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 #3:
Entering Clients and their Service and Clinical Data

It does NOT cover entering referrals, HIV counseling & testing, pregnancy or relations data. For that you'll need the full user manual.

Guides in this series:

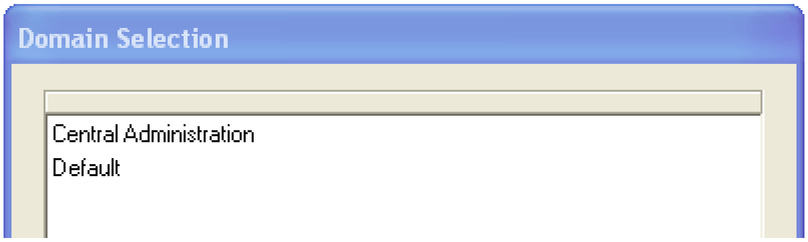
1. *Downloading and installing CAREWare*
2. *Creating contracts and services*
3. *Entering Clients and their Service and Clinical Data*
4. *Customizing tabs and fields*
5. *Customizing clinical data*
6. *Working with CAREWare's prebuilt reports (including the Ryan White Program Data Report)*
7. *Creating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

First Things First
What do I need to get started?

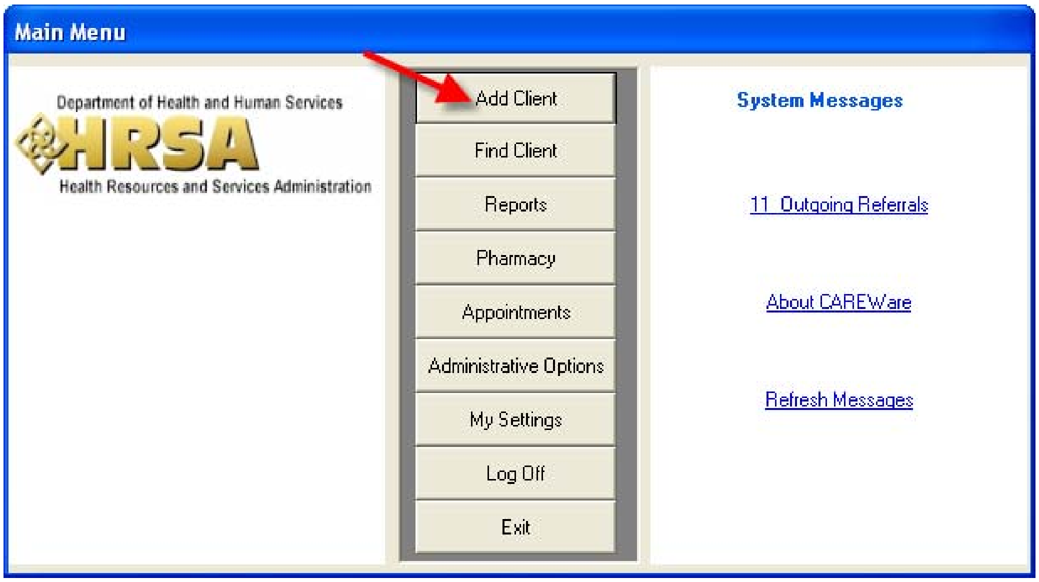
- You can't enter services until you've set up your contracts. Please see the Quick Start guide, "Setting up Contracts and Subservices."

Entering Clients

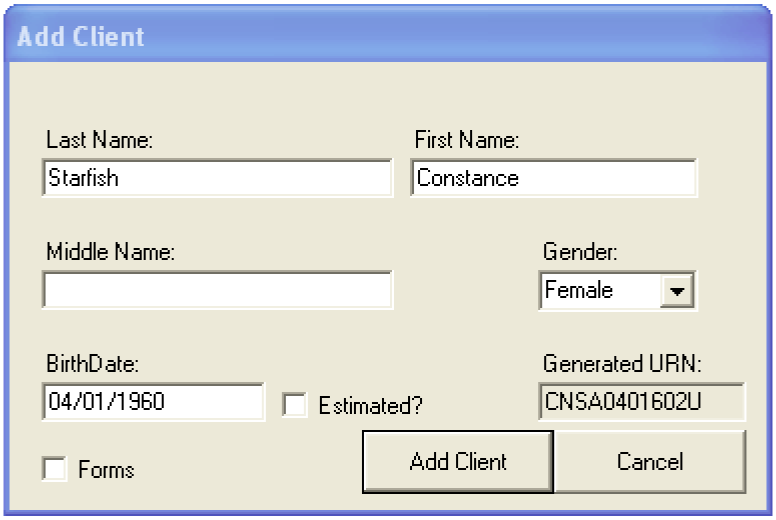
1. Log into CAREWare. If you have administrative privileges and are asked to choose between Central Administration and Provider ("Default" until you change the name), log in as a Provider.



2. Select **Add Client** from the main menu.

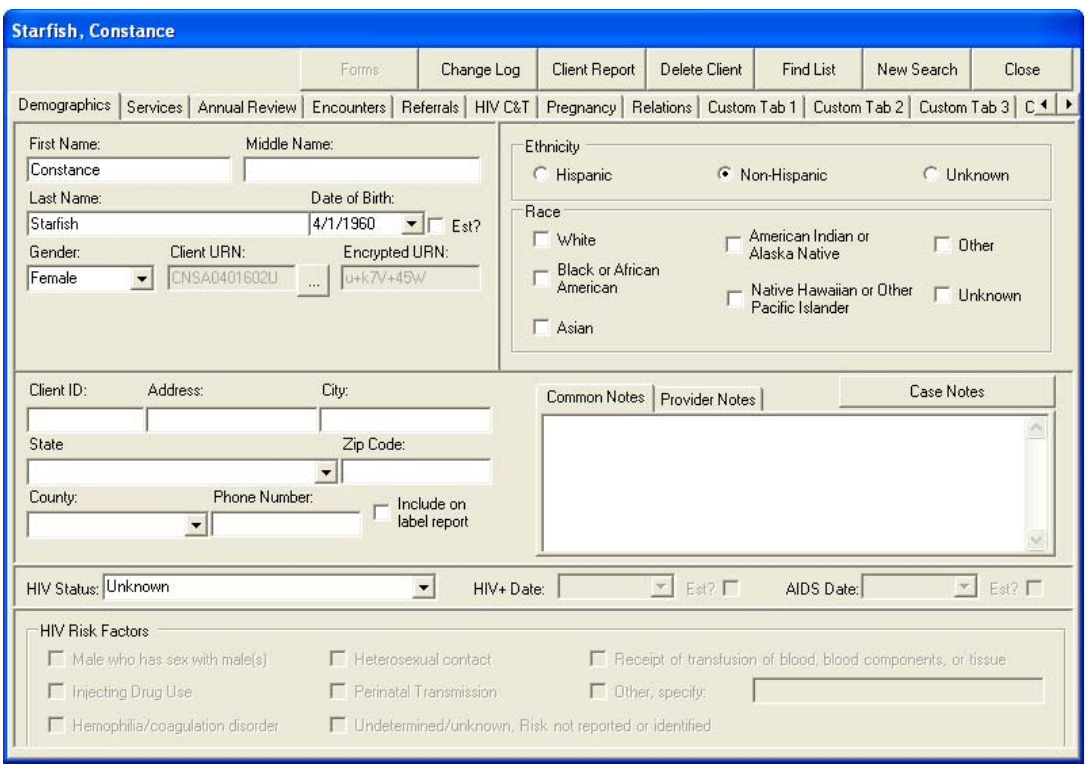


3. The client information window appears.



You'll need to enter at least **Last Name, First Name, Gender** and **Date of Birth**. Check **Estimated** if you don't know the client's exact birth date. Check **Forms** to use a Form Designer template to enter client data. (You'll have to have already created a form; please see the complete user manual for instructions.)

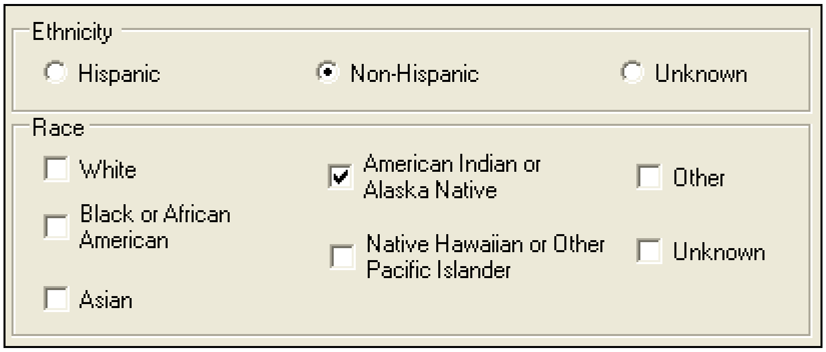
4. Click **Add Client**. The main CAREWare demographic screen will appear.



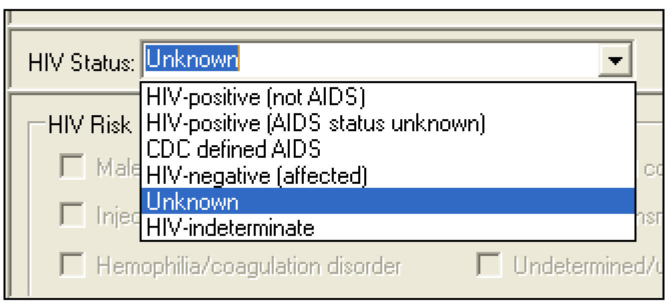
You can go directly to the Services tab from here and begin entering services, but it's a good idea to enter all the Ryan White Program Data Report-required client data when you first create the client. There are three steps to this:

- Enter the client's Race/Ethnicity and HIV Status/Risk Factors
- Enter the client's first service
- Enter the remaining demographic information on the Annual Review tab

5. Enter the client's Race/Ethnicity by checking the relevant boxes.



6. Enter the client's HIV status from the drop-down menu. (If you don't specify this, CAREWare will treat the client as HIV-negative (affected) and won't count the client as HIV-positive in your Ryan White Program Data Report.)



