


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

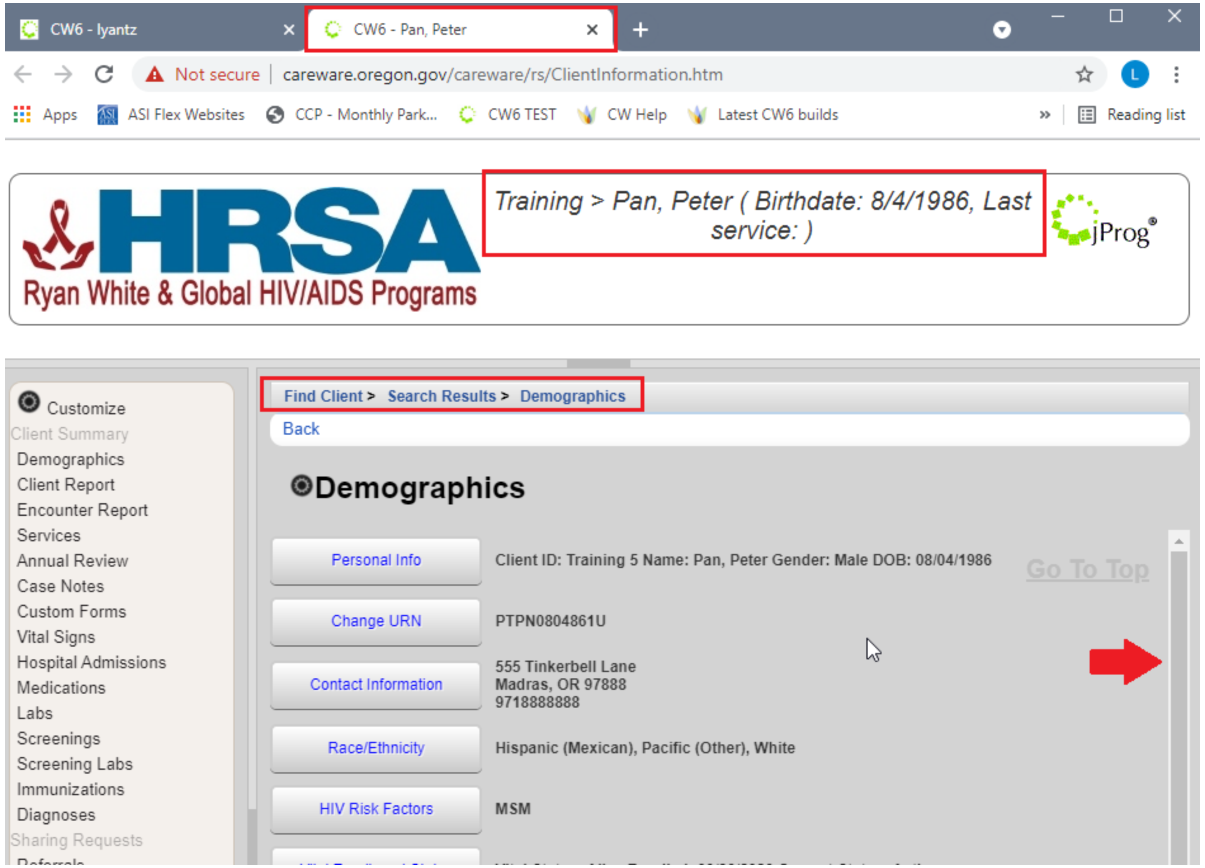
MODULE 6: Admin Training

Topics:

- The basics of CW6
- Accessing the CW6 website
- Log-in to CW6
- Change your password
- Find a client
- View/Edit services
- Run financial reports

CAREWare 6: The Basics

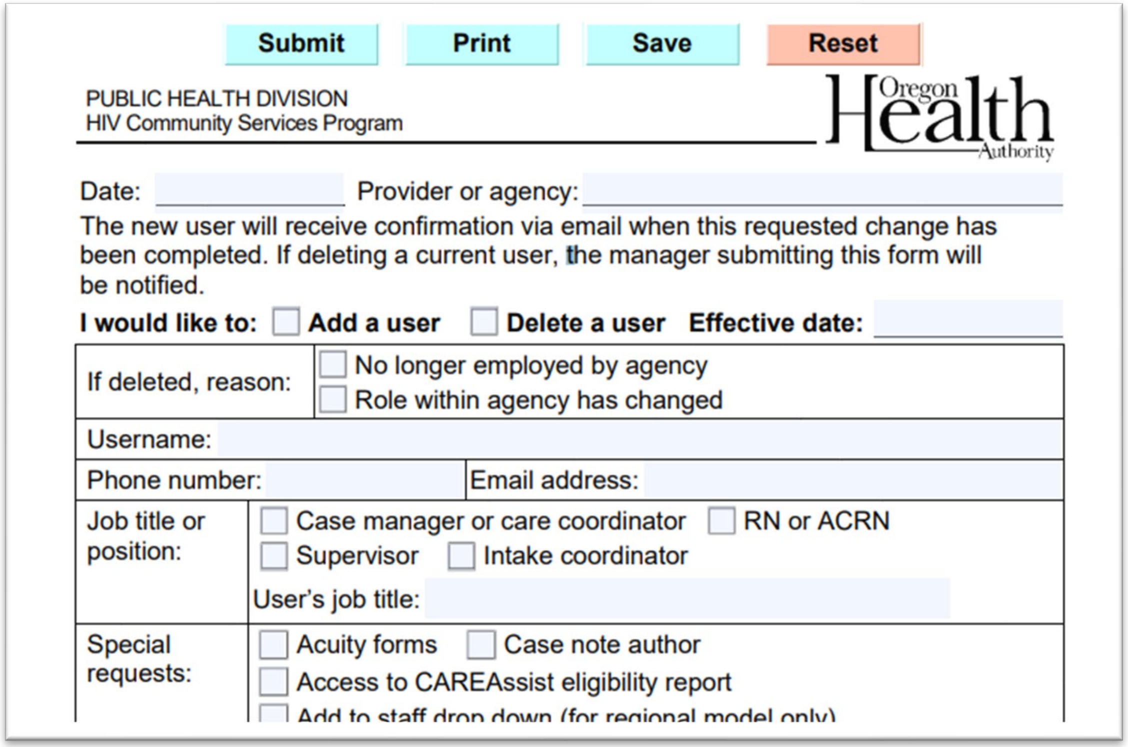
- CW6 has new features including:
  - Search fields.
  - Drop down menus.
- Scroll bar on the righthand side of the page.
- CW6 has “breadcrumbs” to track your steps in the database.
- Clients will open in new tabs – don’t forget to close out when finished!
- Top bar will show client name, DOB, and last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



CAREWare 6 Database Access

- 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.


Submit Print Save Reset

PUBLIC HEALTH DIVISION
HIV Community Services Program

Oregon Health Authority

Date: Provider or agency:

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.

I would like to: ☐ **Add a user** ☐ **Delete a user** **Effective date:**

If deleted, reason:	☐ No longer employed by agency ☐ Role within agency has changed
Username:	
Phone number:	Email address:
Job title or position:	☐ Case manager or care coordinator ☐ RN or ACRN ☐ Supervisor ☐ Intake coordinator User's job title:
Special requests:	☐ Acuity forms ☐ Case note author ☐ Access to CAREAssist eligibility report ☐ Add to staff drop down (for regional model only)

