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 #5:
Customizing Clinical Data

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 must have the appropriate user privileges to access and change clinical settings.

- You should have at least one client entered in the system so you can see how your customized clinical data will look.

Customizing Clinical Data

CAREWare comes prepackaged with the most common HIV-related tests and medications. You can add or change these with certain exceptions, such as tests whose value ranges have been preset by HRSA. We'll get into these exceptions below.
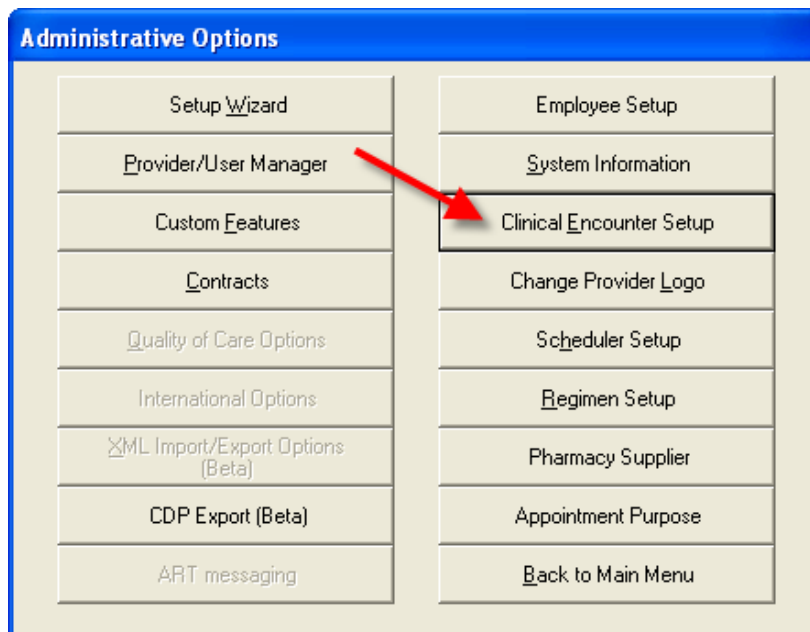
1. Log into CAREWare. If you have administrative privileges and are asked to choose between Central Administration and Provider ("Default" until you change the name), log in as a Provider.
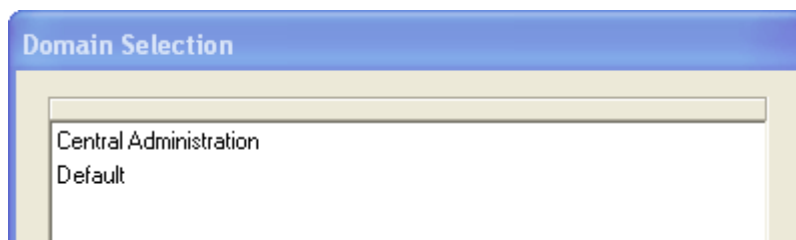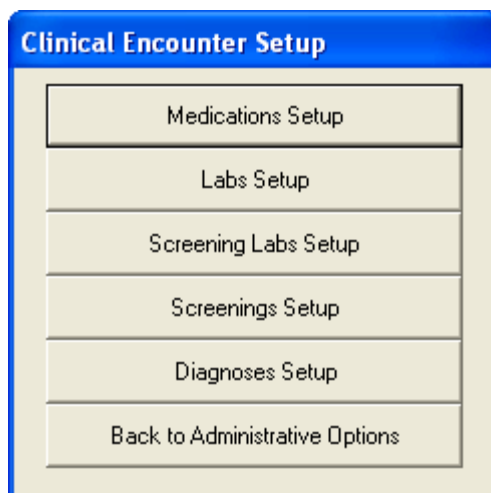

2. Select **Administrative Options** from the main menu.
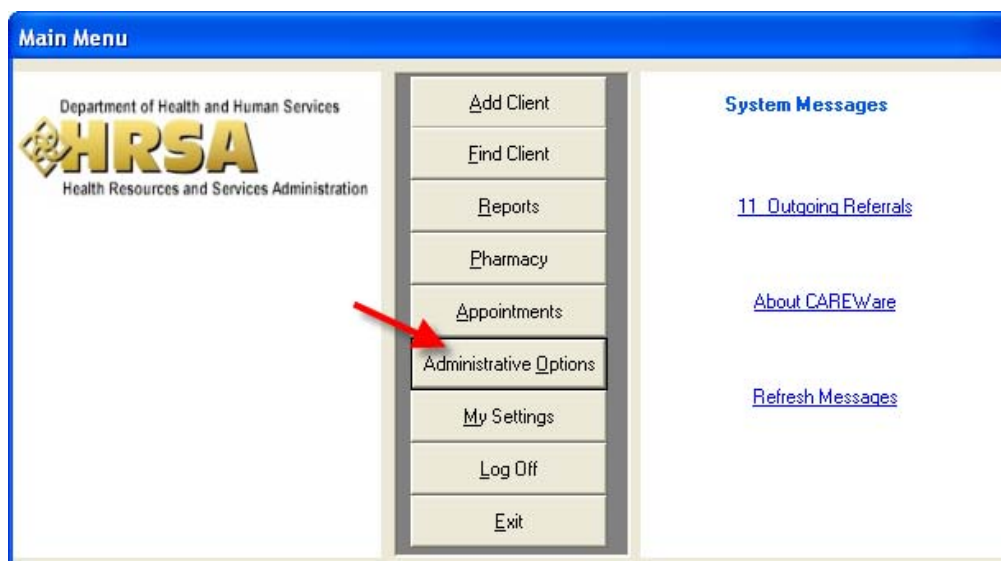
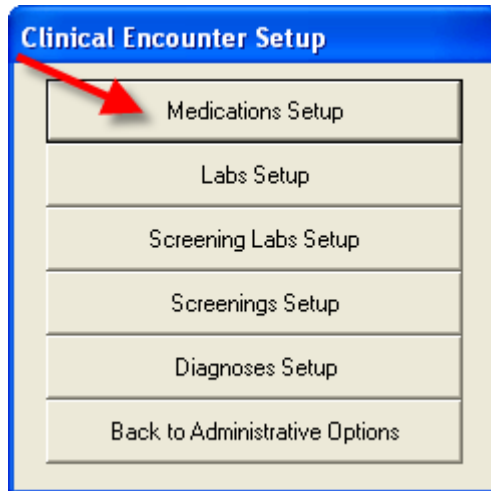3. Select **Clinical Encounter Setup** from the Admin Options menu.