- HIV-indeterminate is only available for clients less than 2 years of age

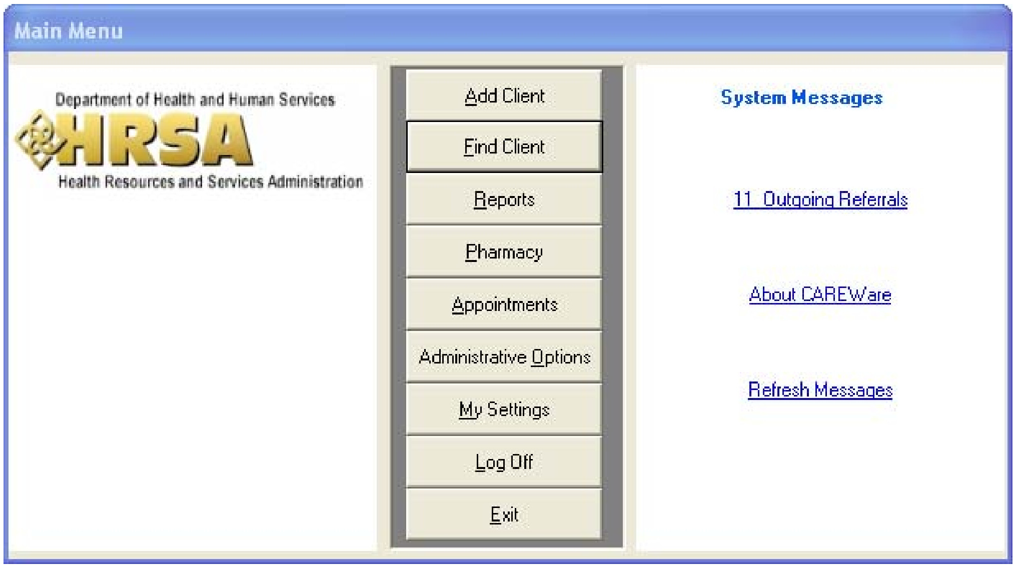
7. Now you'll need to go to the Services tab and enter a service, before going to the Annual Review tab to complete the client's entry into the system.

- Remember that a client won't get counted in the Ryan White Program Data Report if they don't have at least one service in the reporting period!

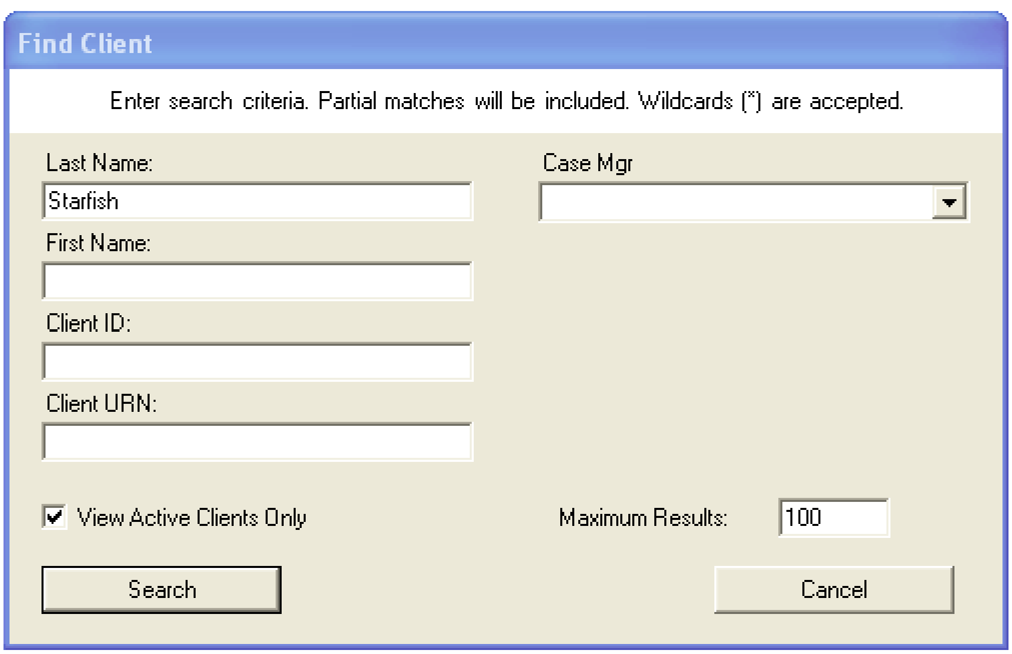
Entering Services

If you're entering a new client, you'll be in the client screen already; **skip to step 5**. If you're entering services for an existing client, perform the following actions.

1. Log into CAREWare and select **Find Client** from the main menu.

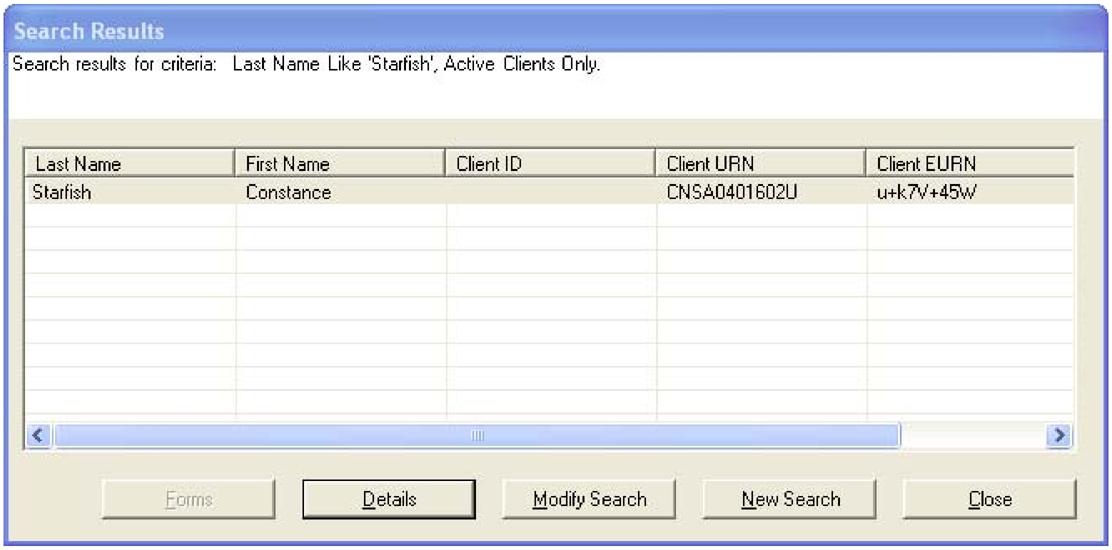


2. Search by any of the available fields; in this case we'll use the last name.



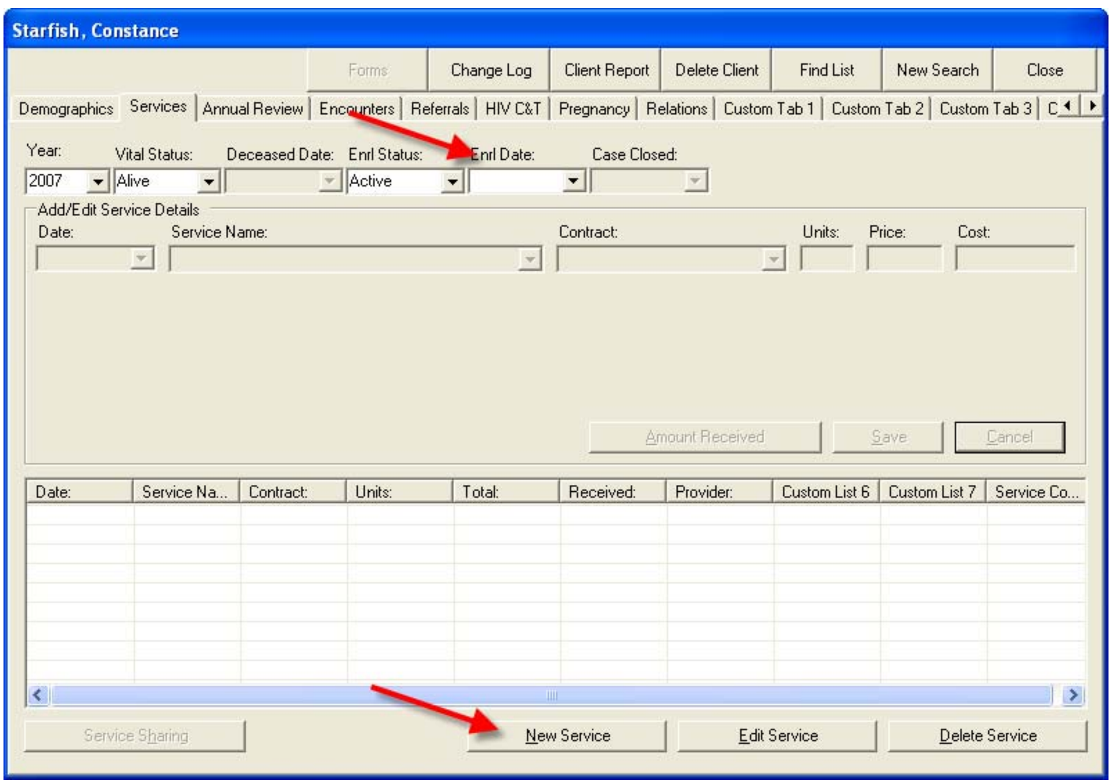
Please note that "Case Mgr" appears here because this copy of CAREWare has been customized. Please see the Quick Start guide, "Customizing Tabs and Fields" for information on this.

