

Welcome!

CAREWare Quick Starts will walk you through the basics of setting up, managing and using basic CAREWare functions. They're not a replacement for the CAREWare User Manual, which is where you'll need to go to learn about more advanced functions. This material is for non-technical users who just need to get information in and out of CAREWare with no worries.

About This Guide #2: Setting up Contracts and Services

It does NOT cover merging subservices, service sharing between providers, or other more advanced topics. For that you'll need the full user manual.

Guides in this series:

1. *Downloading and installing CAREWare*
2. *Setting up contracts and services*
3. *Entering Clients and their Service and Clinical Data*
4. *Customizing tabs and fields*
5. *Customizing clinical data*
6. *Working with CAREWare's prebuilt reports (including the Ryan White Annual Program Data Report)*
7. *Creating basic custom reports*
8. *Creating more advanced reports*
9. *User and System administration*

First Things First

What are contracts?

CAREWare has been set up to mirror the way services are handled in the real world: for instance, your agency may have a contract to perform case management services, and the contract is funded by Part B (formerly RW Title II). Under that contract, you perform a variety of subservices – intakes, medical case management, chart updates, etc. What you'll be doing in CAREWare is setting up your data entry to reflect that. That contract might also have multiple sources of funding—Part B and Part C, and your contract will need to reflect that; CAREWare allows you to accommodate this as well.

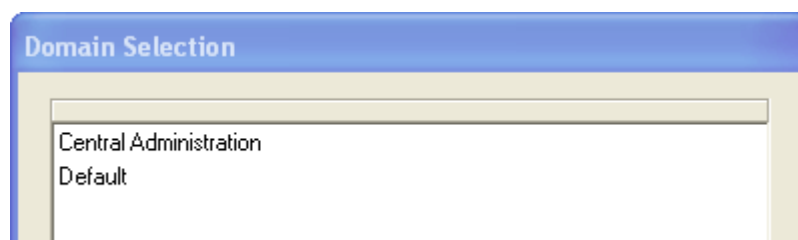
Remember. At least one contract must be set up in CAREWare before you can begin entering services!

What do I need to get started?

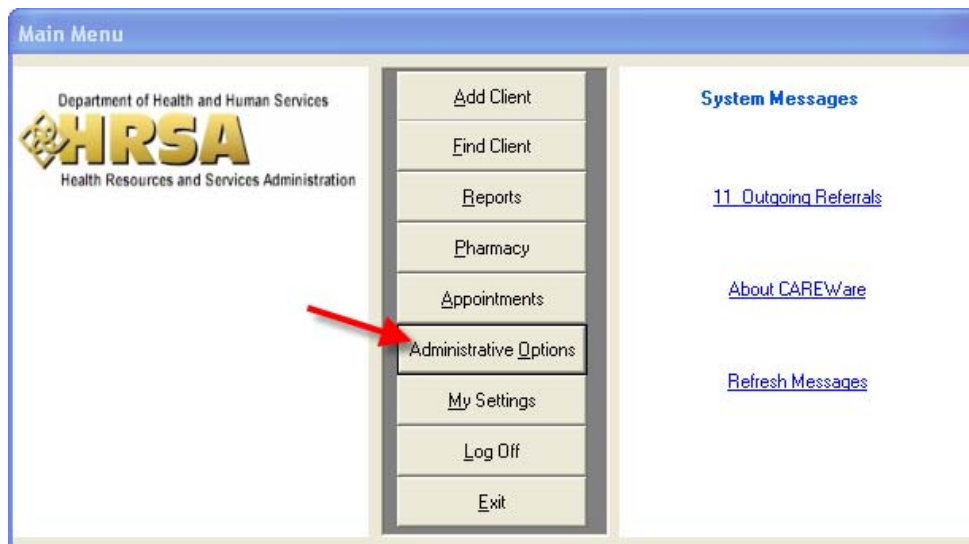
- You'll need to decide if your contracts are going to be Central (only editable by the user with access to Central Administration) or Provider level (editable only by users with access to the Provider domain and the necessary permissions). If you are a stand-alone provider (for example a Part C or D grantee that receives no other Ryan White Program funding), we recommend making all your contracts Provider level, but you will want to make sure that not all users in your agency have the right to modify contracts (see appropriate guide for details on restricting rights for user accounts).

