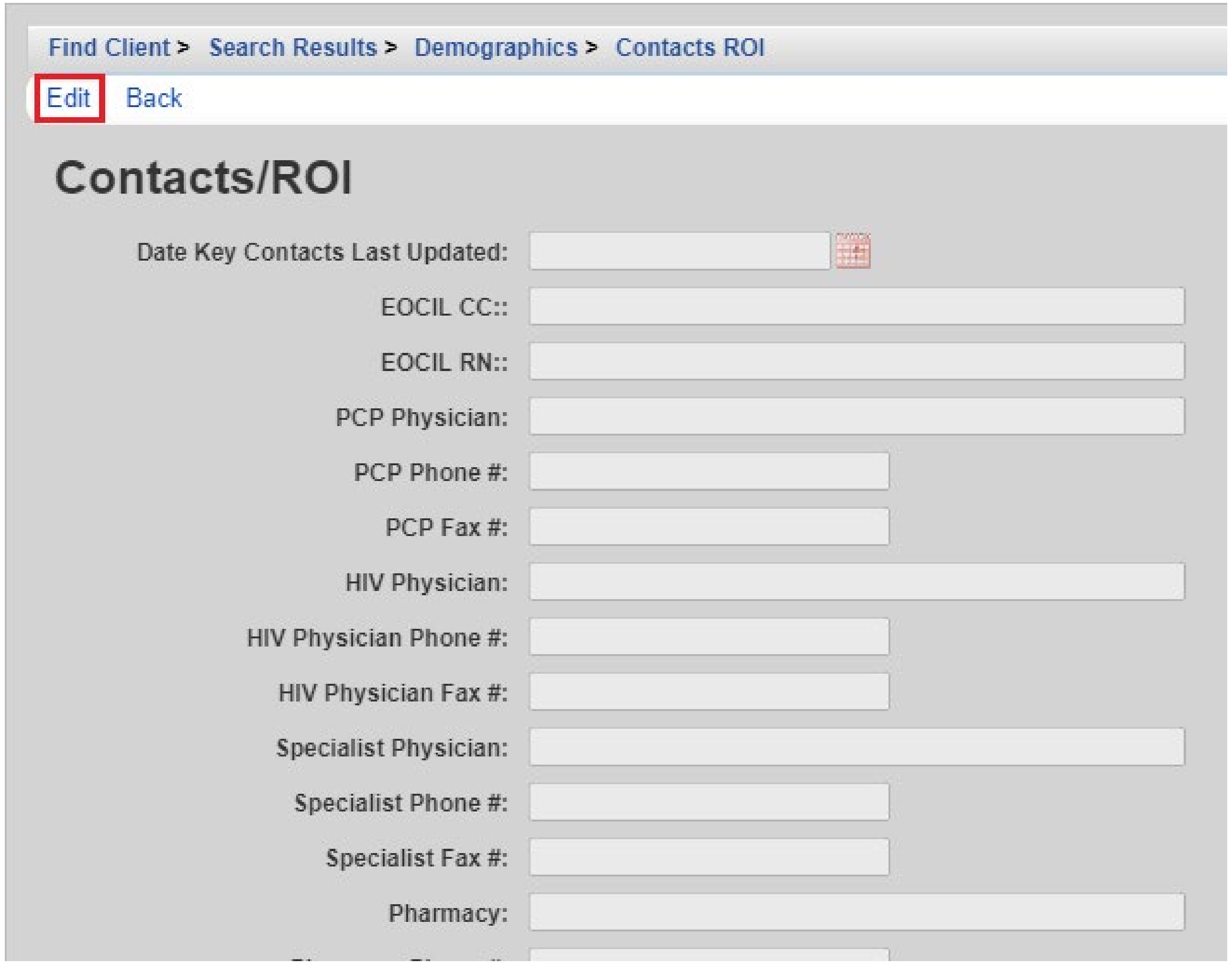
Contacts/ROI Tab

- Contacts/ROI tab provides fields to record appropriate contact information for the client.
- Click Contacts/ROI on the Demographics menu.



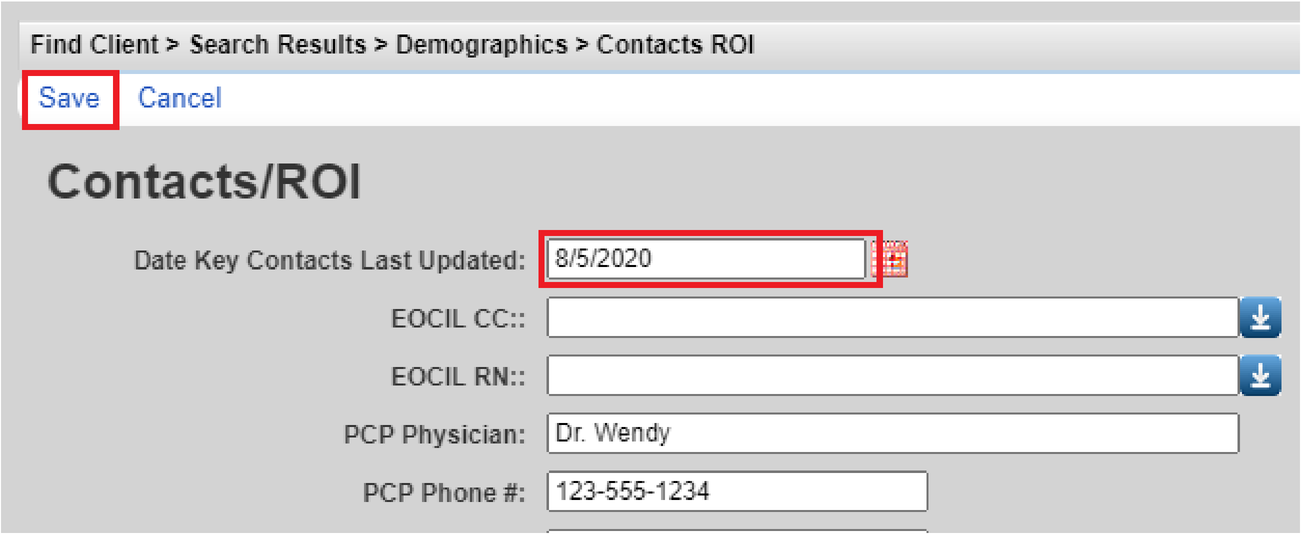
Contacts/ROI Tab cont.

- Click Edit.



Contacts/ROI Tab cont.

- Enter the Date of data entry and the appropriate information into the key contact fields.
- Click Save.