3. Click **Search**. A list of matches to your search appears.



4. Select the correct name from the list and click **Details**. The client information window appears.

5. Click on the Services tab.

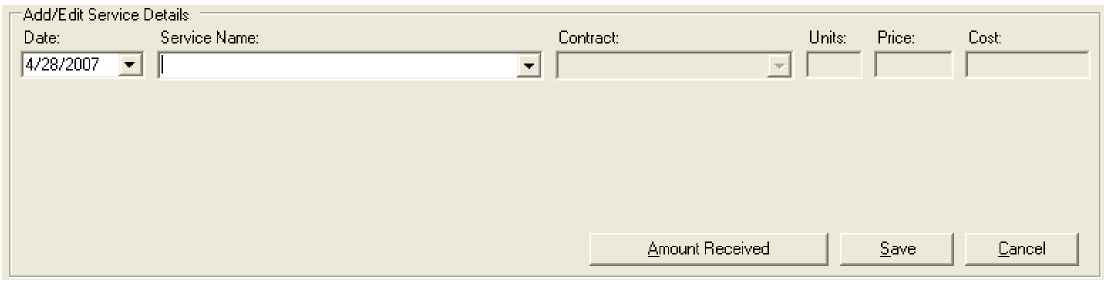


6. Enter the client's status information.

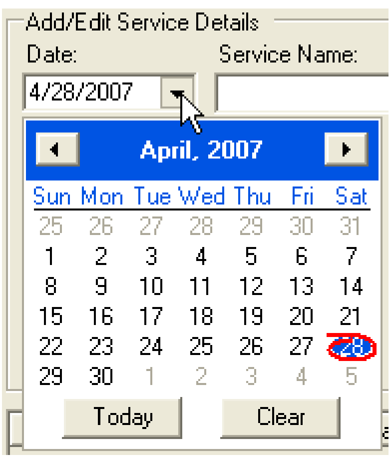
   - The defaults are a Vital Status of "Alive" and an Enrollment Status of "Active." It's possible for a client to be deceased and still be an active case, as you may still be doing case management, charting, etc. for a deceased client.

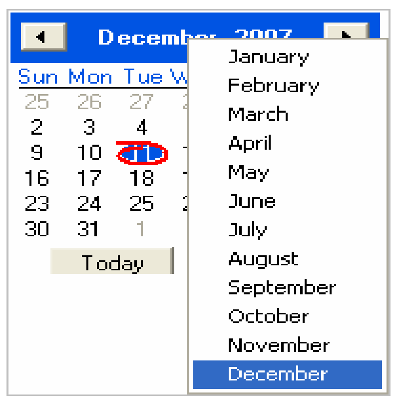
- Once the Enrollment Status is set to "Inactive/Case Closed," you can't enter any more services without resetting the Enrollment Status to "Active."
- The Enrollment Date should be the date of intake. *Note that the enrollment year is used by CAREWare for the Ryan White Program Data Report to determine if this client is new in the current year or not*.

7. After setting these, click **New Service**. The Add/Edit Service Details pane becomes active.

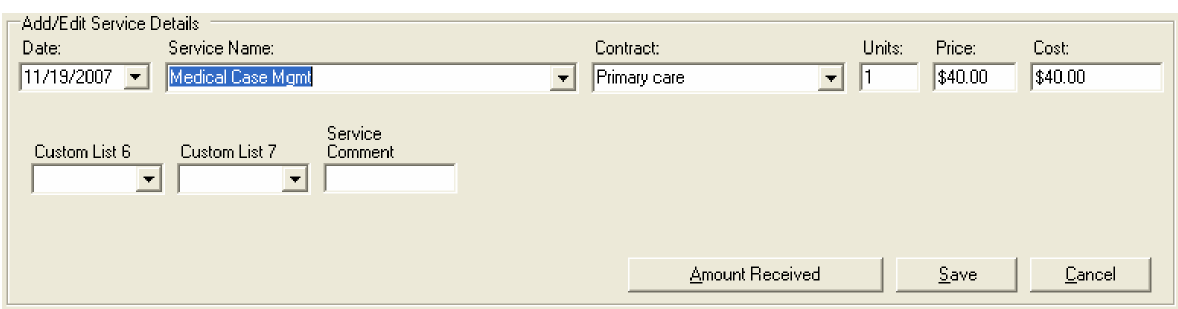


8. The default service date is today's date. Type in a different date if necessary or click the  arrow next to the date to use the calendar function. It's easy to change the month by clicking on the month and selecting from the list.





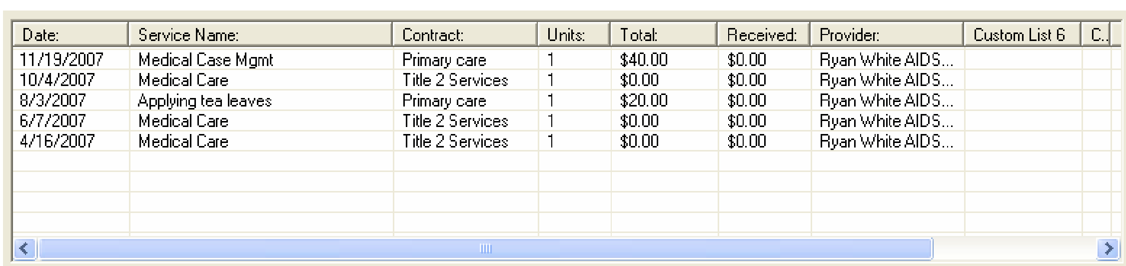
9. Type in the first few letters of the service name or select one from the drop-down menu.



- Only services under active contracts will be listed; if you are looking for a service that you know is in there but doesn't appear on your drop-down list, the contract may have reached its end date or you may have forgotten to add that subservice to this specific contract. See the Quick Start Guide, "Creating Contracts and Services."

10. Enter the contract for this service.
    - If this service is only funded under one contract, that contract will auto-fill under the Contract field. If the service is provided under multiple contracts (for instance, you may have case management services funded by both Part B and D), select the appropriate contract from the drop-down menu.

11. The default number of units and price will auto-fill based on how the service was set up. Enter any changes to the default, if required.
12. The Custom Lists fields are discussed in the Quick Start Guide, "Customizing Tabs and Fields."
13. Enter any service comment you wish to add. These can be used as mini-case notes, for instance, "Client dropped by to discuss housing issues." (See "Customizing Tabs and Fields" to see how you can make this field appear larger.)
14. Use the Amount Received button if you collect fees for services. (Please see the complete user manual for details.)
15. Click **Save** when done.
16. The service will appear in the service record portion of the screen (latest on top):



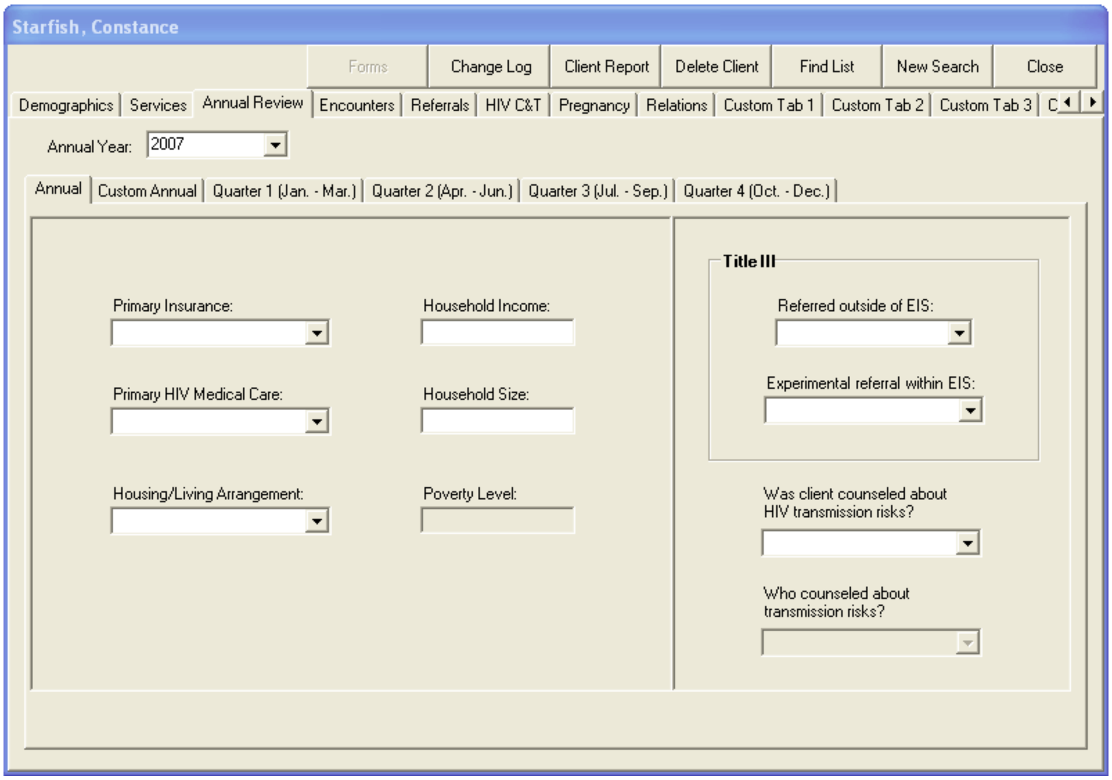
Date:	Service Name:	Contract:	Units:	Total:	Received:	Provider:	Custom List 6
11/19/2007	Medical Case Mgmt	Primary care	1	$40.00	$0.00	Ryan White AIDS...	
10/4/2007	Medical Care	Title 2 Services	1	$0.00	$0.00	Ryan White AIDS...	
8/3/2007	Applying tea leaves	Primary care	1	$20.00	$0.00	Ryan White AIDS...	
6/7/2007	Medical Care	Title 2 Services	1	$0.00	$0.00	Ryan White AIDS...	
4/16/2007	Medical Care	Title 2 Services	1	$0.00	$0.00	Ryan White AIDS...	

