



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 3:

Case Management B

Topics:

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



Welcome!

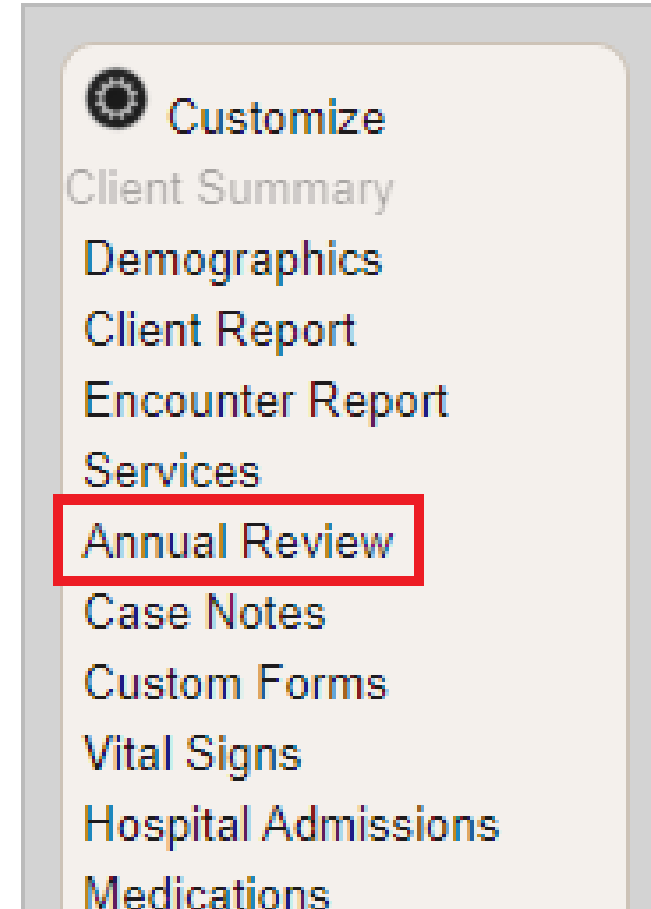
- The CAREWare 6 website is:
<https://careware.oregon.gov/careware/rs/index.htm>





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.

Find Client > Search Results > Demographics > Annual Data

[Back](#)

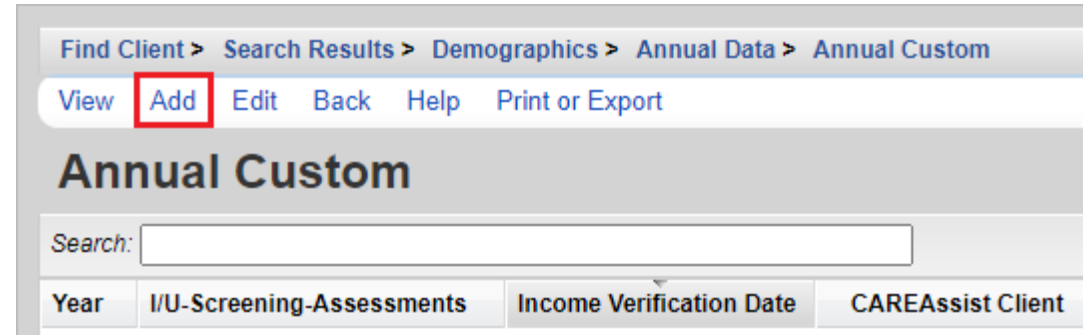
⚙️ Annual Data

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



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.