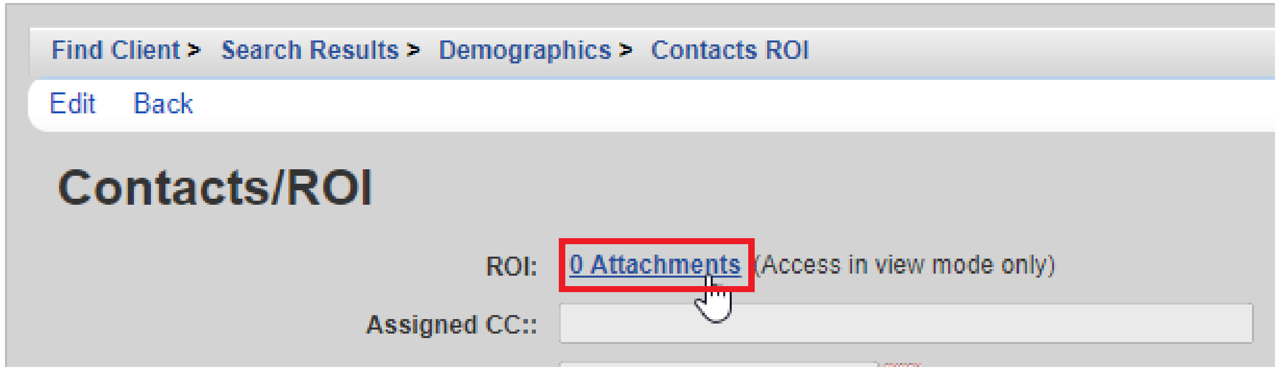


Uploading ROIs

- ROIs are uploaded on the Contacts/ROI screen in the **regional** model.
- ROIs are uploaded on the Attachments screen in the **county** model.
- The upload process is the same between models once users navigate to the correct screen.

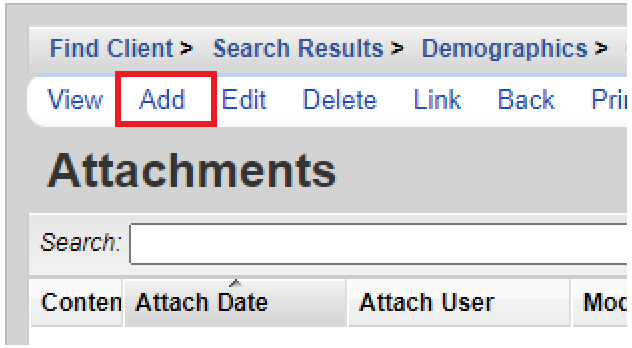
Uploading ROIs cont.

Click the Attachments hyperlink on the Contacts/ROI screen (regional model) or the Attachments screen (county model).

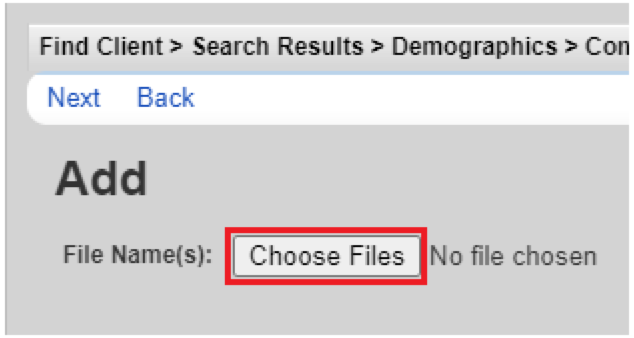


Uploading ROIs cont.

- Click Add.

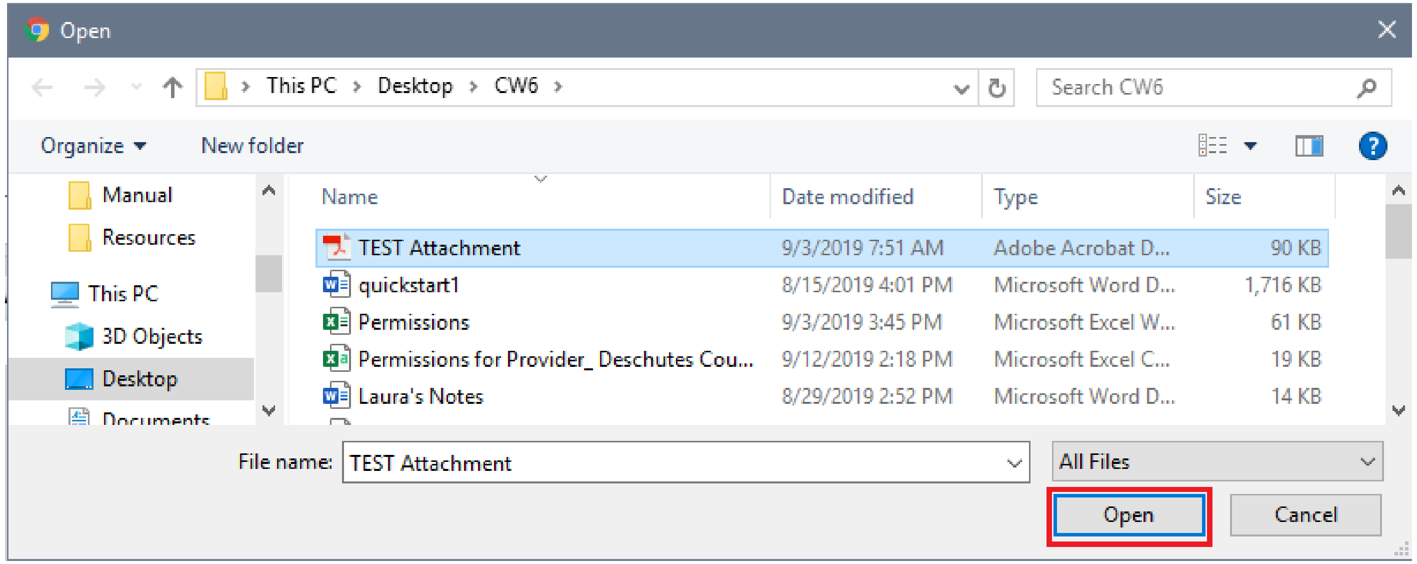


- Click Choose Files.