    - You can **Edit** or **Delete** service records as needed.

17. If this is the client's first service, click on the Annual Review tab to complete their entry. Otherwise, you can continue entering services or other client information.

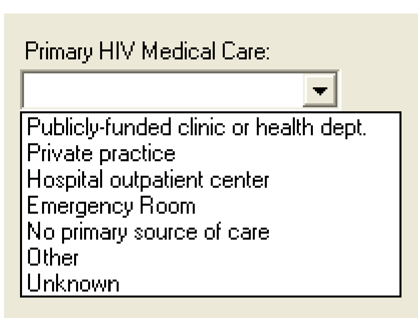
Entering Ryan White Program Data Report-Required Annual Review Data

1. After entering and saving the client's first service, go to the Annual Review tab.

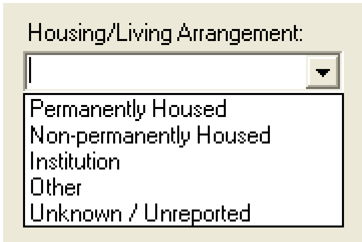


2. The following need to be entered for Ryan White Program Data Report purposes:

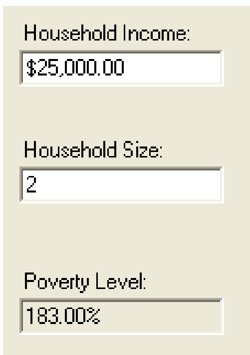
- Primary HIV Medical Care. If you are a medical care provider, select your type of organization from the list. If you are not, enter the type of organization where your client receives his or her medical care.



- Housing/living arrangement. Please refer to HRSA guidelines to determine the difference between permanently and non-permanently housed.



- Household income. Enter the total household income, and total number in household. This will automatically calculate the Federal poverty level for that calendar year.

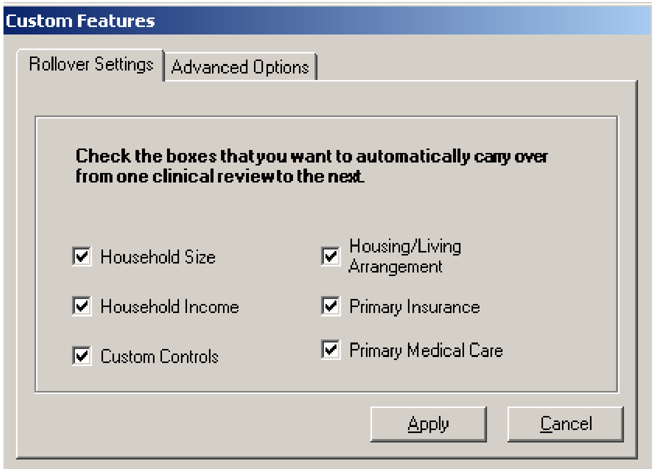


The part of CAREWare that calculates the Federal poverty level for each calendar year is released as an update shortly after the federal government issues its annual guidelines, typically in February or March. You will need to install this update each year to correctly calculate annual poverty levels.

3. This completes new client entry. For information on other fields in this tab, please see the complete user manual.

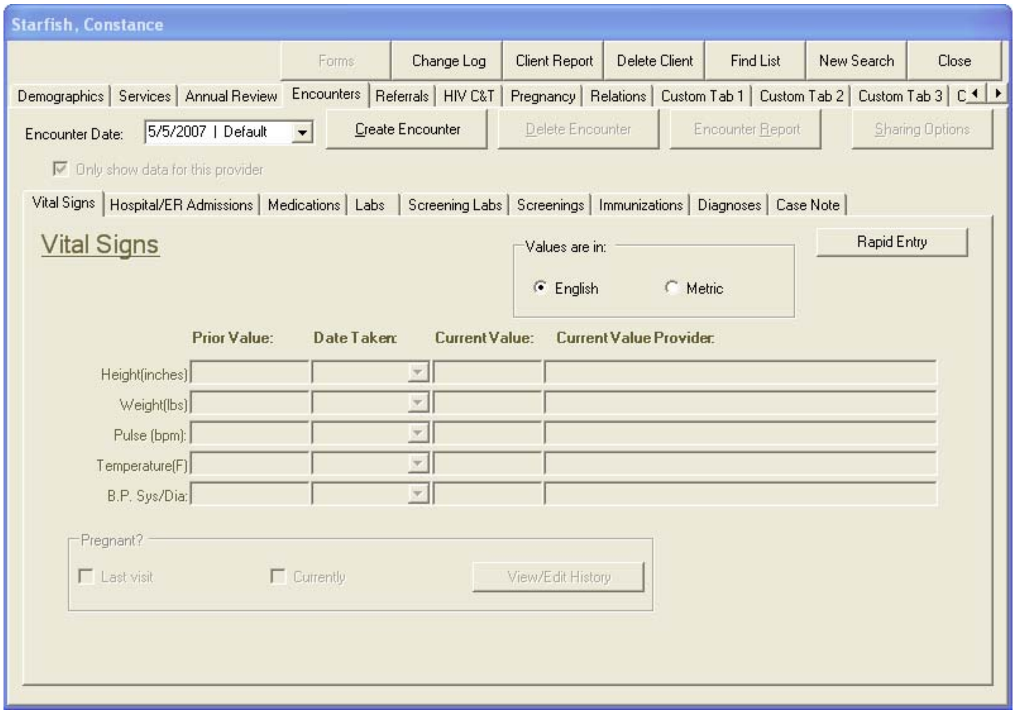
Data entry hint: Much of the information on the Annual Review tab may stay the same from year to year. CAREWare contains a feature that will “roll-over” these data from one year to the next immediately after the client receives their first service in the new year.

To turn on this rollover feature, go to Administrative Options > Custom Features> Annual Review Rollover.



Entering Clinical Encounter Data

1. Open the client's records using the steps on page 5, then click on the Encounters tab.

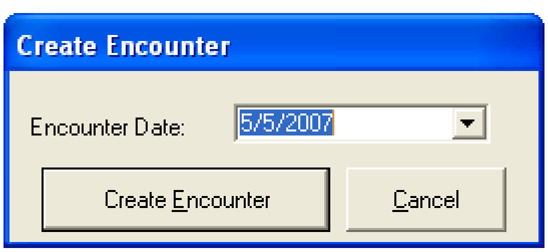


There are two ways to enter clinical data.

You can choose **Create Encounter,** which allows you to enter all the data associated with an encounter date (i.e. a doctor visit), or

You can choose **Rapid Entry**, which allows you to enter just one subset of data (e.g. labs or screenings) on any date, on or off a formal clinical encounter. For details on Rapid Entry, please see the complete User Manual. It is only in Rapid Entry that you can print graphs of lab tests and vital signs over time.

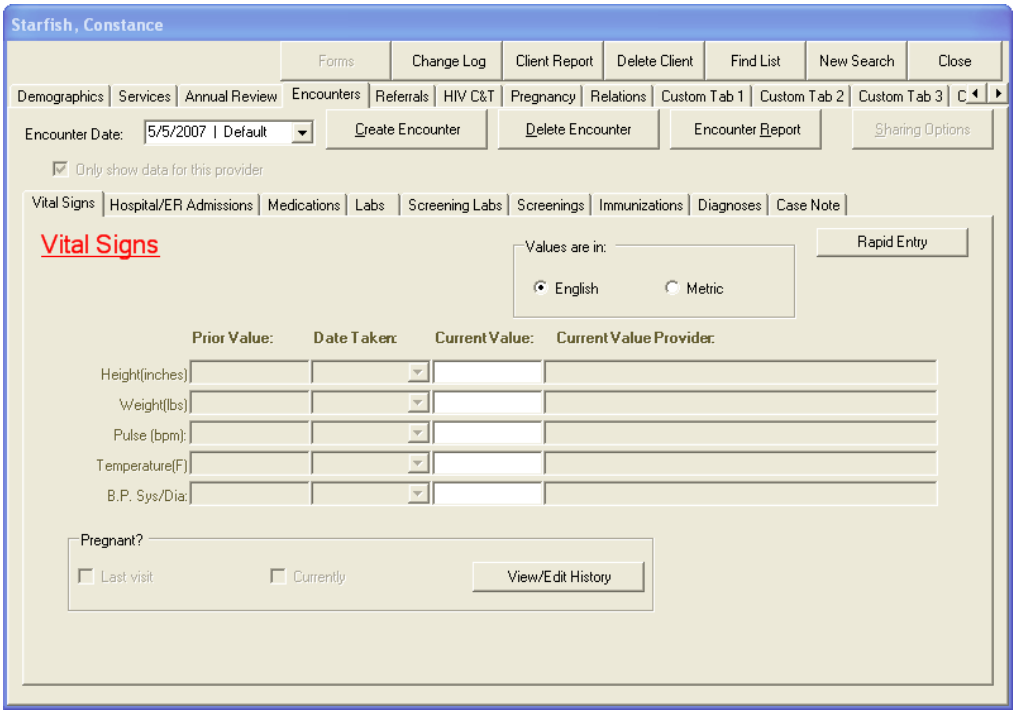
2. Click **Create Encounter** to create an encounter.



