



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 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 .

The screenshot displays the CAREWare 6 web application. The browser window has two tabs: 'CW6 - lyantz' and 'CW6 - Pan, Peter'. The address bar shows the URL 'careware.oregon.gov/careware/rs/ClientInformation.htm'. The top navigation bar includes the HRSA logo, a breadcrumb trail 'Training > Pan, Peter (Birthdate: 8/4/1986, Last service:)', and the jProg logo. On the left is a sidebar menu with options like 'Customize', 'Client Summary', 'Demographics', 'Client Report', 'Encounter Report', 'Services', 'Annual Review', 'Case Notes', 'Custom Forms', 'Vital Signs', 'Hospital Admissions', 'Medications', 'Labs', 'Screenings', 'Screening Labs', 'Immunizations', 'Diagnoses', 'Sharing Requests', and 'Referrals'. The main content area shows the 'Demographics' section for a client named Peter Pan. It includes a 'Find Client > Search Results > Demographics' breadcrumb, a 'Back' button, and a 'Go To Top' link. The client information is organized into sections: 'Personal Info' (Client ID: Training 5 Name: Pan, Peter Gender: Male DOB: 08/04/1986), 'Change URN' (PTPN0804861U), 'Contact Information' (555 Tinkerbell Lane, Madras, OR 97888, 9718888888), 'Race/Ethnicity' (Hispanic (Mexican), Pacific (Other), White), and 'HIV Risk Factors' (MSM). A red arrow points to the vertical scrollbar on the right side of the main content area.



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				
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:		Effective date:		
		☐ Add a user ☐ Delete a user		
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)			





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.



Your connection is not private

Attackers might be trying to steal your information from **careware.oregon.gov** (for example, passwords, messages, or credit cards). [Learn more](#)

NET::ERR_CERT_DATE_INVALID



To get Chrome's highest level of security, [turn on enhanced protection](#)

Advanced

Back to safety





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.



Your connection is not private

Attackers might be trying to steal your information from **careware.oregon.gov** (for example, passwords, messages, or credit cards). [Learn more](#)

NET::ERR_CERT_DATE_INVALID



To get Chrome's highest level of security, [turn on enhanced protection](#)

Advanced

Back to safety



Privacy Message cont.

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



Your connection is not private

Attackers might be trying to steal your information from **careware.oregon.gov** (for example, passwords, messages, or credit cards). [Learn more](#)

NET::ERR_CERT_DATE_INVALID



To get Chrome's highest level of security, [turn on enhanced protection](#)

Hide advanced

Back to safety

This server could not prove that it is **careware.oregon.gov**; its security certificate expired 397 days ago. This may be caused by a misconfiguration or an attacker intercepting your connection. Your computer's clock is currently set to Thursday, July 29, 2021. Does that look right? If not, you should correct your system's clock and then refresh this page.

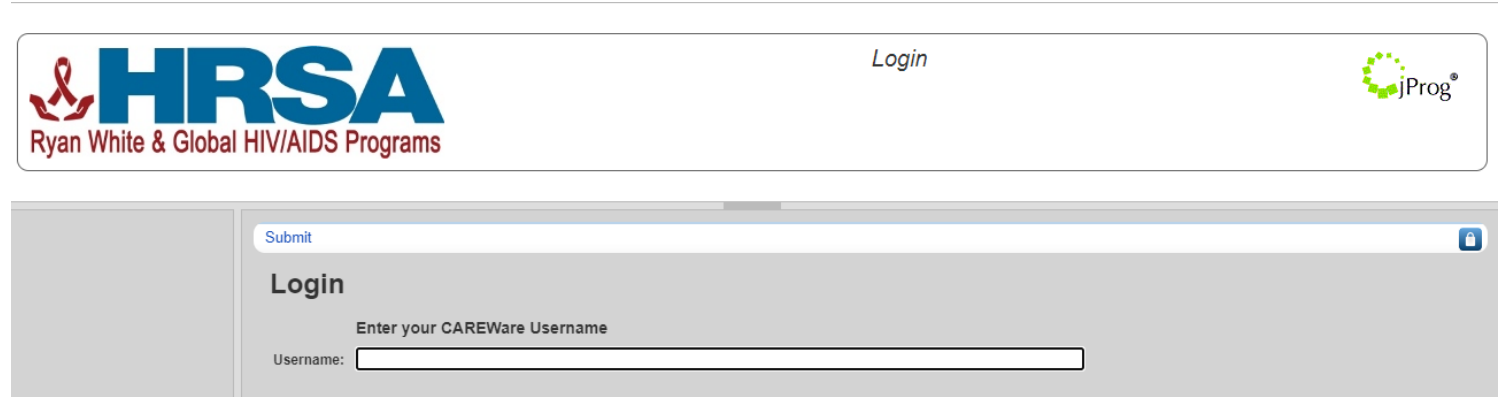
[Proceed to careware.oregon.gov \(unsafe\)](#)





Privacy Message cont.