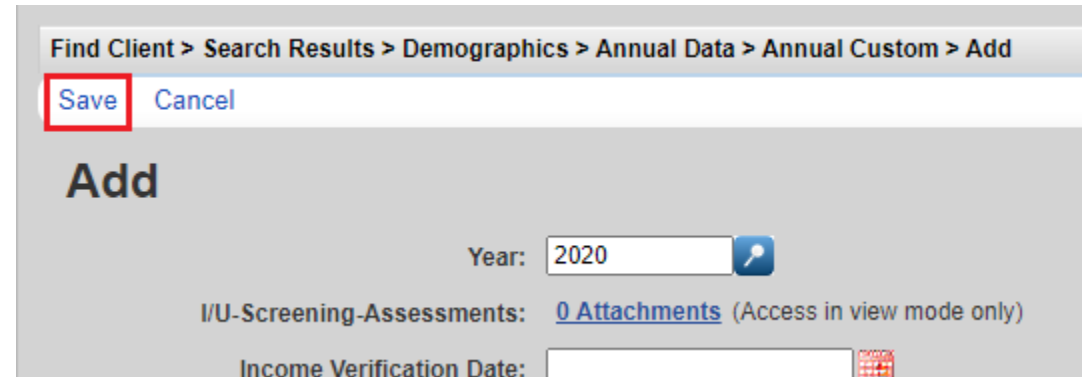
Find Client > Search Results > Demographics > Annual Data > Annual Custom

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

Annual Custom

Search:

Year	I/U-Screening-Assessments	Income Verification Date	CAREAssist Client
------	---------------------------	--------------------------	-------------------



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

Save Cancel

Add

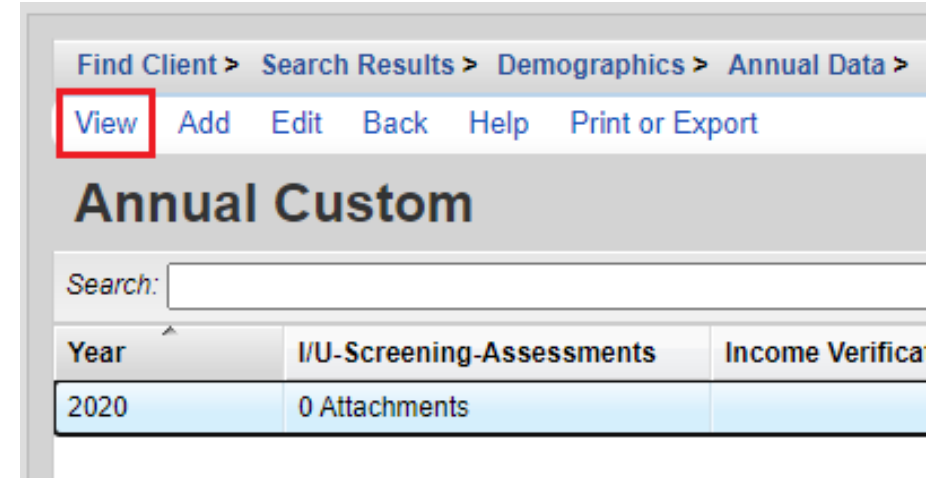
Year: 

I/U-Screening-Assessments: [0 Attachments](#) (Access in view mode only)

Income Verification Date: 

Document Uploading – Regional Model cont.

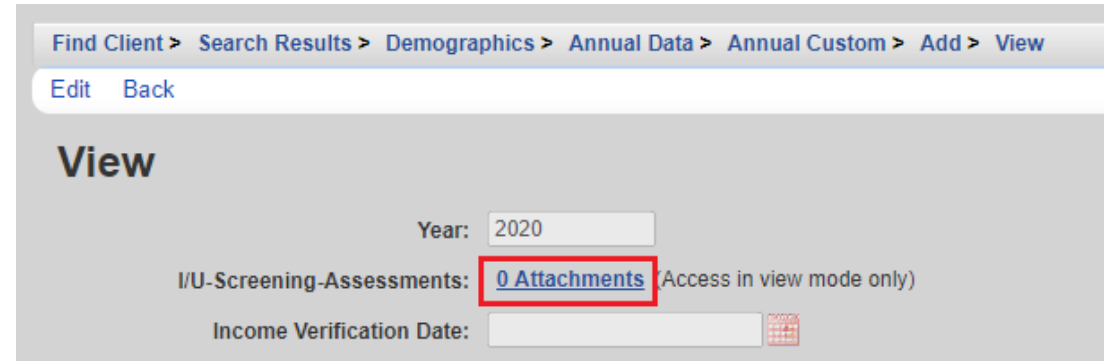
- If the year is already listed, or after users add the year, select the year row.
- Click View.