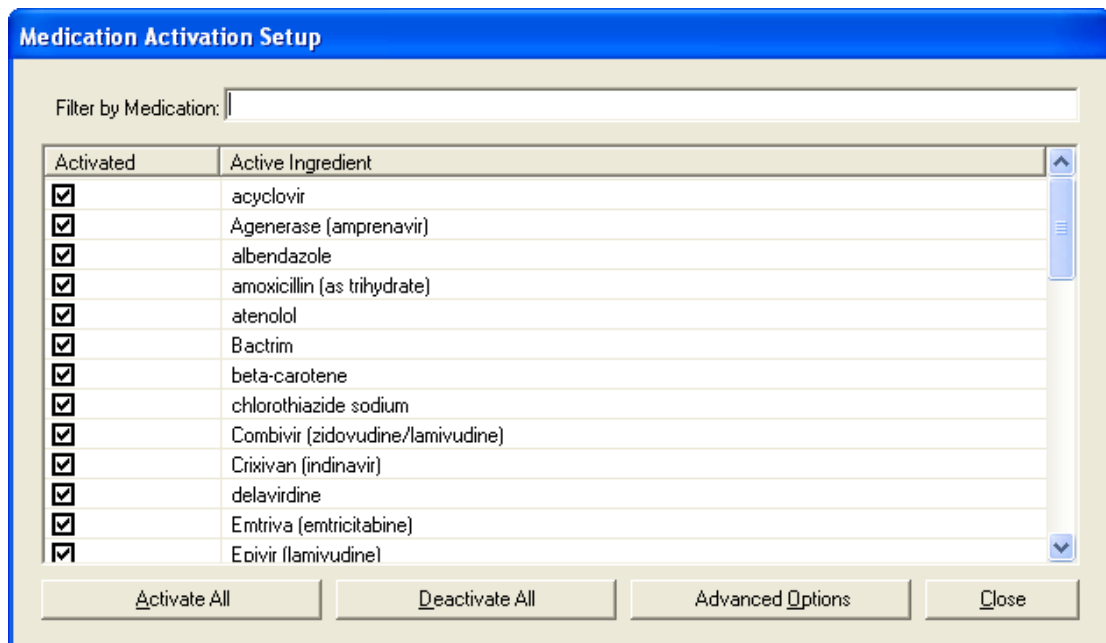4. Select the appropriate clinical information setup.

Medications Setup
Adding a medication to the active list

1. From the **Clinical Encounter Setup** menu, select **Medications Setup**.



2. The **Medications Setup** window will open.

From this window, you may **activate** or **deactivate** any medication. By doing this, you are modifying the list of meds available for data entry. You may wish to deactivate a medication that has been recalled or which you are no longer prescribing so that it can't be accidentally entered into a client's record. **Deactivating a medication does not remove the medication from the database, or from the records of clients who have received it.** It only alters whether or not the med is available to the data entry person.
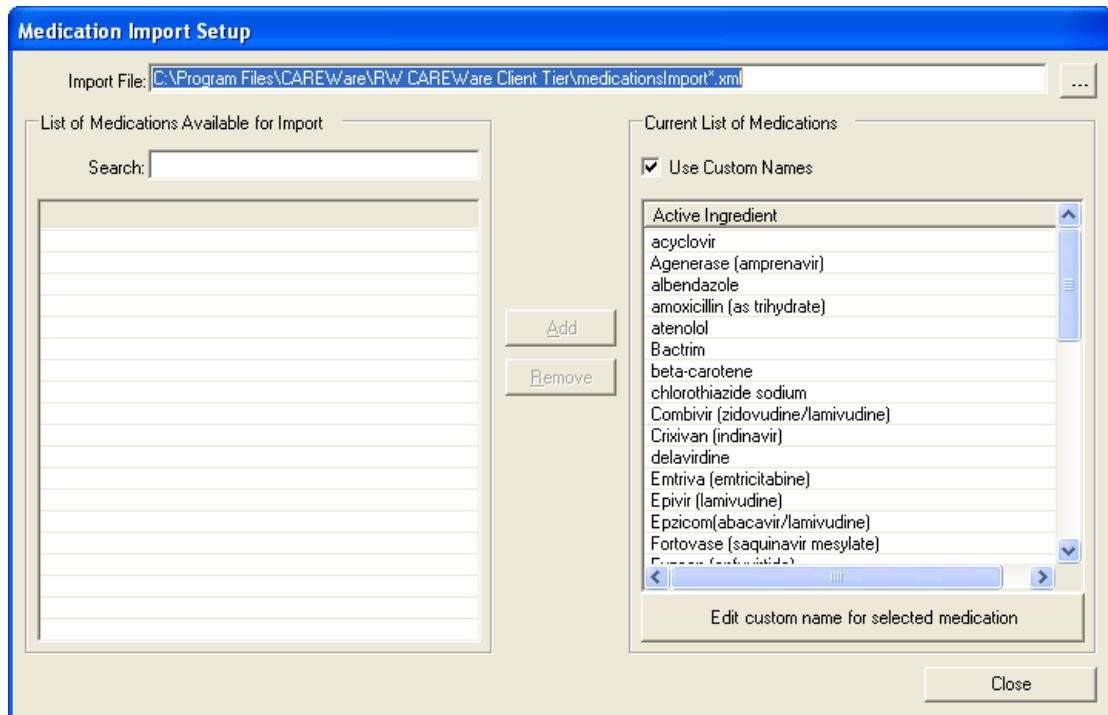
Use the check box ☑ next to the ingredient name to activate or deactivate it. You can also use the **Activate All** or **Deactivate All** buttons.