You will be prompted to enter the encounter date; the system defaults to today's date. You can type in a different date or use the arrow to bring up the drop-down calendar. Click **Create Encounter** after entering the date. To back enter data for a clinical encounter, select the appropriate encounter date.

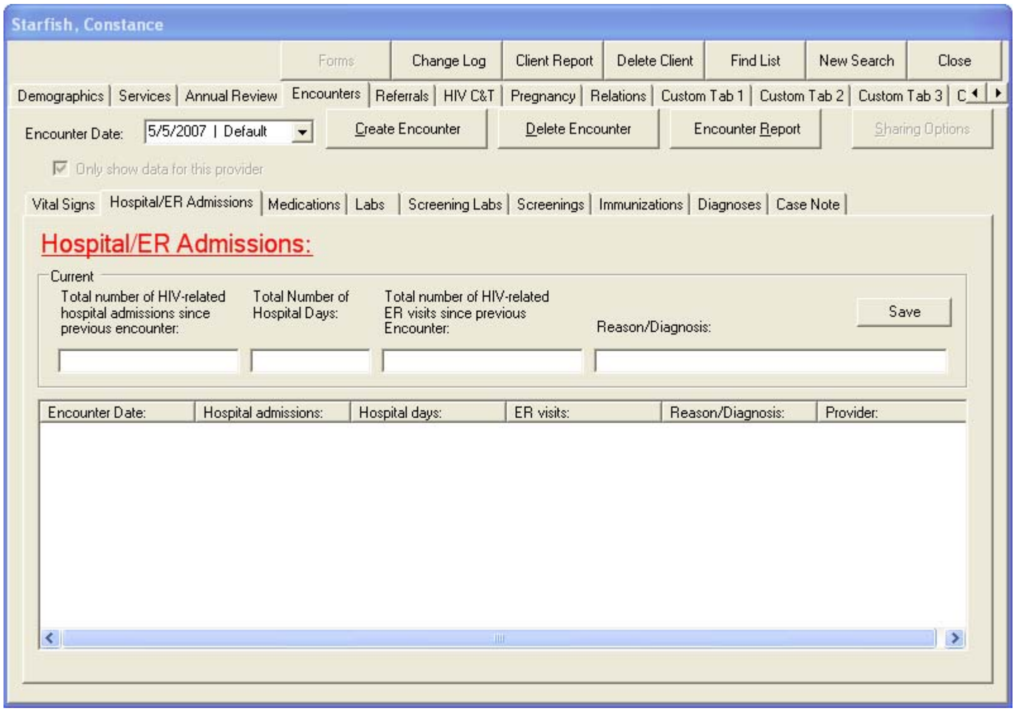
3. The color of the subtab titles goes from gray to red. Select any subtab to enter data.

a) Vital Signs:



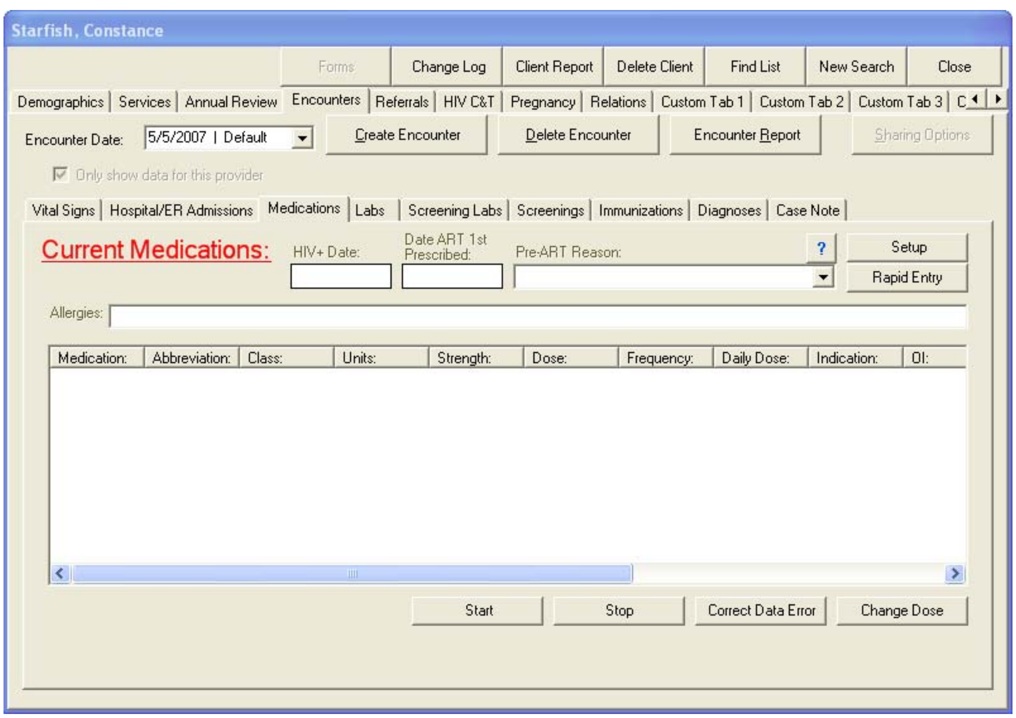
Choose English or Metric values. You only need to enter Height once; this will roll over to future encounters (of course, you'll need to change this for children).

b) **Hospital/ER Admissions**

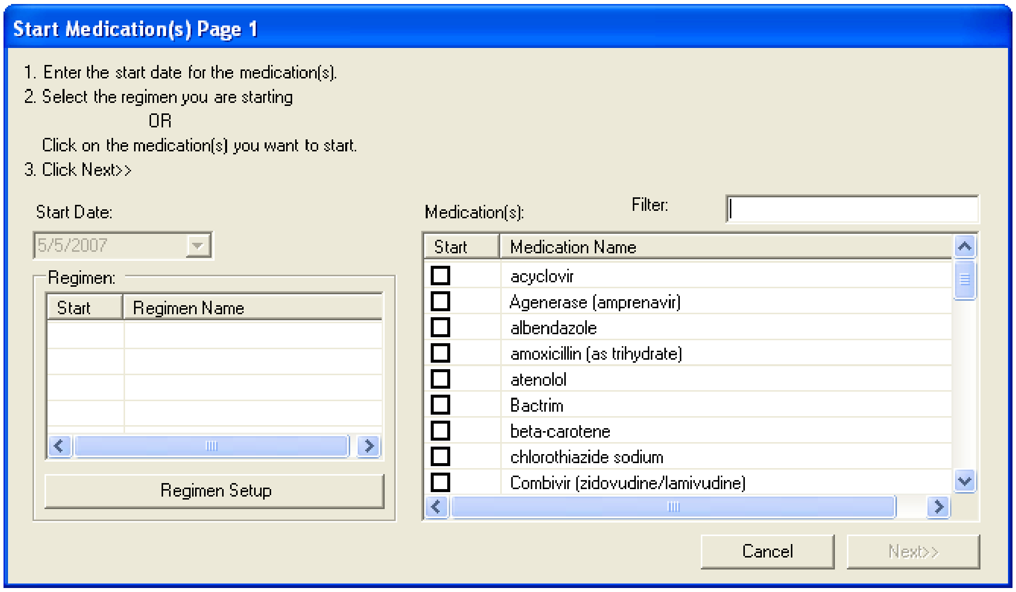


These fields are self-explanatory; click **Save** when done.