Find Client > Search Results > Demographics > Annual Data >		
View Add Edit Back Help Print or Export		
Annual Custom		
Search:		
Year	I/U-Screening-Assessments	Income Verifica
2020	0 Attachments	

Document Uploading – Regional Model cont.

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



Find Client > Search Results > Demographics > Annual Data > Annual Custom > Add > View

Edit Back

View

Year: 2020

I/U-Screening-Assessments: [0 Attachments](#) (Access in view mode only)

Income Verification Date: 



Document Uploading – County Model

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

Find Client > Search Results > Demographics

Delete Client Back

Demographics

Personal Info	Client ID: Name: Headlights, Deer N Gender: Female DOB: 04/25/1980
Change URN	DEHA0425802U
Contact Information	9648 Doe Lane Deerland, OR 97123 123-555-1234
Race/Ethnicity	White
HIV Risk Factors	IDU
Vital Enrollment Status	Vital Status: Alive Enrolled: 07/01/2020 Current Status: Active
Eligibility	Not Eligible for Ryan White
HIV Status	HIV-positive (not AIDS) Estimated HIV Date: 08/01/2004
Common Notes	No description supplied
Provider Notes	No description supplied
Additional Data	View or Edit the client's Additional Data information
Attachments	View or Edit the client's Attachments information
Custom Tab 3	Requires permission: 'Edit Tab 3' or 'View Tab 3'





Document Uploading – County Model cont.

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

[Find Client](#) > [Search Results](#) > [Demographics](#) > [Attachments](#)

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

Attachments

ROI:	0 Attachments	(Access in view mode only)
Intake/Eligibility Review:	0 Attachments	(Access in view mode only)
Screening:	0 Attachments	(Access in view mode only)
RN Assessment/Reassessment:	0 Attachments	(Access in view mode only)
Care Plan:	0 Attachments	(Access in view mode only)
Triage:	0 Attachments	(Access in view mode only)
ID Card:	0 Attachments	(Access in view mode only)
Insurance Card:	0 Attachments	(Access in view mode only)
Miscellaneous:	0 Attachments	(Access in view mode only)



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.

Find Client > Search Results > Demographics > Annual Data > Annual Custom > Add > View > 0 Attachments

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

Attachments

Search:

Content	Attach Date	Attach User	Mod Date	Mod User	File Name
---------	-------------	-------------	----------	----------	-----------

Find Client > Search Results > Demographics > Attachments > 0 Attachments

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

Attachments

Search:

Content Type	Attach Date	Attach User	Mod Date	Mod User	File Name
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Document Uploading – All Models cont.

Click Choose Files.