3.   To add a medication, click the **Advanced Options** button.
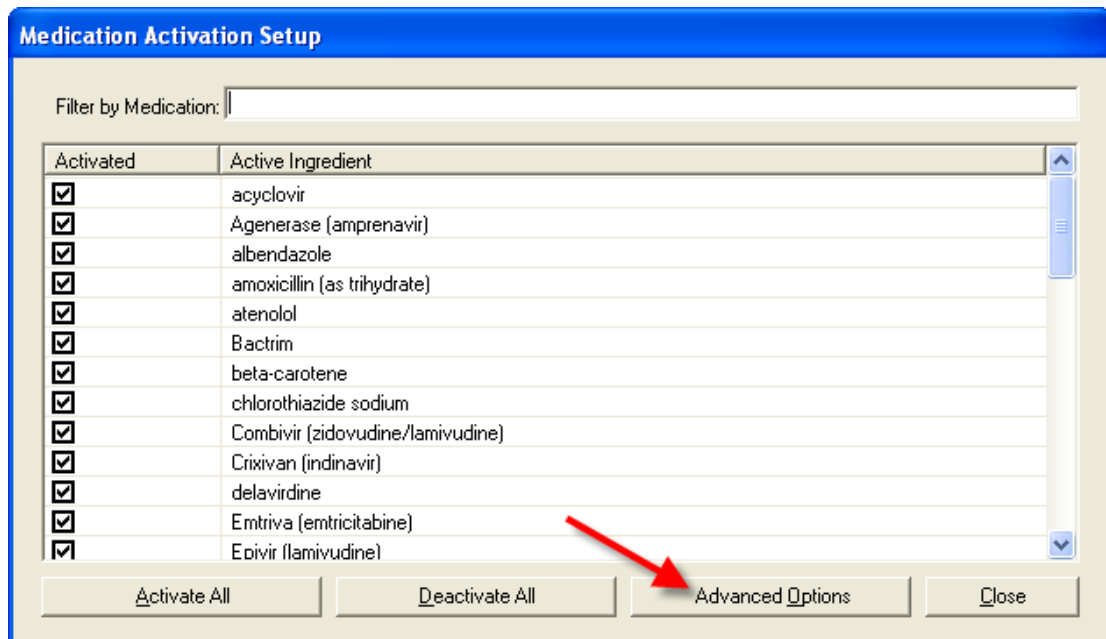
4.   You'll see a prompt related to the HRSA-created file that contains all available medication definitions.
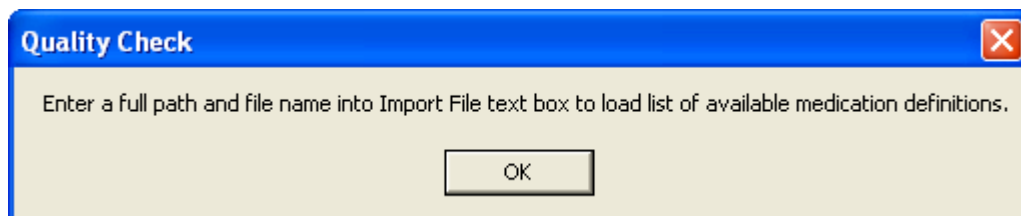

Click **OK** to continue.