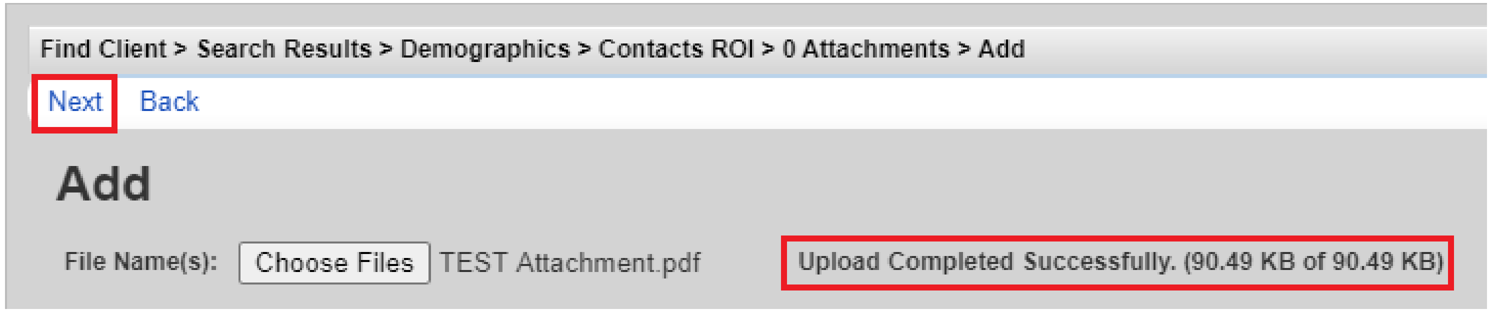
Uploading ROIs cont.

Navigate to the file to be uploaded and click Open.



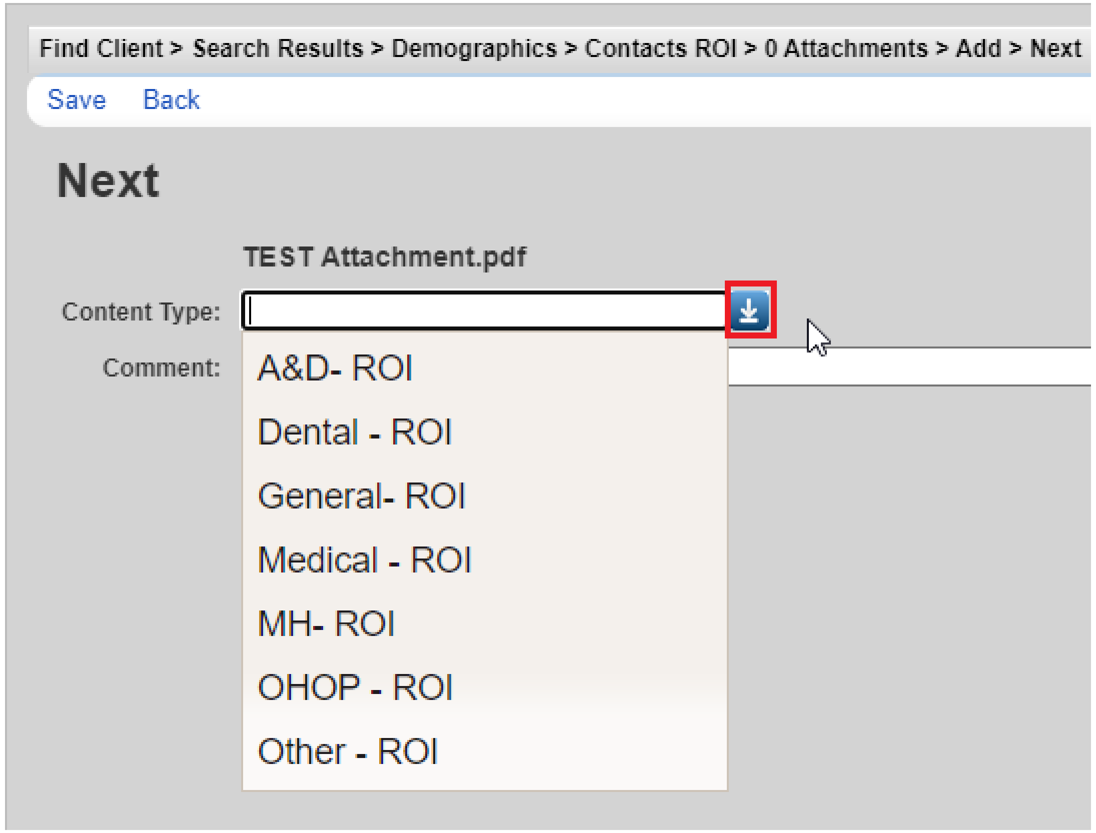
Updating ROIs cont.

- CAREWare will upload the file.
- Click Next.



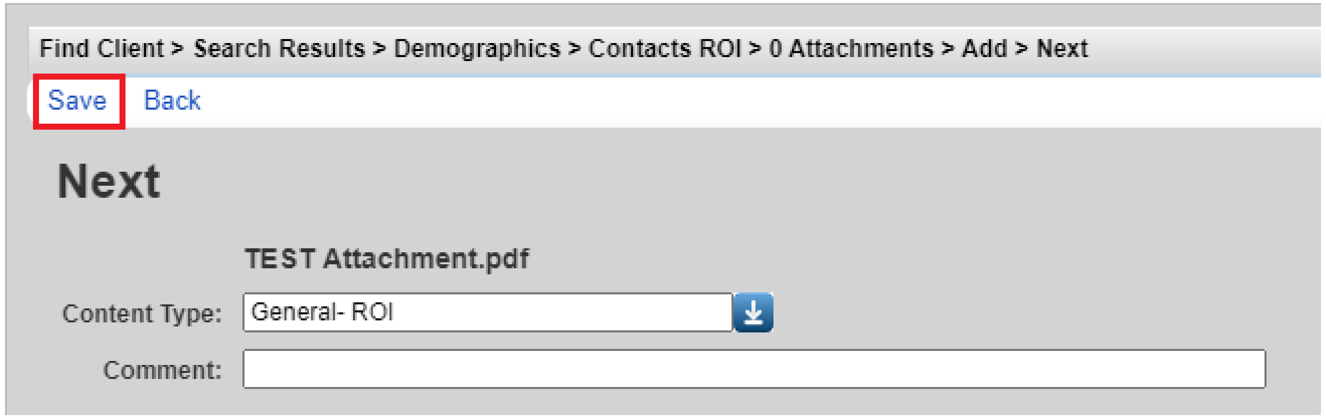
Updating ROIs cont.

Enter the Content Type from the dropdown menu options.