Setting Up Contracts

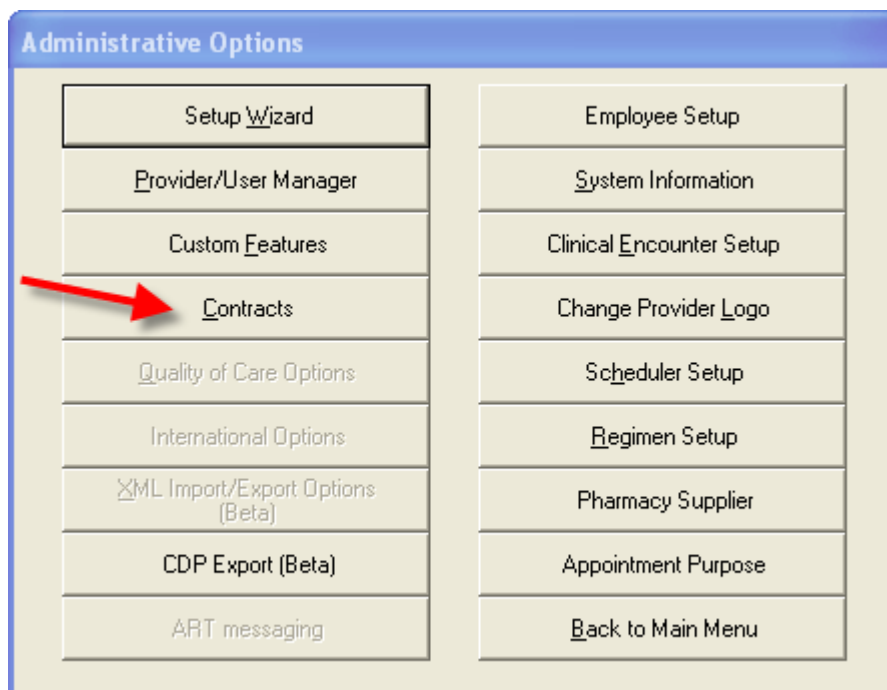
1. Log into CAREWare as either Central or Provider.



2. Select **Administrative Options** from the main menu.



3. Select **Contracts**.



The Service Contracts menu will appear.

If you have imported your database from CAREWare 3.6, you will see the contracts CAREWare has automatically created based on the service setup you performed in 3.6. In this sample database, imported from 3.6, the services were entered with an “unspecified” or “not currently funded” funding source.

4. Click **Add** to enter a new contract. The Contract Editor appears.

Name:	Start Date:	Stop Date:	Funding:	Central ?:
Unspecified	3/1/1999	10/31/2003	Unspecified	No
Not Currently Funded	1/1/2003	1/31/2003	Not Currently Funded	No

5. Enter the name of the contract. It's a good idea for basic RW grants to use the funding stream as the name of your contract.
Below this, enter the start date of your contract. It's not necessary to enter a stop date; remember, if you do, you'll be unable to enter services provided past this stop date!
6. Now you'll specify the funding source. Click **Edit List** to indicate available funding streams.
7. Select one or more funding streams. You can add streams not listed by default; To do so, simply click Edit List, then Add Item, and then Save after you've typed in a new Funding Source Name. In this case, we'll select Part B. Click **Use selected Funding Sources** when done.

Remember to check "CARE Act funded" if that is appropriate.

Check 1 or more funding sources to use

Funding Source Name	CARE Act Funded
<input type="checkbox"/> HOPWA	No
<input type="checkbox"/> Not Currently Funded	No
<input type="checkbox"/> Part A	Yes
<input checked="" type="checkbox"/> Part B	Yes
<input type="checkbox"/> Part C	Yes
<input type="checkbox"/> Part D	Yes
<input type="checkbox"/> Part D Youth	Yes
<input type="checkbox"/> Unspecified	No

Add/Edit

Funding Source Name:

CARE Act Funded

8. Click **Save Contract Changes** to continue.

Contract Editor: Ryan White AIDS Care

Contract Name: Central?