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

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

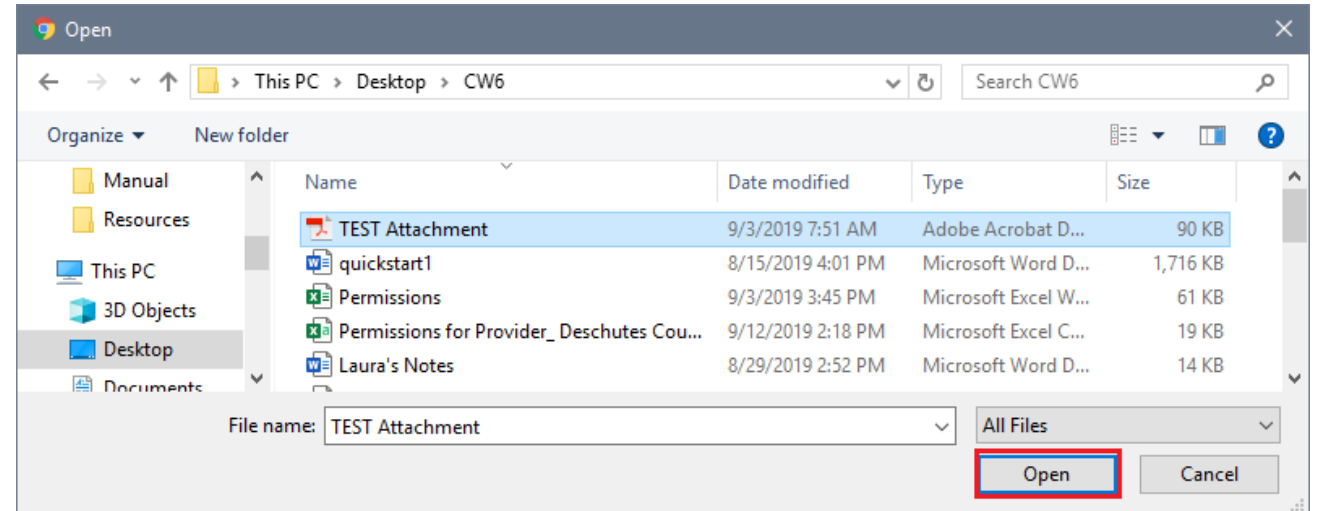
Add

File Name(s): No file chosen



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.

Find Client > Search Results > Demographics > Attachments > 0 Attachments > Add

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

Add

File Name(s): TEST Attachment.pdf

Upload Completed Successfully. (90.49 KB of 90.49 KB)



Document Uploading – All Models cont.

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

Find Client > Search Results > Demographics > Annual Data > Annual Custom > Add > View > 0 Attachments > Add > Next

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

Next

TEST Attachment.pdf

Content Type: 

Comment:

Find Client > Search Results > Demographics > Attachments > 0 Attachments > Add > Next

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

Next

TEST Attachment.pdf

Content Type: 

Comment:



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.



[Find Client](#) > [Search Results](#) > [Demographics](#) > [Annual Data](#) > [Annual Custom](#) > [Add](#) > [View](#) > 0 Attachments

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

Attachments

Search:

Content Type	Attach Date	Attach User	Mod Date	Mod User	File Type	File Name
Assessment	8/5/2020	LAURA	8/5/2020	LAURA	.pdf	TEST Attachment



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.



[Find Client](#) > [Search Results](#) > [Demographics](#) > [Attachments](#) > 0 Attachments

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

Attachments

Search:

Content Type	Attach Date	Attach User	Mod Date	Mod User	File Type	File Name
General- ROI	8/5/2020	LAURA	8/5/2020	LAURA	.pdf	TEST Attachment



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.



Find Client > Search Results > Demographics > Annual Data > Annual Custom > Add > View > 0 Attachments

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

Attachments

Search:

Content Type	Attach Date	Attach User	Mod Date	Mod User	File Type	File Name
Assessment	8/5/2020	LAURA	8/5/2020	LAURA	.pdf	TEST Attachment



Find Client > Search Results > Demographics > Attachments > 0 Attachments

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

Attachments

Search:

Content Type	Attach Date	Attach User	Mod Date	Mod User	File Type	File Name
General- ROI	8/5/2020	LAURA	8/5/2020	LAURA	.pdf	TEST Attachment





Viewing Attachments

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

Find Client > Search Results > Demographics > Contacts ROI > 0 Attachments > View

Edit Back

View

File Name: TEST Attachment.pdf

Content Type: General- ROI

Comment:

Contacts/ROI Tab

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

Demographics

Personal Info	Client ID: Name: Pan, Peter Gender: Male DOB: 09/15/198
Change URN	PTPN0915851U
Contact Information	No description supplied
Race/Ethnicity	White
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
Contacts/ROI	View or Edit the client's Contacts/ROI information
Custom Tab 2	Requires permission: 'Edit Tab 2' or 'View Tab 2'
Custom Tab 3	Requires permission: 'Edit Tab 3' or 'View Tab 3'





Contacts/ROI Tab cont.

- Click Edit.

[Find Client](#) > [Search Results](#) > [Demographics](#) > [Contacts ROI](#)

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

Contacts/ROI

Date Key Contacts Last Updated: 

EOCIL CC::

EOCIL RN::

PCP Physician:

PCP Phone #:

PCP Fax #:

HIV Physician:

HIV Physician Phone #:

HIV Physician Fax #:

Specialist Physician:

Specialist Phone #:

Specialist Fax #:

Pharmacy:



Contacts/ROI Tab cont.