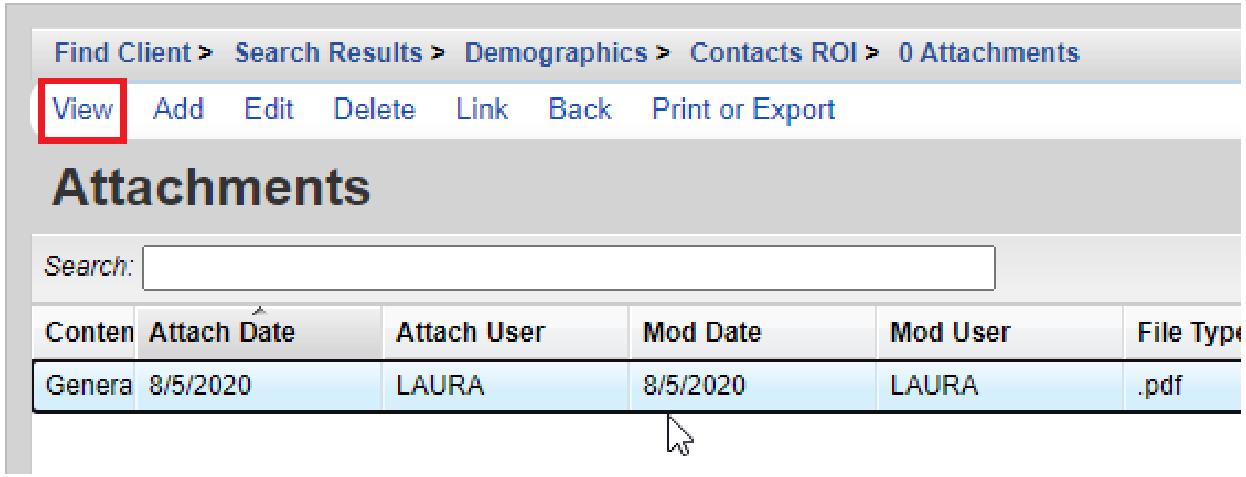
Updating ROIs cont.

- Enter a Comment if desired.
- Click Save.



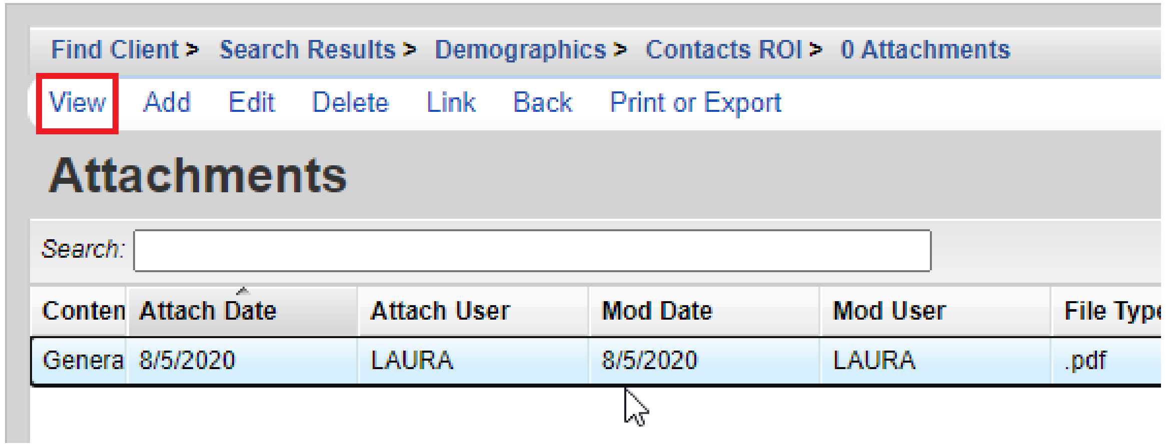
Updating ROIs cont.

The ROI will now be visible in the Attachments list.



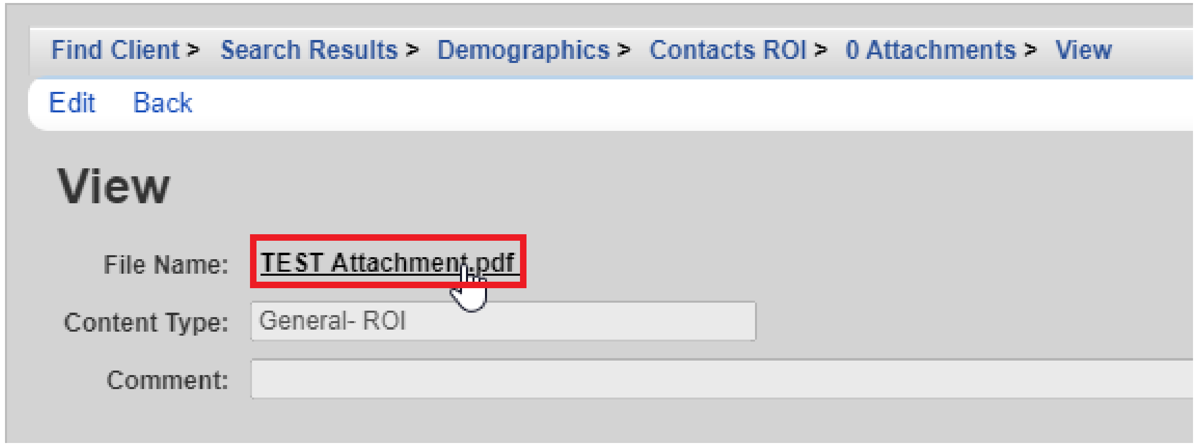
Viewing ROIs

To open an attachment, select the ROI. Then, click View.



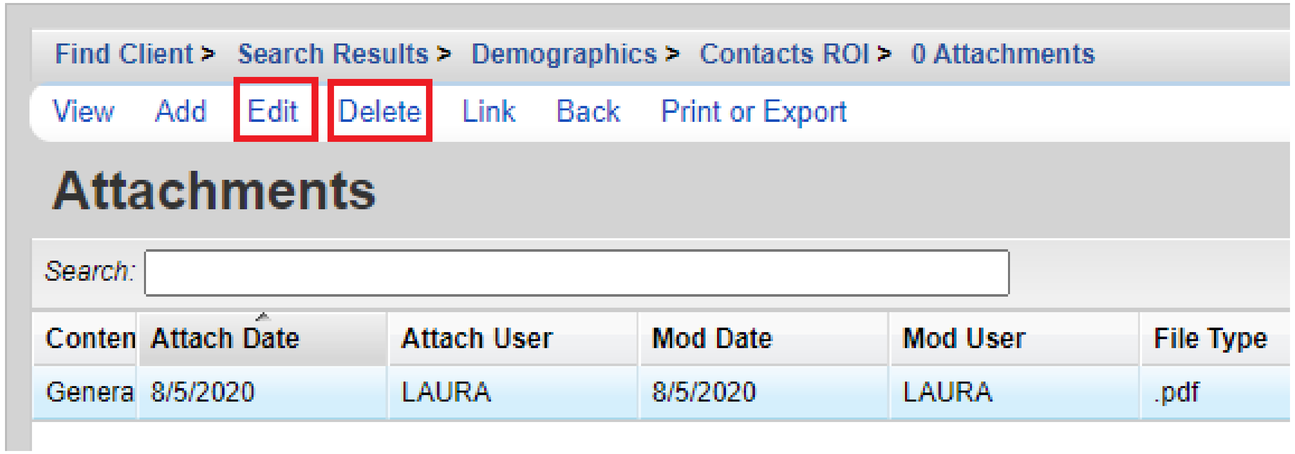
Viewing ROIs cont.

