DC EMA CAREWare 6 Quick User Guide

Messay Zerga
DC Health

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What is CAREWare?

Overview of CAREWare

CAREWare is free, scalable software for managing and monitoring HIV clinical and supportive care and will quickly produce a completed Ryan White HIV/AIDS Program Services Report (RSR) for meeting reporting requirements to the federal grantee, the U.S. Department of Health and Human Services, Health Resources and Services Administration, HIV/AIDS Bureau (DHHS, HRSA, HAB).

DC EMA CAREWare is a secure, centralized, web-based software application designed to report client-level data from HIV services programs funded through Part A and Part B of the Ryan White HIV/AIDS Program, as well as through state dollars. Ryan White and state funds are used in the EMA to support core medical and essential support services.

How CAREWare Data Will Be Used

Demand for HIV-related services continues to grow, and the system of services available to persons with HIV disease is becoming more complex. Evaluating the success of these programs in meeting the needs of our EMA with HIV, and reporting the activities of our providers to the federal government and community members are vital functions of HAHSTA.

As the range of HIV services grows more complex, and needs continue to outweigh resources, monitoring the success of the entire system becomes more important. A system-wide evaluation allows HAHSTA to:

- Target funds to populations most in need, especially those not receiving services;
- Report accurate data to DC Council, HRSA, Congress, and other funding bodies;
- Help community providers to better meet the needs of persons with HIV disease through the evaluation of their services in the context of the entire services system; and
- Strengthen the effort to work for changes in the broader health care and social services system by providing accurate analysis of the needs of our EMA living with HIV.
- To address HIV Care related disparities among population subgroups based on data driven interventions

This type of system-wide evaluation and analysis requires several components, including the need to collect the names and birth dates of clients receiving any HIV service funded by the EMA

The client-level reporting system will allow HAHSTA to answer important evaluation questions, such as:

- How many people are served through the HIV programs? What are the demographic characteristics of these persons?
- How do these people compare to the entire population of persons with HIV in the EMA?
- How many people served through HIV programs are seeing a medical provider for their HIV care? What are the characteristics of those who are not in care?
- Are people receiving case management more likely to access additional Ryan White support services?

Safeguarding Client Confidentiality

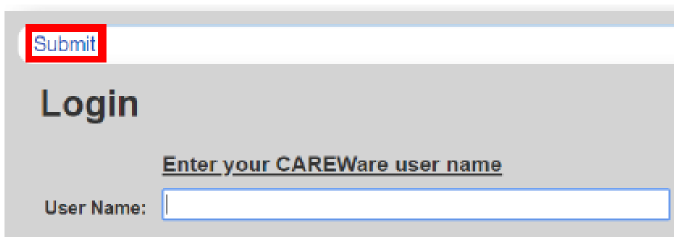
Safeguarding the confidentiality of clients is of critical importance, at both the local and federal level. In order to maintain client confidentiality, the following will occur:

- Client names will not be reported to HRSA. Client level data will be reported to HRSA using an encrypted unique client identifier.
- The full birth date of clients will not be reported to HRSA. Only year of birth will be reported to HRSA.
- A client name will only be shared between EMA providers serving that client. Access to client names by HAHSTA staff will be limited to those few who have a job-related need (technical assistance, data management, system administration, and cross-reference with the HIV/AIDS Surveillance System).
- Client-specific information from CAREWare will only be shared with an entity other than HAHSTA, HRSA, or consultants specifically contracted for data analysis if a client has given his/her consent.
- All clients of HIV services will be informed that this information is being collected by HAHSTA in order to comply with federal law and to improve the HIV services system.

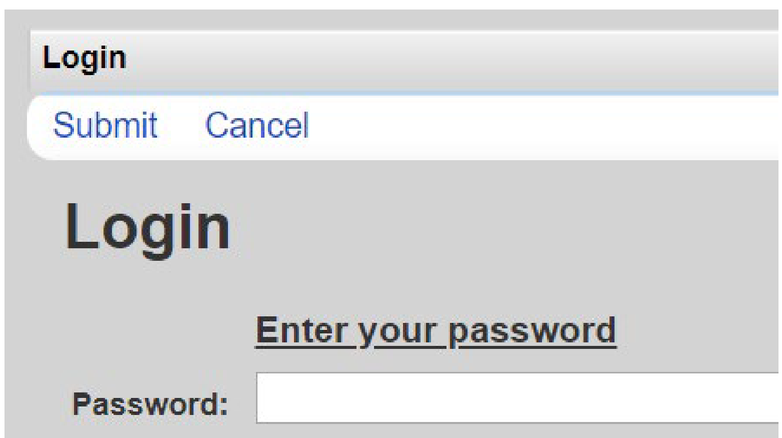
Navigating CAREWare v.6

Logging in to CAREWare

1. Open your browser and enter the secure webpage address to connect to your CAREWare system (contact your CAREWare administrator if not known). Enter your CAREWare username and click Submit.



2. Enter your CAREWare password, click Submit.



3. Select a Provider domain, click Submit or double-click on Domain name.

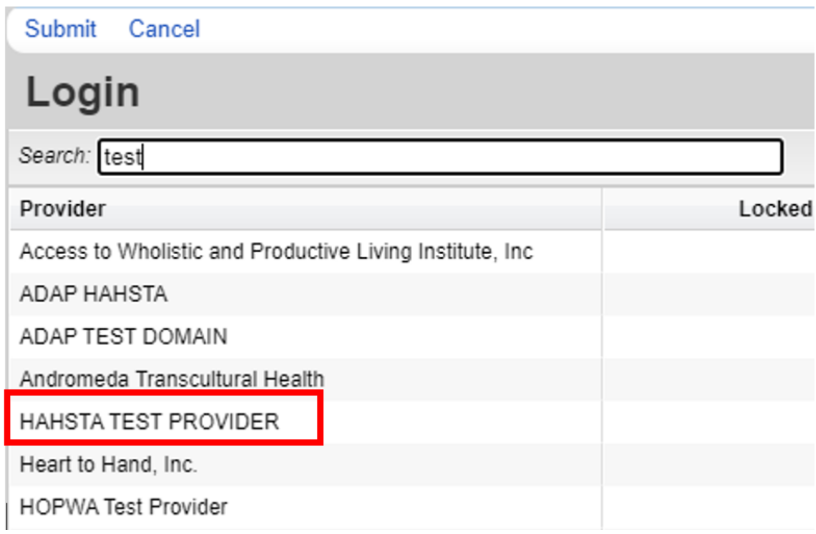
Unlocking Your Own CAREWare User Account

DC EMA's CW 6 allows users unlock their own accounts after too many failed log-in attempts. It will send atoken (code) to the email address in My Settings. To activate this function:

- Immediately after logging in for the first time, click **My Settings**, then **Change my Contact Info**,
- and edit your email address if it is missing or incorrect.
- In your email Contacts list or address book, enter noreply-carewaredc@ixn.com so messages
- are not blocked.
- Whenever you are locked out for three attempts to log in with an incorrect password, CAREWare
- will email a "CAREWare password reset token" message to the address listed.
- Enter the code from that message into the **Reset Password Token** on the CW log-in Screen.
- In the **Change Password** screen, enter a new password twice and click **Change Password**.

- Log in with your new password.

Check the appendix for how to set up your 2FA instruction or enter the authentication code



Terms and Definitions in CAREWare v.6

CAREWare Version 6.0 is a design change that performs more like a web application than previous versions of CAREWare. After logging into CAREWare, a Menu of Links will be displayed on the left. Links will list common user tasks in CAREWare. Upon selecting a link, the Link Summary description will be displayed on the right.

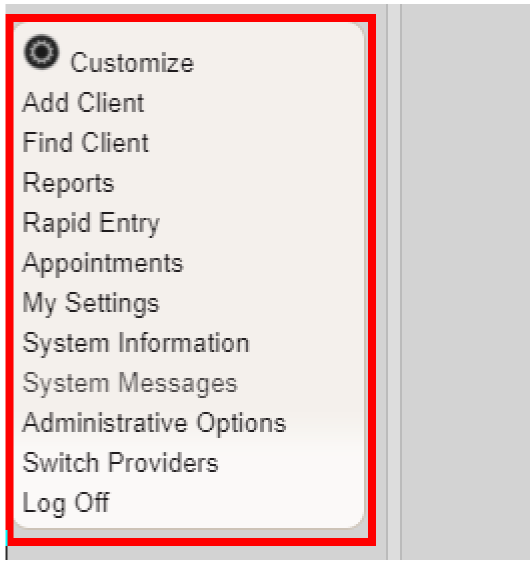
Similar formats, link menus, and descriptions are the same throughout CAREWare Version 6.0!

Provider Summary

New to CAREWare are Provider and Client summary screens that allow you to graphically display performance measures (for Providers) and line graphs of quantitative labs (e.g. viral loads, CD4 counts, etc) for cients.

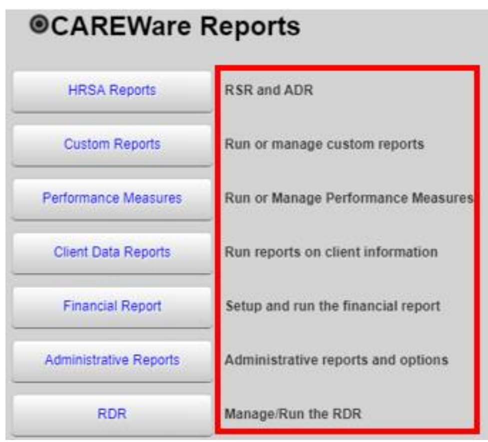
Menu of Links

Upon logging in to CAREWare, you will find a Menu of Links on the left-hand side of the screen. Simply click on the item you wish to access. Clicking Add Client or Find Client will open a new tab within your browser.



Link Summary

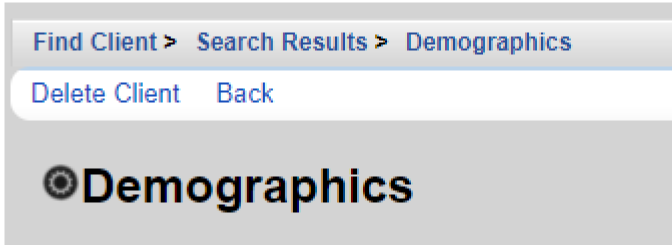
A Link Summary is displayed to the right of each link item. In the example below, once Reports is selected from the Menu of Links, a new screen appears with additional link items. To the right of each is a Link Summary.



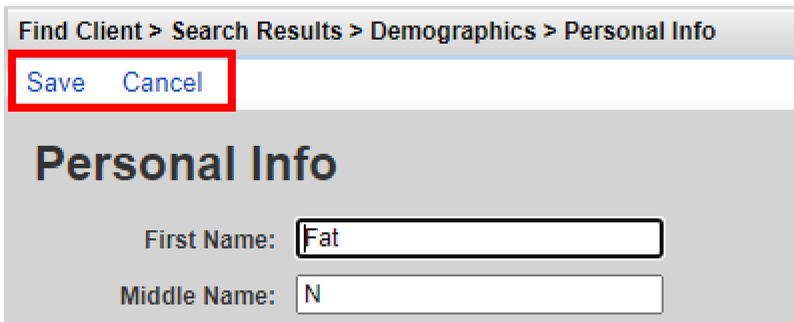
Breadcrumbs and Link Actions

Breadcrumbs or breadcrumb trails allow users to keep track and maintain awareness of their locations within CAREWare 6.