The **Import File** is the HRSA-generated list of all available medication definitions. It is updated whenever the FDA approves a new HIV medication for use. You can download the most recent file from http://hab.hrsa.gov/careware.
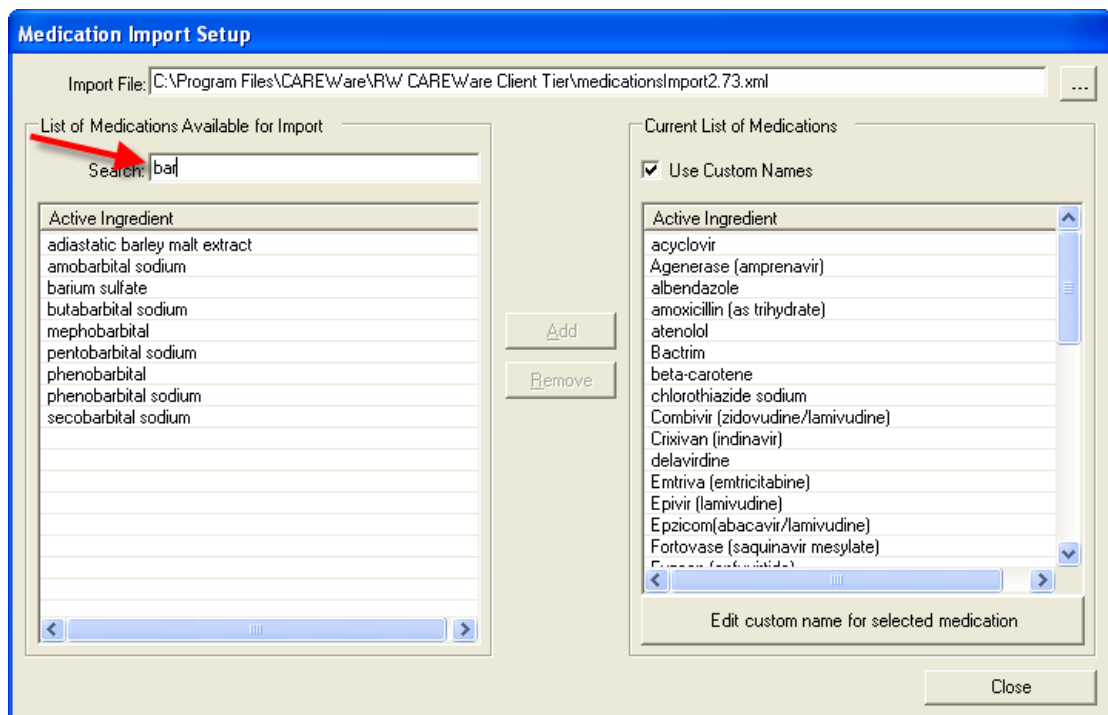
5.   Use the button next to the file name to find the most recent edition of the file. It will have a name like "medicationsImport2.73.xml." (The number will change as the file is updated.)
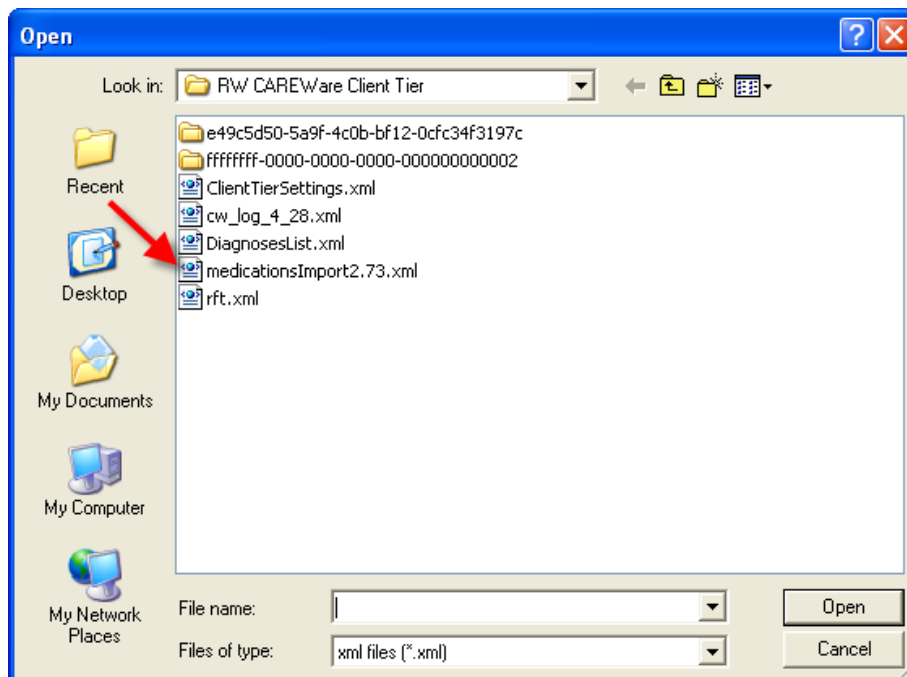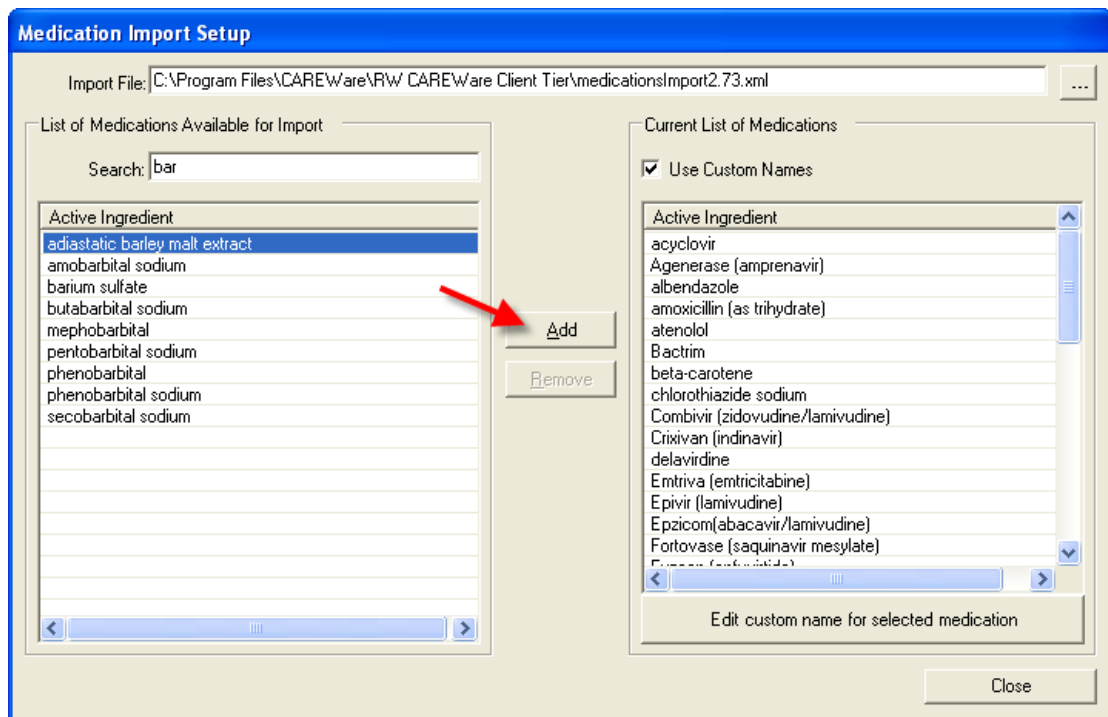
6.   Select the file name and click **Open**.
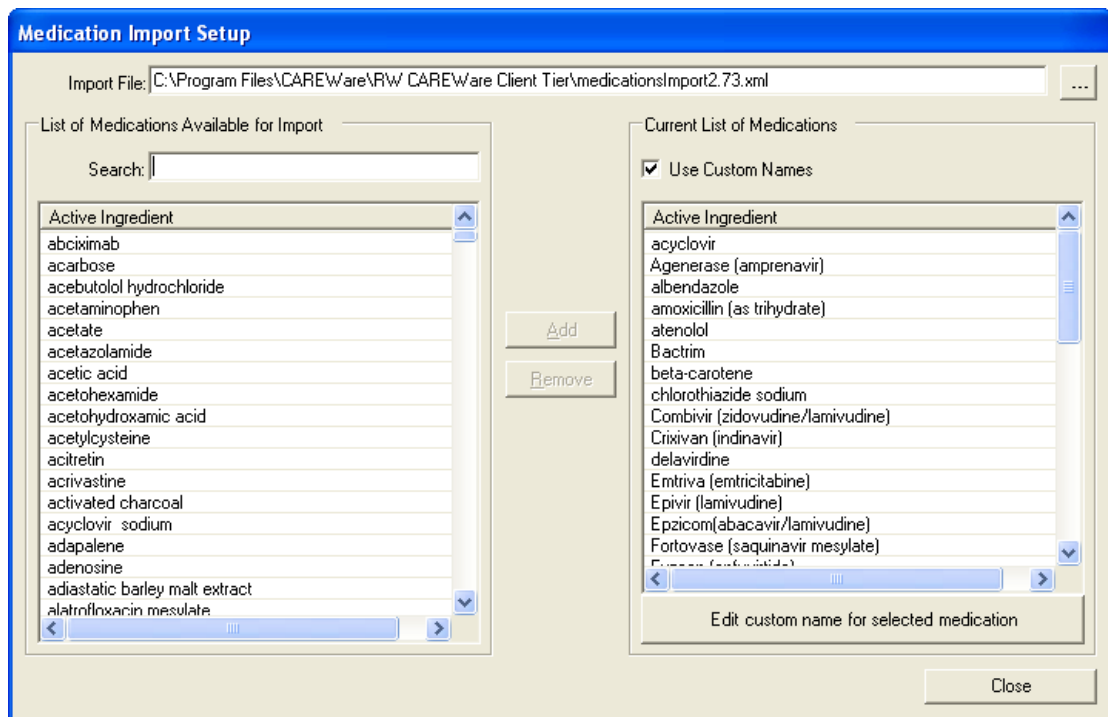
7.   The left hand side of the screen will populate with all available meds by their active ingredient. Use the **Search** box to narrow down the field by typing a few letters of the ingredient's name.