Funding:

Funding Source Name	CARE Act ...
Part A	Yes
Part B	Yes

Start: End:

Contract Items

Contract Item Name: Budget:

Allow Data-Entry past Budget Amount
 Primary Health Care Service

Contract Item:	Subservices:	Budget:	Allow Data-Entry Past Budget:
Main HIV Services	22	\$100,000.00	Yes

9. Click **Add New Item** to enter a contract item name.

- Enter the broad general name of the contract item (in this case we've called it Main HIV Services), the budget (not required) and whether or not to Allow Data-Entry past Budget Amount.

IMPORTANT: The item labeled “Primary Health Care Service” must be checked if you would like clients that receive the subservices in this contract item to be counted in Section 6.2 of the Ryan White Program Data Report for Part D

Contract Editor: Ryan White AIDS Care

Contract Name: Central? Funding:

Funding Source Name	CARE Act ...	Edit List
Part B	Yes	

Start: End:

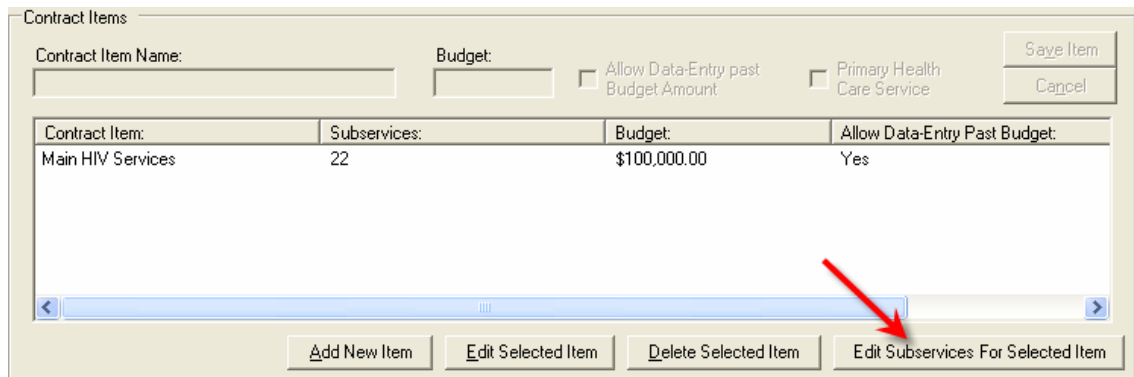
Contract Items

Contract Item Name: Budget: Allow Data-Entry past Budget Amount Primary Health Care Service

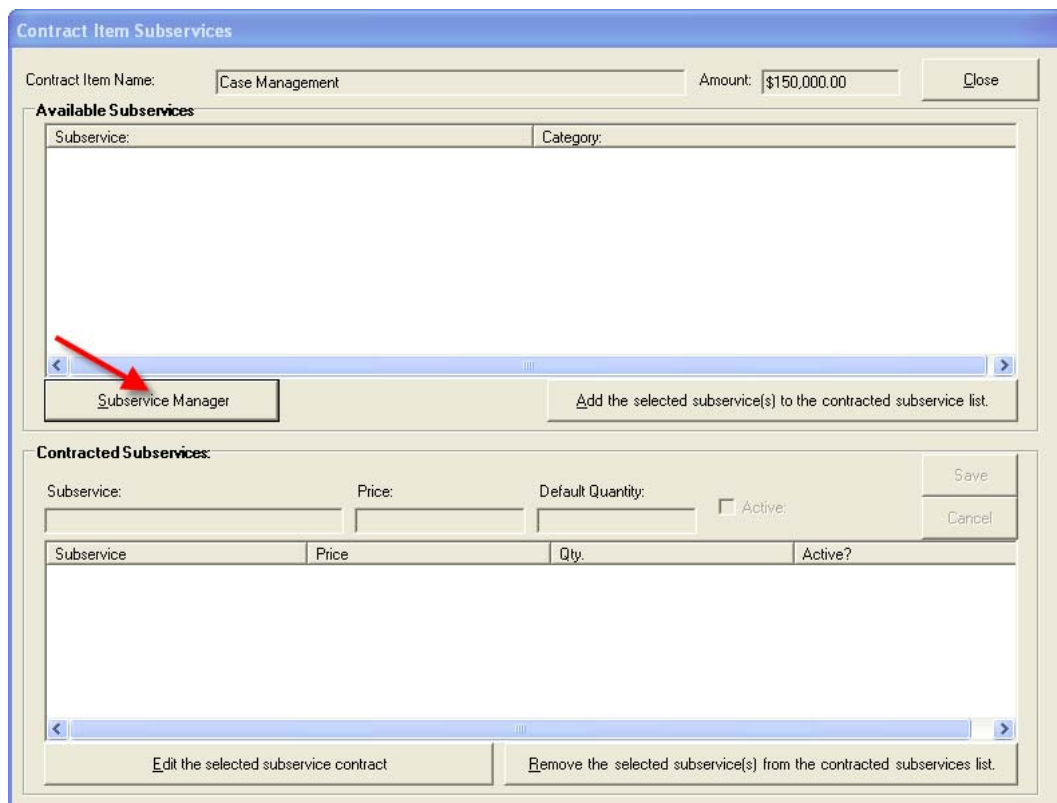
Contract Item:	Subservices:	Budget:	Allow Data-Entry Past Budget:
Main HIV Services	22	\$100,000.00	Yes