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



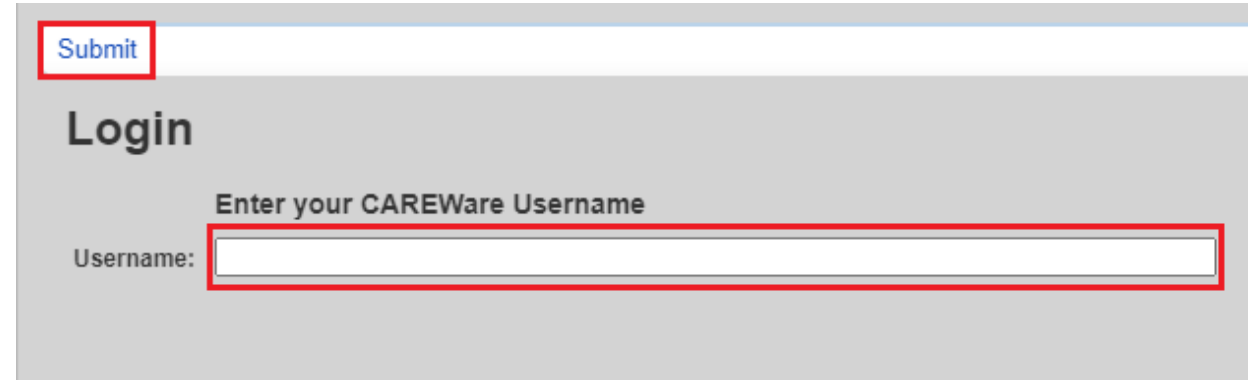
The screenshot shows the HRSA CAREWare 6 login interface. At the top, there is a header bar containing the HRSA logo (a red ribbon and the text "HRSA Ryan White & Global HIV/AIDS Programs") on the left, the word "Login" in the center, and the "jProg" logo on the right. Below the header, there is a login form with a "Submit" button at the top right. The form is titled "Login" and includes the instruction "Enter your CAREWare Username". Below this instruction, there is a label "Username:" followed by a text input field.





Logging in

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

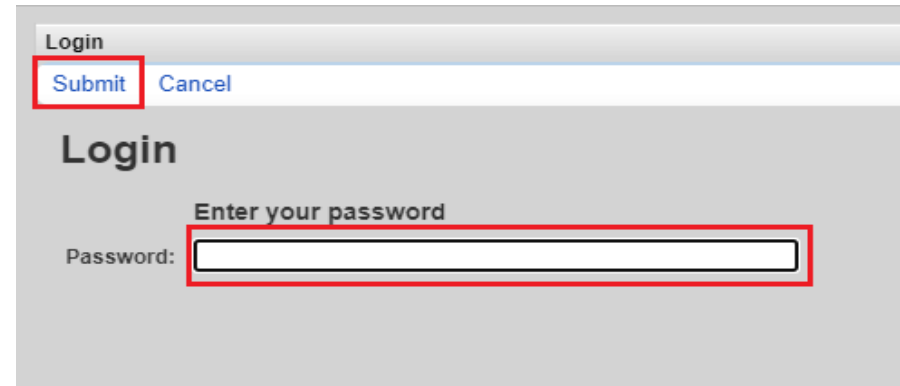


Submit

Login

Enter your CAREWare Username

Username:



Login

Submit Cancel

Login

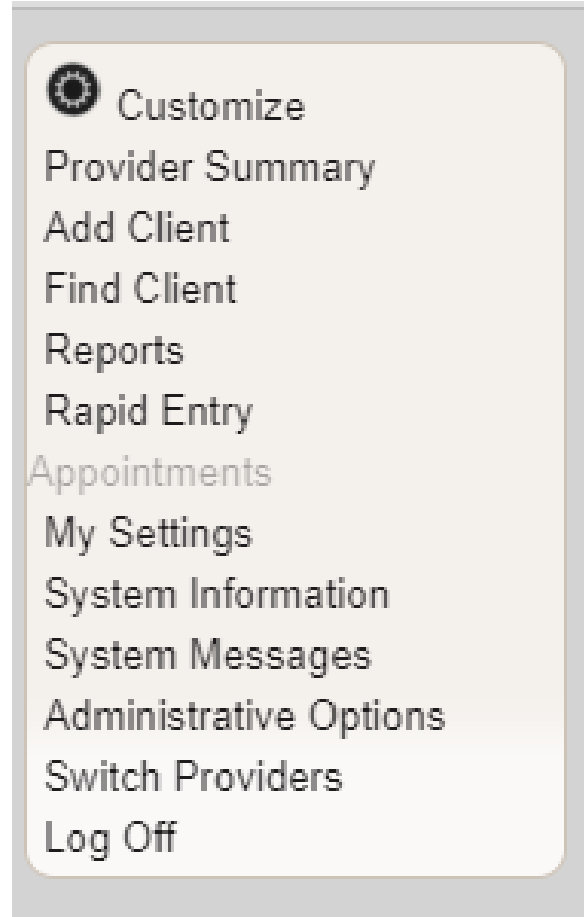
Enter your password

Password:



Provider Main Menu

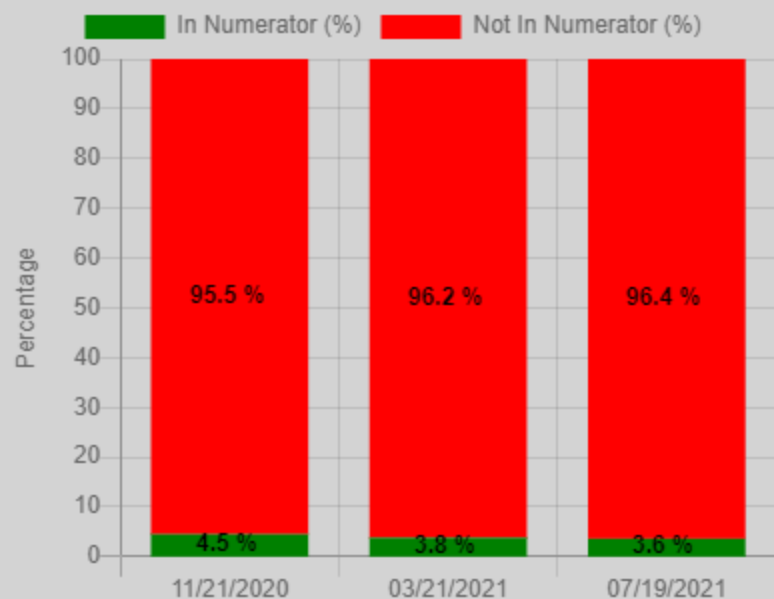
The provider main menu appears on the left side.



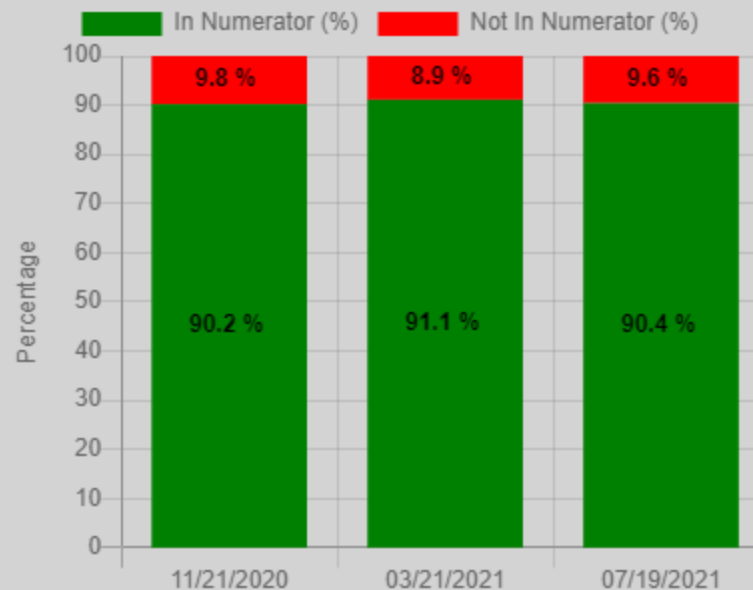
Provider Summary

Provider Summary (2 Charts As of 12:01 AM)