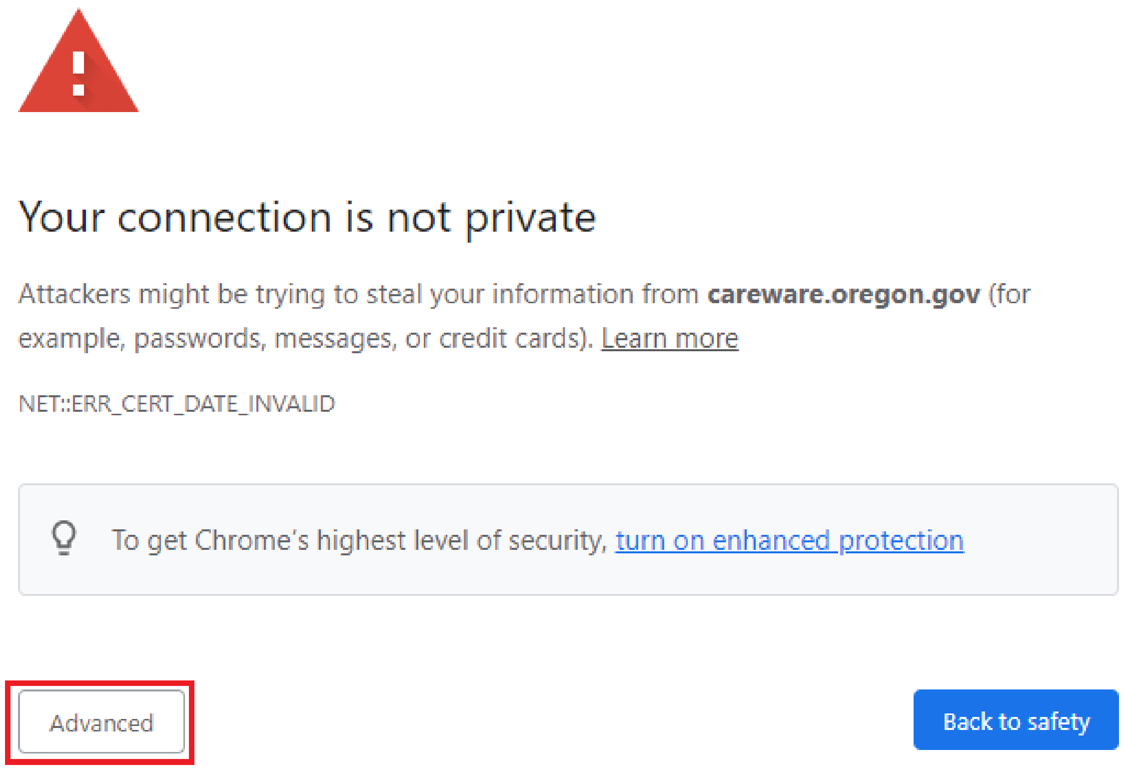
END HIV

CAREWare 6 Website

https://careware.Oregon.gov/careware/rs/index.htm

Privacy Message

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

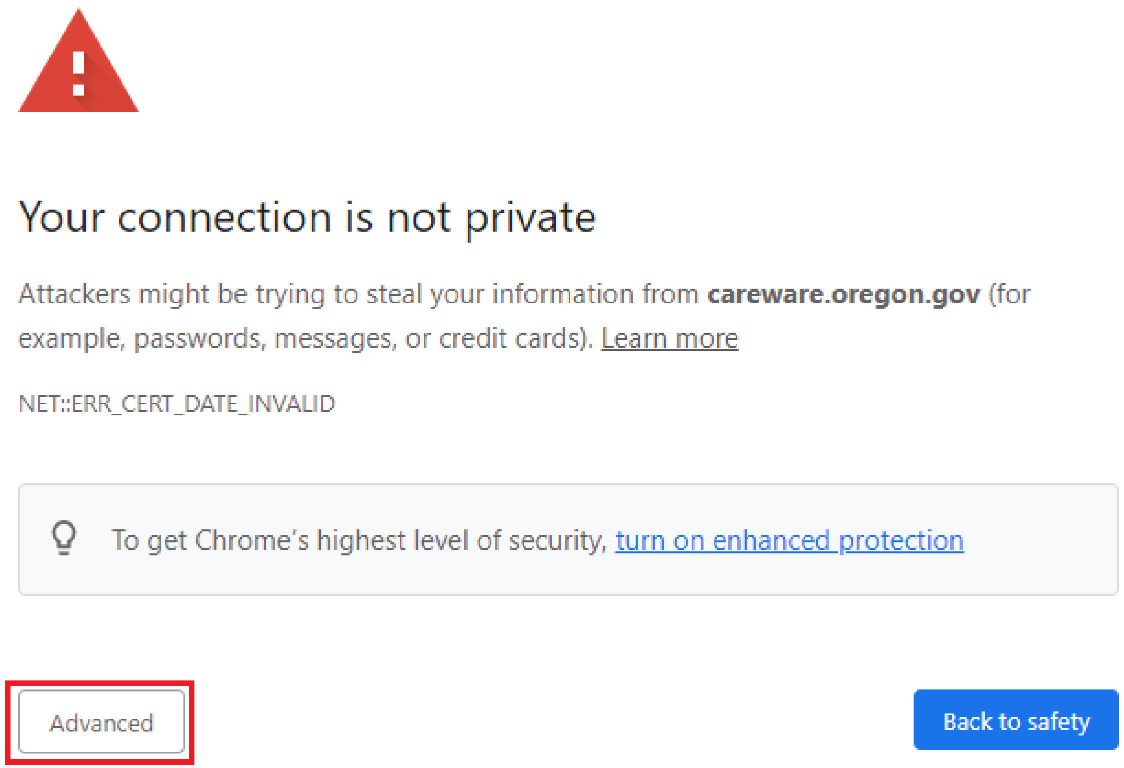


Privacy Message cont.

- 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.

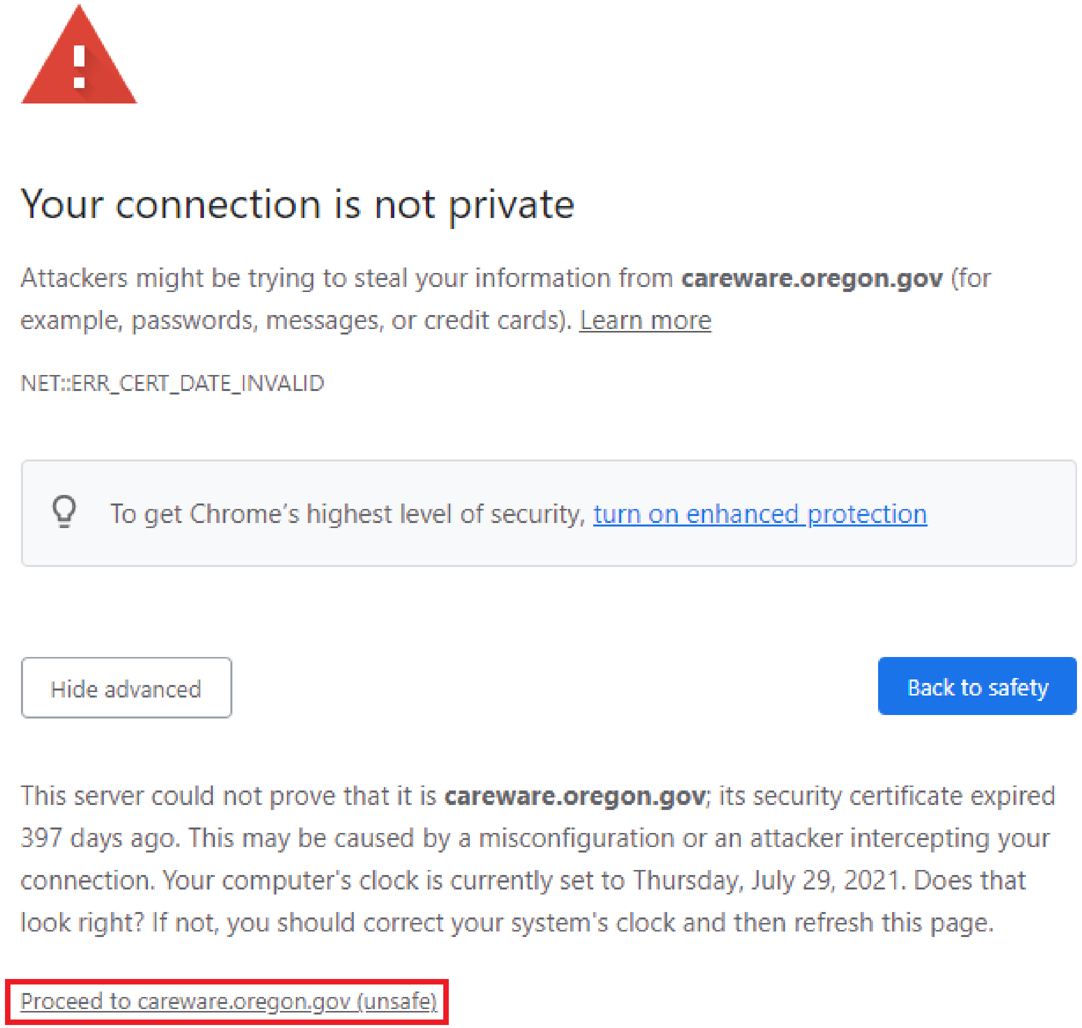
Privacy Message cont.

To navigate past this page, click Advanced.