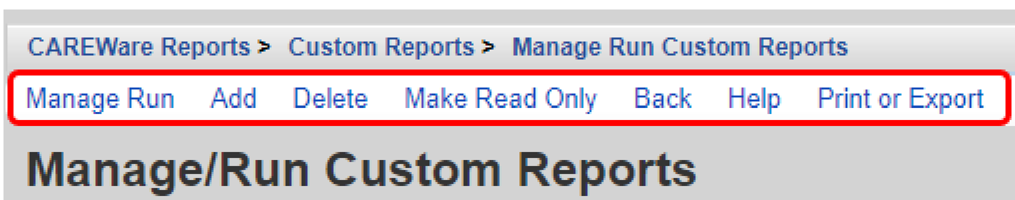
In this example: Find Client > Search Results > Demographics is considered the Breadcrumb trail.



If the items in the Breadcrumb trail are blue (as in the example above), click on the item link to return to that section. If they are black, you must either click Save or Cancel to return to the previous section, as seen below.



Link Actions are displayed below the Breadcrumb trail and are actions that can be taken on each screen.

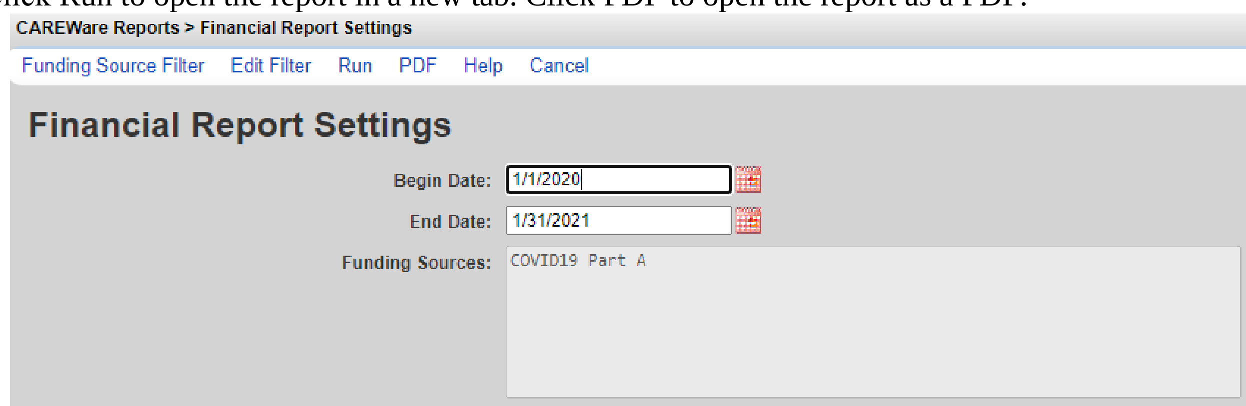


TIP: Using the Help option within the Link Actions will open a new tab within your browser with more information on the section you are currently in

Menu Navigation

1. From the Menu of Links, select Reports and the CAREWare Reports screen will appear. For this example, click Financial Report

2. You will now be on the Financial Report Settings screen. • Enter Begin Date
• Enter End Date
• Click Run to open the report in a new tab. Click PDF to open the report as a PDF.

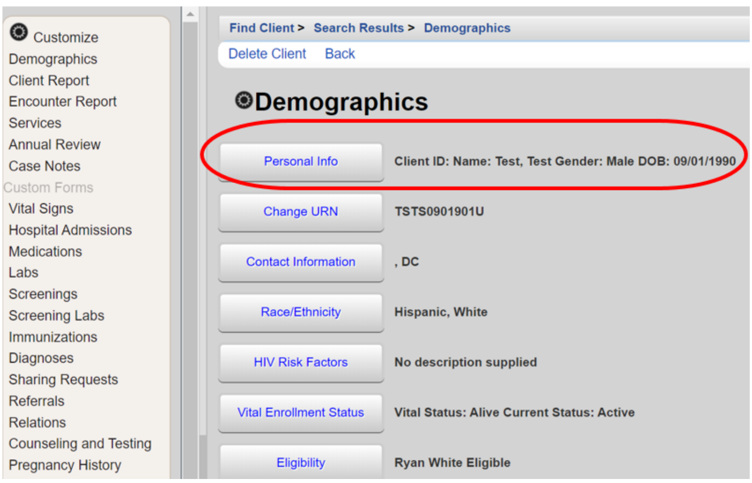


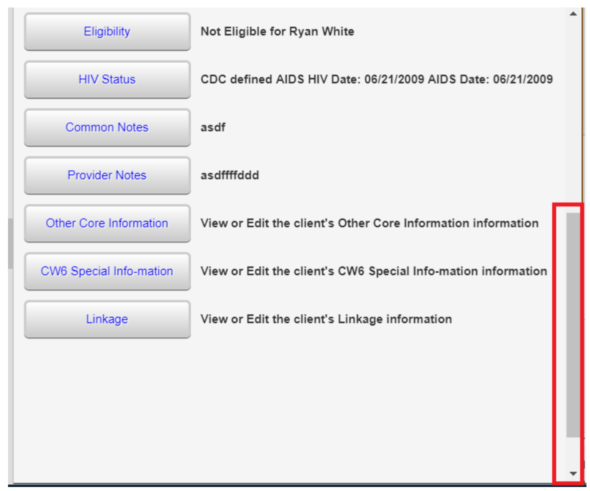
Once you click Run, a report confirmation message will open in the upper right corner of the screen. Select View Financial Report. Your report will be displayed in a new tab.

Best Practice Data Entry Policies

1. Capitalization - All fields are to be entered in an upper/lower case format. The first initial of formal names are to be capitalized unless another format is deemed necessary.
2. Unknown/Unreported – Never change known information to unknown/unreported if valid data exists
3. If you see valid data along with unknown data, please remove the unknown data

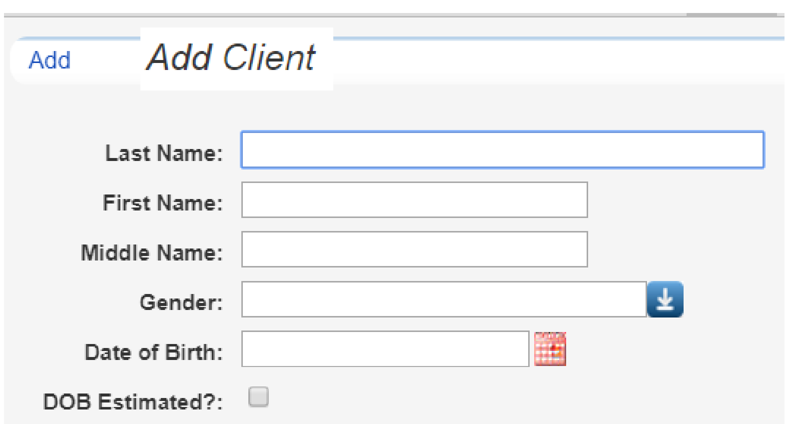
Demographics

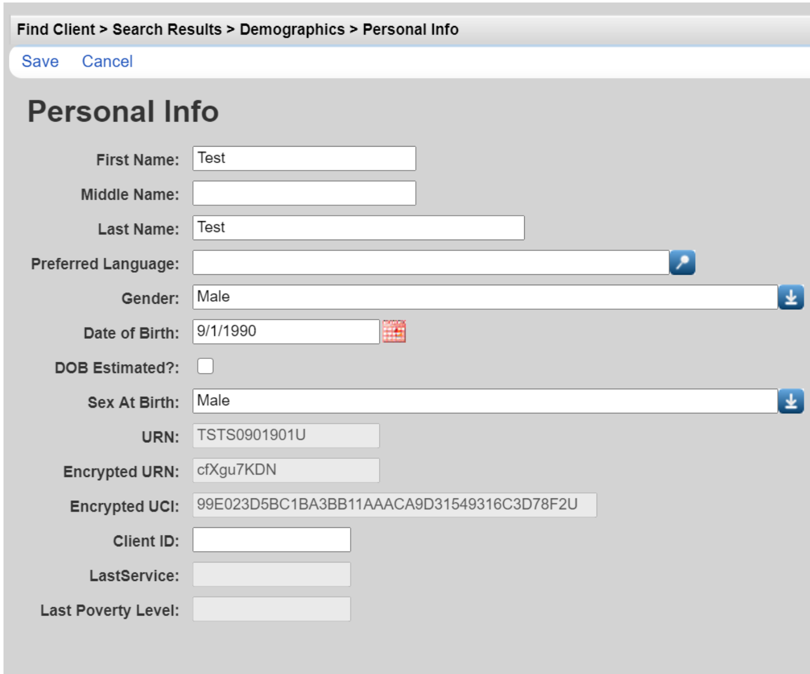




Key Fields

- **CAREWare requires the following fields to produce an unduplicated client: First name, Last Name, Date of Birth and Gender.**





Client URN and Encrypted URN (eURN)

These are calculated by CAREWare. The eURN is created by taking the URN and applying an algorithm to create an encrypted value. URN can be modified to accommodate multiple clients with the same URN.

Notes:

URN consists of:

- First and Third letters of First name
- First and Third letters of Last name
- Date of Birth
- Gender – 1 = male, 2=female, 3=transgender, 9=unknown/unreported
- Unique character

- Shared – with other providers who serve same client

Encrypted UCI

This is calculated by CAREWare and used for the client level Ryan White Services Report (RSR) and ADAP Data Report (ADR)

Notes:

- Shared – with other providers who serve same client

Name Fields *(First, Middle, Last)*

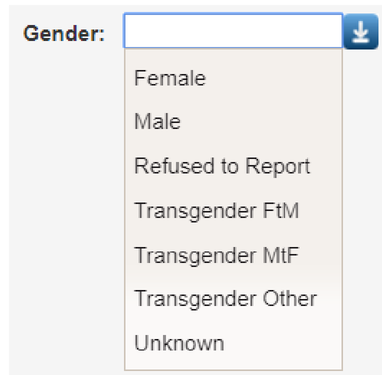
Enter the client's legal name

Notes/Tips:

- Spelling of the name is to follow the legal format
    - Ex, O'Connor (use the appropriate capitalization and use of characters)
    - Ex, De La Client (use appropriate spacing of name as well)
- Seek clarity of names by verifying with an ID or legal documents
- Nicknames/aliases can be placed in the Common Notes field

- **Required fields are First and Last name for CAREWare**
- Shared – with other providers who serve same client

Gender



Enter the gender the client identifies

Notes/Tips:

- Self-reported field

- Shared – with other providers who serve same client
- **Required field for CAREWare**
- **RSR required field**
    - https://www.targethiv.org/
        - Search for "RSR manual" to find more information

Date of Birth

Enter the client's legal date of birth

Notes/Tips:

- Shared – with other providers who serve same client
- **Required field for CAREWare**
- **RSR required field (Year only)**
    - https://www.targethiv.org/
        - Search for "RSR manual*" to find more information