8.   Click to highlight the ingredient and click **Add**.

Medication Import Setup

Import File: C:\Program Files\CAREWare\RW CAREWare Client Tier\medicationsImport2.73.xml

List of Medications Available for Import

Search: bar

Active Ingredient
adiastatic barley malt extract
amobarbital sodium
barium sulfate
butabarbital sodium
mephobarbital
pentobarbital sodium
phenobarbital
phenobarbital sodium
secobarbital sodium

Add

Remove

Current List of Medications

☑ Use Custom Names

Active Ingredient
acyclovir
Agenerase (amprenavir)
albendazole
amoxicillin (as trihydrate)
atenolol
Bactrim
beta-carotene
chlorothiazide sodium
Combivir (zidovudine/lamivudine)
Crixivan (indinavir)
delavirdine
Emtriva (emtricitabine)
Epivir (lamivudine)
Epzicom(abacavir/lamivudine)
Fortovase (saquinavir mesylate)

Edit custom name for selected medication

Close

The ingredient will appear on the current list of medications.

# Using custom medication names

Custom medication names have two uses:

- To make data entry easier by using brand or other custom names (i.e. Fortovase instead of saquinavir mesylate).

- To allow you to "create" or add a medication not in the HRSA database. This becomes a necessity when manufacturers release combination therapies. Rather than entering the three ingredients separately in the client's record, you can take a medication from the database that will never be used (in our examples below, we'll use "adiastatic barley malt extract") and give it the brand name of the combination therapy.

  IMPORTANT: Do NOT add antiretroviral medications to the database on your own. These will be added by HRSA when the drug is approved by the FDA. A new medication database will be posted on our website for download.

You must have the **Use Custom Names** check box selected to see the custom names vs. the ingredient names.