New Clients



Active Clients



Numerator: 58 Clients

48 Clients

46 Clients

Numerator: 1280 Clients

1277 Clients

1288 Clients

Not in Num: 1222 Clients

1229 Clients

1242 Clients

Not in Num: 139 Clients

125 Clients

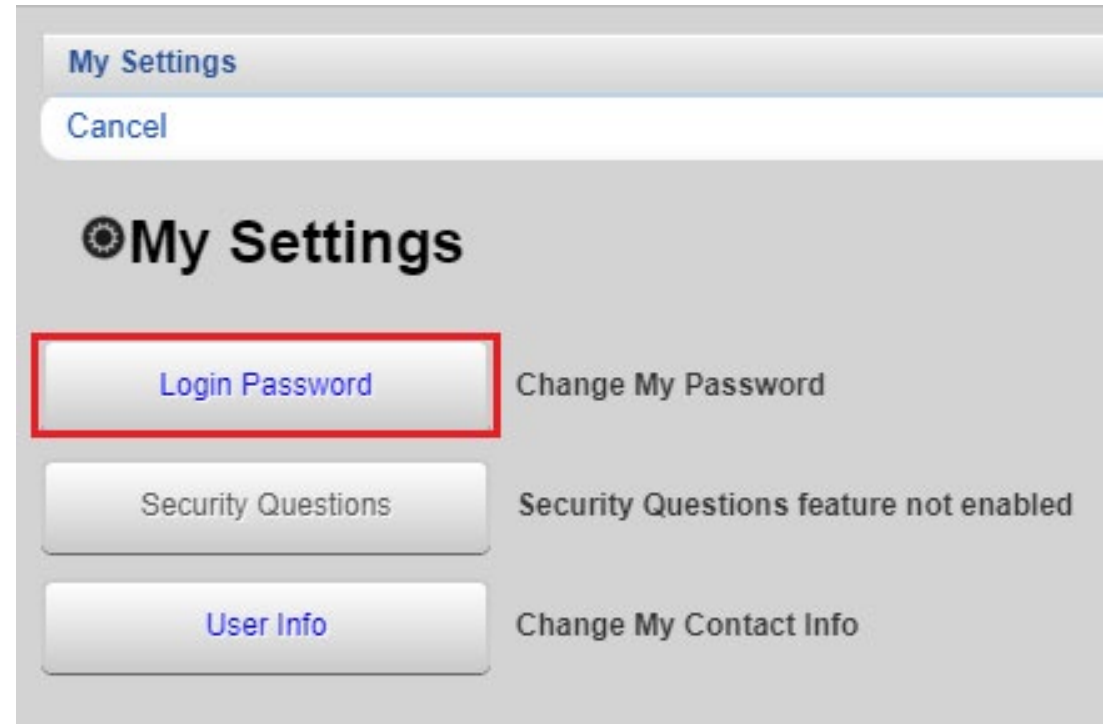
137 Clients





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.

My Settings > Login Password

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

Login Password

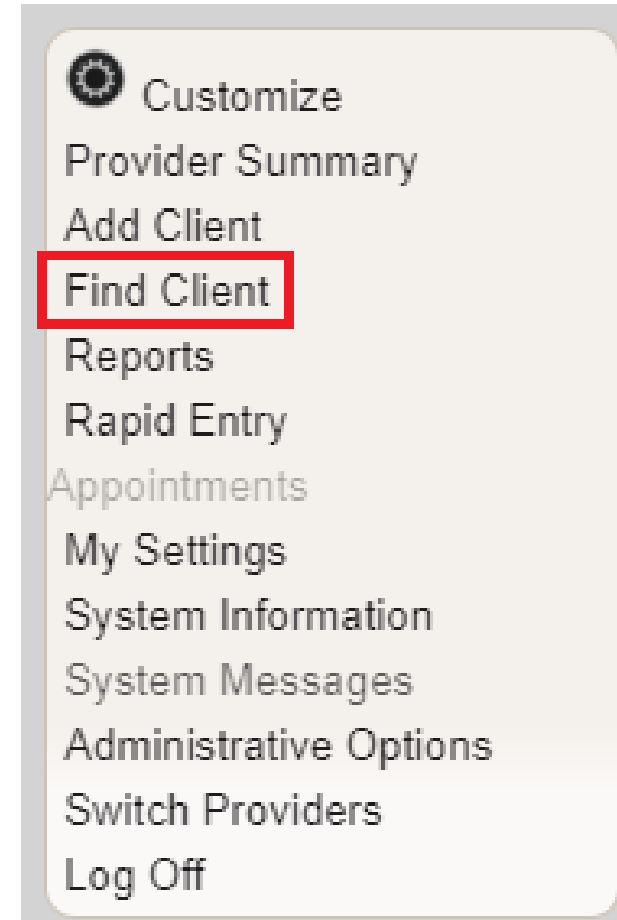
New Password:

Repeat Password:



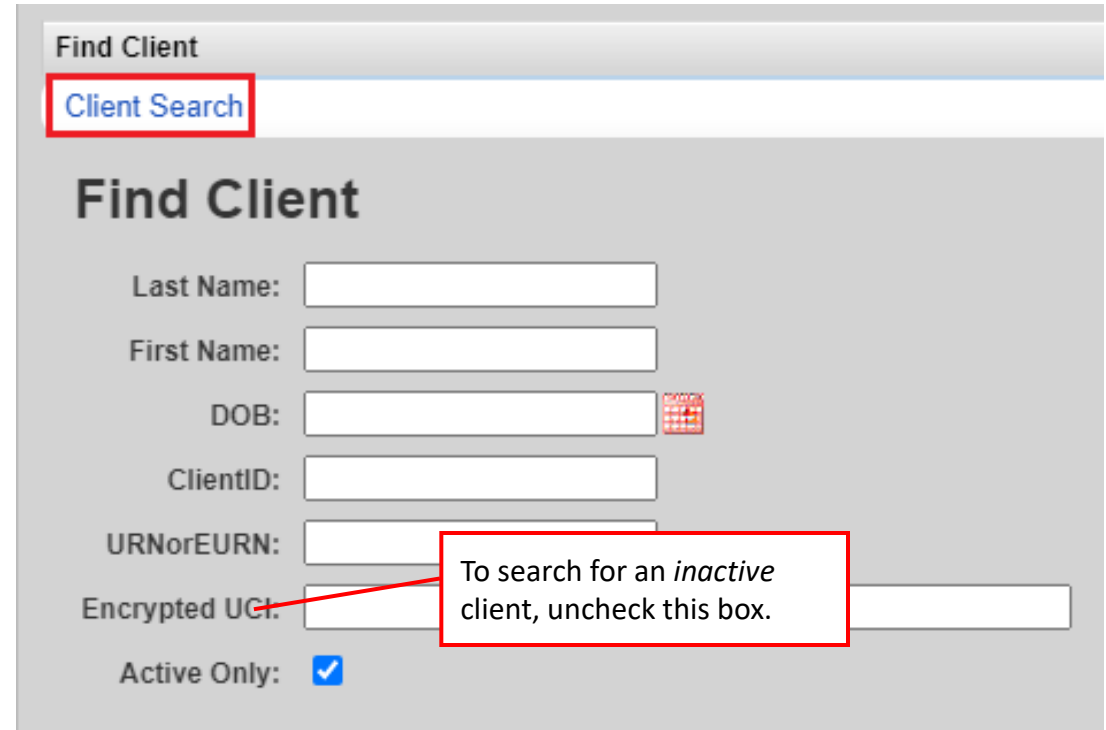
Finding a Client

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.



The screenshot shows a web interface titled "Find Client". At the top, there is a tab labeled "Client Search" which is highlighted with a red border. Below the tab, the form contains several input fields: "Last Name:", "First Name:", "DOB:" (with a calendar icon), "ClientID:", "URNorEURN:", and "Encrypted UCI:". The "Encrypted UCI" field is highlighted with a red box, and a callout points to it with the text: "To search for an *inactive* client, uncheck this box." Below the "Encrypted UCI" field is a checkbox labeled "Active Only:" which is currently checked with a blue checkmark.

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.

Search Results > Search Results

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

Search Results

Search:

Last Name	First Name	DOB	Client ID	URN	EURN	Encrypted UCI	Match Type
Man	Bat	9/16/2000		BTMN0916001U	P1n+iOvk1	4E473DC20C49512	Soundex
Man	Super	5/10/1965		SPMN0510651U	AuPeY6hki	C987086002447B5	Soundex



Finding a Client cont.

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

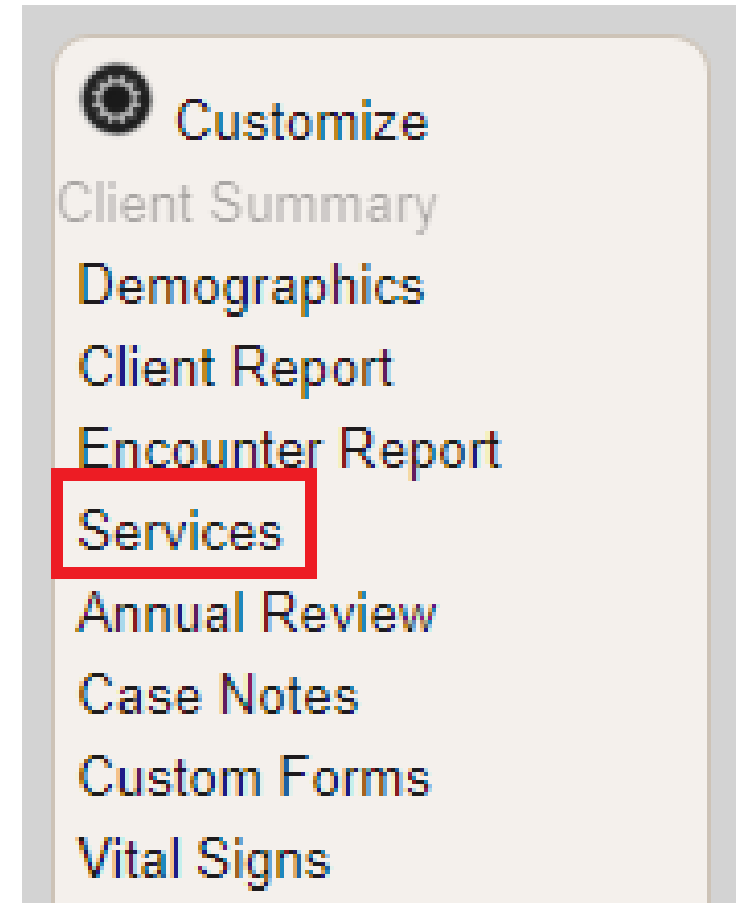
The screenshot shows a web interface for searching clients. At the top, there is a breadcrumb trail: "Search Results > Search Results". Below this, there are four buttons: "View Details", "Custom Forms", "Back", and "Print or Export". The "Back" button is highlighted with a red rectangular box. Below the buttons, the heading "Search Results" is displayed. Underneath the heading is a search input field with the label "Search:". Below the search field is a table with four columns: "Last Name", "First Name", "DOB", and "Client".