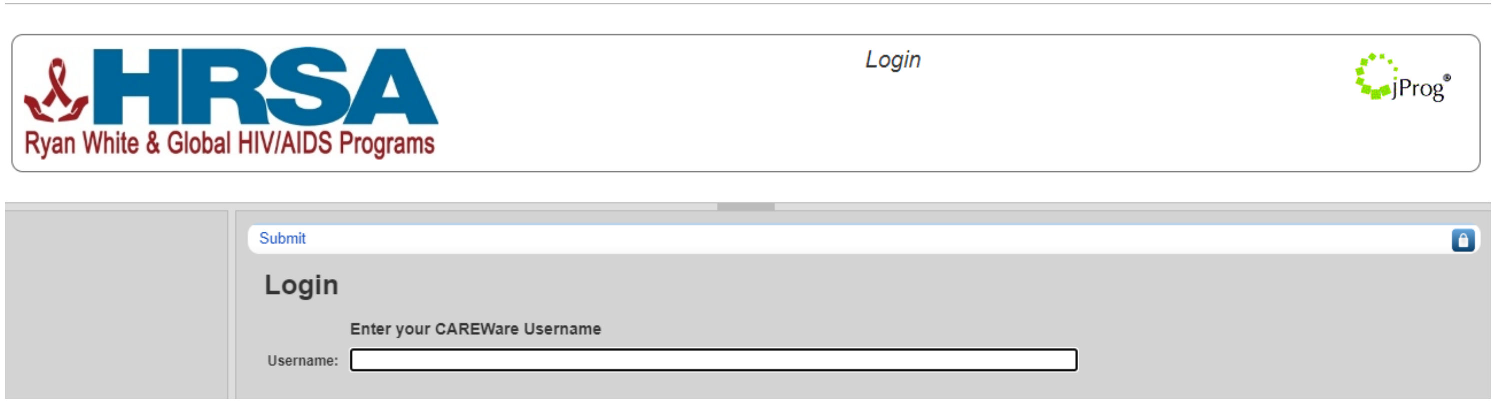
Privacy Message cont.

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



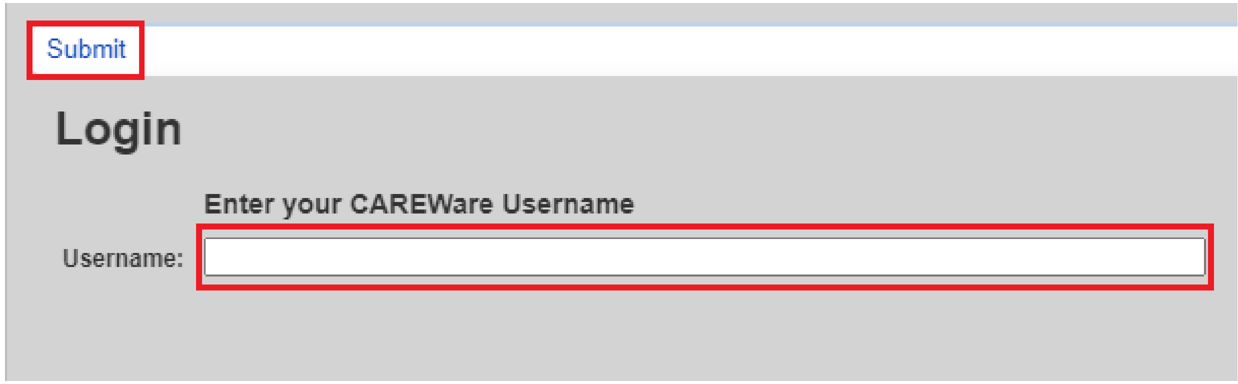
Privacy Message cont.

This should take you to the main CAREWare 6 login page.

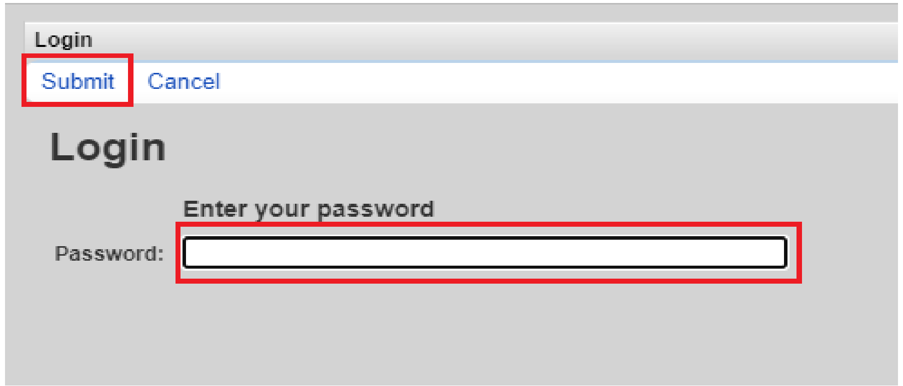


Logging in

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

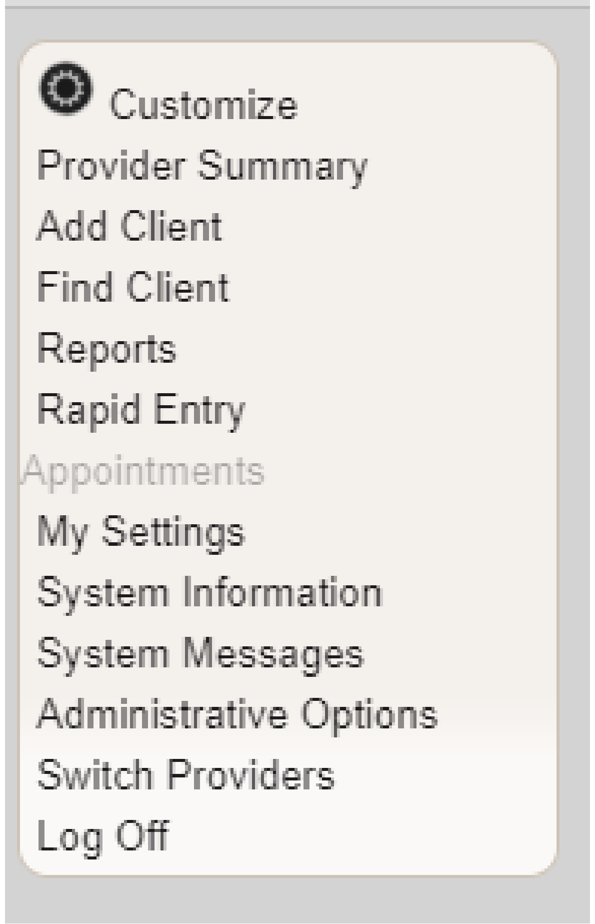


- Enter your CW password and click Submit.

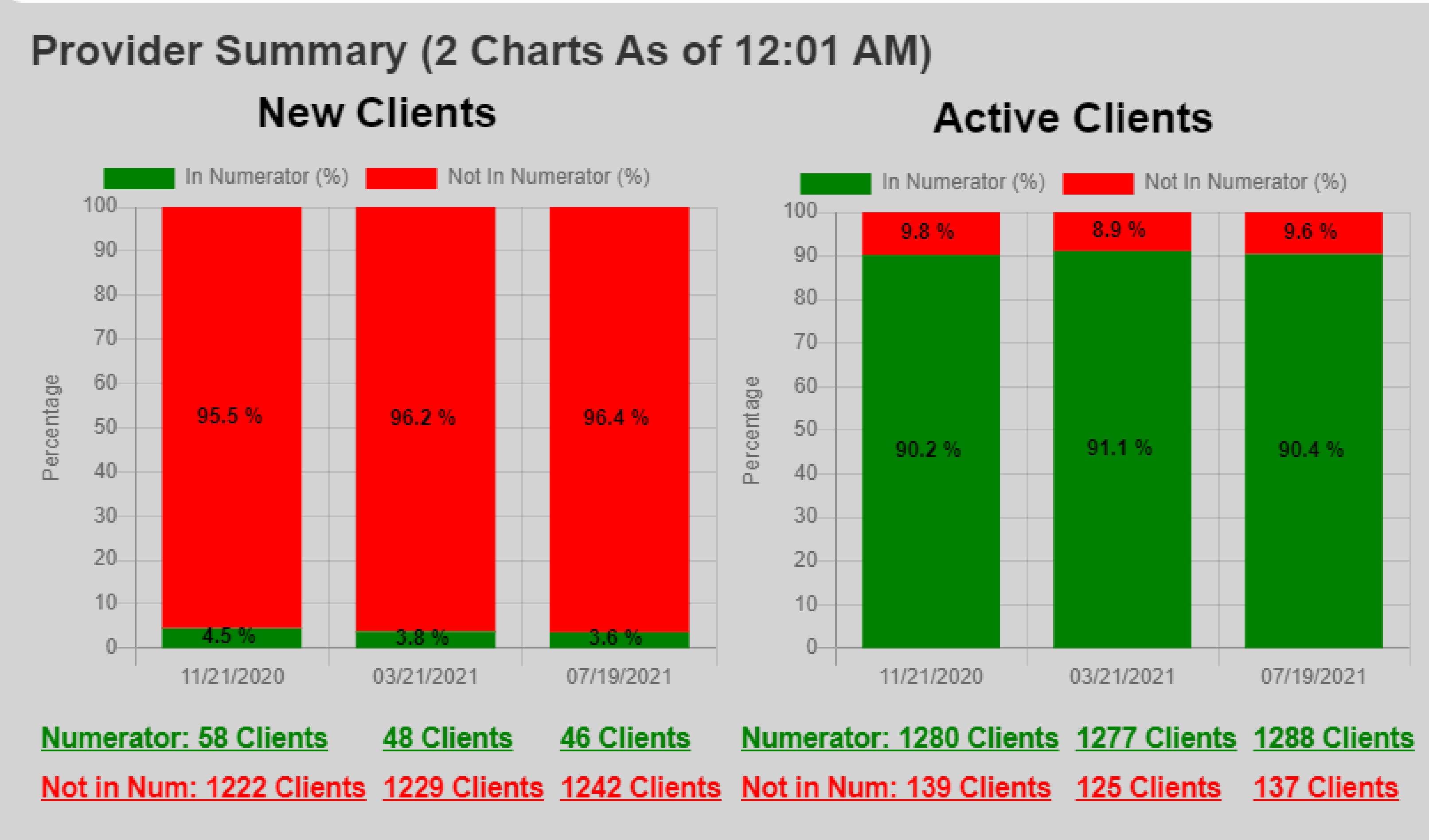


Provider Main Menu

The provider main menu appears on the left side.