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

Find Client > Search Results > Demographics > Contacts ROI

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

Contacts/ROI

Date Key Contacts Last Updated:

EOCIL CC:: 

EOCIL RN:: 

PCP Physician:

PCP Phone #:



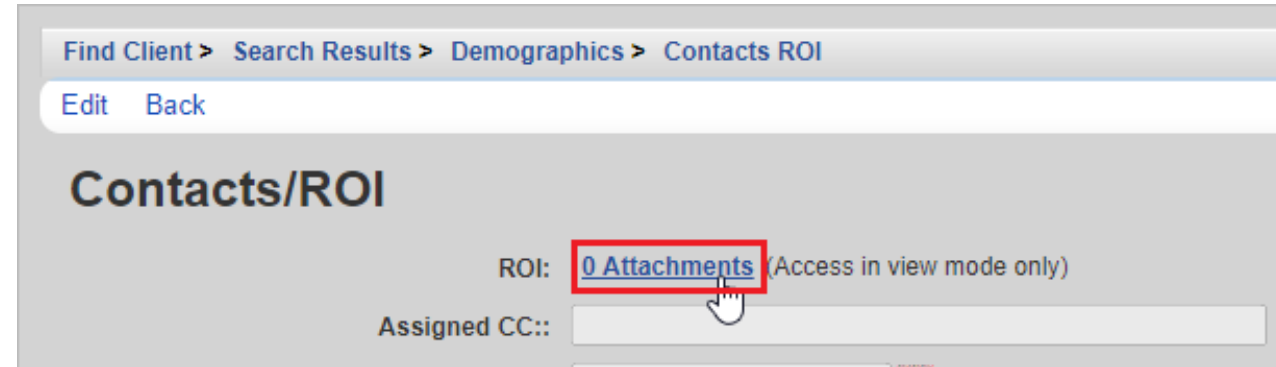
Uploading ROIs

- 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).





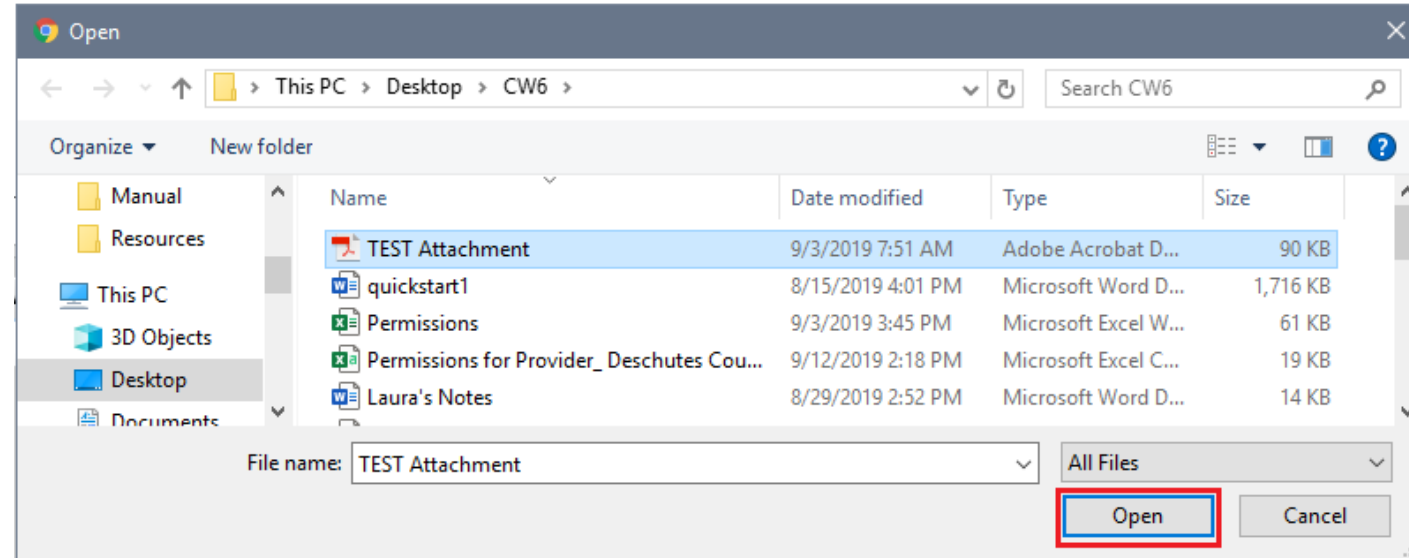
Uploading ROIs cont.