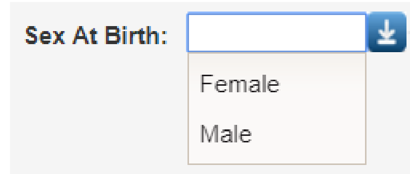
*RSR manual is updated annually to accommodate reporting requirement changes

Sex at Birth

Enter the client's biological sex assigned at birth

Notes/Tips:

- Shared – with other providers who serve same client
- **RSR required field**
    - https://www.targethiv.org/
        - Search for "RSR manual" to find more information

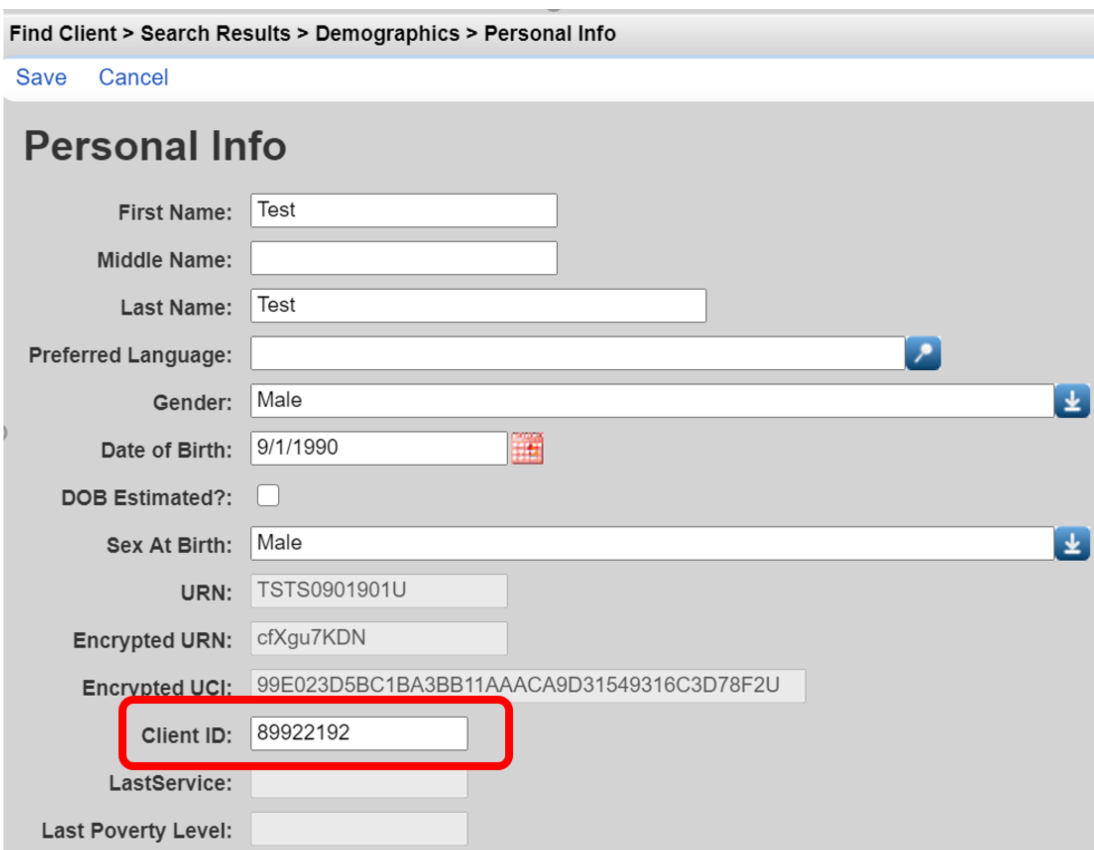


Client ID

Enter an unique identifier for the client

Notes/Tips:

- Provider-specific field
- Used to identify clients between multiple systems
- Optional
- Not Shared with other providers that may serve the same client



Address Fields

Enter following the USPS guidelines for bulk mail

Notes/Tips:

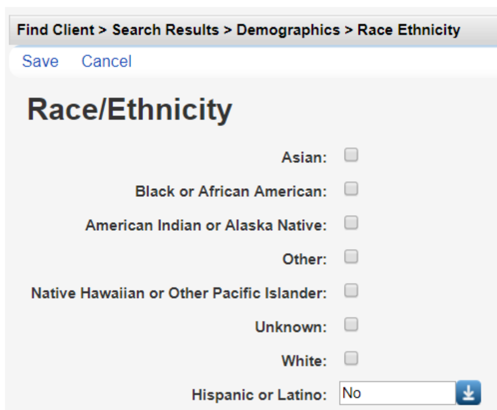
- State field is used to build the County field
- If the client is homeless and does not have a mailing address, enter Homeless in the street address line
- Shared – with other providers who serve same client

Phone Number and Alt Phone Numbers

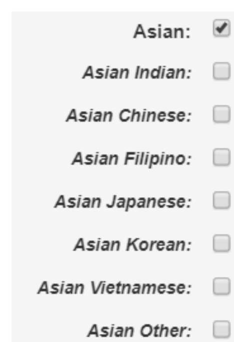
Enter the client's contact phone numbers provided as needed

Notes/Tips:

- Shared – with other providers who serve same client



Race and Subgroups

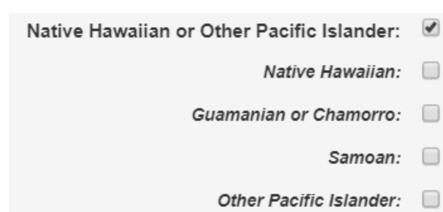


Enter what race(s) the client identifies

Notes/Tips:

- Self-reported field
- Subgroups include Asian and Native Hawaiian or Other Pacific Islander
- A client that has an unknown Ethnicity and no Race checked will report as unknown/unreported on the RSR and ADR

- Shared – with other providers who serve same client
- **Subgroups are required**
- **RSR required field**
- **ADR required field**
    - https://www.targethiv.org/
        - Search for "RSR manual" to find more information

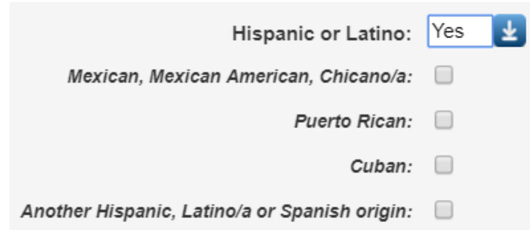


Ethnicity and Subgroups

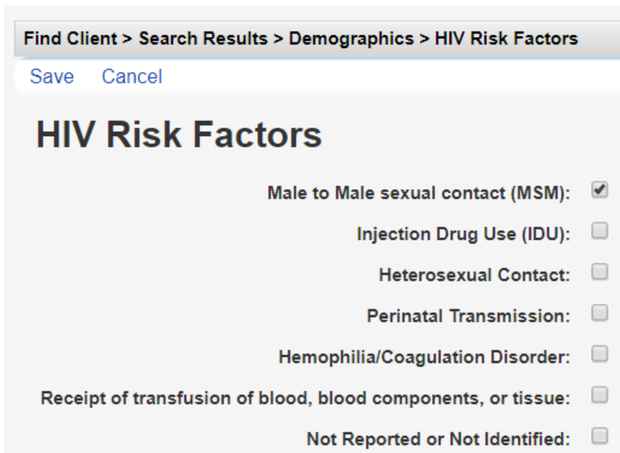
Enter how the client identifies

Notes/Tips:

- Self-reported field
- A client that has an unknown Ethnicity and no Race checked will report as unknown/unreported on RSR and ADR



- Shared – with other providers who serve same client
- **Subgroups are required**
- **RSR required field**
- **ADR required field**
    - https://www.targethiv.org/
        - Search for "RSR manual" to find more information

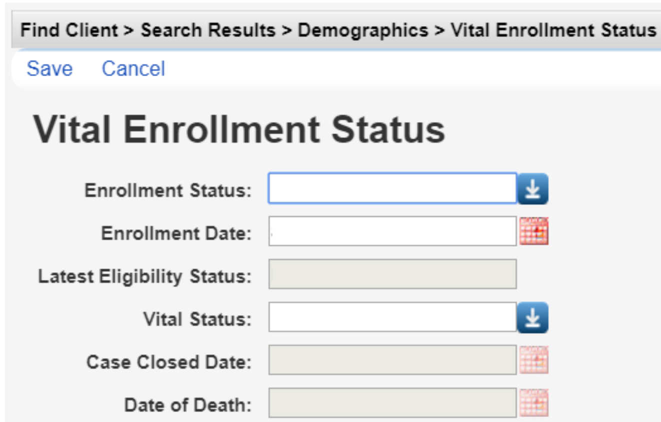


HIV Risk Factors

Select all factors the client identifies

Notes/Tips:

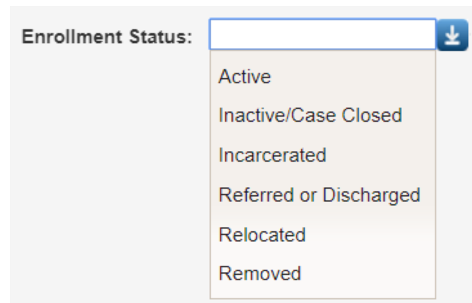
- Self-reported field
- Shared – with other providers who serve same client
- **RSR required field**
    - https://www.targethiv.org/
        - Search for "RSR manual" to find more information



Enrollment Status

Enter the client's status within your agency

Notes/Tips:



- Provider-specific field

- Not Shared
- **RSR required field**
  - https://www.targethiv.org/
    - Search for "RSR manual" to find more information

Enrollment Date

Enter the date the client was first enrolled at your agency

Notes/Tips:

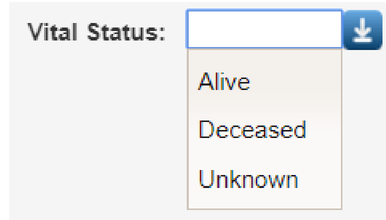
- Provider-specific field
- This should reflect the 1st date a client was seen even if they have come and left your agency several times
- No services can be entered before this date

- Not Shared
- **RSR required field**
  - https://www.targethiv.org/
    - Search for "RSR manual" to find more information

Vital Status

Enter the client living status to the best of your knowledge

Notes/Tips:



- Unknown should not be used
- Please use this field carefully as the client will show up as deceased on all providers

- Shared – with other providers who serve same client
- **RSR required field**
    - https://www.targethiv.org/
        - Search for "RSR manual" to find more information

Date of Death

Enter the date a client was deceased to the best of your knowledge

Notes/Tips:

- Shared – with other providers who serve same client

Case Closed Date

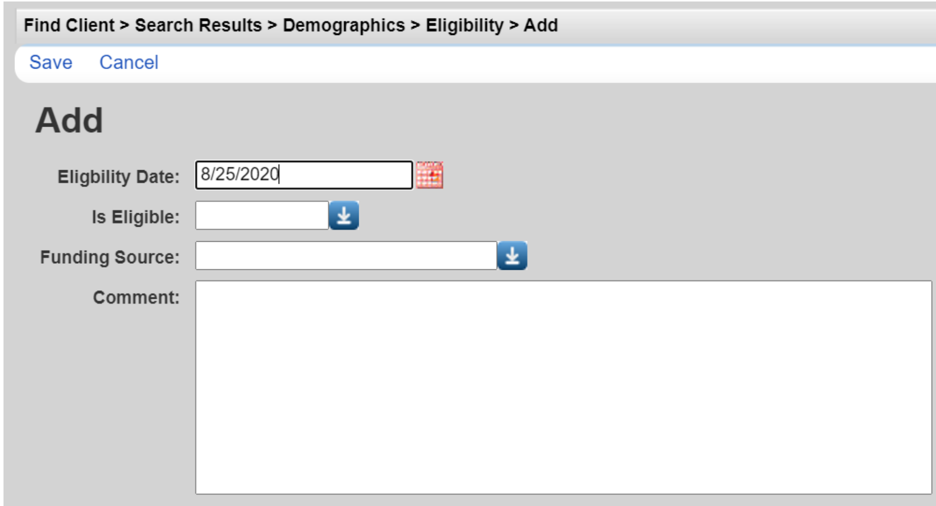
Enter the date a client was closed or left your agency

Notes/Tips:

- Provider-specific field
- This will not let you enter any services past that date
- This should reflect the last date a client was closed even if they have come and left your agency several times

- Not Shared

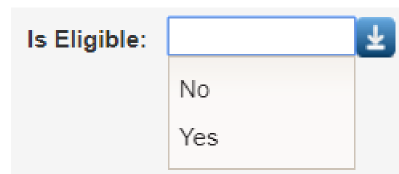
Services may be entered after a deceased date (for example, when some case management is performed) but not after a case closed date and not before the enrollment date.