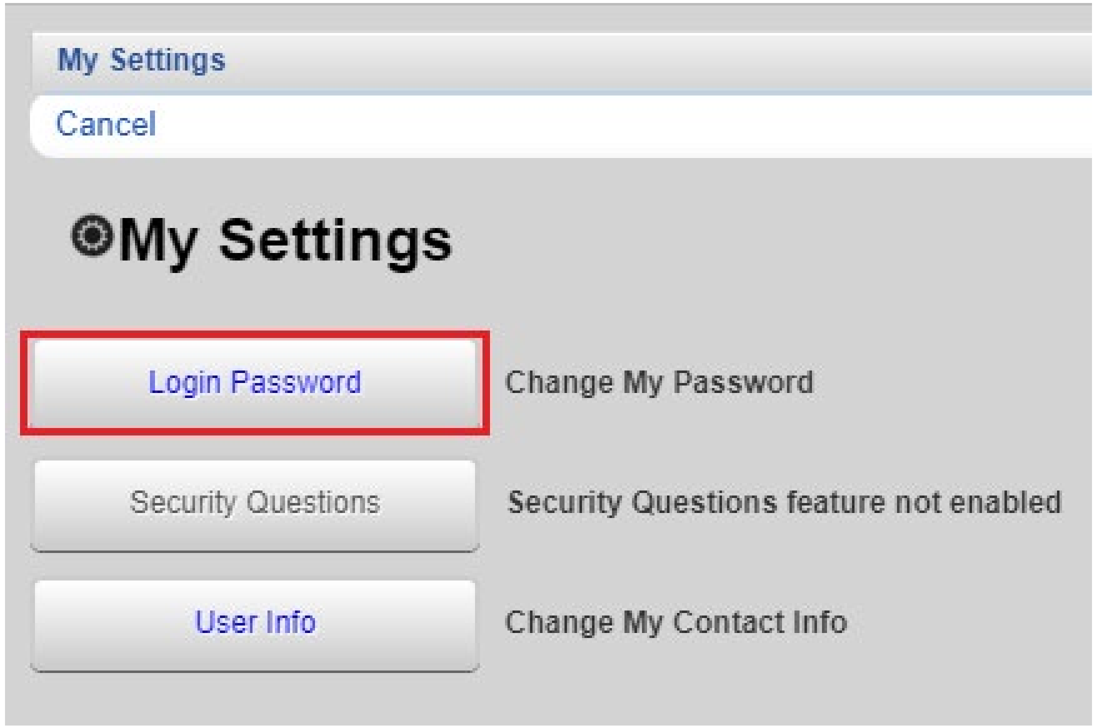


Provider Summary



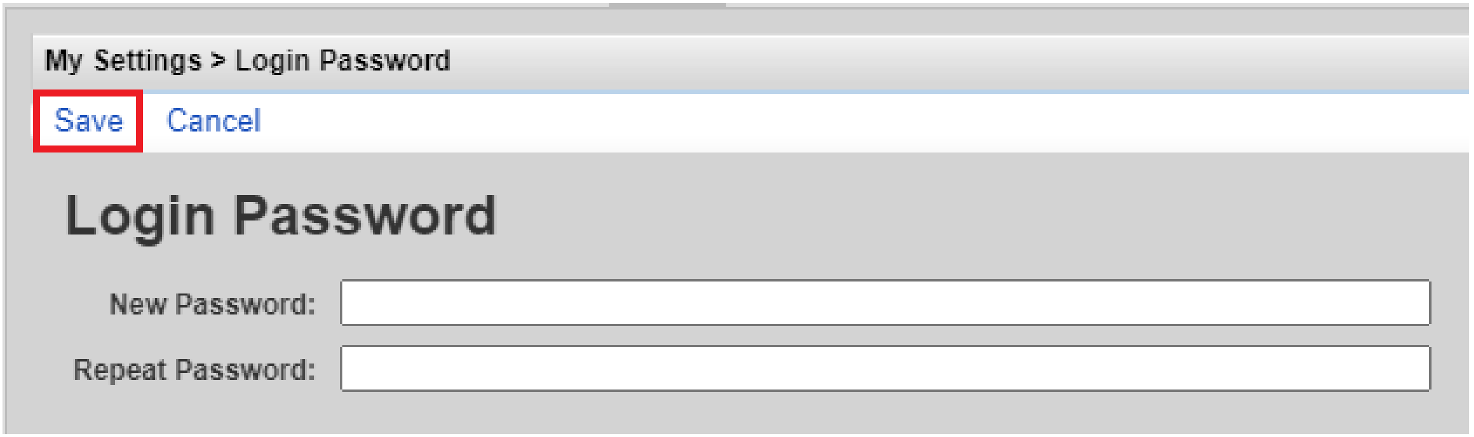
Changing your CW Password

Users can change their password by clicking My Settings from the main menu, then clicking Login Password.



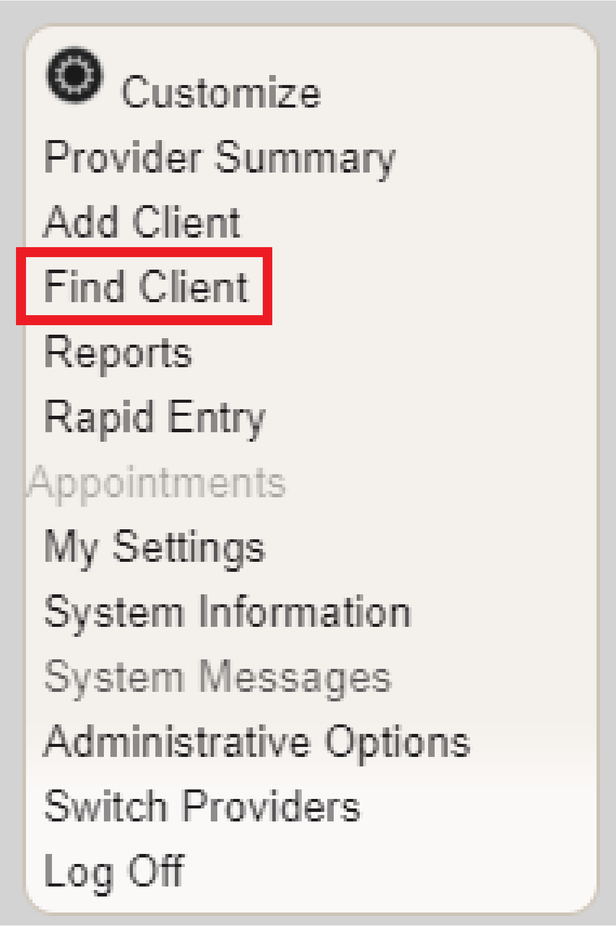
Changing your CW Password cont.

A new screen will prompt the user to enter a new password twice. Click Save when completed.



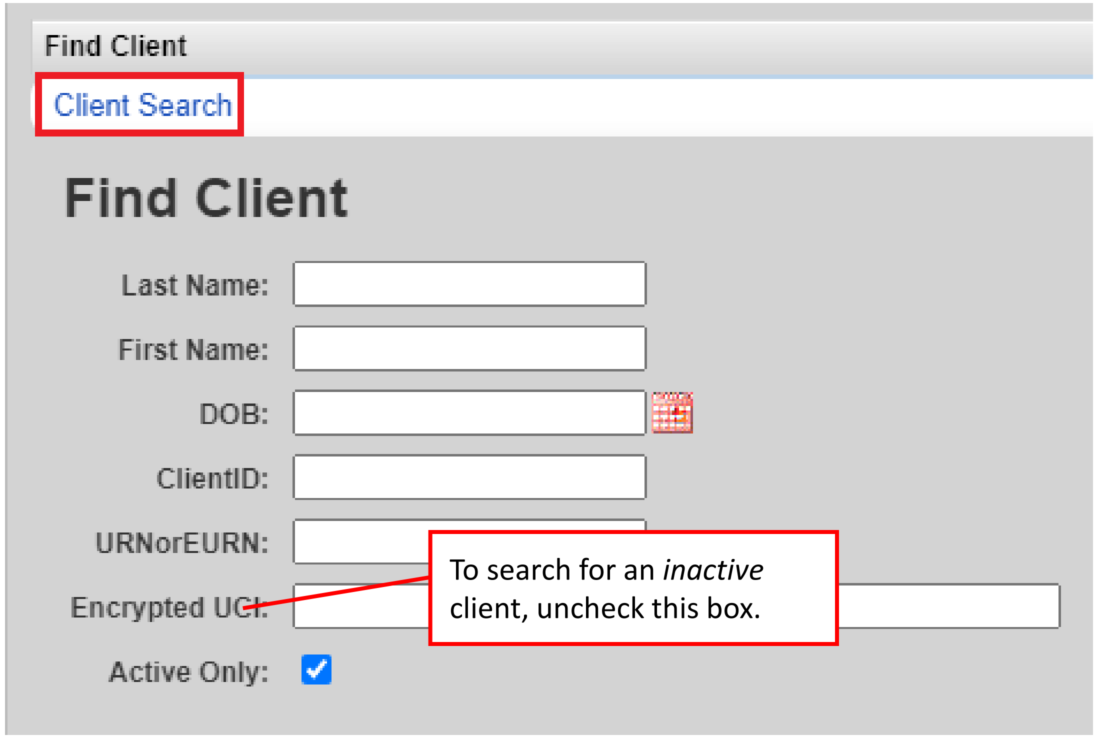
Finding a Client

Click Find Client from the main menu.