- 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.

Find Client > Search Results > Demographics > Contacts ROI > 0 Attachments > Add

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

Add

File Name(s): TEST Attachment.pdf

Upload Completed Successfully. (90.49 KB of 90.49 KB)



Updating ROIs cont.

Enter the Content Type from the dropdown menu options.

Find Client > Search Results > Demographics > Contacts ROI > 0 Attachments > Add > Next

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

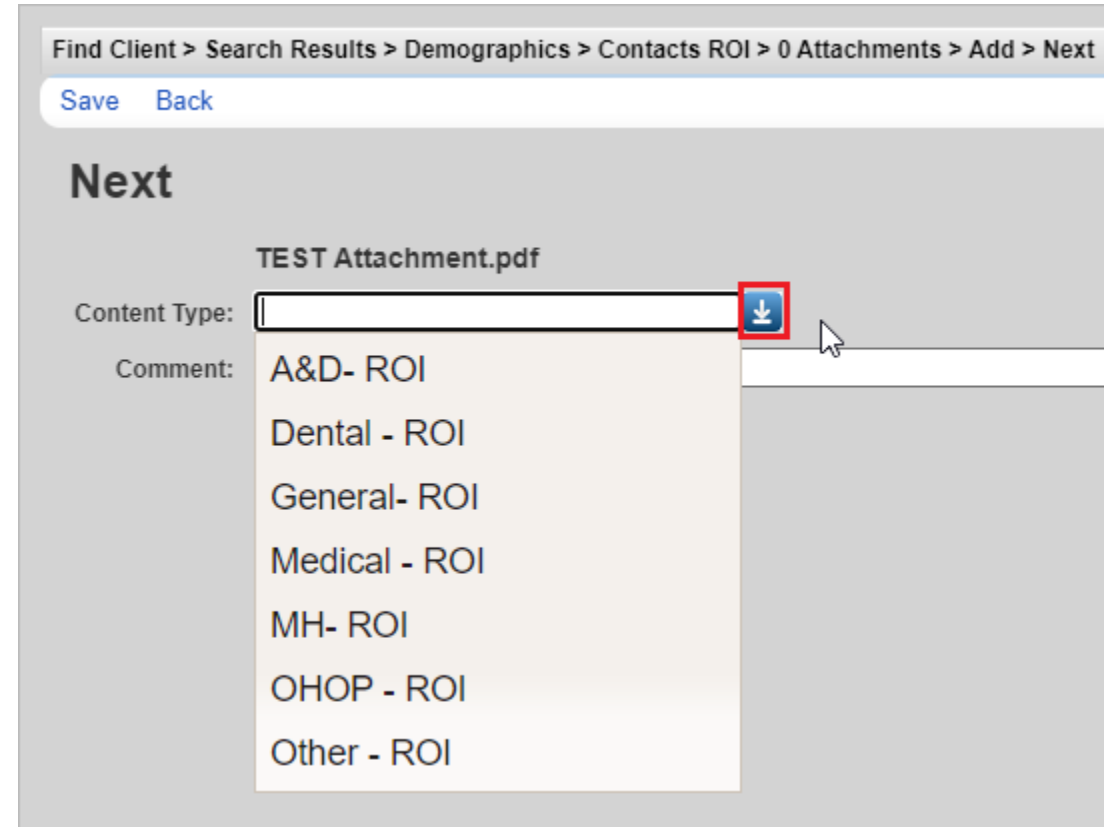
Next

TEST Attachment.pdf

Content Type:

Comment:

- A&D- ROI
- Dental - ROI
- General- ROI
- Medical - ROI
- MH- ROI
- OHOP - ROI
- Other - ROI



Updating ROIs cont.

- Enter a Comment if desired.
- Click Save.

Find Client > Search Results > Demographics > Contacts ROI > 0 Attachments > Add > Next

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

Next

TEST Attachment.pdf

Content Type: 

Comment:



Updating ROIs cont.

The ROI will now be visible in the Attachments list.