c) **Medications**

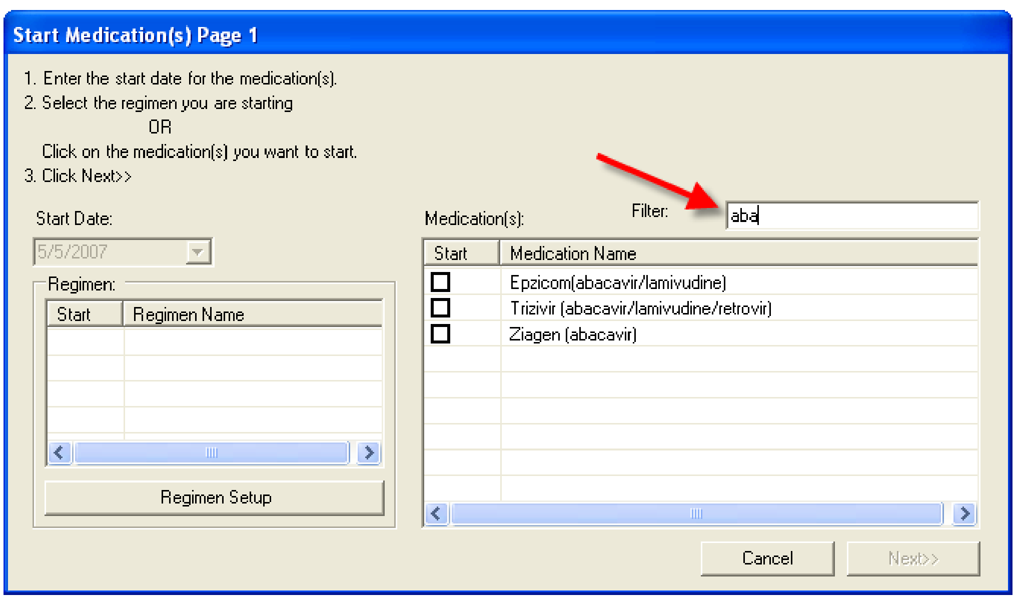


1. Click **Start** to enter a new medication.



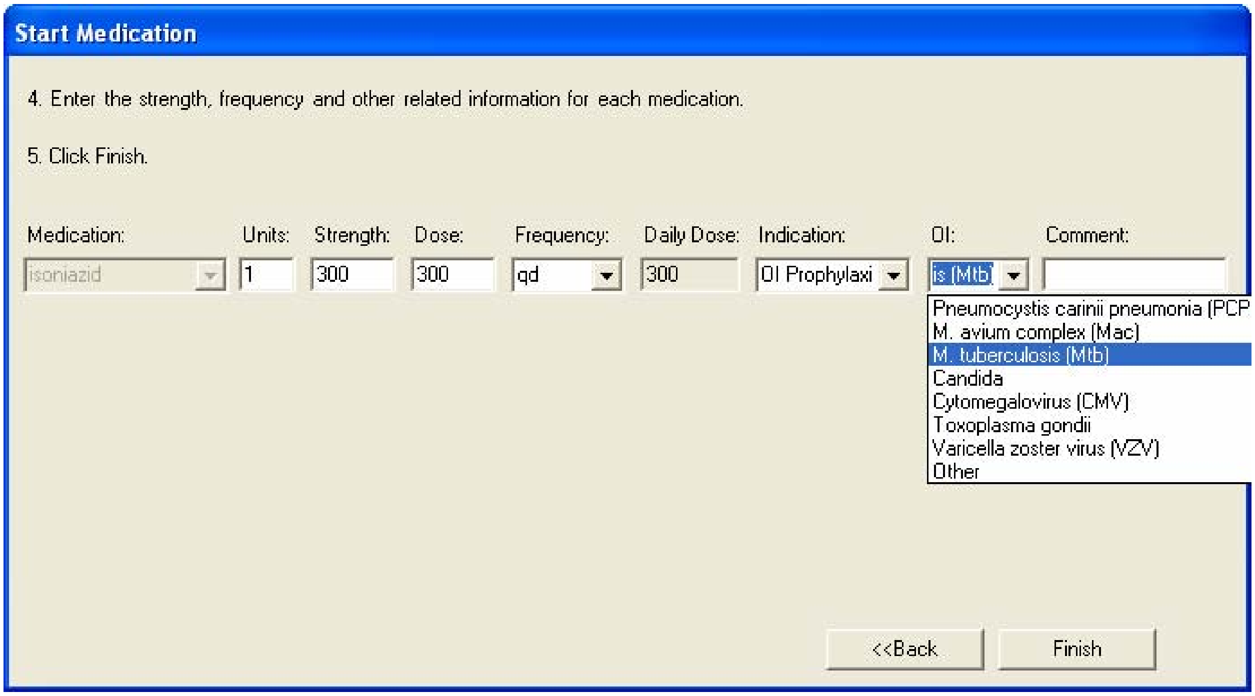
The start date is grayed out as the encounter date = start date. Scroll through the list of medications and select the check box next to the med or meds to start. You can also create a Regimen or group of antiretrovirals that will ease data entry by starting all the medications in the regimen at once.

You can use the Filter to do a quick find. Type several of the letters in the medication's name to automatically reduce the length of the list. For example, typing "aba" will bring up all drugs with abacavir.

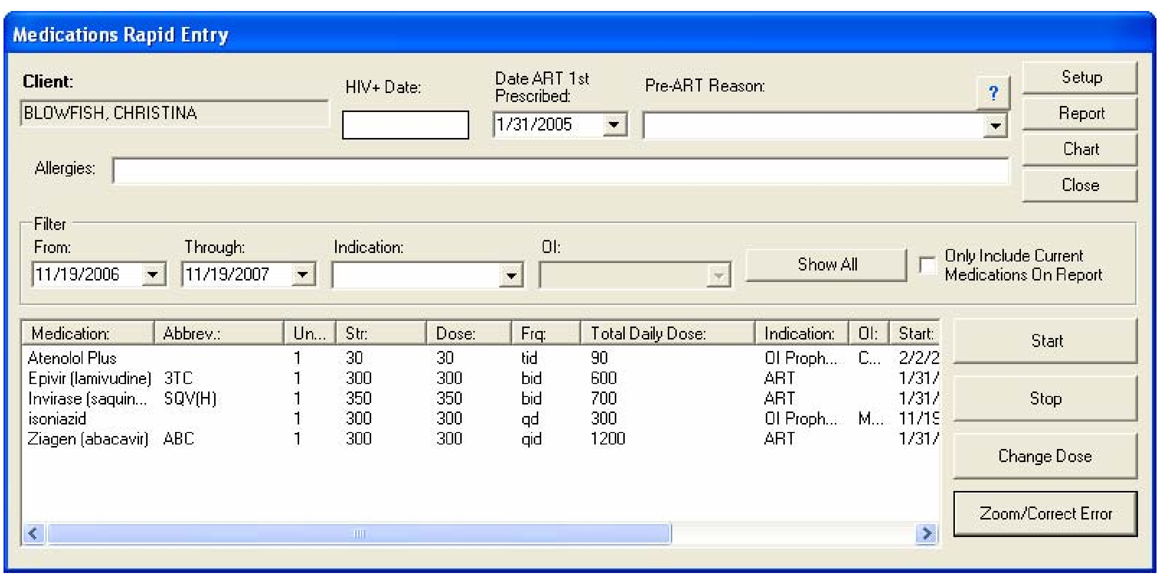


2. Click **Next** to enter strength, frequency, etc. Indicate whether the medication is ART, Opportunistic Infection (OI) treatment, OI prophylaxis or other. If this is an OI med, the OI drop down box will activate so you can choose the OI being treated.

IMPORTANT: For the Annual Data Report, medical section 5, CAREWare looks to these fields—Indication and OI- to determine how many antiretroviral medications the client is on (if any) and if a client has been or is currently being treated for TB Prophylaxis or Disease.

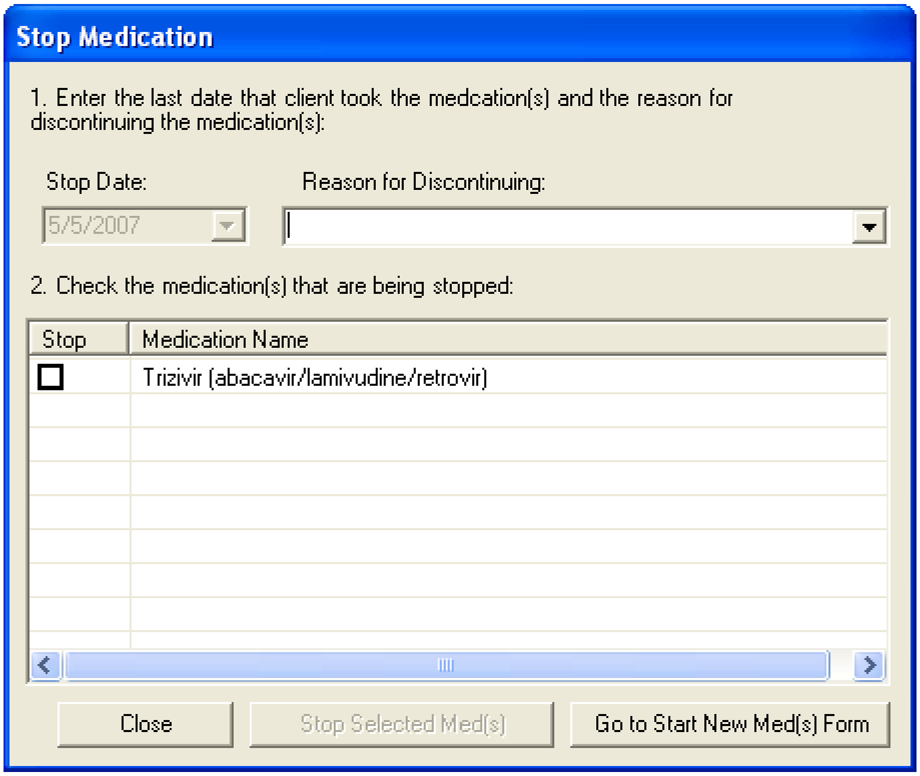


3. Click **Finish** when done.



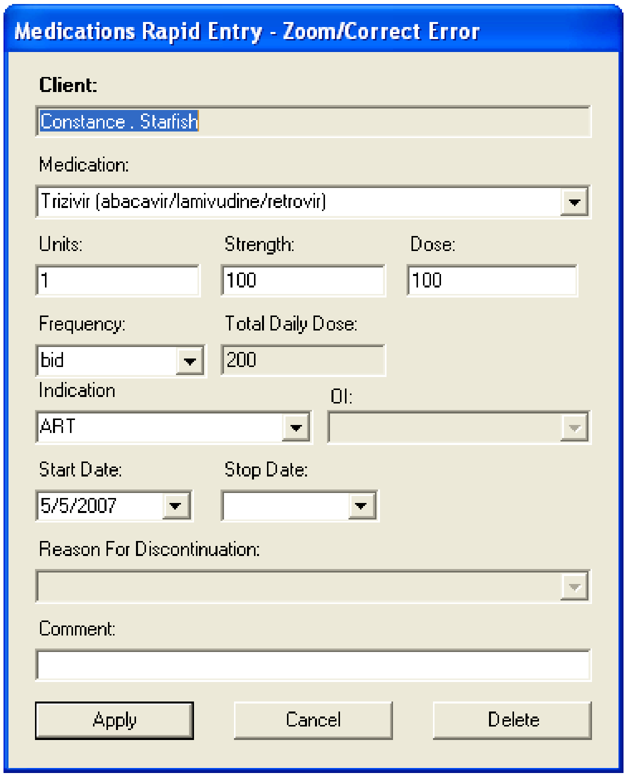
If you indicated that the drug was ART, the **Date ART 1st Prescribed** field will auto-populate with the start date of the first ART drug entered. The **HIV+ Date** comes from information entered in the Demographics tab. If the client is not yet on ART, you can enter a **Pre-ART Reason** from the drop down menu.