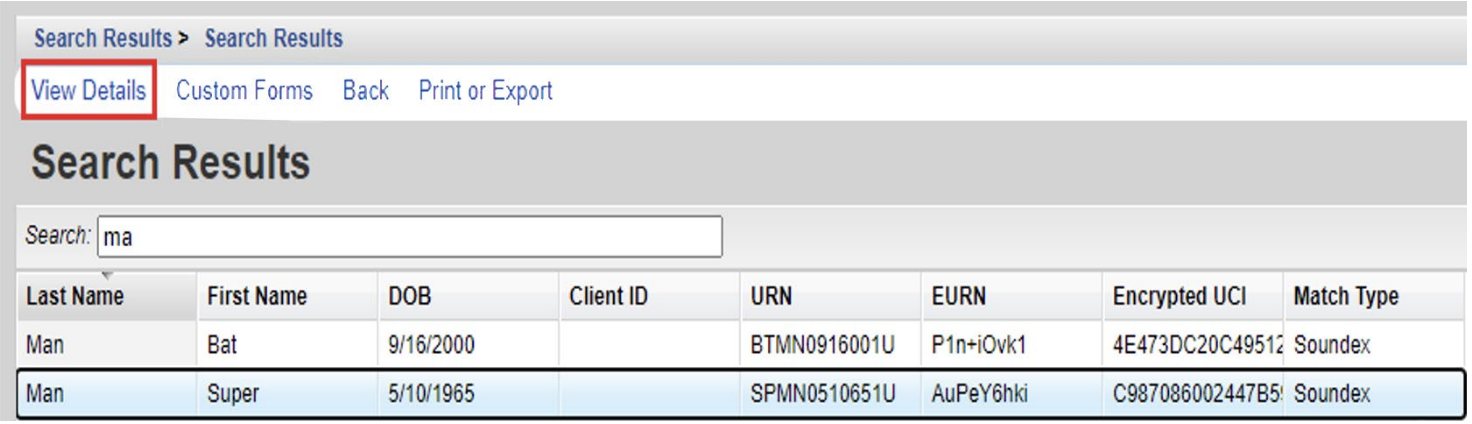
Finding a Client cont.

- 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.



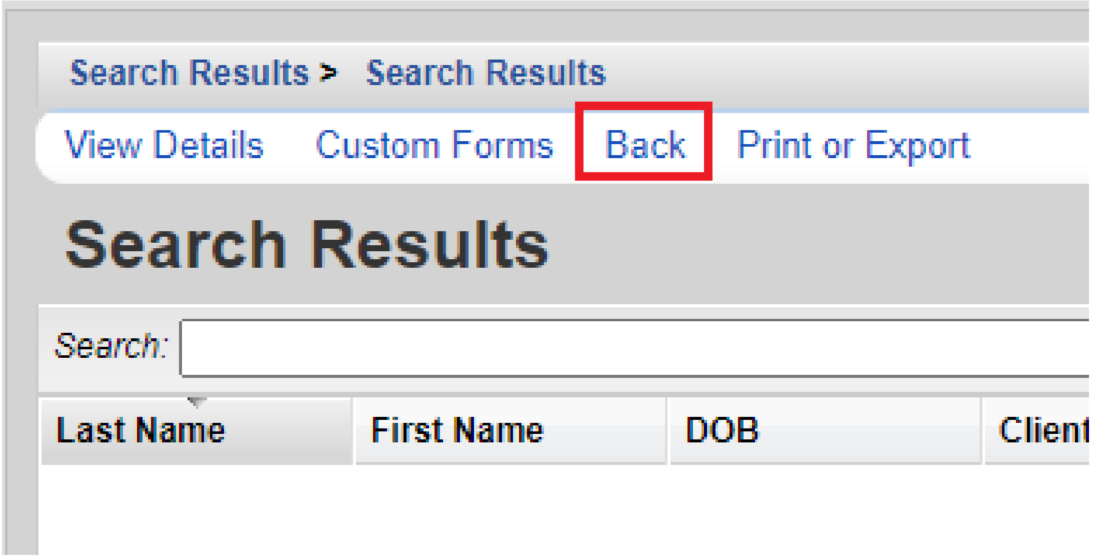
Finding a Client cont.

- 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.



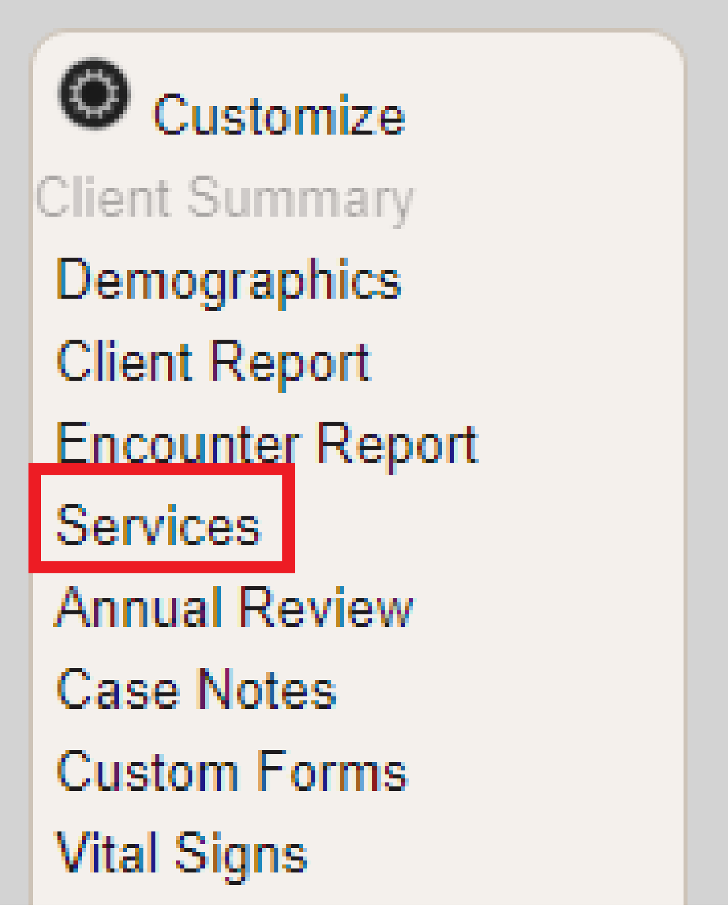
Finding a Client cont.

If the client of interest does not appear on the search list, click Back to modify the search criteria.