1. Use the steps above to add "adiastatic barley malt extract" to the active ingredient list.

2. Click to highlight this ingredient in the active ingredients window pane and click **Edit custom name for selected medication**.
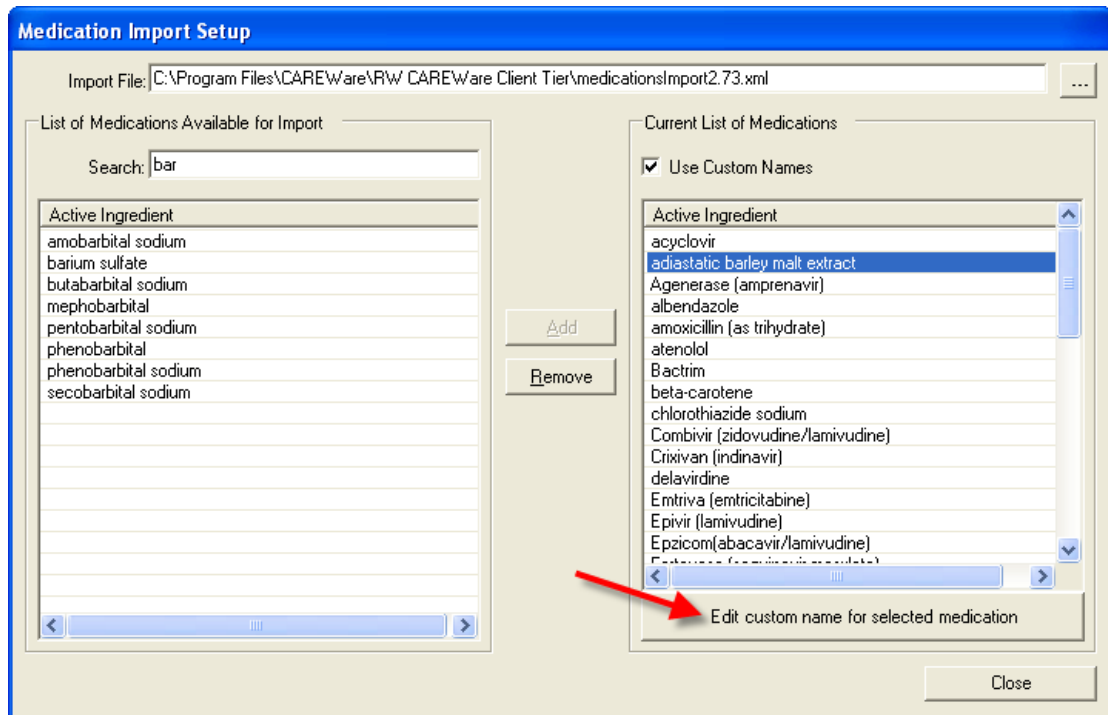
3. You'll be prompted to enter the custom name. Enter it and click **Save**.
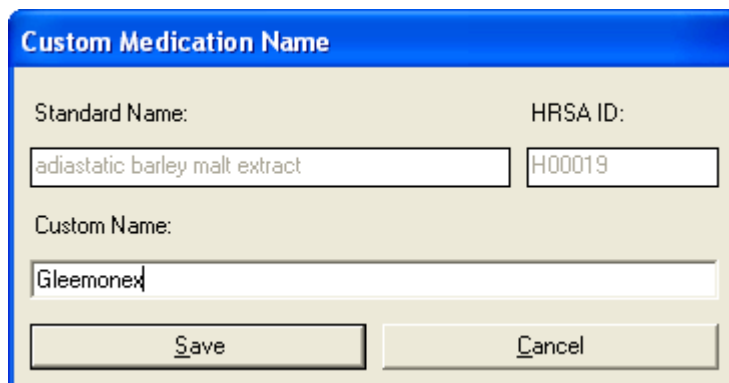
4. The medication will appear on the list and will be available for data entry.
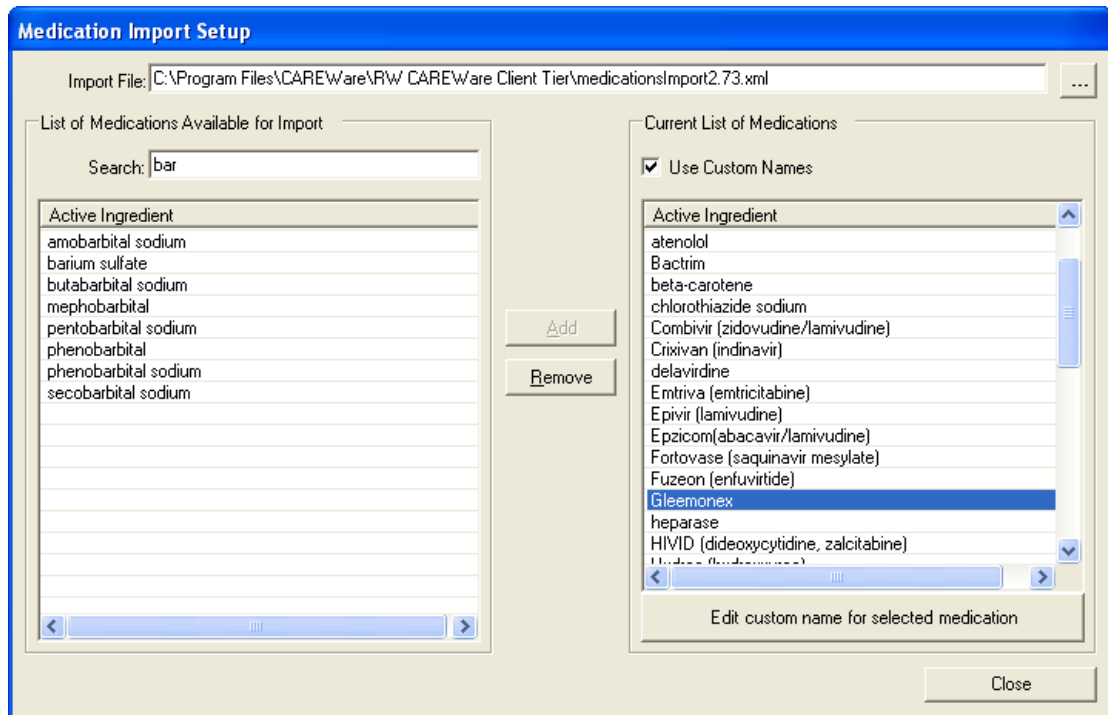
Creating or Altering Tests and Values

Clinical tests are divided in CAREWare into three categories.

- **Labs** are tests that return numeric values (to measure levels of CD4 cells, cholesterol, etc.).

- **Screening Labs** are tests that come back positive or negative, and may or may not use a titer to determine the level of antibodies in the system.

- **Screenings** are tests that are generally performed annually (TB, pap smear) to screen for certain conditions. A hepatitis C test, therefore, is a screening lab, whereas a viral load or total cholesterol level is a lab.

Modifying Labs

1. From the **Administrative Options** button, click the **Clinical Encounter Setup** button and then click **Labs Setup**.
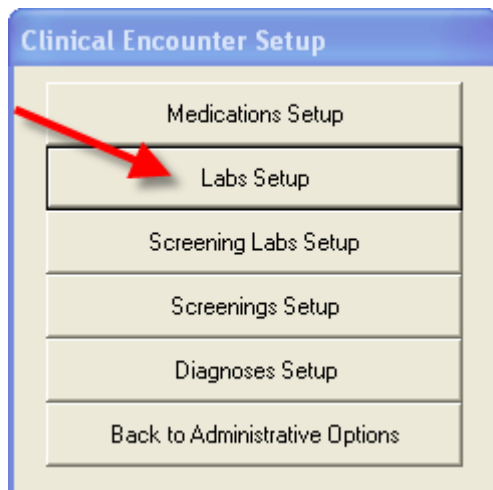
Labs can be activated or deactivated using the check box ☑ next to each lab. You can also Activate All or Deactivate All. **Deactivating a lab does not remove the lab from the database, or from the records of clients who have received it.** It only alters whether or not the lab is available to the data entry person.

2.   Click **Add/Edit** to make changes to the lab list.
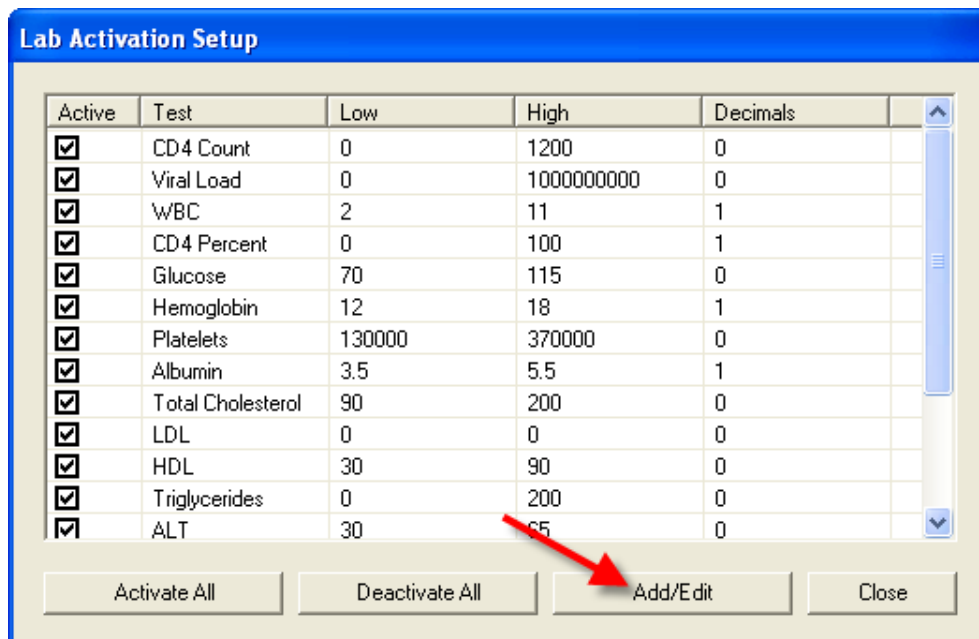
3.   Let's review the options on this menu:

CAREWare comes with certain HIV-related tests preconfigured. These tests are not "editable." i.e., you can't change the test name or units. **CD4 Count** is one of these. You can change the high and low ranges for these tests, which you may wish to do to prevent quality control warnings from popping up regularly.

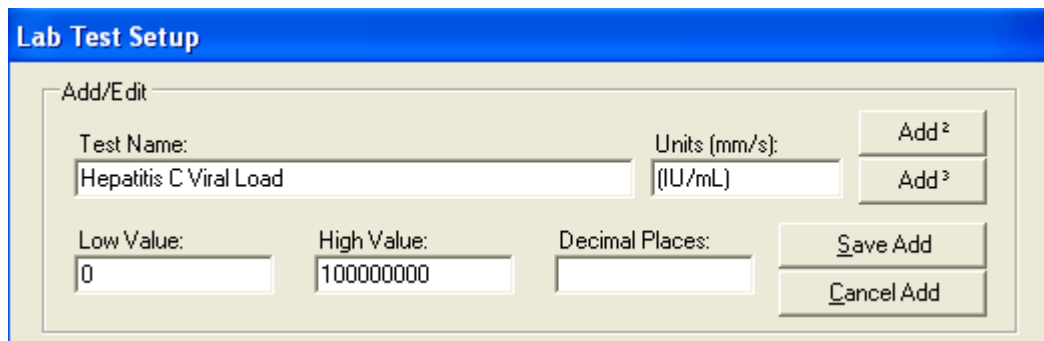4.   As an example, select **CD4 Count** and click **Edit**.

You'll see that the low and high value are available for modification. You may have a disproportionate number of clients with high (over 1200) CD4 counts. You can modify the high value to a greater number to prevent the popup warning that CAREWare will generate if you exceed the listed value:

Quality Check

Warning: the result you entered is higher than the expected maximum result: 1200
Do you wish to save the lab result anyway?

[Yes]   [No]
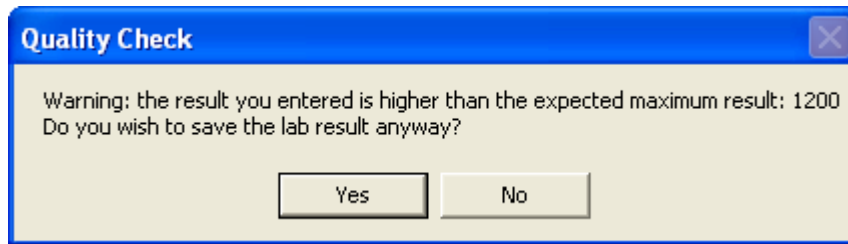
5.   Enter a higher value and click **Save Edit**.

Adding Labs

1.   From the **Lab Test Setup** window, click **Add**.

2.   Enter the name, units of measurement and high/low values for the test. Use the **Add^2** or **Add^3** buttons to add a superscripted 2 or 3 within your units of measurement definition, if necessary.
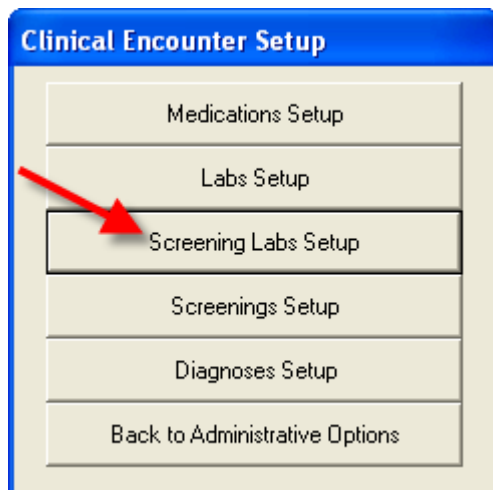
Lab Test Setup

Add/Edit

Test Name: Units (mm/s):   Add^2
Hepatitis C Viral Load   (IU/mL)   Add^3

Low Value: High Value: Decimal Places: Save Add
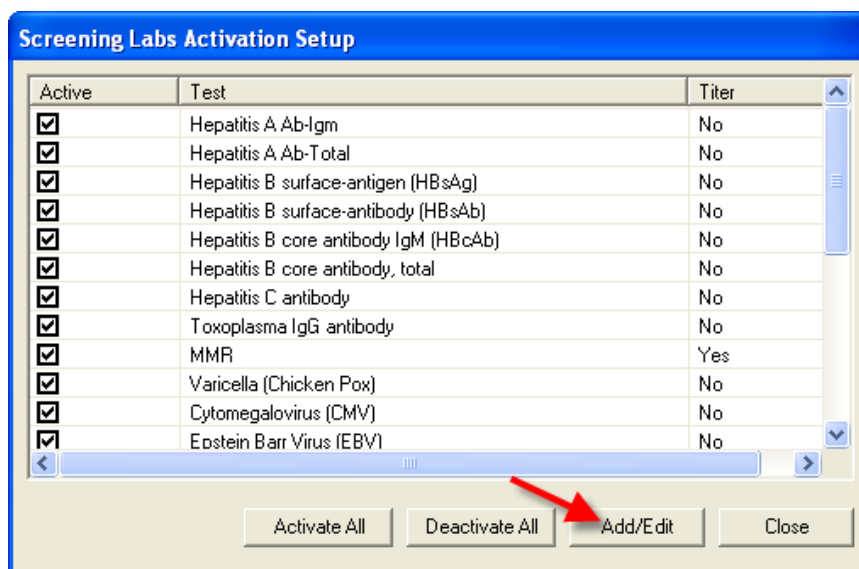0   100000000   Cancel Add