4. To stop a medication, click on **Stop**.

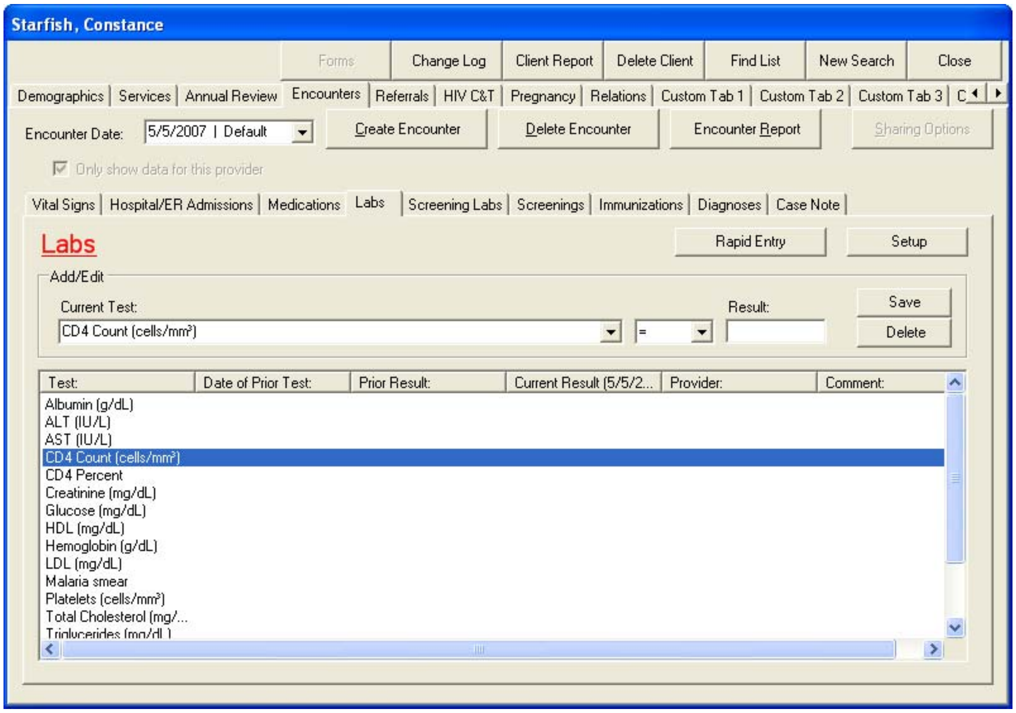


Reason for Discontinuing menu:

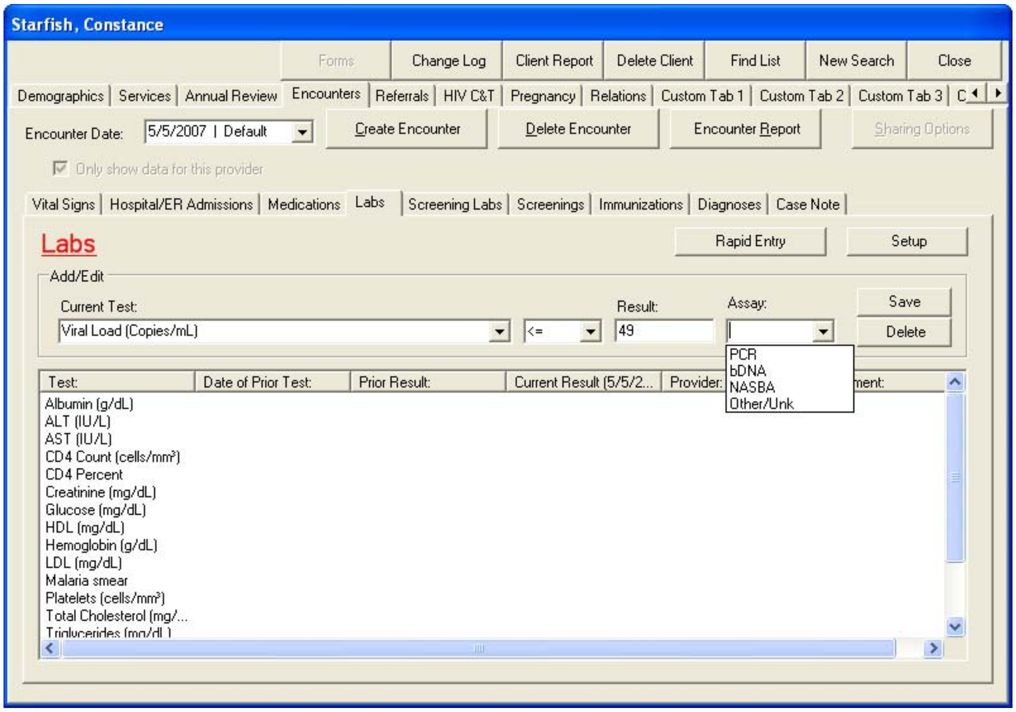
5. Select the reason for discontinuing from the drop down menu, check the medication to be stopped. Click **Close** if you are done with meds, or click **Go to Start New Med(s) Form** to start the client on a new med.
6. To make changes, click on a med to highlight it and click **Correct Data Error**. The edit screen will appear. Make any necessary changes and click **Apply**.


Medications Rapid Entry - Zoom/Correct Error
Client:
Constance . Starfish
Medication:
Trizivir (abacavir/lamivudine/retrovir)
Units:
1
Strength:
100
Dose:
100
Frequency:
bid
Total Daily Dose:
200
Indication
ART
OI:
Start Date:
5/5/2007
Stop Date:
Reason For Discontinuation:
Comment:
Apply
Cancel
Delete

d) Labs: *Designated for tests with a quantitative (numeric) result*

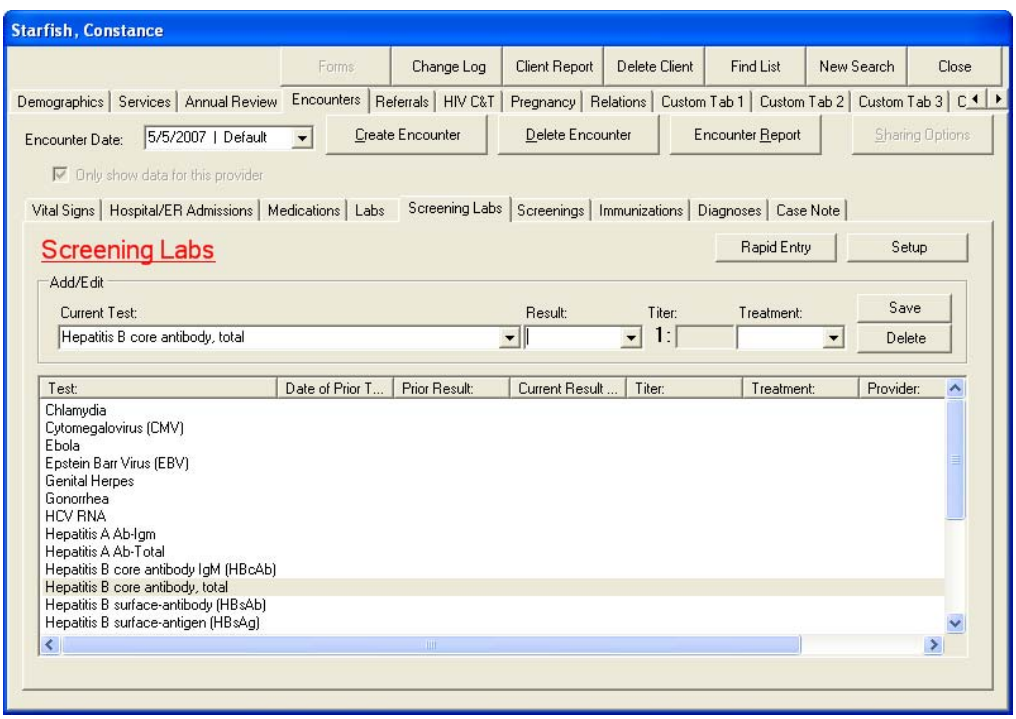


7. Click on any test or select one from the **Current Test** drop down menu.
8. Select whether the result is =, <= or >=.
9. Enter the value in the Result box.
10. For viral load, you have the option of selecting “Assay” from the drop down menu.



e) Screening Labs

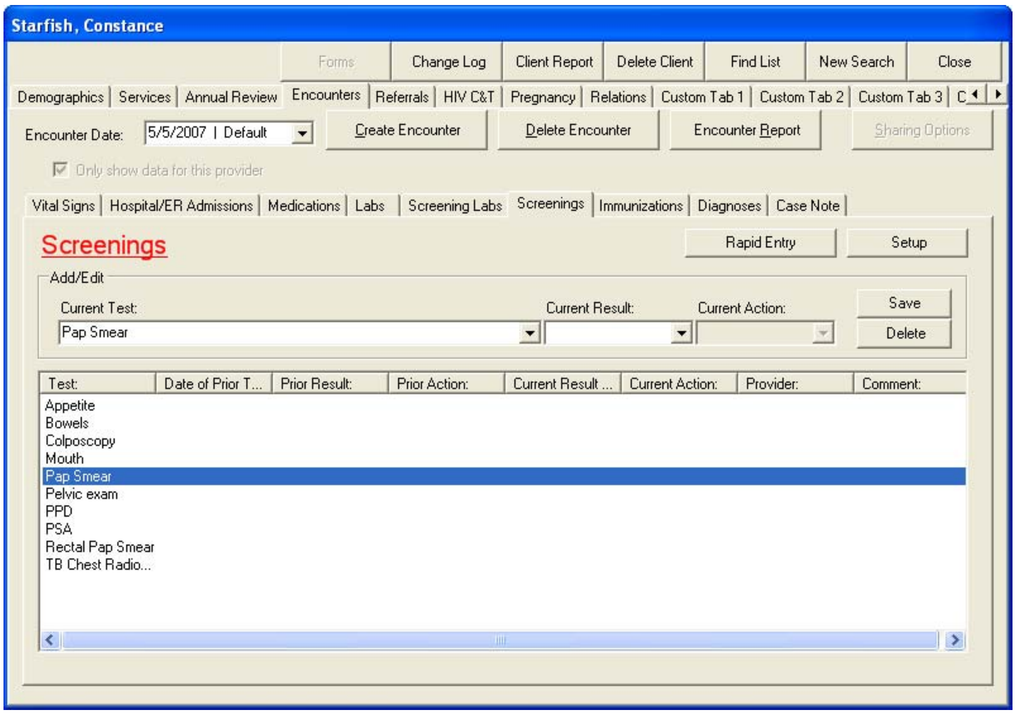
- *Designated for tests with a Qualitative result—Negative, Positive, Indeterminate, etc.*