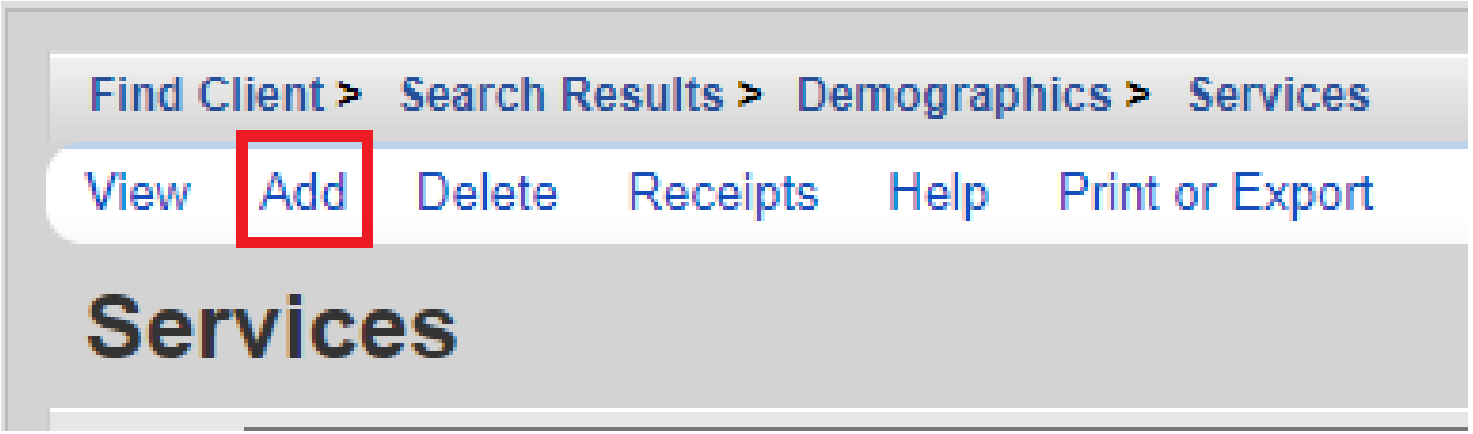
Adding Client Services

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



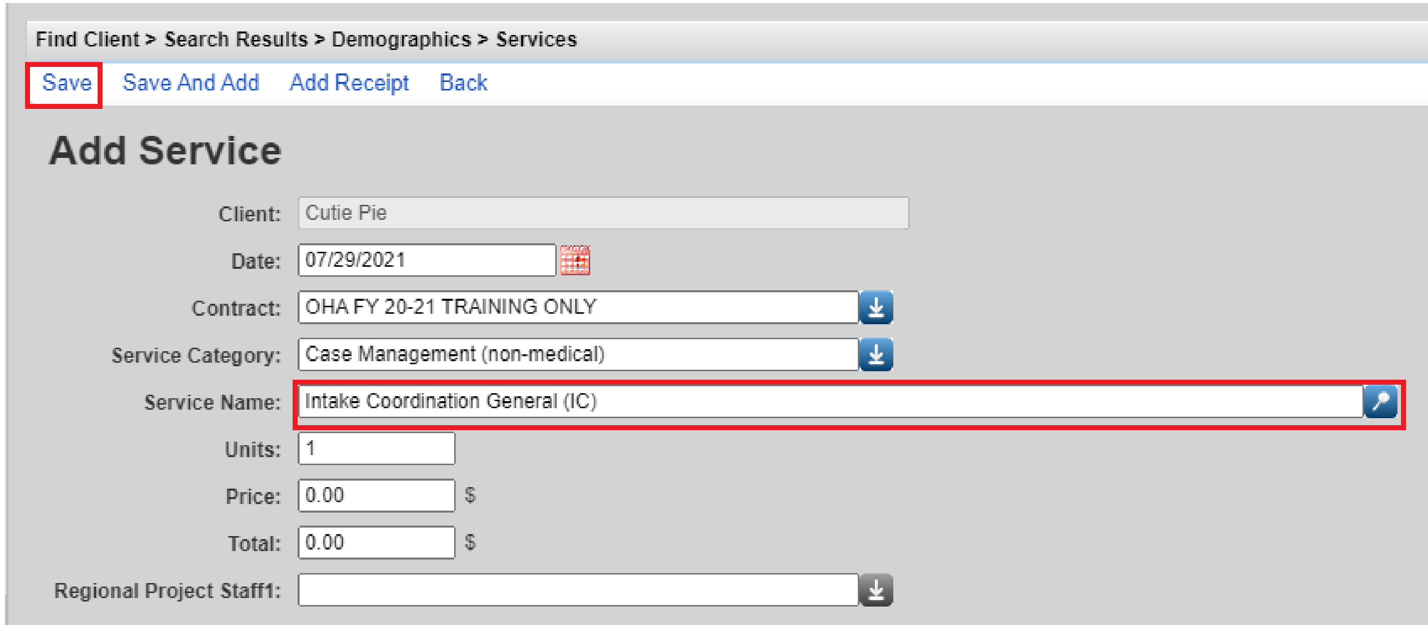
Adding Client Services

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.

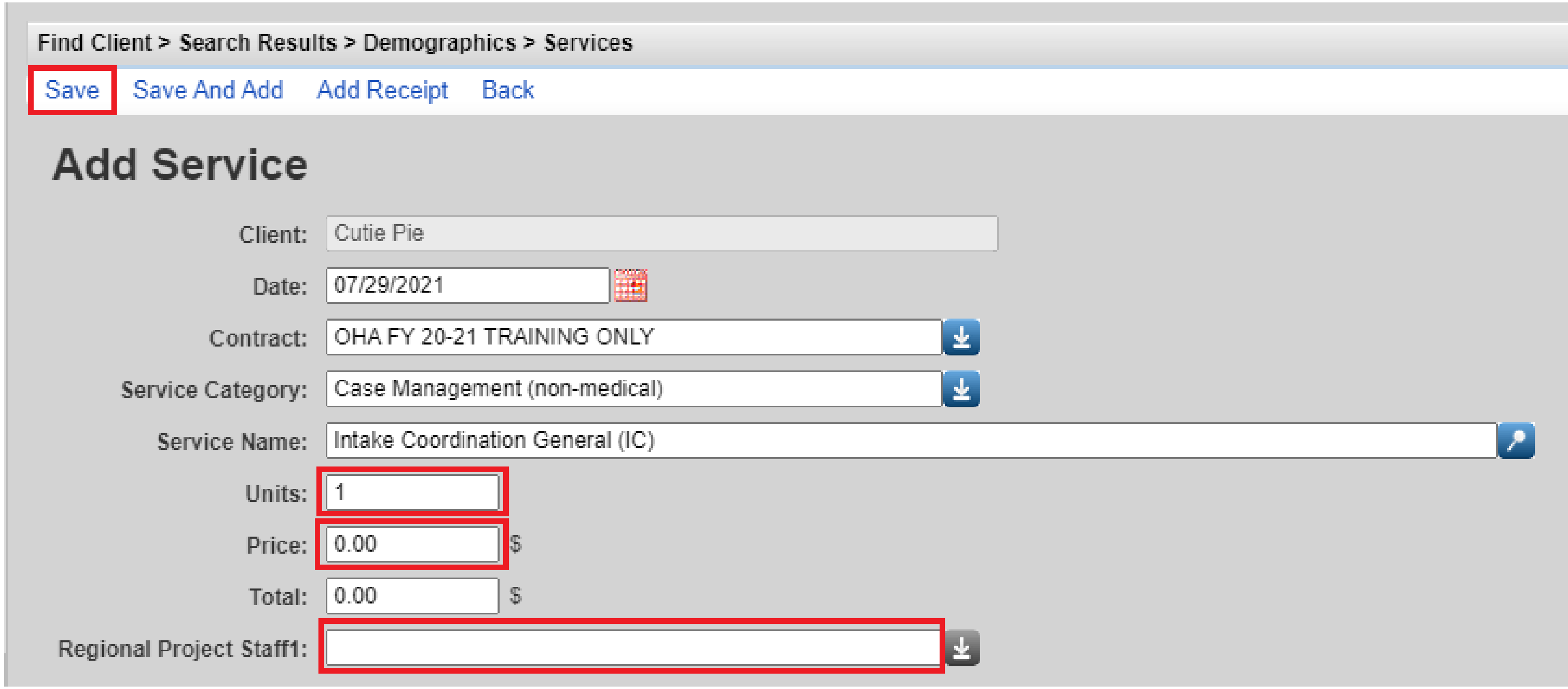


Adding Client Services cont.

- 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.

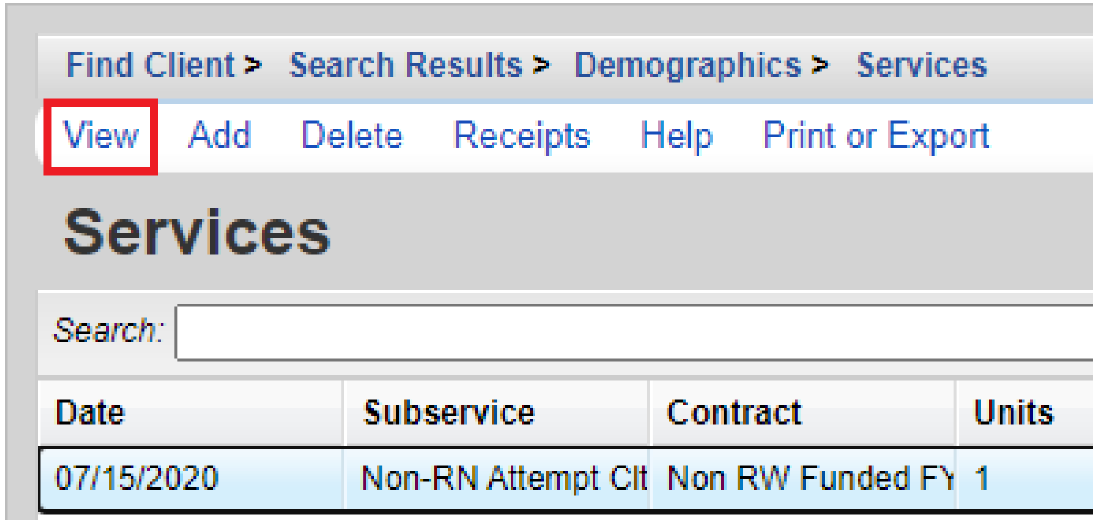
Note: Additional service fields may be required to be completed depending on the provider or subservice.