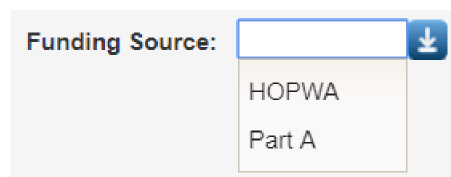
Eligibility

Enter a record when the client is enrolled into Ryan White services and update the record if the client is no longer enrolled in services

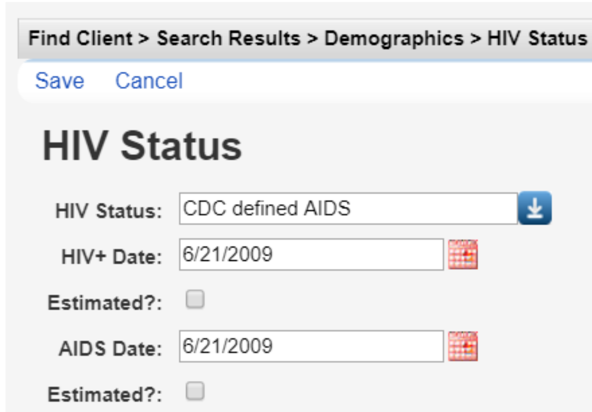
Notes/Tips:



- This status is used to enter a client onto the Ryan White Services Report (RSR)
- Is Eligible indicates they are Ryan White funded or Not
- Funding Source is populated by the contracts set up in CAREWare



- Can be Shared
- **RSR required field**
  - https://www.targethiv.org/
    - Search for "RSR manual" to find more information

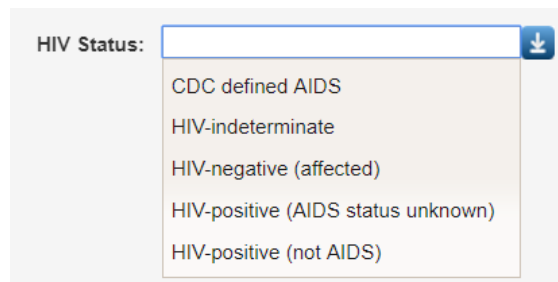


HIV Status and Diagnosis Dates

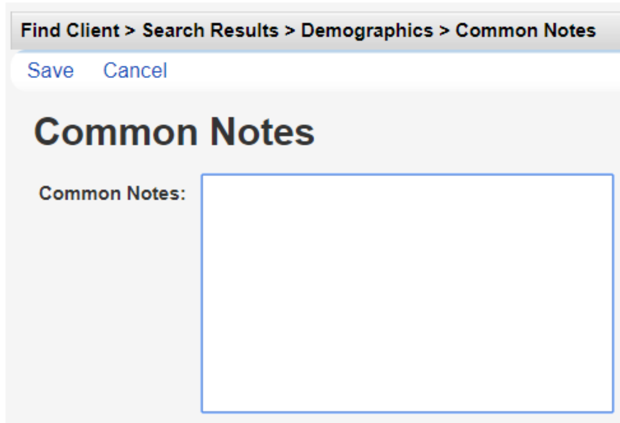
Enter client's current HIV Status and the date(s) the client was originally diagnosed with either HIV or AIDS

Notes/Tips:

- Once a client has been diagnosed as AIDS, they must be reported as AIDS
  - The status may change from HIV to AIDS
  - The status would not change from AIDS back to HIV
- The Date fields will become active depending on the HIV Status that is selected
  - Use an estimated date as needed
  - Be sure to ask the client for the earliest date they were diagnosed or check for medical records or doctor's note



- Shared – with other providers who serve same client
- **RSR required field**
  - https://www.targethiv.org/
    - Search for "RSR manual" to find more information

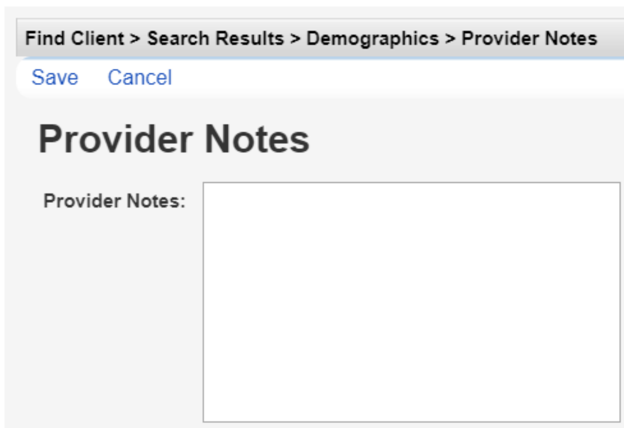


Common Notes

Enter information about the client that can be shared with other providers who serve the client

Notes/Tips:

- A good place for nicknames/aliases
- Shared – with other providers who serve same client



Provider Notes

Enter information about the client that is useful for your agency staff

Notes/Tips:

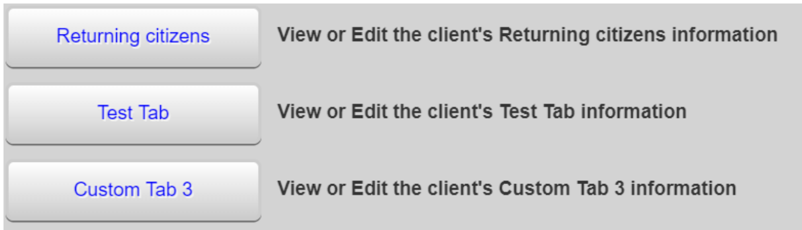
- Not Shared

Custom Tabs

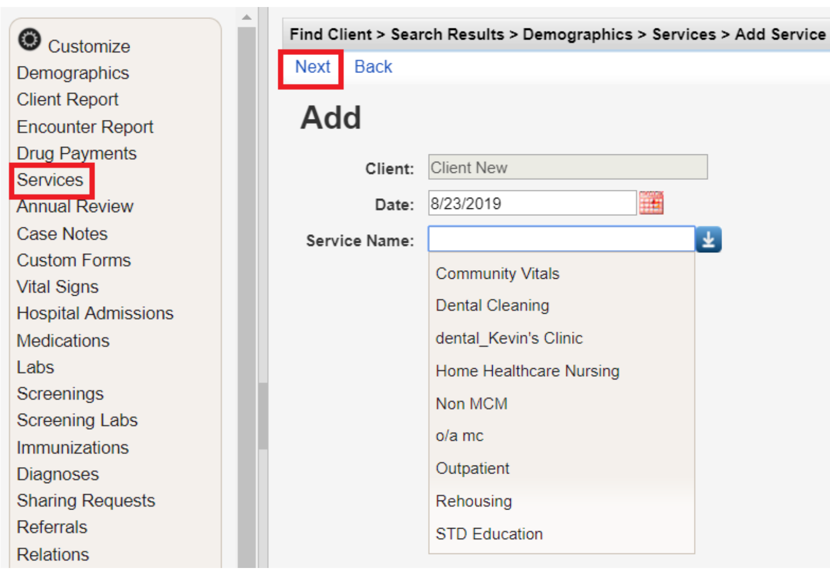
Used to place custom fields/data needed to collect agency specific or other reporting requirements

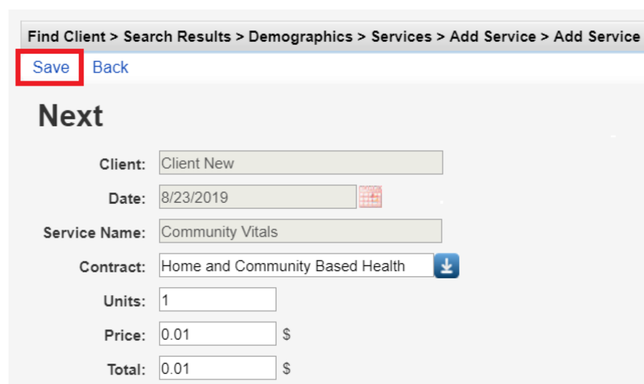
Notes/Tips:

- Tab names can be customized
- Individual fields can be shared if they are activated at multiple providers
- Optional



Services





Services entered for a client are very important for correctly reporting to HRSA on the RSR. Services are set up under the Contract module and should be reviewed every year for changes or updated when a change occurs. Each agency may use CAREWare to enter services and data for other Ryan White and other funding sources but use caution to NOT set up the contracts, so the data is reported on the RSR.

Please note there is a requirement for RSR reporting called **"Eligible Scope"** that began January 2015 that an eligible client would have all services reported during their eligibility period regardless of payer source (See glossary to search definition).