- Click the File Name (this is a hyperlink).
- The attachment will open in a new browser tab.



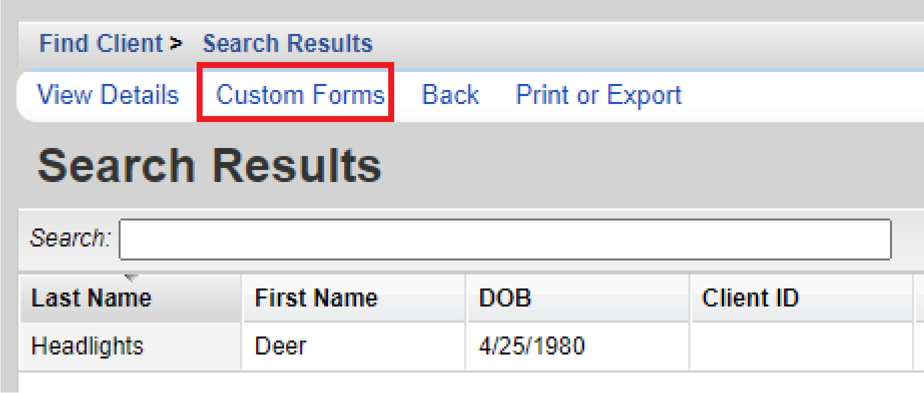
Editing or Deleting an ROI

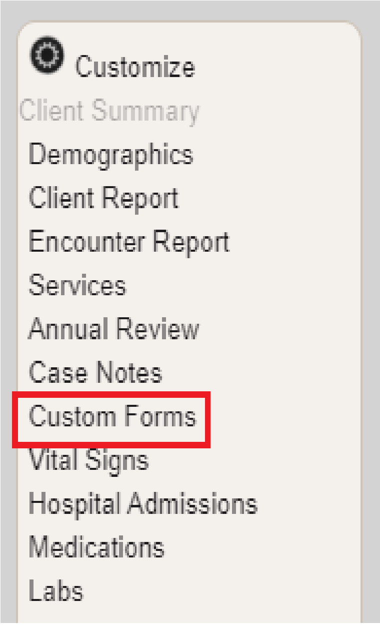
- To edit or delete an attachment (including ROIs), select the ROI.
- Click Edit or Delete.



Forms

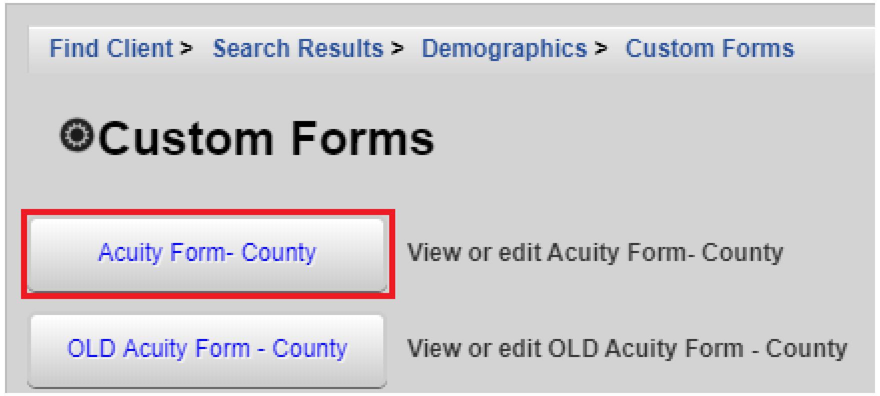
- Users can access the Nurse Acuity (county model) or the Psychosocial Acuity and Medical Acuity (regional model) forms on the Find Client search results screen.
- Or directly from the client main menu.



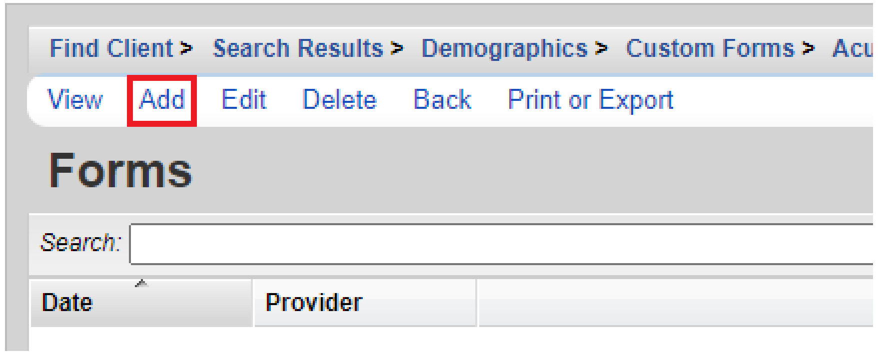


Adding New Forms

- Click on the Custom Forms screen.