Last Name	First Name	DOB	Client
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Adding Client Services

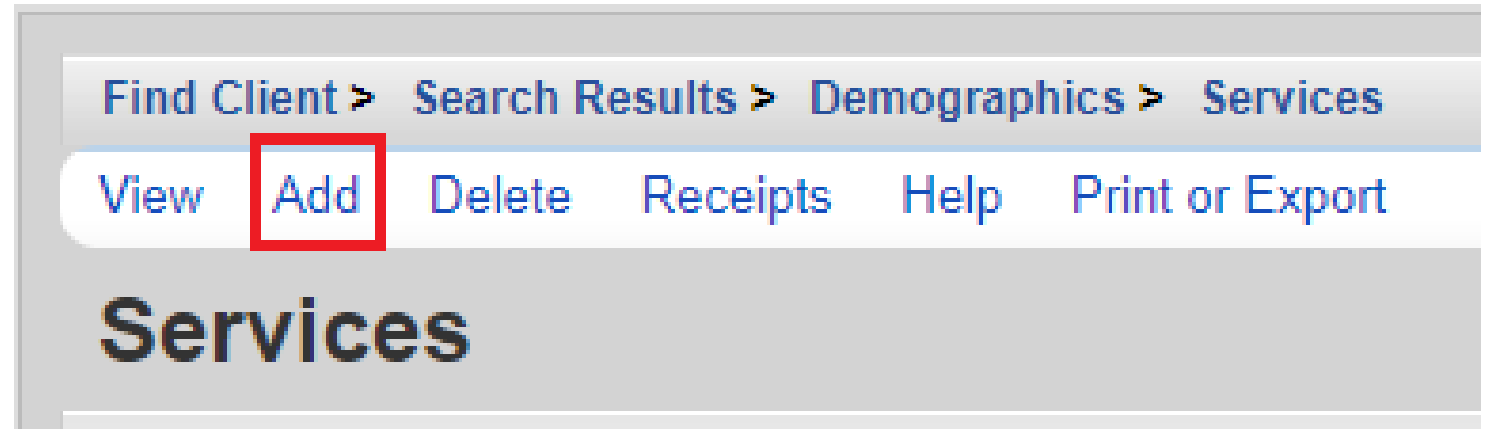
- To enter a new service into CAREWare, navigate to the client record.
- Click Services on the main menu.





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 on 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

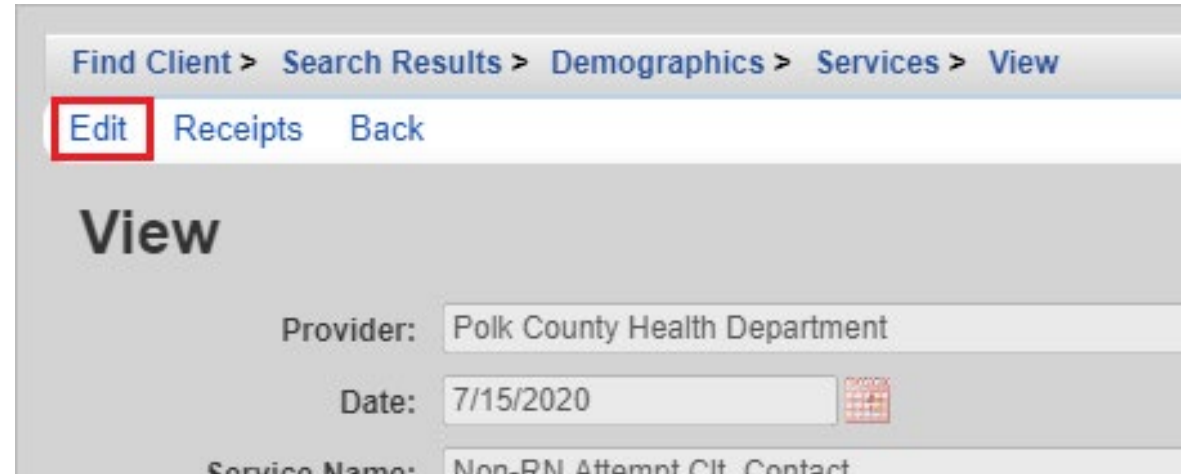
Services

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



Editing Client Services cont.