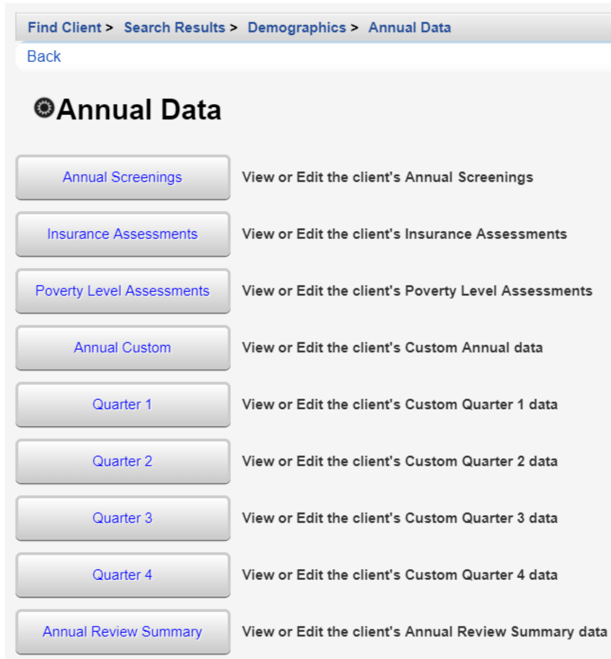
Notes/Tips:

- Service Name - list is specific to each agency
- Date – date the service was provided NOT entered into CAREWare
- Data entry can be done at any time

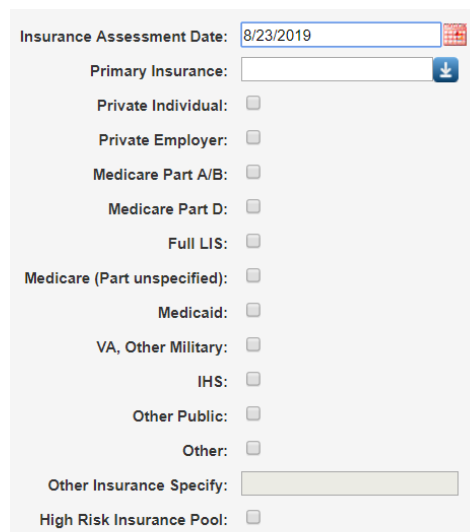
- Can be Shared
- **RSR required field (by service category)**

- https://www.targethiv.org/
  - Search for “RSR manual” to find more information

Annual Review



Insurance Assessments



Enter all sources of the client’s medical insurance

Notes/Tips:

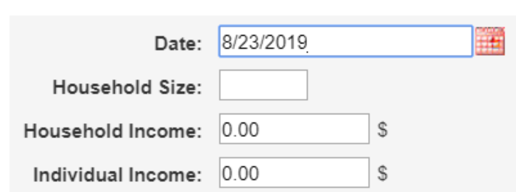
- This is reported by the client and verified at Eligibility Certification/Recertification

- Shared – with other providers who serve same client
- **RSR required field**
  - https://www.targethiv.org/
    - Search for “RSR manual” to find more information

Poverty Level Assessments

Enter the client’s household size and household income per approved documentation

Notes/Tips:



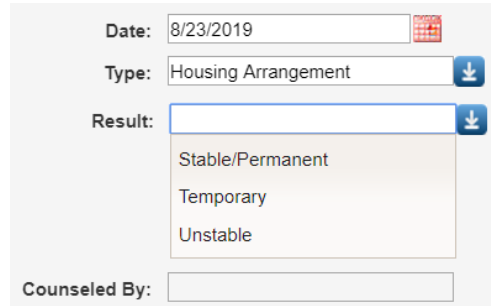
- This is reported by the client and verified at Eligibility Certification/Recertification

- Shared – with other providers who serve same client
- **RSR required field**
  - https://www.targethiv.org/

        ▪ Search for “RSR manual” to find more information

Housing Arrangement

Enter the current type of residence the client identifies as living

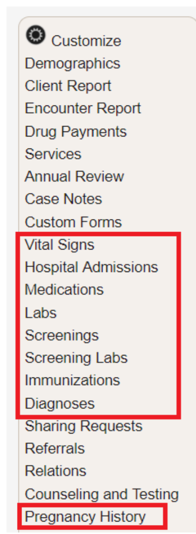


Notes/Tips:

- This is reported by the client and verified at Eligibility Certification/Recertification
- Homeless would be reported as unstable
- See RSR manual for definitions

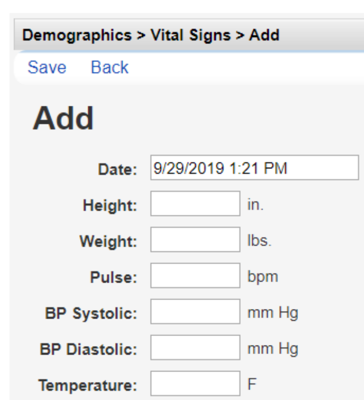
- Shared – with other providers who serve same client
- **RSR required field**
    - https://www.targethiv.org/
        - Search for “RSR manual” to find more information

Clinical Data



Vital Signs

Enter the client’s vital information as needed at your agency



Notes/Tips:

- Optional

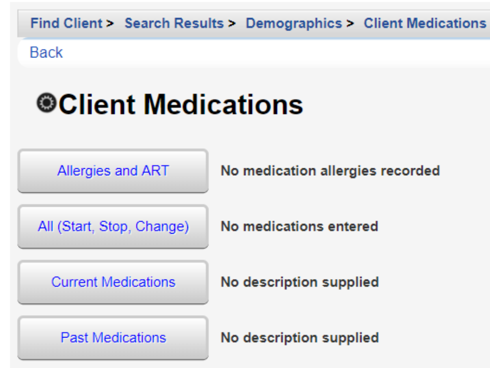
- Can be shared

Medications

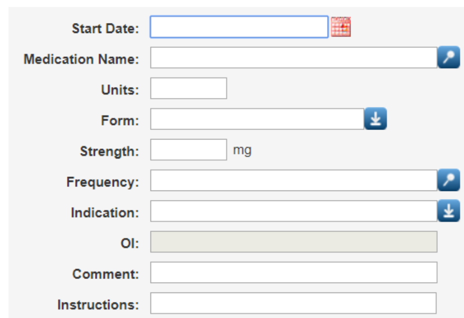
Enter the client's current regimen of ART (Antiretroviral Treatment) and Pneumocystis pneumonia (PCP) prophylaxis medications

Notes/Tips:

- A Medications Import file is created by jProg and needs to be imported
    - Download file at: https://hab.hrsa.gov/program-grants-management/careware
- Medications need to be activated prior to data entry



- Can be shared
- **ARTs are required**
- **RSR required field**
    - https://www.targethiv.org/
        - Search for "RSR manual" to find more information

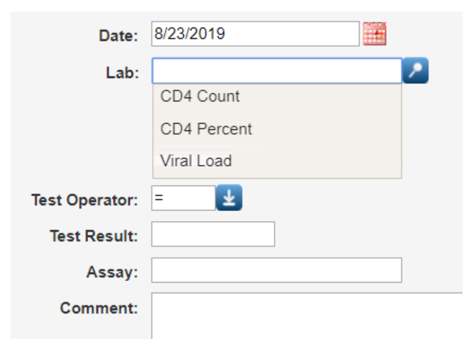


Labs

Enter the client's laboratory results as needed at your agency

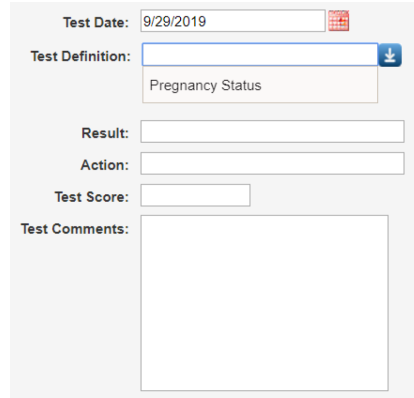
Notes/Tips:

- CAREWare has a list of laboratory tests built in and allows you to create new tests as needed



- Can be shared
- **Viral Load and CD4 counts are required**
- **RSR required field**
    - https://www.targethiv.org/
        - Search for "RSR manual" to find more information

Screenings

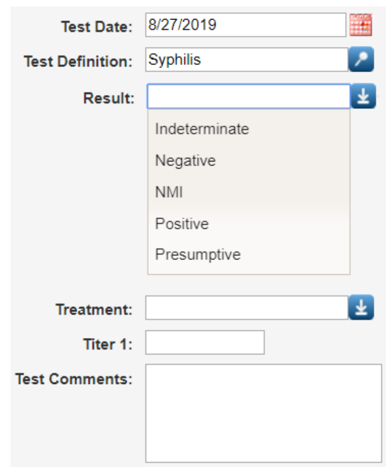


Enter the client's screening results as needed at your agency

Notes/Tips:

- Optional
- CAREWare has a list of screenings built in and allows you to create new tests
- Can be shared

Screening Labs

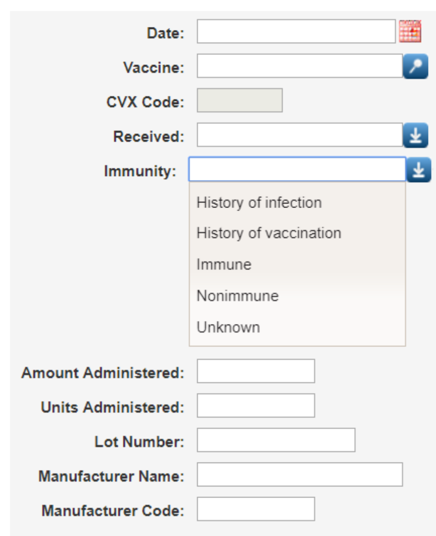


Enter the client's screening laboratory results as needed at your agency

Notes/Tips:

- CAREWare has a list of screening laboratory tests built in and allows you to create new tests
- Can be shared
- **syphilis screening is required**
- **RSR required field**
  - o https://www.targethiv.org/
    - Search for "RSR manual" to find more information

Immunizations

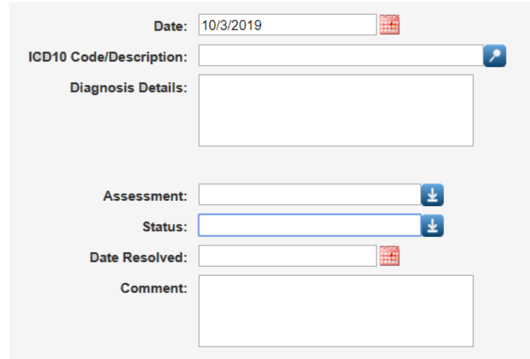


Enter the client's immunity results as needed at your agency

Notes/Tips:

- Optional
- CAREWare has a list of immunizations built in and allows you to create new tests
- Can be shared

Diagnoses

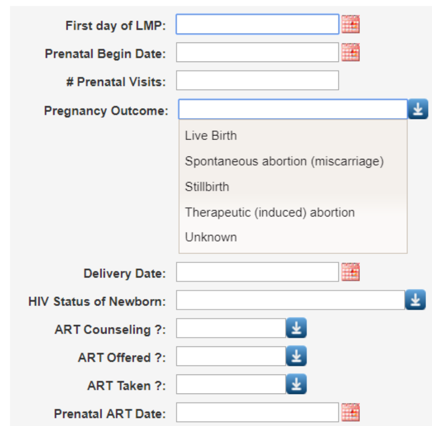


Enter the client's medical diagnoses as needed at your agency

Notes/Tips:

- Optional
- CAREWare has a list of IDC 10 codes built in
- Can be shared

Pregnancy History



Enter each female client's pregnancy information

Notes/Tips:

- LMP means Last Menstrual Period
- **RSR required field**
    - https://www.targethiv.org/
        - Search for "RSR manual" to find more information

Running your Reports

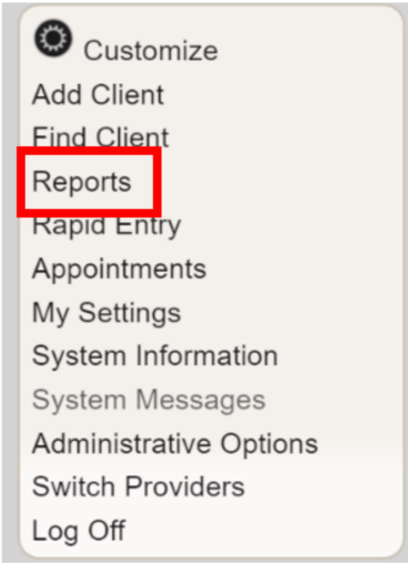
To run report; 1) You must have the appropriate user privileges to run reports. 2) You should have a number of clients entered in the system so you can see how your reports will look. CAREWare comes prepackaged with several summary and service reports. We'll cover a few of them here.