Adding Client Services cont.



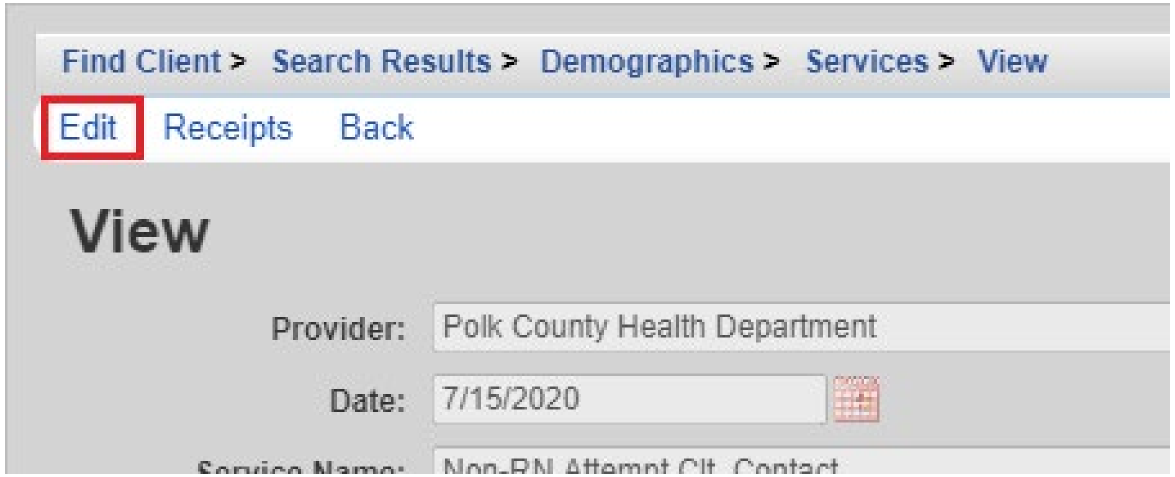
Editing Client Services

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



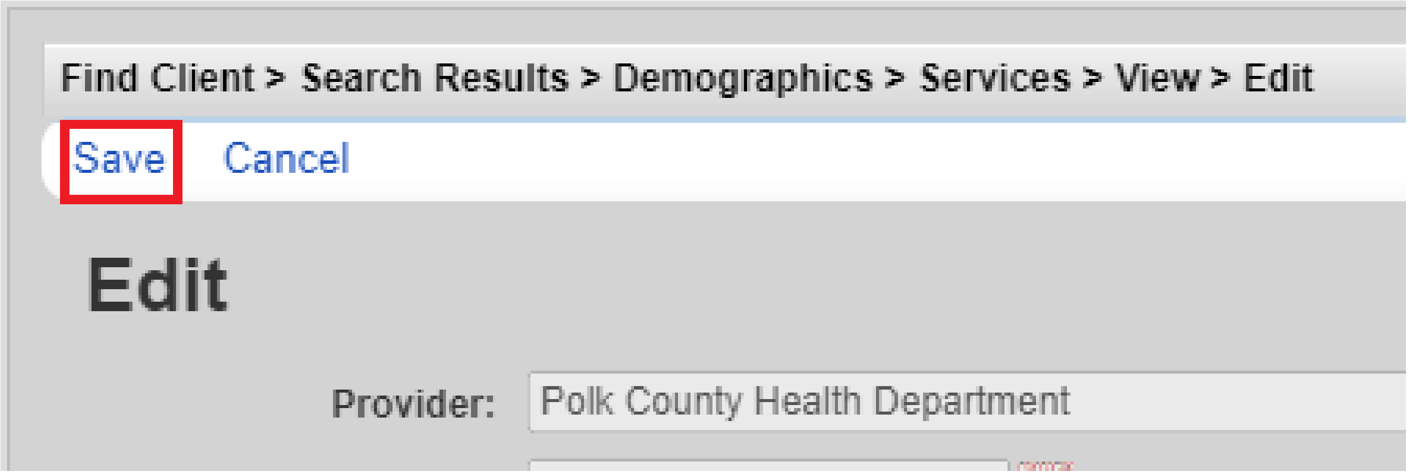
Editing Client Services cont.

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



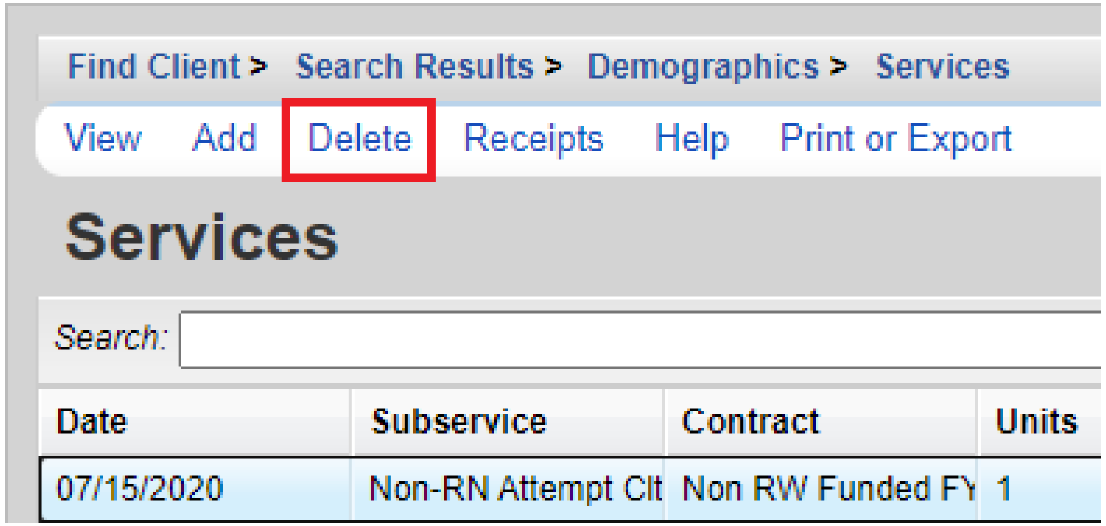
Editing Client Services cont.

Click Save.



Deleting Client Services

Select the service to be deleted, then click Delete.

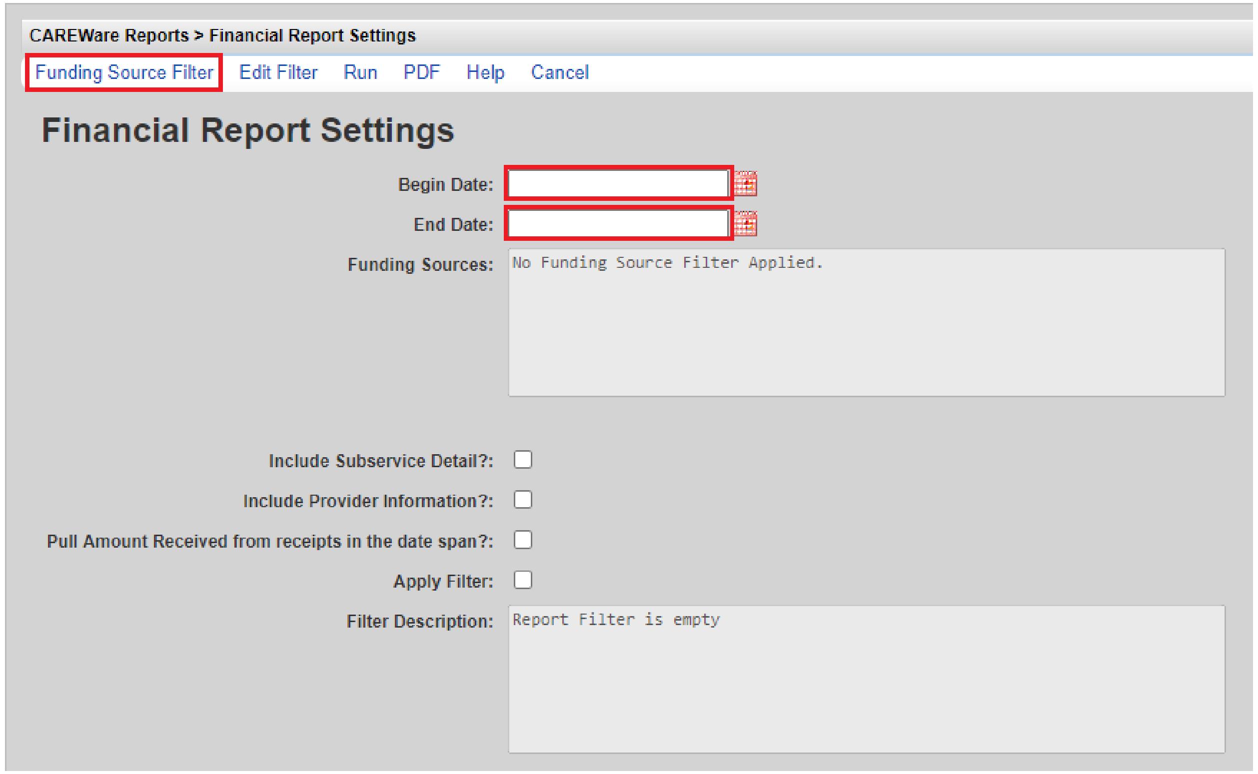


Financial Report

- This report displays the units and total costs of services/subservices provided by your agency and the number of unduplicated clients served in a specified time period.
- Click Financial Report on the Reports screen.