Entering the budget allows you to choose whether or not to allow data entry beyond the budget amount. In a minute, you'll see how to enter a unit cost of service for your subservices. If you deselect this check box, and provide unit costs of service for the subservices, CAREWare will lock out data entry when the amount spent first exceeds the budget amount.

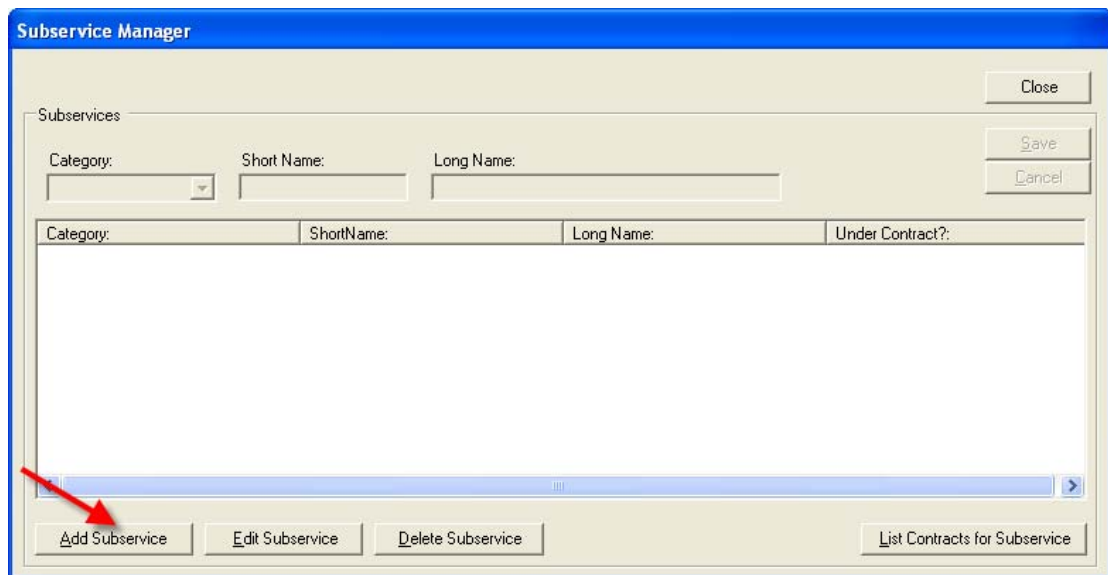
- Click **Save Item** to continue. The contract item will appear in the lower part of the window.
- Highlight the contract item, and click **Edit Subservices for Selected Item in the bottom right.**



If you're new to CAREWare, you'll see an empty window. Click the **Subservice Manager** to add subservices. If you've imported data from the old version 3.6 this window will be populated with those services and their funding sources. You will likely want to edit this as needed to reflect your new contract structure.