1. Log into CAREWare. For more details on how to do so, please refer to the **Logging into CAREWare section**
2. Select **Reports** from the **Menu of Links**. The various report categories will appear

Running HRSA Reports

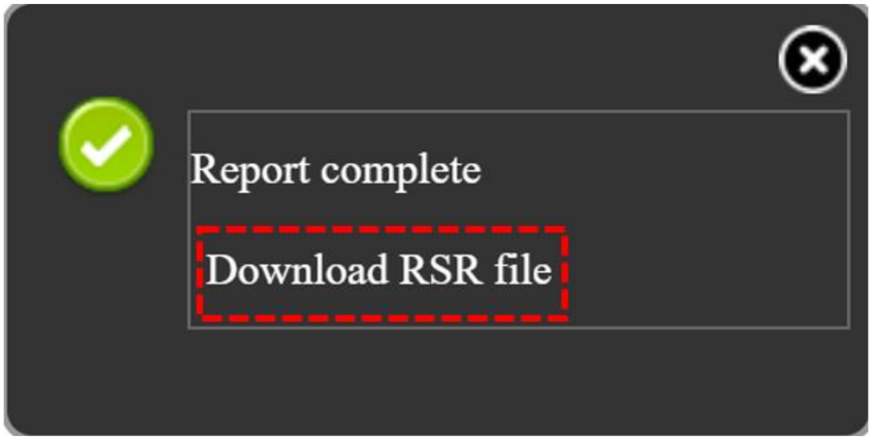
The RSR

1. From the CAREWare Reports screen, click **HRSA Reports**

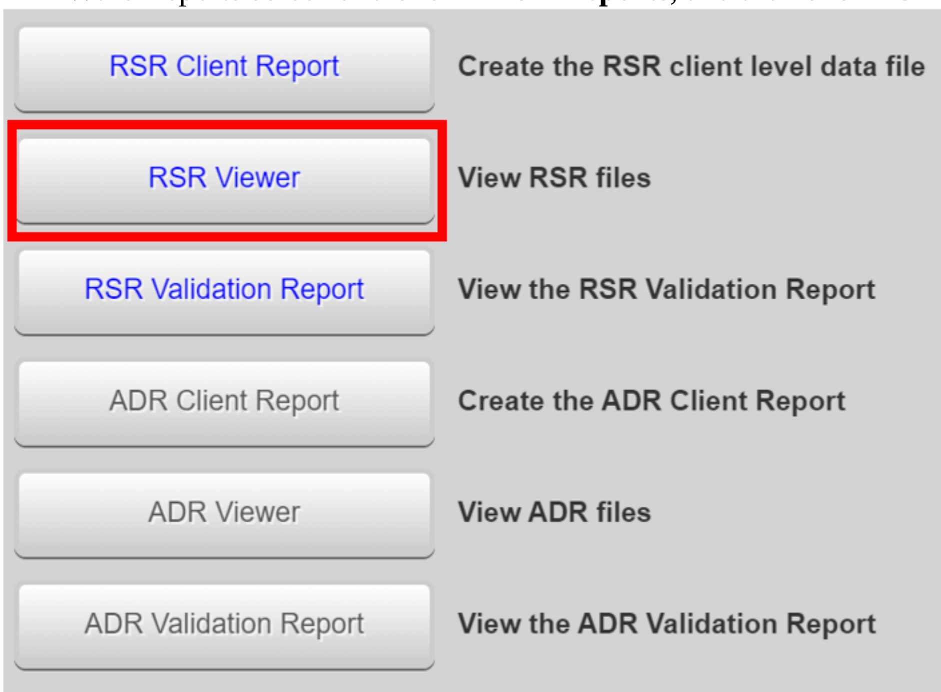


2. Select **RSR Client Report**. If necessary, change the **Report Year** by clicking **Edit**. To edit Filters, click **Edit Filter** and then check **Apply Filter**. Once complete, click **Run**.

3. Click **Download RSR file**. Select a location on your local computer to save the *RSR_Export.xml* file. *Tip:* It is recommended to save the RSR file to the computer Desktop for easy retrieval, as it is used in the next step. Default file location is downloads folder (click on your file explorer and look for downloads folder then sort by date modified column.



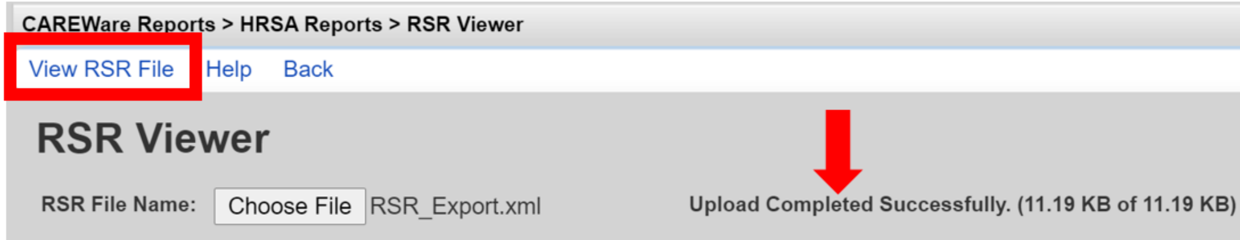
4. Return to the CAREWare Reports screen and click **HRSA Reports**, and then click **RSR Viewer**



5. Click on **Choose File**.

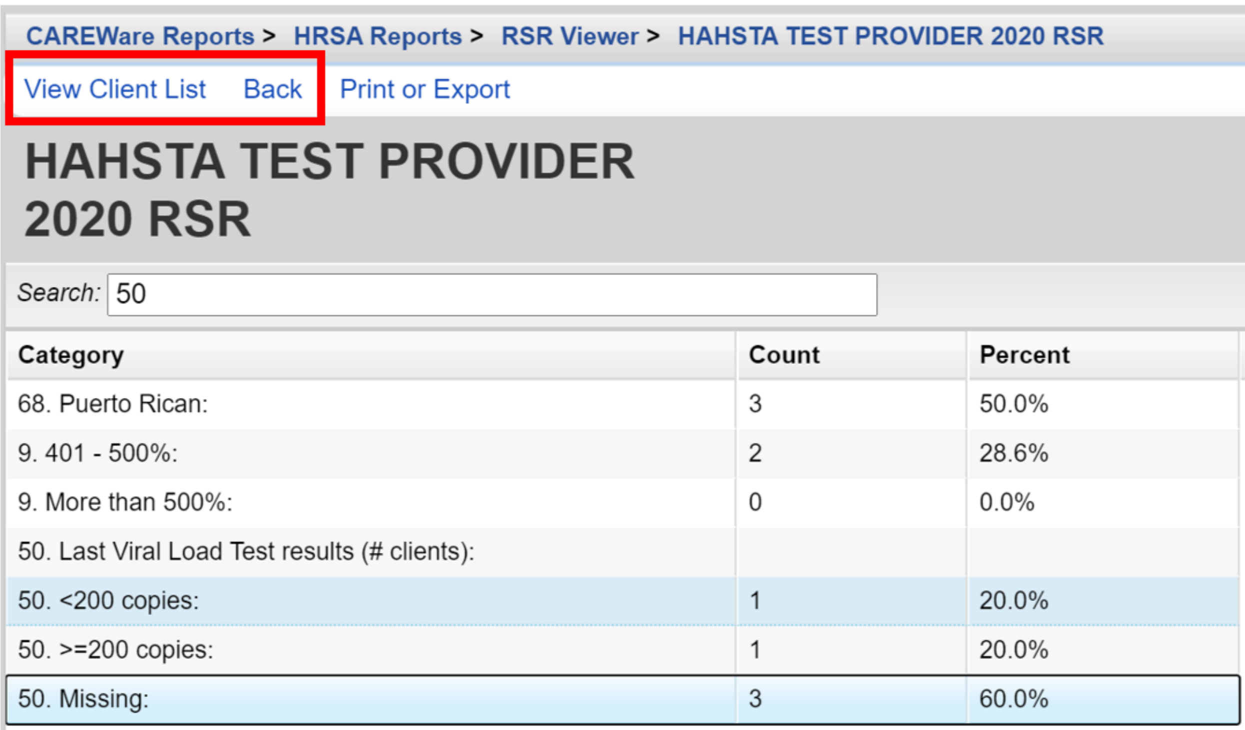
6. Select the *RSR_Export.xml* file saved on your local computer in step #4. Once chosen, the message **Upload Completed Successfully** should appear.

7. Select **View RSR File**.

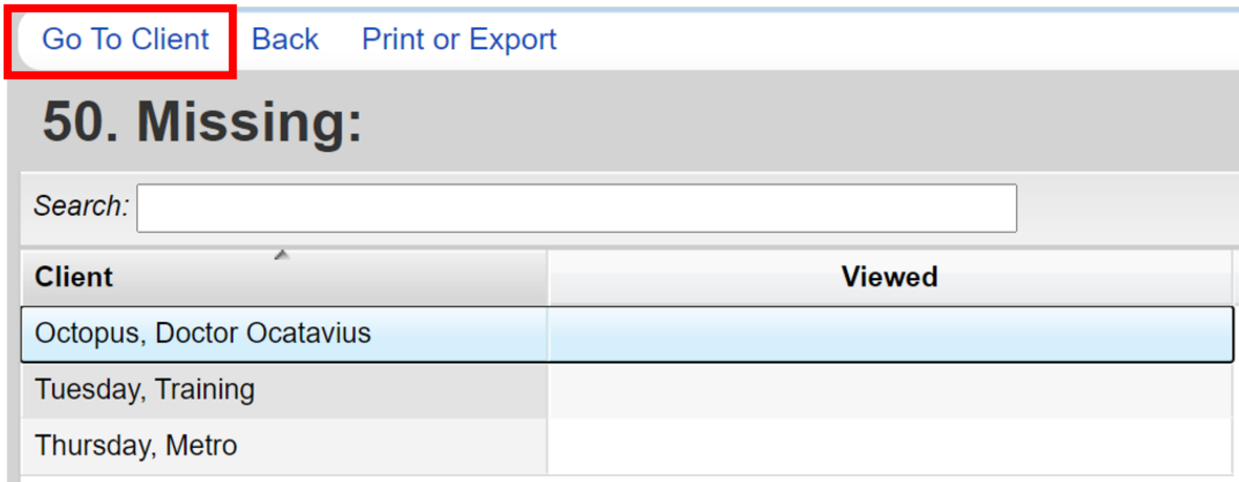


The RSR Report is displayed, with *Category*, *Count*, *Percent*, and *Viewable* columns. The *Category* column contains each HRSA RSR data field with a number listed to the left, which corresponds to the HRSA RSR required client-level data element. It is strongly recommended that the RSR Report should be used throughout the year, to identify and correct client data fields that are missing, unknown, or out of compliance with HRSA RSR data requirements.