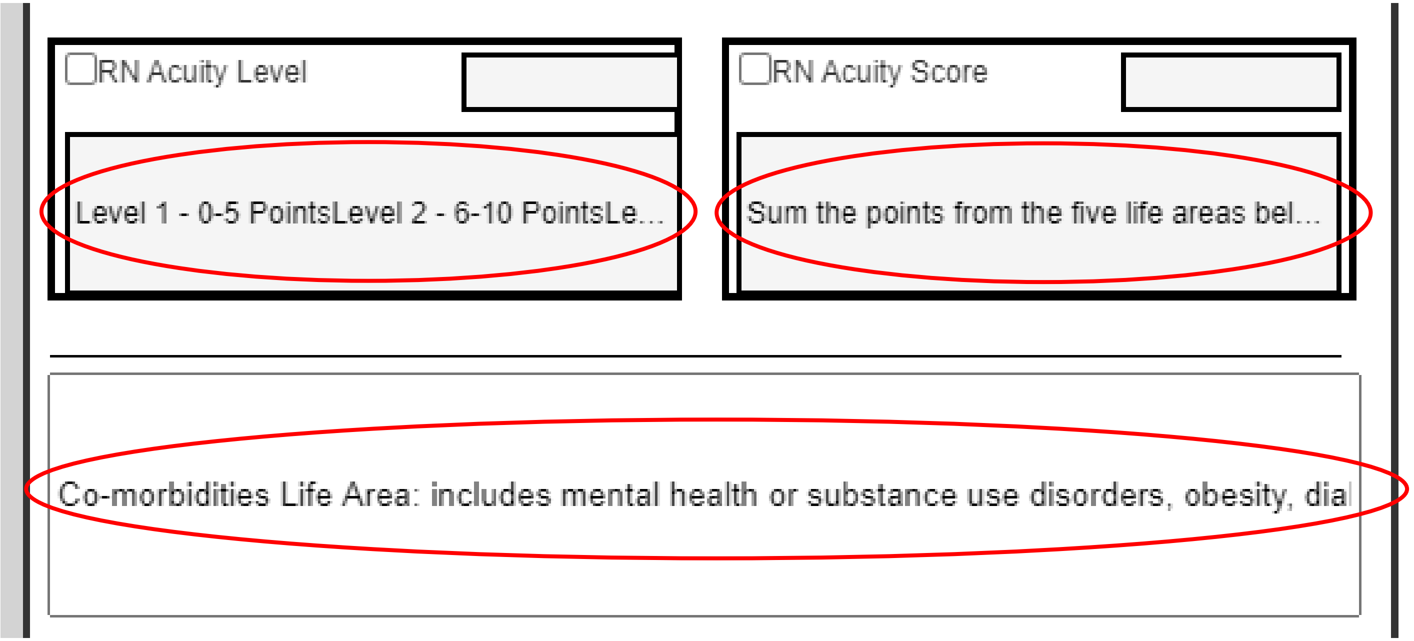


- Click Add.



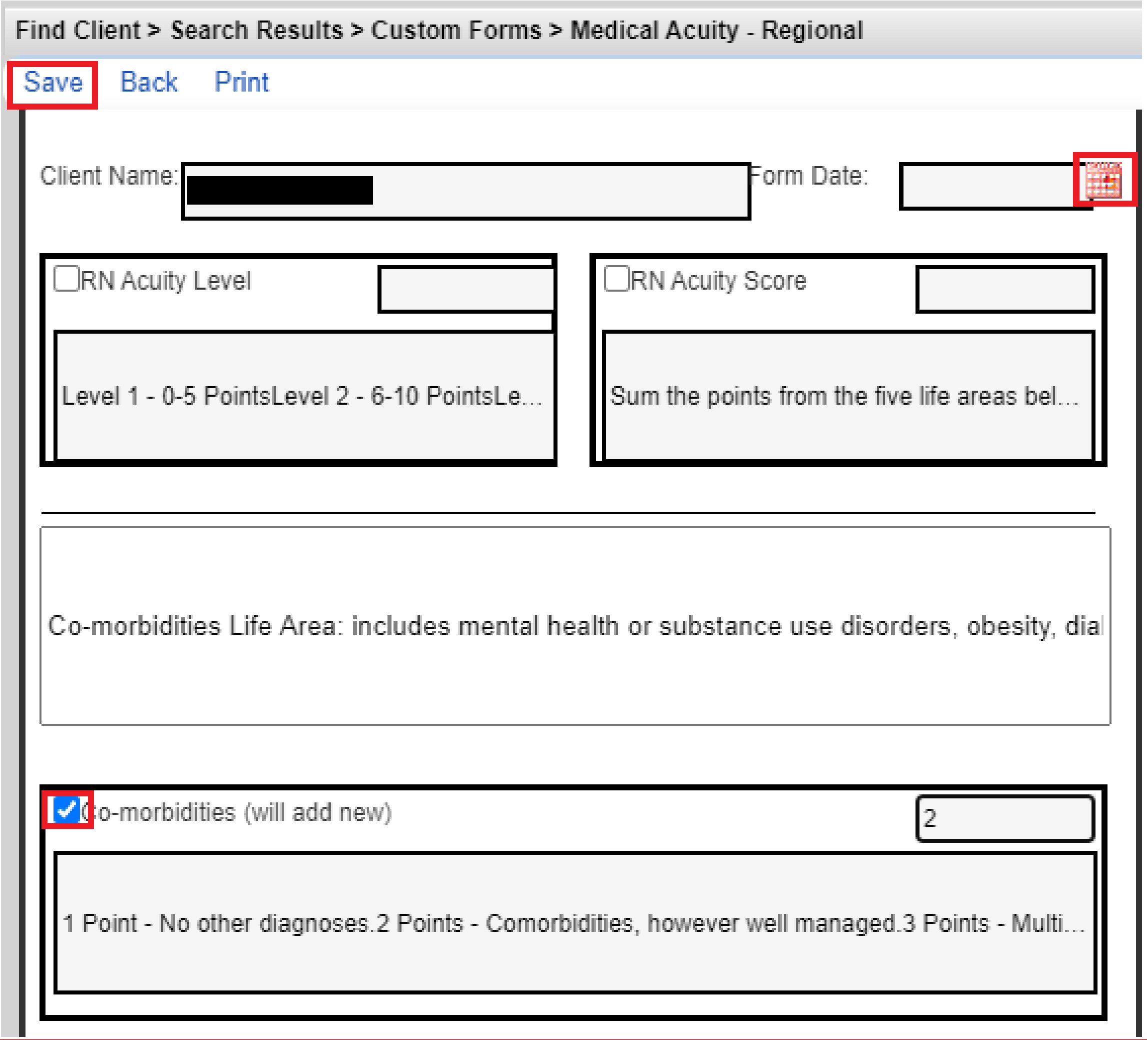
A Note about Forms

- The current CAREWare build does not allow for returns within the form creation on the backend of the CW database.
- Therefore, all text is listed in one line.
- It is recommended that Care Coordinators have a downloaded copy of the forms from the OHA website for guidance on form scoring.