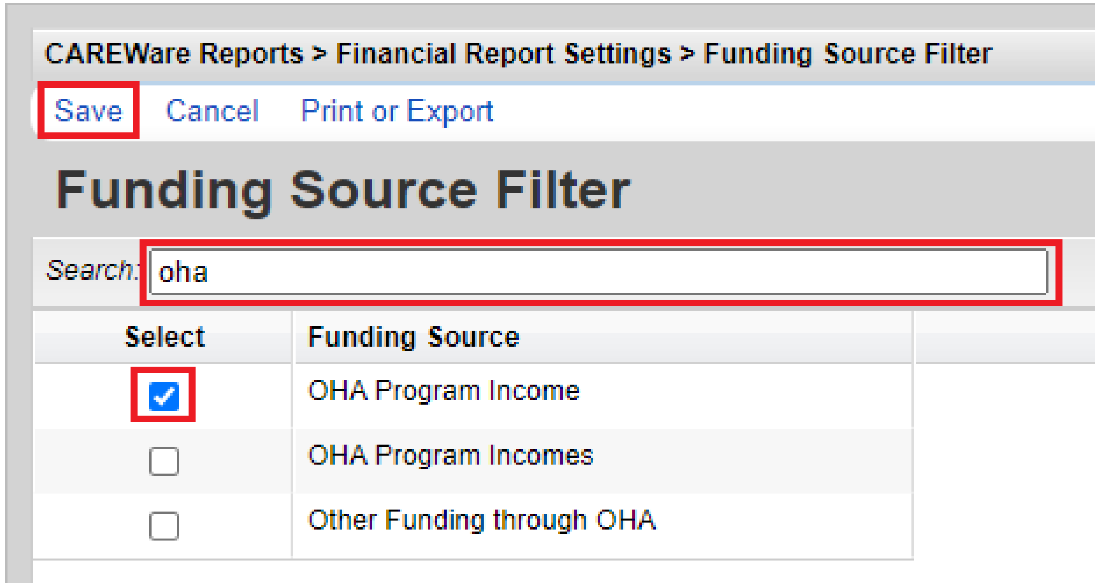
Financial Report cont.

- Enter the Begin Date and End Date.
- Click on Funding Source Filter.



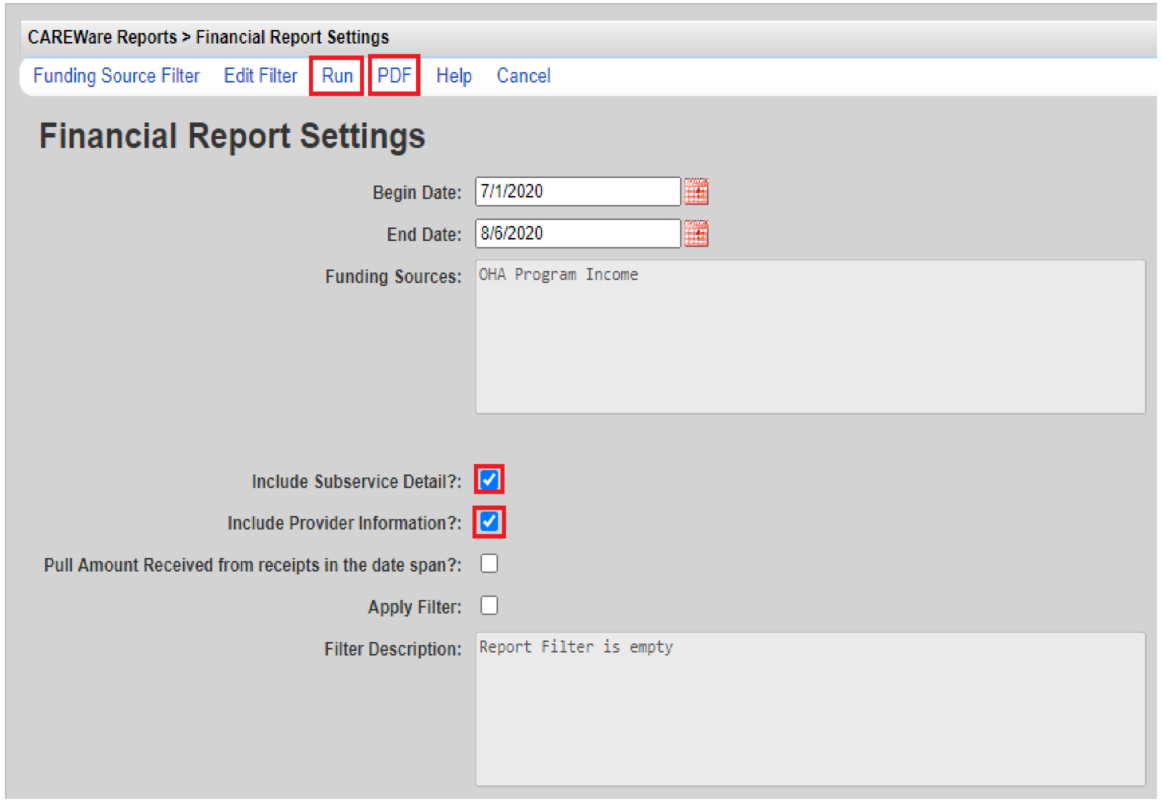
Financial Report cont.

- Select the Funding Source from the list.
  - Common funding sources include Part B and Part B Program Income.
  - Let the HIV Care and Treatment Team know if a funding source does not appear.
- Click Save.



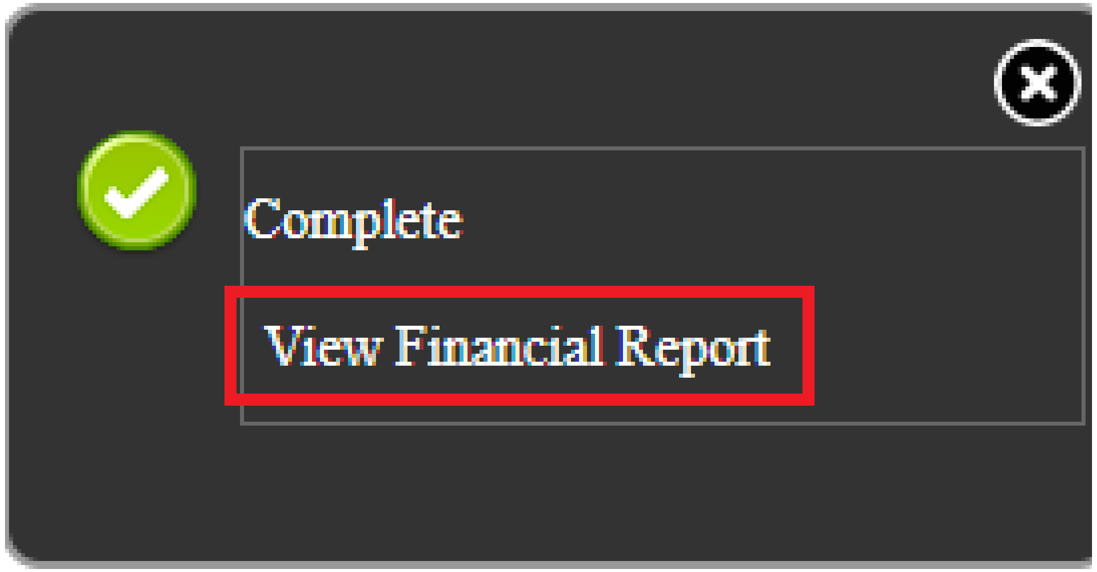
Financial Report cont.

- Check the Include Subservice Detail? and Include Provider Information? check boxes.
- Check Apply Filter if a filter is desired.
- Click Run or PDF.
  - Run will open the report in a new browser tab.
  - PDF will open a PDF file in a new browser tab. This is best if the report will be printed.



Financial Report cont.

- If PDF was selected, a pop-up will appear on the right side of the screen.
- Click View Financial Report.



Thank you

Please download a copy of the CAREWare 6 User Manual.

[CAREWare 6 User Support Website]