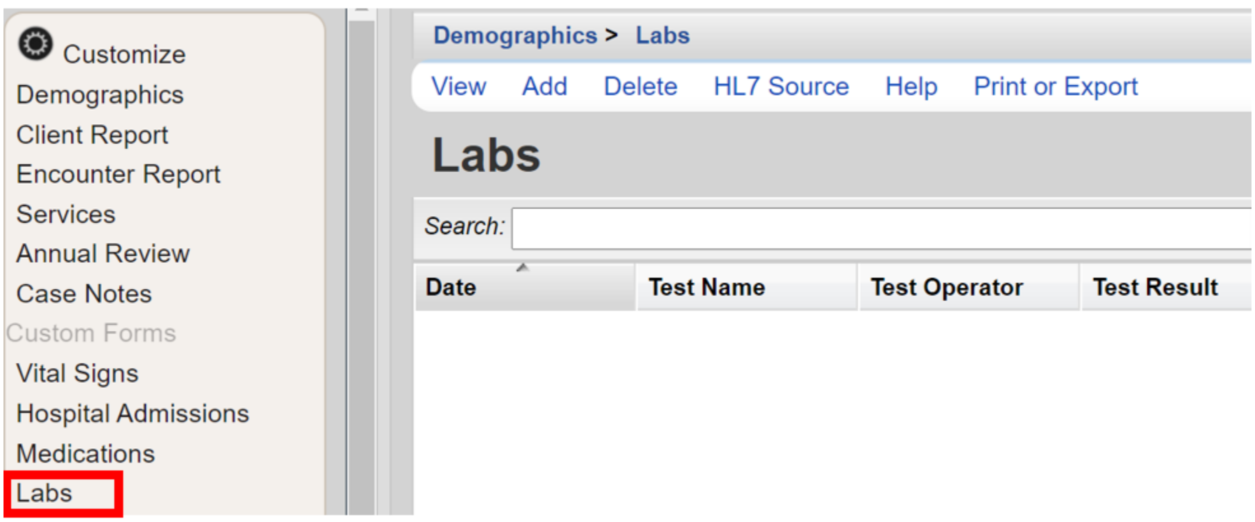
8. In this example, on page 2 of the RSR Viewer, for the Category **50. Missing**, the Count shows 3. This indicates there are Three (3) clients that are missing **#50 – Last Viral Load Test Results**. Select the 50. Missing row by clicking on it, and then click **View Client List**.



9. The three clients missing Last Viral Load test results are listed. Select a client by clicking on their name and click **Go To Client** or double-click the client's name. CAREWare performs a real-client lookup and opens the client record with the missing data automatically.



10. A new tab will open and the client's Demographic screen will appear. For this example, client "Octopus, Doctor Ocatavius" was selected. Click on **Labs** from the Menu List



As you can see above there is no Viral Load test data for this client. Click on add and put in the viral load records for the client.

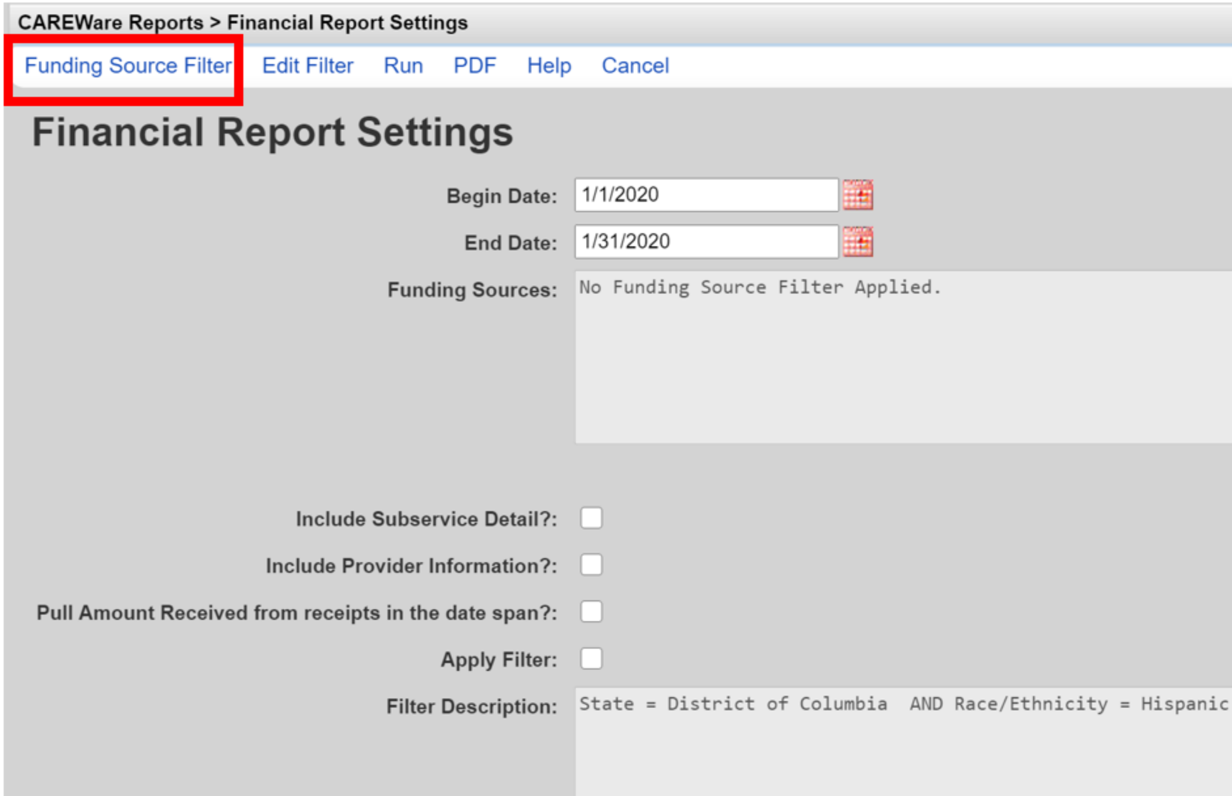
Check all the remaining **RSR Report Categories** and **Columns** for Missing, Unknown, and Out of Compliance data values, including, Demographic and Clinical information. Review all Categories to check program data accuracy. Additionally, remember to rerun the RSR Client Report to include any changes made to the client record(s) in CAREWare.

Running Financial Reports

Financial Report is an easy way to get a quick summary of unduplicated clients served within a specific date span, as well as a distribution of the number of clients for each HRSA Service Category. The Financial Summary report can also display client totals and services for a single or multiple Funding Source(s).

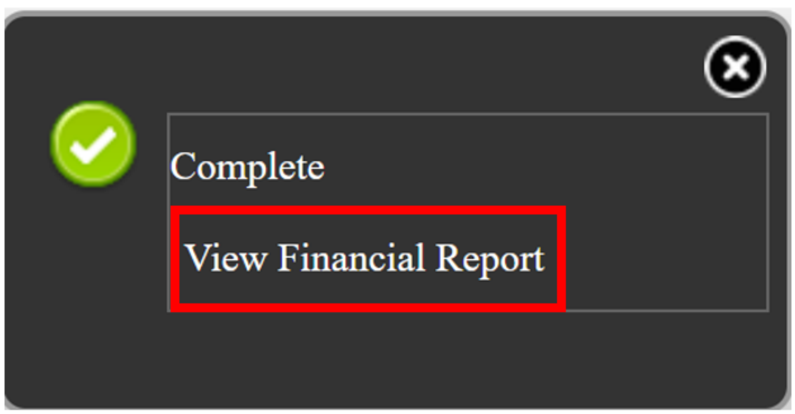
1. From the **Reports** menu, select the **Financial Report**

2. Make your selections as detailed below:
   • Begin Date
   • End Date
   • **Funding Sources** can be edited under the Funding Source Filter link
   • Check **Include Subservice Detail** if you wish to see service category information broken down to the subservice level.
   • **Include Provider Information** is only relevant when you run a report on one provider; it includes provider address and phone number
   • Check **Pull Amount Received from receipts in the date span** if you wish to see the amount received from receipts between the begin and end date
   • You can **Apply Filter(s)** to use a custom report filter on your data to get more granular results. Click the **Edit Filter** link to *Manage*, *Add*, *Delete*, etc. filters.



3. Click **Run** to open the report in a new tab. Click **PDF** to open the report as a PDF.

4. Once you click **Run**, a report confirmation message will open in the upper right corner of the screen. Select **View Financial Report**. Your report will be display in a new tab



You will now be able to print or save your report based on your choice.
Note: if you like to run other form of report and needed assistance, contact us at care.ware@dc.gov