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

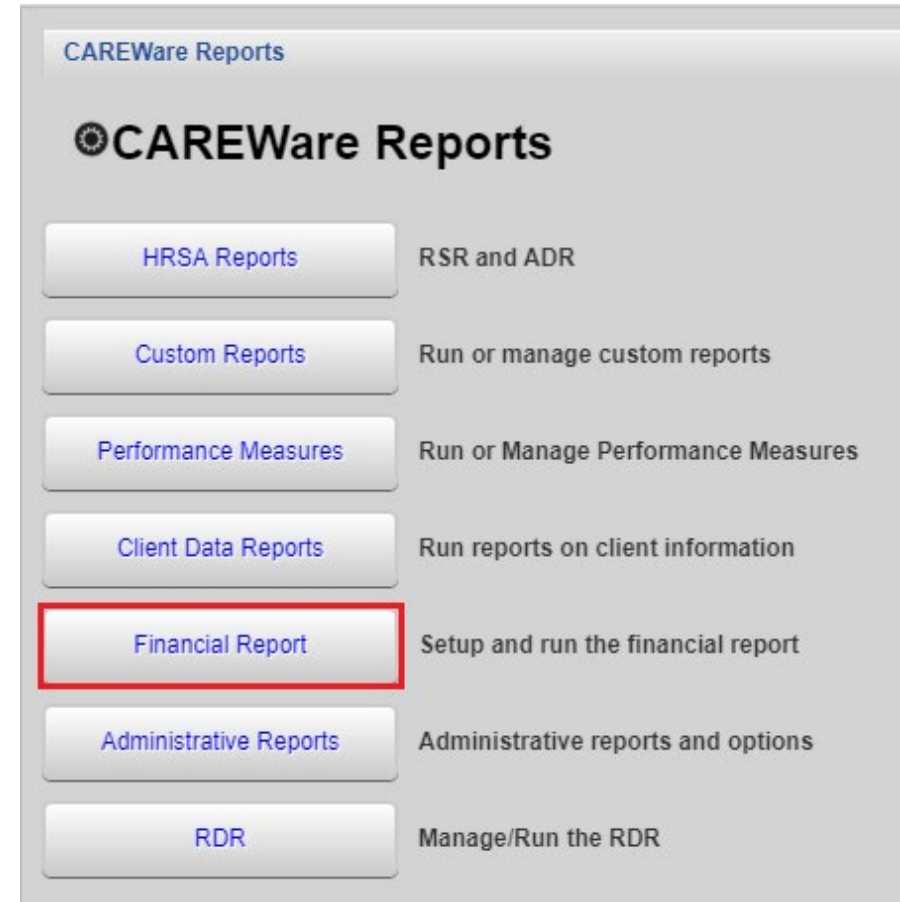
Search:

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



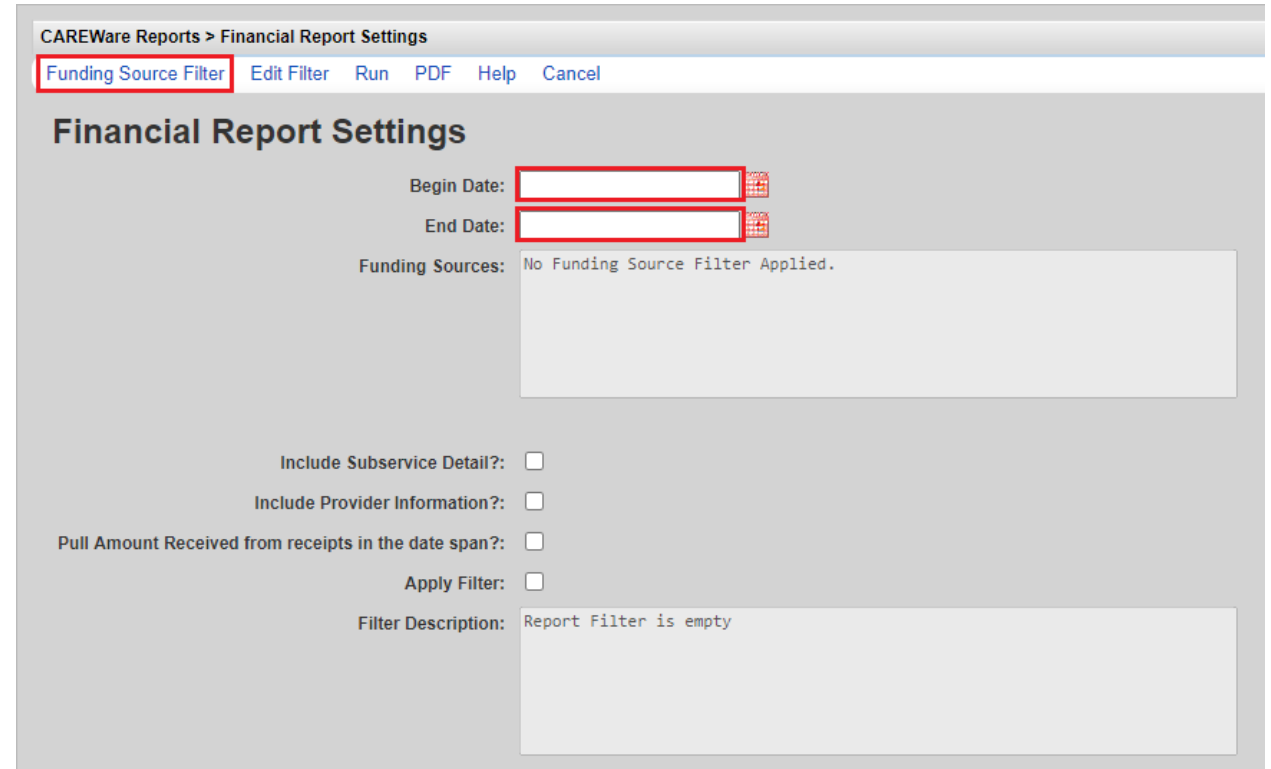
Financial Report

- 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.



CAREWare Reports > Financial Report Settings

Funding Source Filter Edit Filter Run PDF Help Cancel

Financial Report Settings

Begin Date:

End Date:

Funding Sources: No Funding Source Filter Applied.

Include Subservice Detail?: ☐

Include Provider Information?: ☐

Pull Amount Received from receipts in the date span?: ☐

Apply Filter: ☐

Filter Description: Report Filter is empty

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.

CAREWare Reports > Financial Report Settings > Funding Source Filter

[Save](#) [Cancel](#) [Print or Export](#)

Funding Source Filter

Search:

Select	Funding Source
☒	OHA Program Income
☐	OHA Program Incomes
☐	Other Funding through OHA

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.

CAREWare Reports > Financial Report Settings

Funding Source Filter Edit Filter **Run** **PDF** Help Cancel

Financial Report Settings

Begin Date: 7/1/2020

End Date: 8/6/2020

Funding Sources: OHA Program Income

Include Subservice Detail?: ☒

Include Provider Information?: ☒

Pull Amount Received from receipts in the date span?: ☐

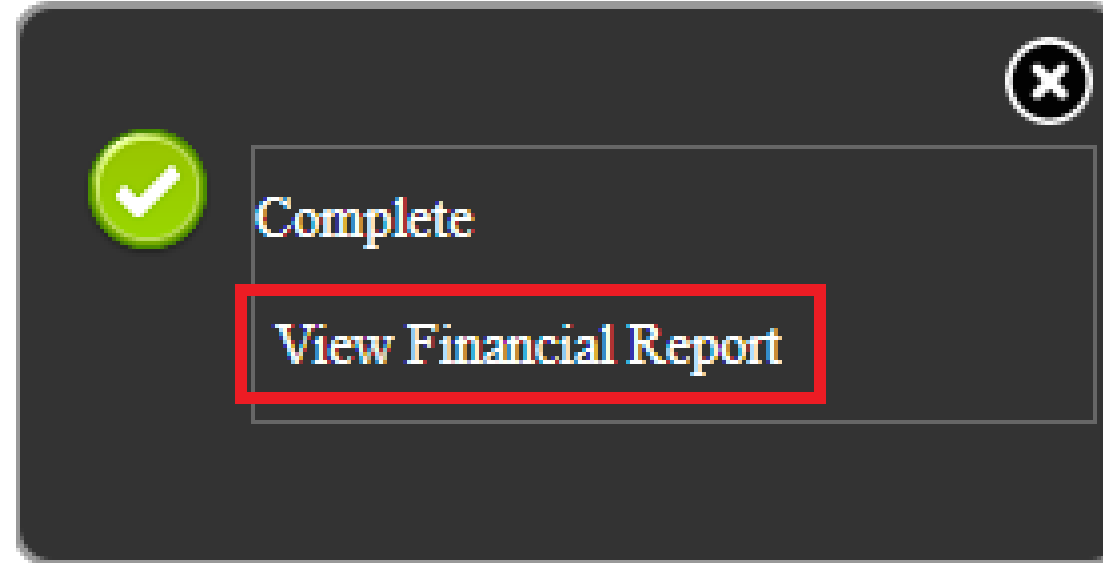
Apply Filter: ☐

Filter Description: Report Filter is empty



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](#)