11. Click on any test or select one from the **Current Test** drop down menu.

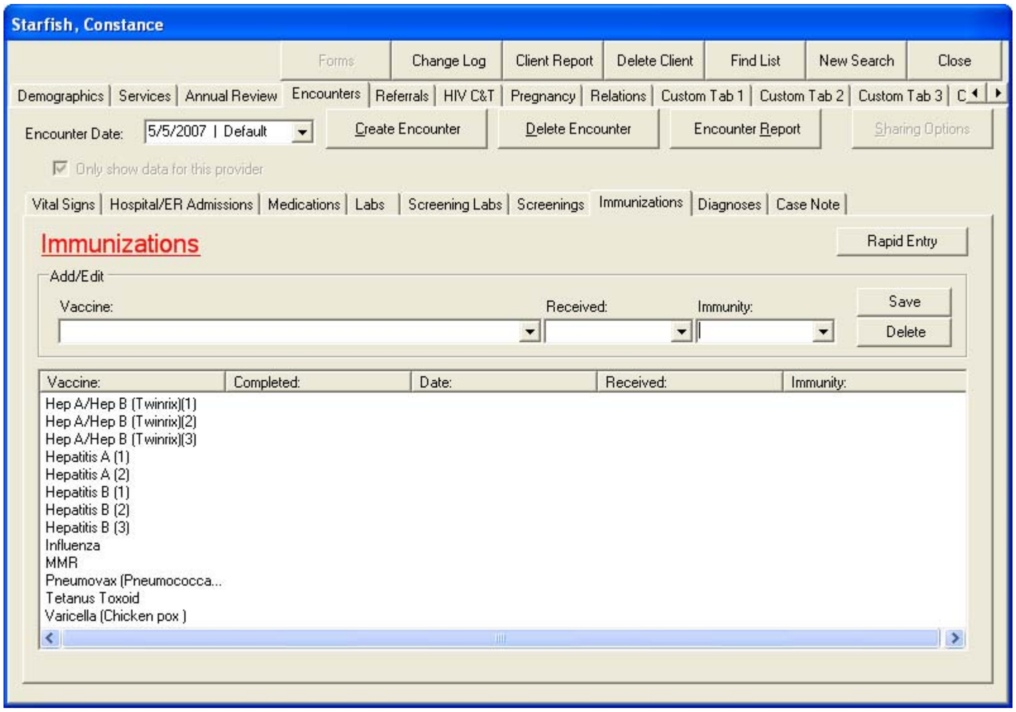
12. Select the **Result** from the drop down menu. (NMI or Not Medically Indicated is often selected for hepatitis tests to indicate that the client has already been exposed; this prevents your reports from counting these clients as not having been tested for hepatitis.)
13. The **Titer** field will activate for tests where titer is indicated (syphilis, etc.).
14. Select a **Treatment** from the drop down menu.
15. Click Save.

f) Screenings



1. Click on any test or select one from the **Current Test** drop down menu.
2. Select the **Current Result** from the drop down menu. Data in the drop down is test dependent, i.e. if you select PPD you'll see Negative <5mm, Positive >5mm, Client did not return for reading, etc.
3. Select a **Current Action** if applicable.
4. Click **Save**.

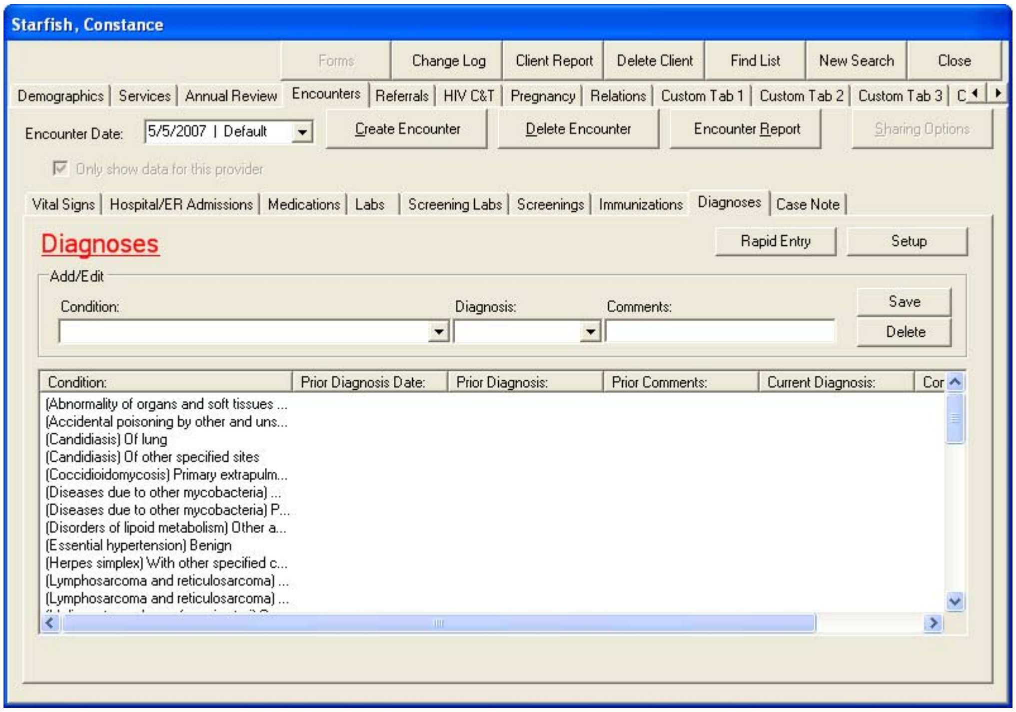
g) Immunizations



1. Click on any test or select one from the **Vaccine** drop down menu.
2. Select the appropriate value from **Received**.
3. Select the appropriate value from **Immunity**.

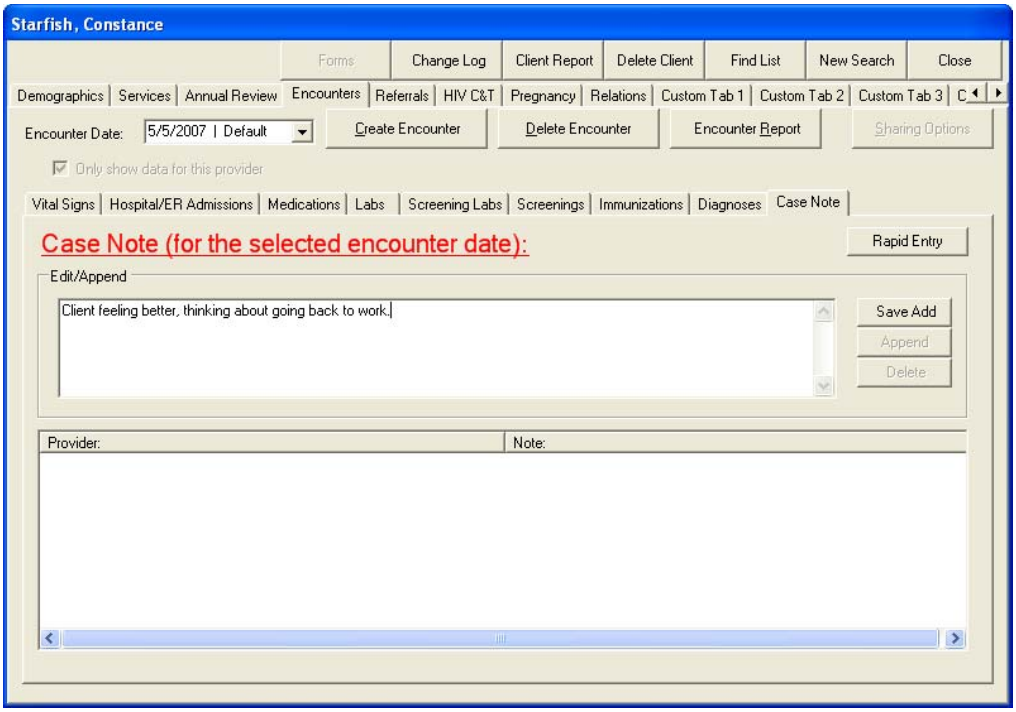
   There are often cases where a client has either been vaccinated prior to entering your care (hepatitis, pneumovax) or has already been exposed and requires no vaccination. In these cases you would select “NMI” under **Received** and “History of immunization” or “History of vaccination” under **Immunity**.
4. Click **Save**.

h) Diagnoses



1. Click on any condition or select one from the drop down menu.
2. Select diagnosis from the drop down menu.
3. Enter any comments.
4. Click **Save**.

i) Case Notes



1. Type a case note in the **Edit/Append** box and click **Save Add** when done.

Where do I go from here?

To customize service data entry fields, please see the Quick Start guide, “Customizing Tabs and Fields.” To add or modify clinical encounter data (add/edit test data, etc.), please see the Quick Start guide, “Customizing Clinical Data.”