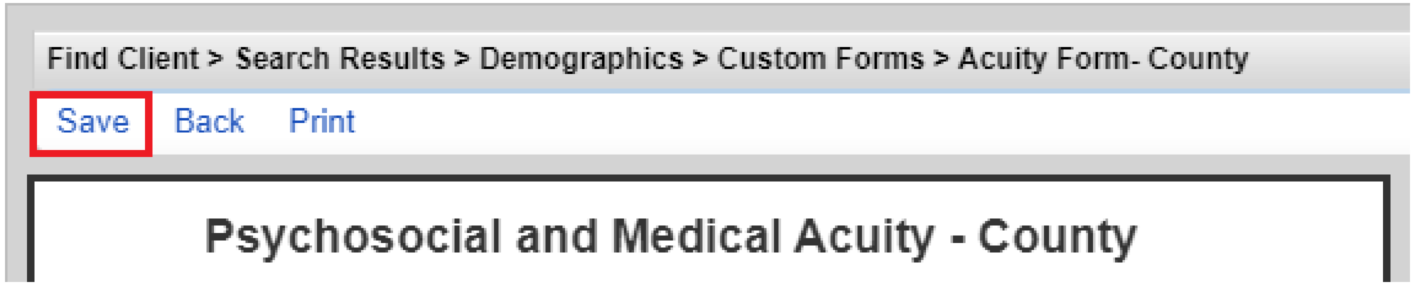
Adding Forms cont.

- The client's name will automatically be populated on the form.
- Enter the Form Date by clicking on the calendar icon.
- Enter data into the appropriate fields.
- Ensure to check the Acuity Life Area field boxes for any entered data.



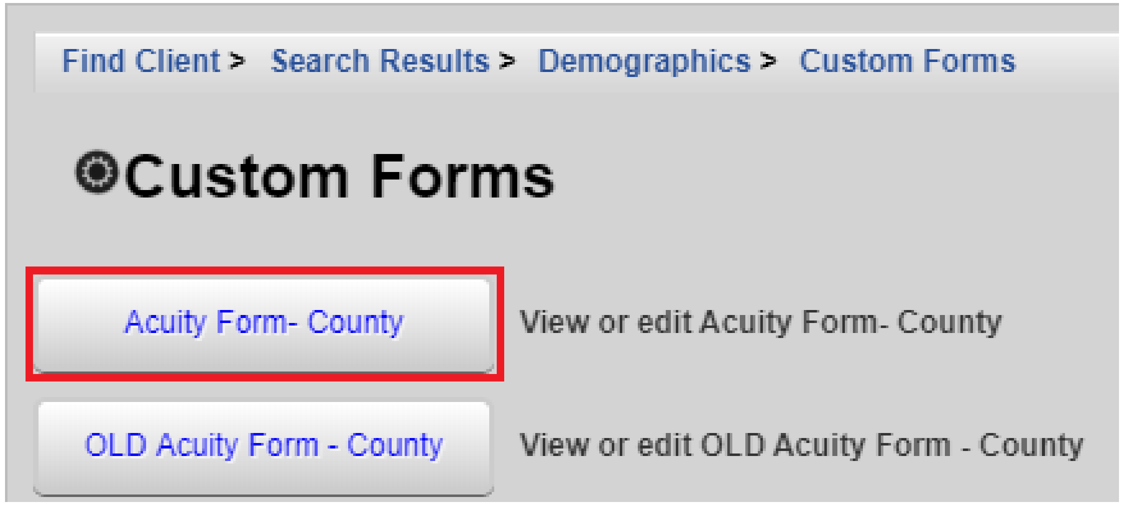
Adding Forms cont.

- Click Save.
- Acuity life values entered into forms will automatically populate into the client's labs when the form is saved.



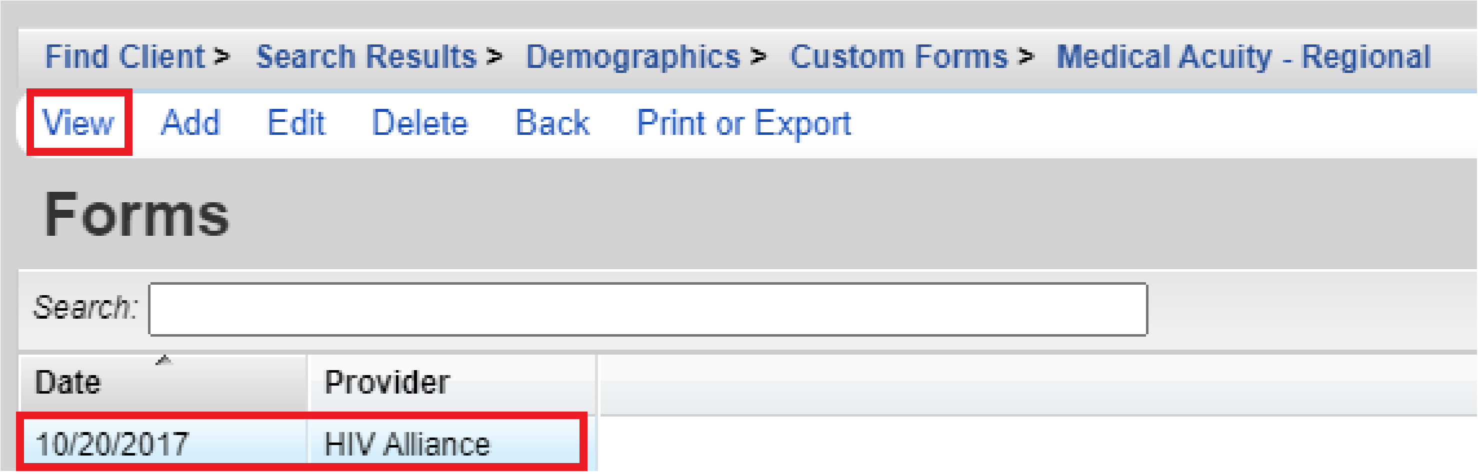
Accessing Previous Forms

To access a previous form, click the form name on the Custom Forms screen.