Seeking Assistance

1. For technical assistance related to data entry elements, reporting or other issues, please contact DC Health

   a. Care.ware@dc.gov

2. For RSR and ADR questions, please contact Data and Reporting TA (DART) Hodan.eyow@dc.gov

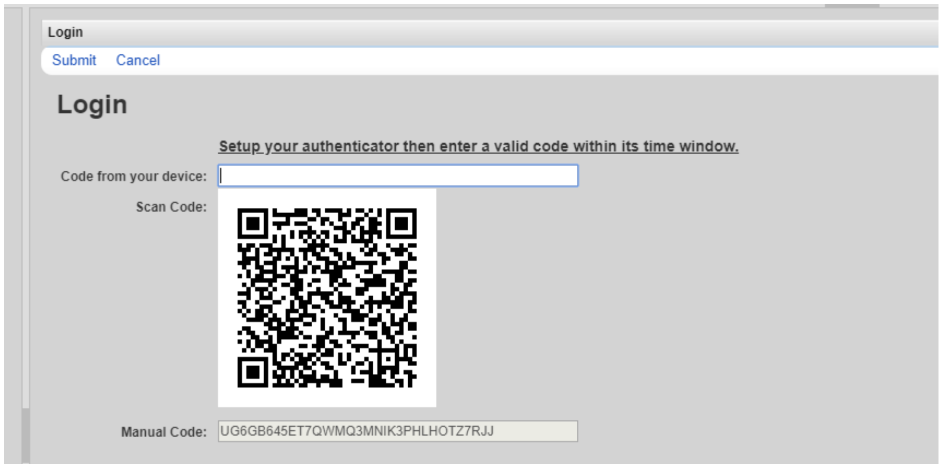
Glossary

https://www.targethiv.org/library/glossary

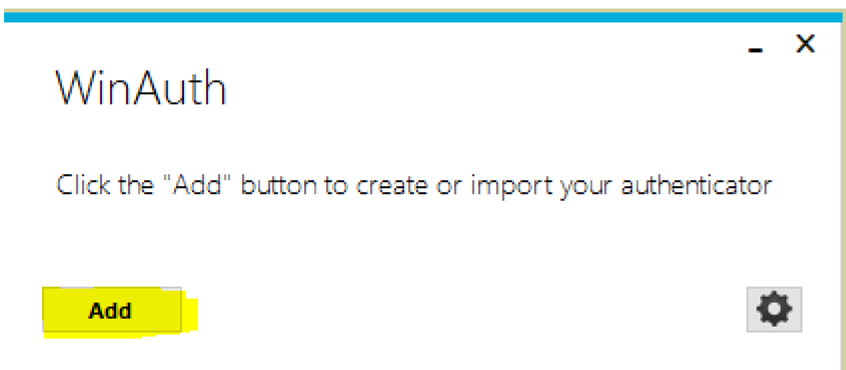
Appendix

DC CAREWAre v.6 2FA set up instruction

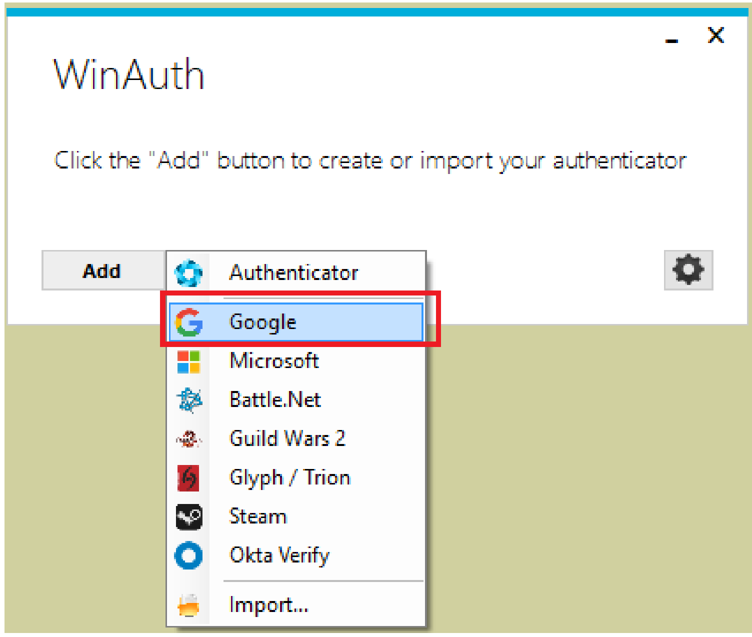
1. **You will get the following screen when you login to CAREWAre once the 2FA feature is updated. Use chrome for ease of manual field selection**



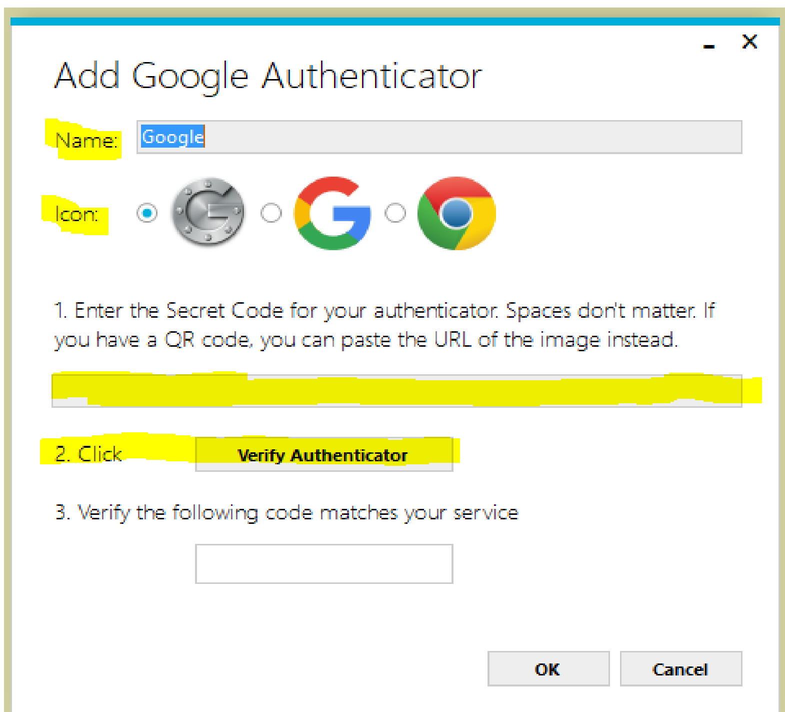
2. Download and install application. The Desktop/laptop WinAuth could be donaloaded here https://github.com/winauth/winauth/releases/tag/3.6.2. If you want to use your smartphone download Google Authenticator from the app store anf follow the prompt by opening and scanning the QR code
3. Open and click add

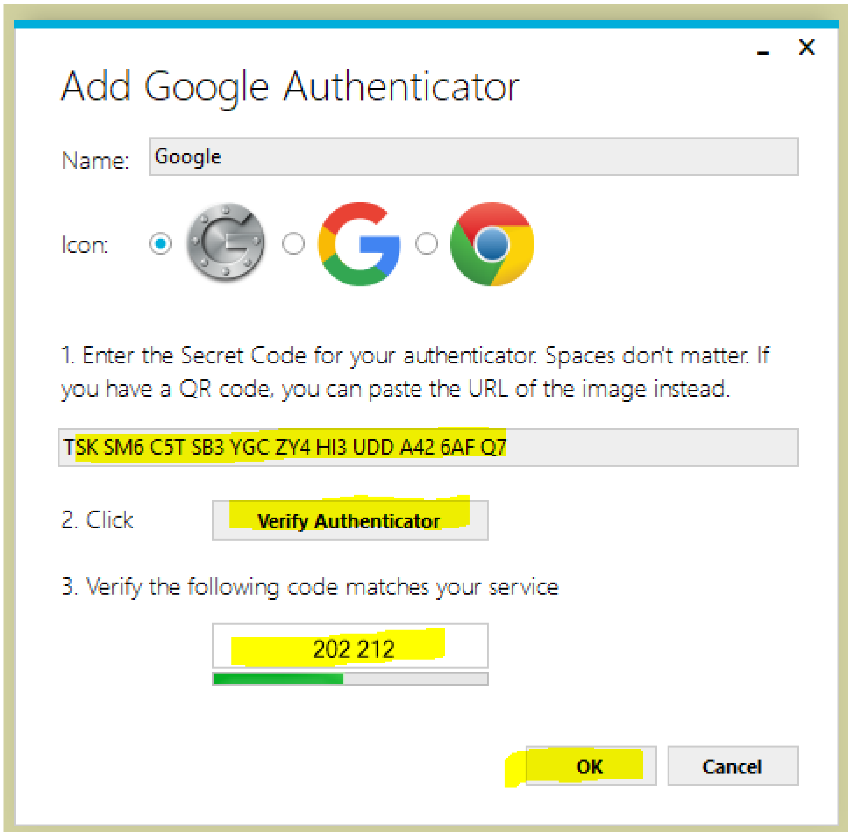


4. Click and select Google

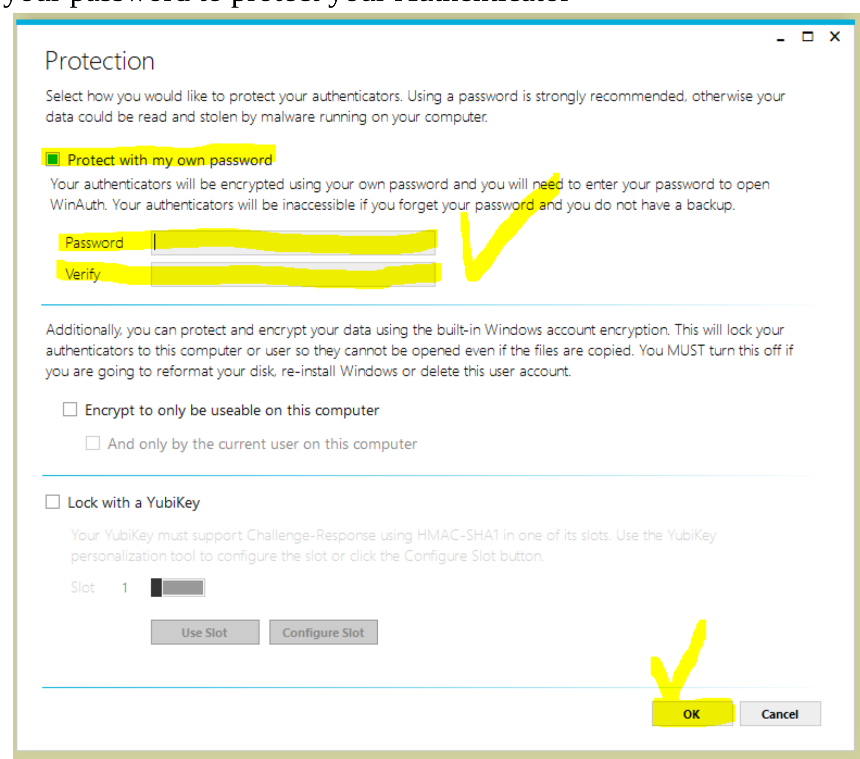


5. The following window will pop up. Then supply the information
    a. You may change the name e.g CAREWARe 2FA
    b. Select your desired Icon
    c. Copy and paste the manual code as shown below

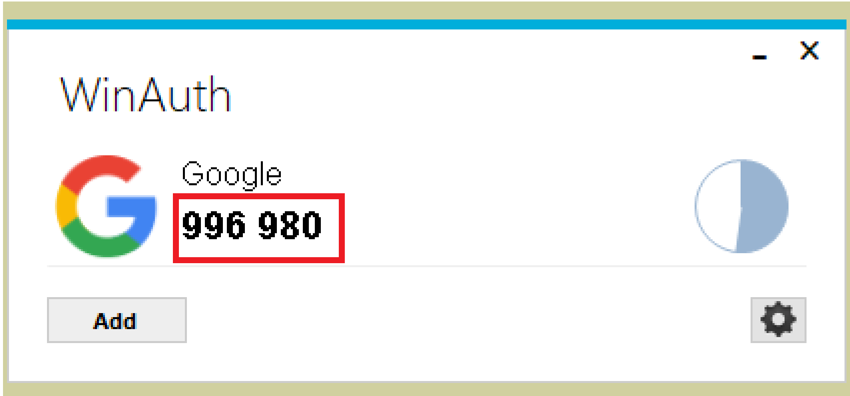




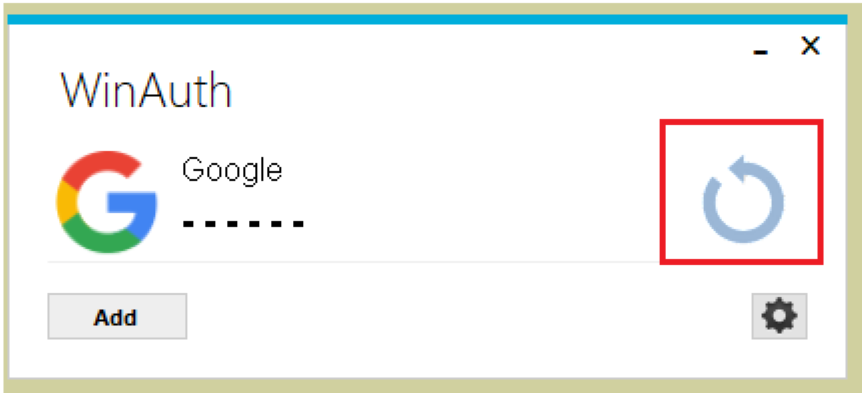
6. Click ok & set up your password to protect your Authenticator



7. When you click ok the following dialog box will open. Enter the number to code from the device field to login in to CAREWAre➔click submit➔ you are in CW v.6



8. Whenever you are accessing CW, open your Auth & click the radial button to populate the code numbers.



Need help on how to set up? Contact us at care.ware@dc.gov