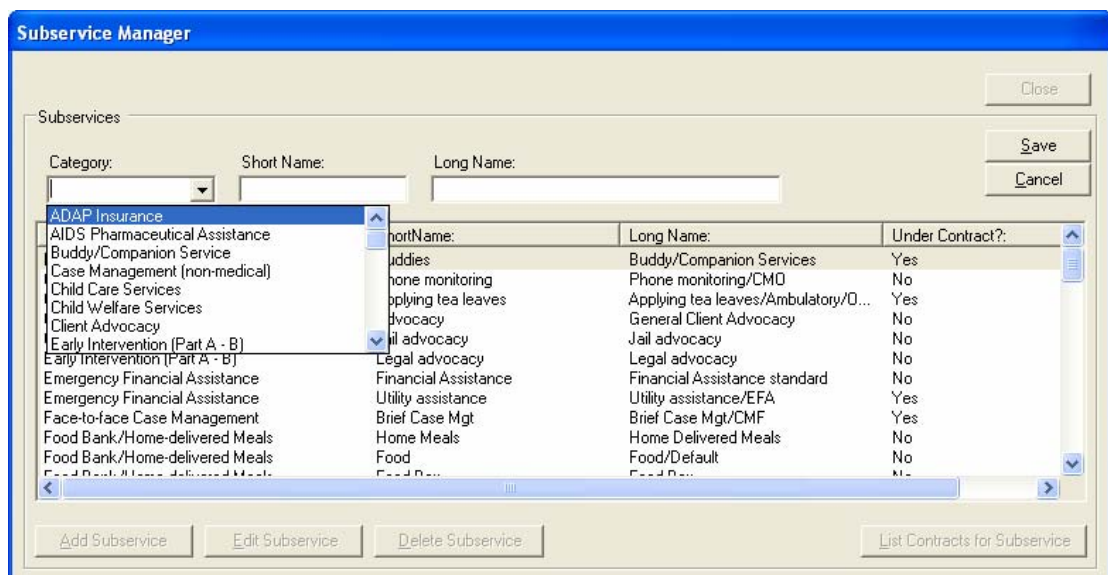


- The Subservice Manager appears. Click on the **Add Subservice** button to create new subservices.



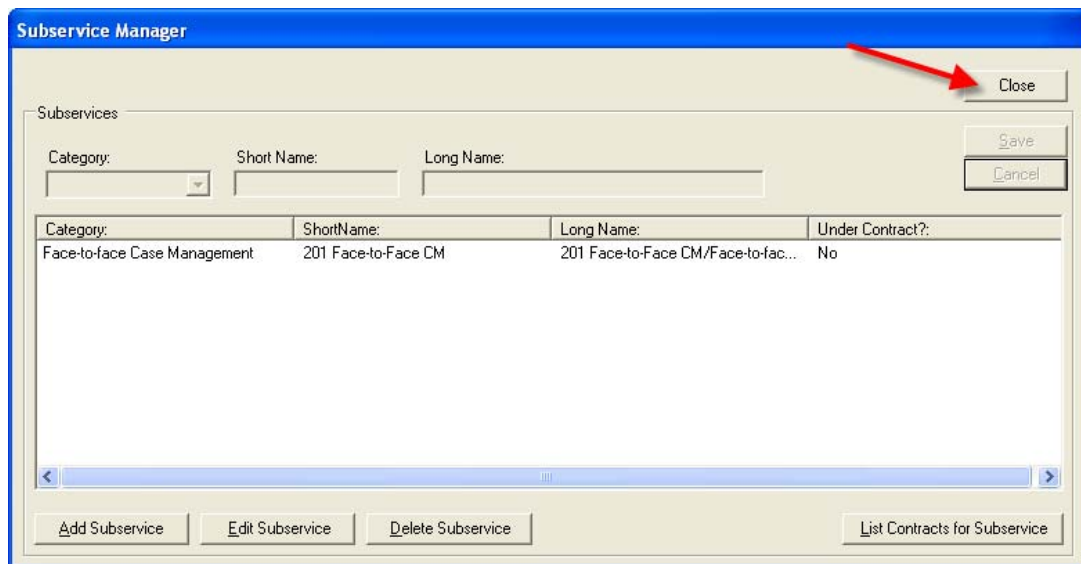
- To add a subservice, you'll need to specify the **Category** and give it a **Short Name**. The Category is the HRSA-defined service category (as seen on your Ryan White Program Data Report). The Short Name is the name you'll use to perform data entry.

Use the drop down menu to select the category.