3.   Click **Save Add** when done.

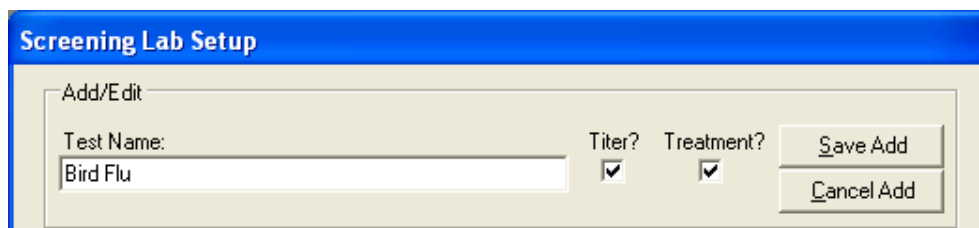# Modifying and Adding Screening labs

1.   From the **Administrative Options** button, click the **Clinical Encounter Setup** button and then click **Screening Labs Setup**.

2.   Use the check boxes to activate or deactivate a screening lab, or the **Activate All** or **Deactivate All** buttons.

3.   Select the **Add/Edit** button to add or edit a screening lab. Preinstalled, HRSA-defined screening labs cannot be modified.
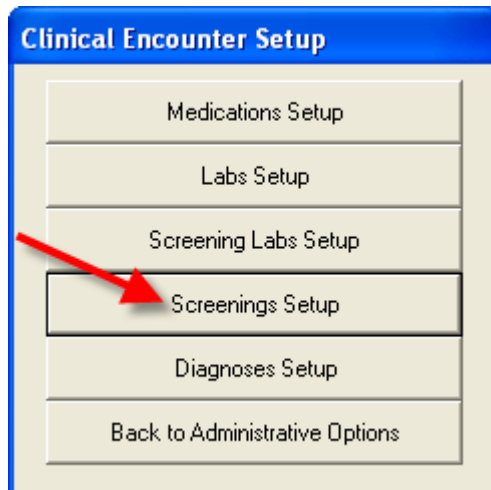

4.   Enter the name of the test, and use the check boxes to indicate whether a titer needs to be entered, and whether to activate the Treatment Yes/No option.
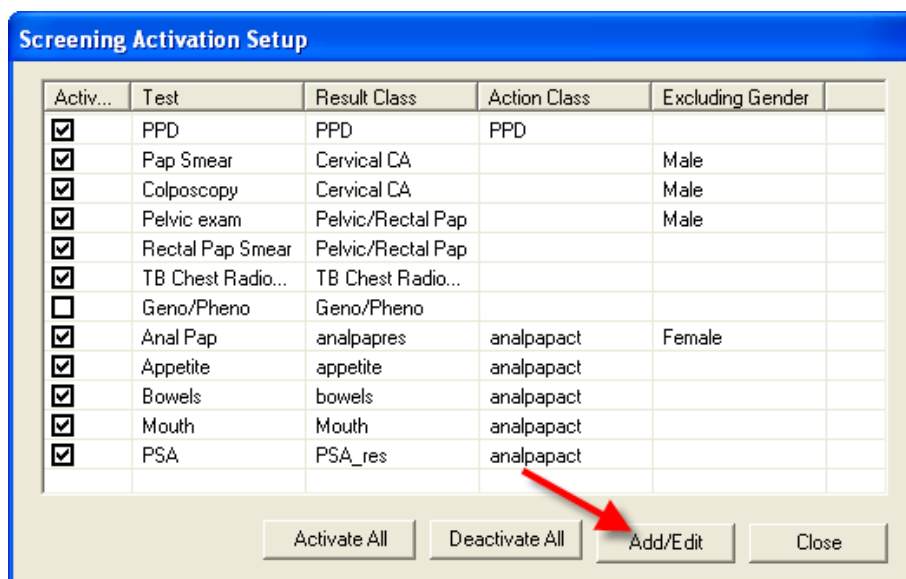
Modifying and Adding Screenings

1. From the **Administrative Options** button, click the **Clinical Encounter Setup** button and then click **Screenings Setup.**

2. Use the check boxes to activate or deactivate a screening lab, or the **Activate All** or **Deactivate All** buttons.

3. Select the **Add/Edit** button to make changes.

    As with labs and screening labs, there are some screenings that are HRSA-defined and cannot be edited. These appear with "No" in the Editable column on the screen below. You can edit any editable screening (including any you've created yourself) or add a new screening.

4. Click **Add** to create a new screening.

5. Enter the Test Name. In this case, we're going to add a mental health screening.

You'll need to select a **Result Class** and **Action Class**, or create new ones. A "Result Class" allows you to create a drop down list of possible results for a screening, and an "Action Class" allows you to create a drop down list of possible actions taken due to a specific result. For a mental health screening, we'll create new classes.

6. Click **Add** next to **Result Class**.

7. Enter a name for the Result Class. A mental health screening will require its own class, so we'll just name it "Mental health."

8.   Click **Add** to enter **Result Name** and **Result Code** for each outcome. The result code is "necessary but not important," i.e. the system uses it to track the result name, but it won't be used in data entry. Codes like 001, 002, etc. are best.

9.   Click **Close** when finished.

10.   Click **Add** next to the **Action Class**.

11.   Perform the same steps above to create the actions that can be taken based on the result.

12.   Click **Close** when done.

13.   Use the **Excluding Gender** box to define a test as appropriate or inappropriate for one gender or another (i.e., Pap Smear excludes males). This prevents data entry errors where a pap smear might accidentally be entered into a male client's record.

14.   Click **Save Add** to complete the screening addition.