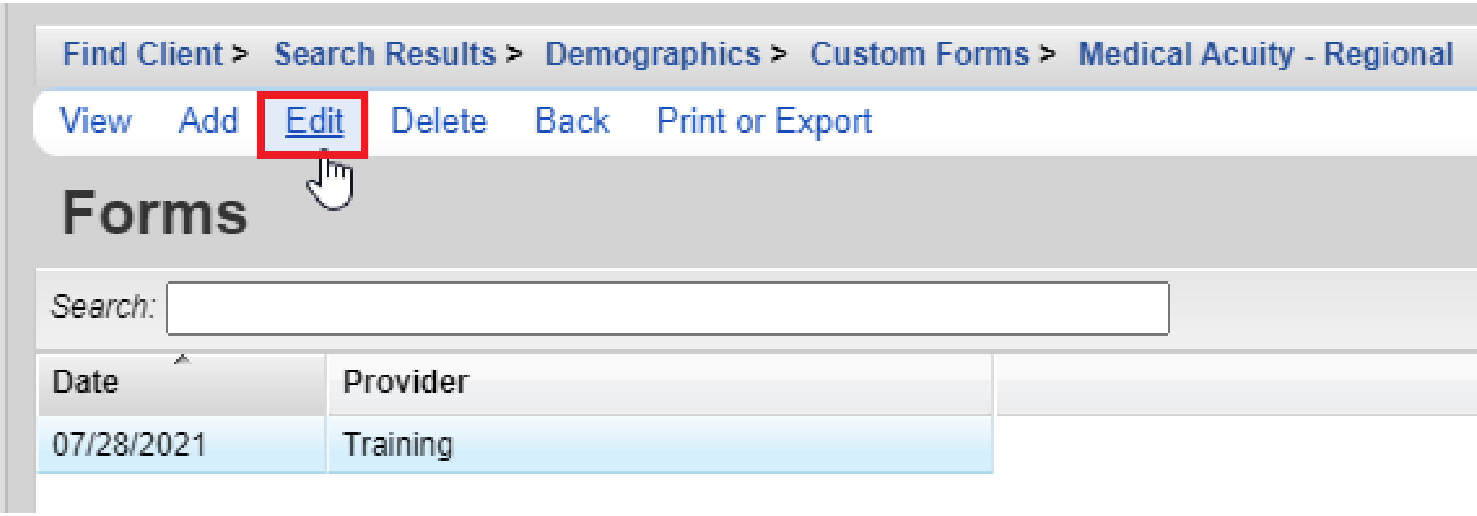
Accessing Previous Forms cont.

Click on the form to view on the Custom Forms screen, then click View.



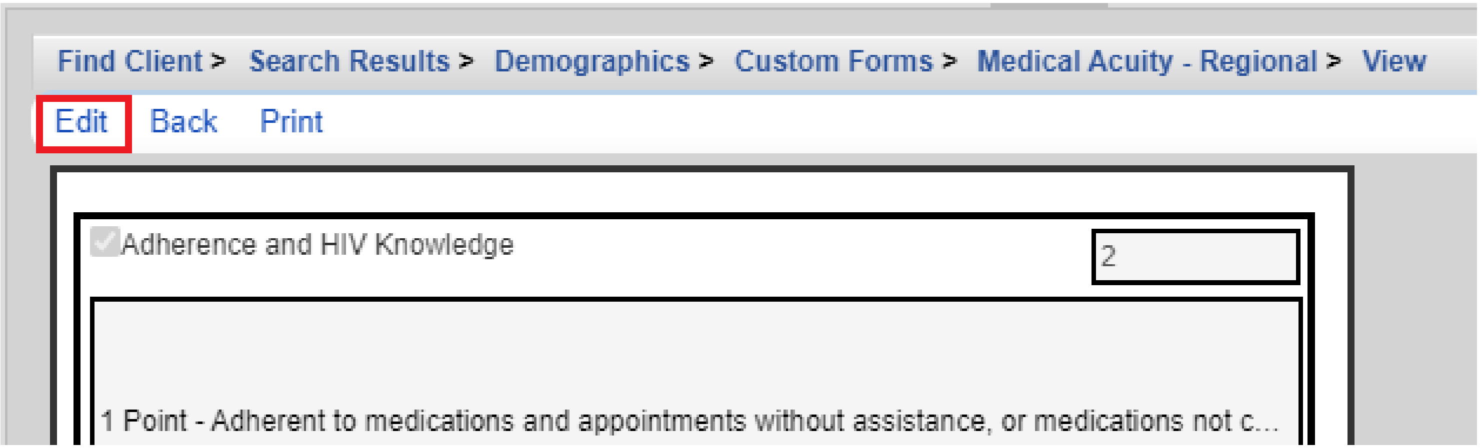
Editing Previous Forms

Click on the form to view on the Custom Forms screen, then click Edit.



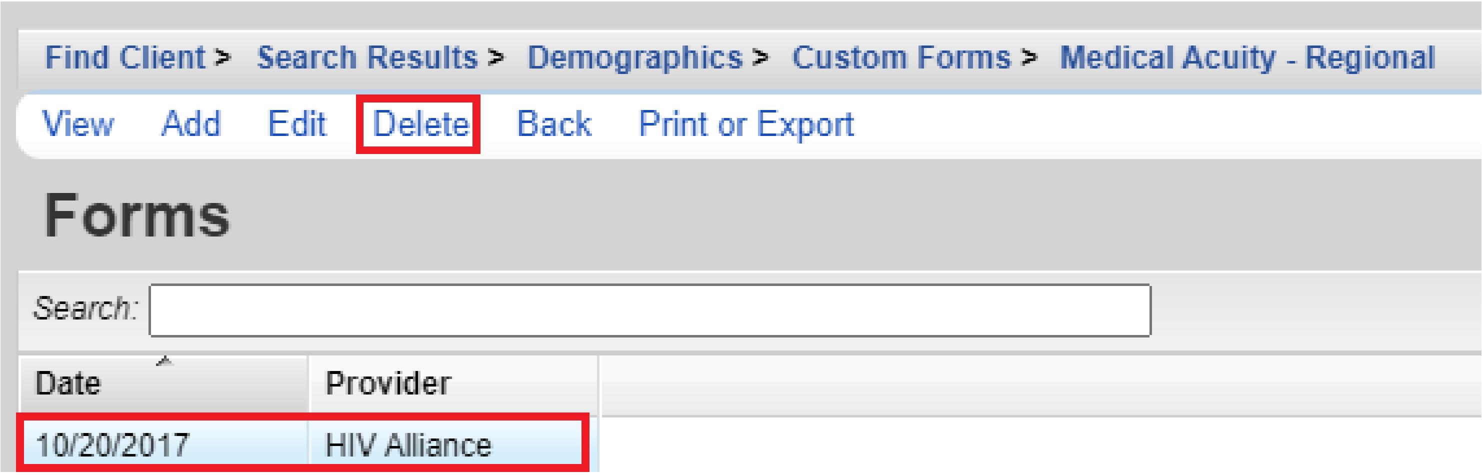
Editing Previous Forms cont.

- Or double click on the form. This will open the form.
- Then click Edit.



Deleting Previous Forms

- Click on the form to view on the Custom Forms screen, then click Delete.
- If a form is deleted, data in the client's labs is not deleted. Users will need to delete the data through the Labs screen.



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