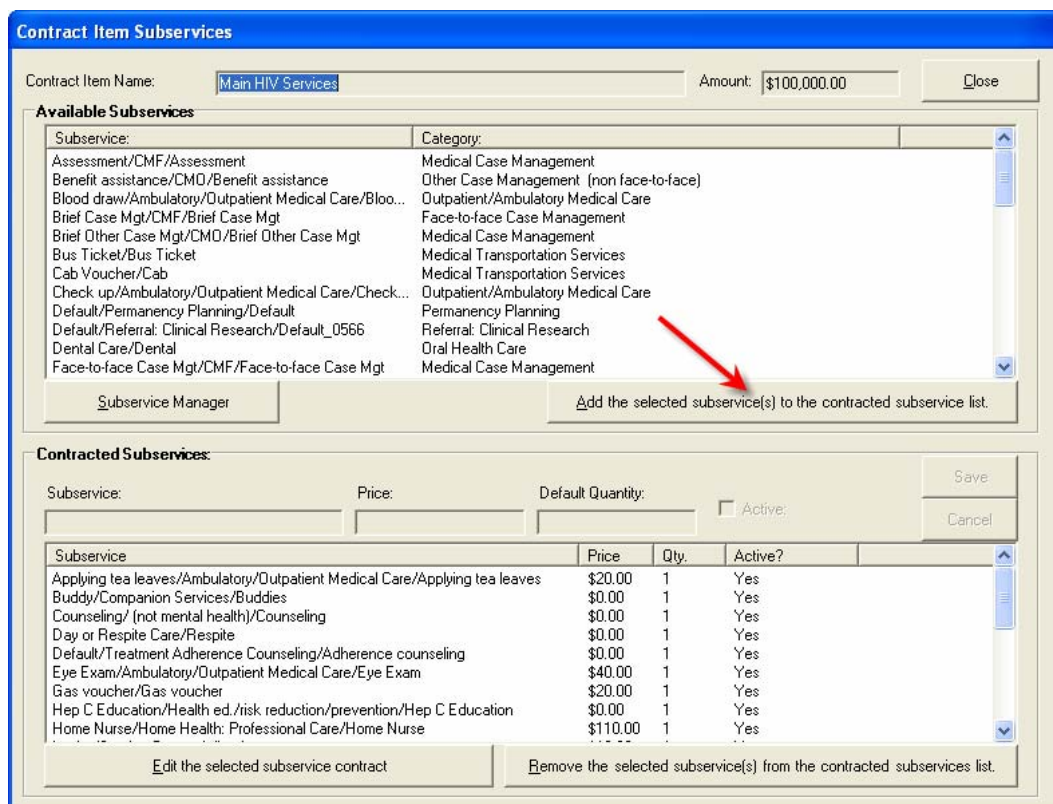


Next, enter a short name. We recommend using clear, easy names. The “Long Name” is a concatenation of the short name you created along with the service category. You can edit the long name if you wish, but it’s not necessary.

15. Click **Save** when you've finished. The subservice appears on the list and is ready to be attached to a contract.
16. Click **Close** to return to the Contract Item Subservices menu.



17. You'll see your new service listed. Click **Add the selected subservice(s) to the contracted subservice list**.



- You'll be prompted to enter default units of service and cost of service. The default quantity is 1, and the default price is 0. You should enter a unit cost of service if you plan on tracking your budgetary expenditure.

Subservice default quantity and price

Current Subservice: 201 Face-to-Face CM

Set the default quantity and price for the subservice: 201 Face-to-Face CM. Click OK to accept the entered values. Click Cancel to skip adding the subservice to the contract. Check the box before clicking OK to use the quantity and price entries for all remaining subservices.

Default Qty: 1 Default Price: \$0.00

Use this quantity and price for all remaining subservice

OK Cancel

- Click **OK**. The subservice is now part of this contract and you can begin doing data entry for this subservice.

Contract Item Subservices

Contract Item Name: Case Management Amount: \$150,000.00 Close

Available Subservices

Subservice: Category:

Subservice Manager Add the selected subservice(s) to the contracted subservice list.

Contracted Subservices:

Subservice: Price: Default Quantity: Active: Save Cancel

Subservice	Price	Qty.	Active?
201 Face-to-Face CM/Face-to-face C...	\$0.00	1	Yes

Edit the selected subservice contract Remove the selected subservice(s) from the contracted subservices list.

- Repeat these steps as necessary for all subservices you'll be providing under your contract and contract items.