[Find Client](#) > [Search Results](#) > [Demographics](#) > [Contacts ROI](#) > 0 Attachments

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

Attachments

Search:

Content	Attach Date	Attach User	Mod Date	Mod User	File Type
General	8/5/2020	LAURA	8/5/2020	LAURA	.pdf



Viewing ROIs

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

Find Client > Search Results > Demographics > Contacts ROI > 0 Attachments

View Add Edit Delete Link Back Print or Export

Attachments

Search:

Content	Attach Date	Attach User	Mod Date	Mod User	File Type
General	8/5/2020	LAURA	8/5/2020	LAURA	.pdf



Viewing ROIs cont.

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

[Find Client](#) > [Search Results](#) > [Demographics](#) > [Contacts ROI](#) > [0 Attachments](#) > [View](#)

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

View

File Name: [TEST Attachment.pdf](#)

Content Type: General- ROI

Comment:

Editing or Deleting an ROI

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

Find Client > Search Results > Demographics > Contacts ROI > 0 Attachments

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

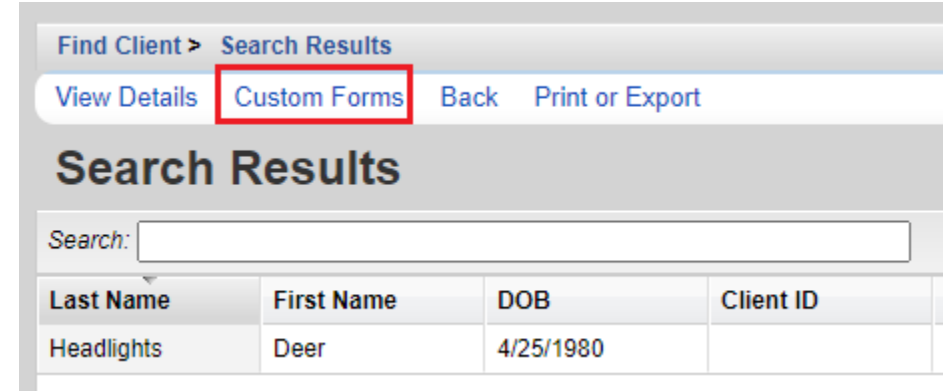
Attachments

Search:

Content	Attach Date	Attach User	Mod Date	Mod User	File Type
General	8/5/2020	LAURA	8/5/2020	LAURA	.pdf

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.



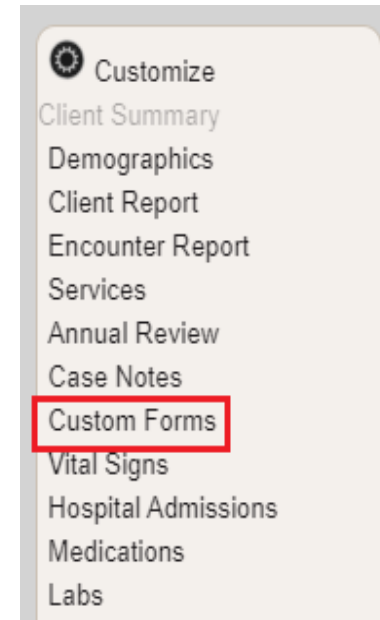
Find Client > Search Results

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

Search Results

Search:

Last Name	First Name	DOB	Client ID
Headlights	Deer	4/25/1980	



- Customize
- Client Summary
- Demographics
- Client Report
- Encounter Report
- Services
- Annual Review
- Case Notes
- Custom Forms**
- Vital Signs
- Hospital Admissions
- Medications
- Labs





Adding New Forms

- Click on the Custom Forms screen.

This screenshot shows the 'Custom Forms' interface. At the top is a breadcrumb trail: 'Find Client > Search Results > Demographics > Custom Forms'. Below this is a heading 'Custom Forms' with a gear icon. There are two buttons: 'Acuity Form- County' (highlighted with a red box) and 'OLD Acuity Form - County'. To the right of each button is a description: 'View or edit Acuity Form- County' and 'View or edit OLD Acuity Form - County' respectively.

- Click Add.

This screenshot shows the 'Forms' interface. At the top is a breadcrumb trail: 'Find Client > Search Results > Demographics > Custom Forms > Acuity'. Below this is a row of action buttons: 'View', 'Add' (highlighted with a red box), 'Edit', 'Delete', 'Back', and 'Print or Export'. The main heading is 'Forms'. Below the heading is a search bar labeled 'Search:'. At the bottom, there is a table with two columns: 'Date' and 'Provider'.



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.

The screenshot displays a web form interface with three main sections. Each section has a title with a checkbox and a text area below it. Red ovals highlight text that has been truncated to a single line.

- Section 1:** Title is ☐ RN Acuity Level. The text area contains "Level 1 - 0-5 PointsLevel 2 - 6-10 PointsLe...", which is truncated.
- Section 2:** Title is ☐ RN Acuity Score. The text area contains "Sum the points from the five life areas bel...", which is truncated.
- Section 3:** A larger text area containing "Co-morbidities Life Area: includes mental health or substance use disorders, obesity, dial", which is also truncated.

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.

Find Client > Search Results > Custom Forms > Medical Acuity - Regional

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

Client Name: Form Date: 

☐ RN Acuity Level
Level 1 - 0-5 Points Level 2 - 6-10 Points Le...

☐ RN Acuity Score
Sum the points from the five life areas bel...

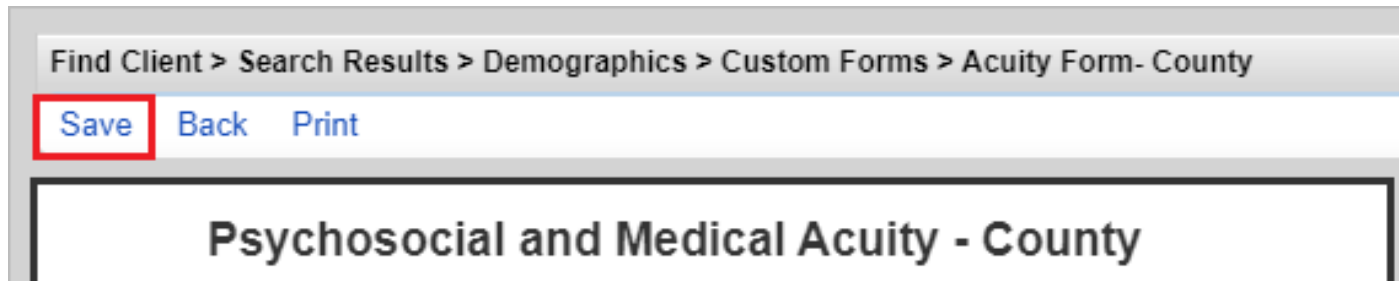
Co-morbidities Life Area: includes mental health or substance use disorders, obesity, dial

☒ Co-morbidities (will add new)
1 Point - No other diagnoses. 2 Points - Comorbidities, however well managed. 3 Points - Multi...



Adding Forms cont.

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



Find Client > Search Results > Demographics > Custom Forms > Acuity Form- County

Save Back Print

Psychosocial and Medical Acuity - County



Accessing Previous Forms

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

Find Client > Search Results > Demographics > Custom Forms

⚙️ Custom Forms

Acuity Form- County	View or edit Acuity Form- County
OLD Acuity Form - County	View or edit OLD Acuity Form - County



Accessing Previous Forms cont.

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

Find Client > Search Results > Demographics > Custom Forms > Medical Acuity - Regional

View Add Edit Delete Back Print or Export

Forms

Search:

Date	Provider
10/20/2017	HIV Alliance





Editing Previous Forms

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

Find Client > Search Results > Demographics > Custom Forms > Medical Acuity - Regional

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

Forms

Search:

Date	Provider
07/28/2021	Training

Editing Previous Forms cont.

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

Find Client > Search Results > Demographics > Custom Forms > Medical Acuity - Regional > View

Edit Back Print

☒ Adherence and HIV Knowledge 2

1 Point - Adherent to medications and appointments without assistance, or medications not c...

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.

Find Client > Search Results > Demographics > Custom Forms > Medical Acuity - Regional

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

Forms

Search:

Date	Provider
10/20/2017	HIV Alliance



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](#)

