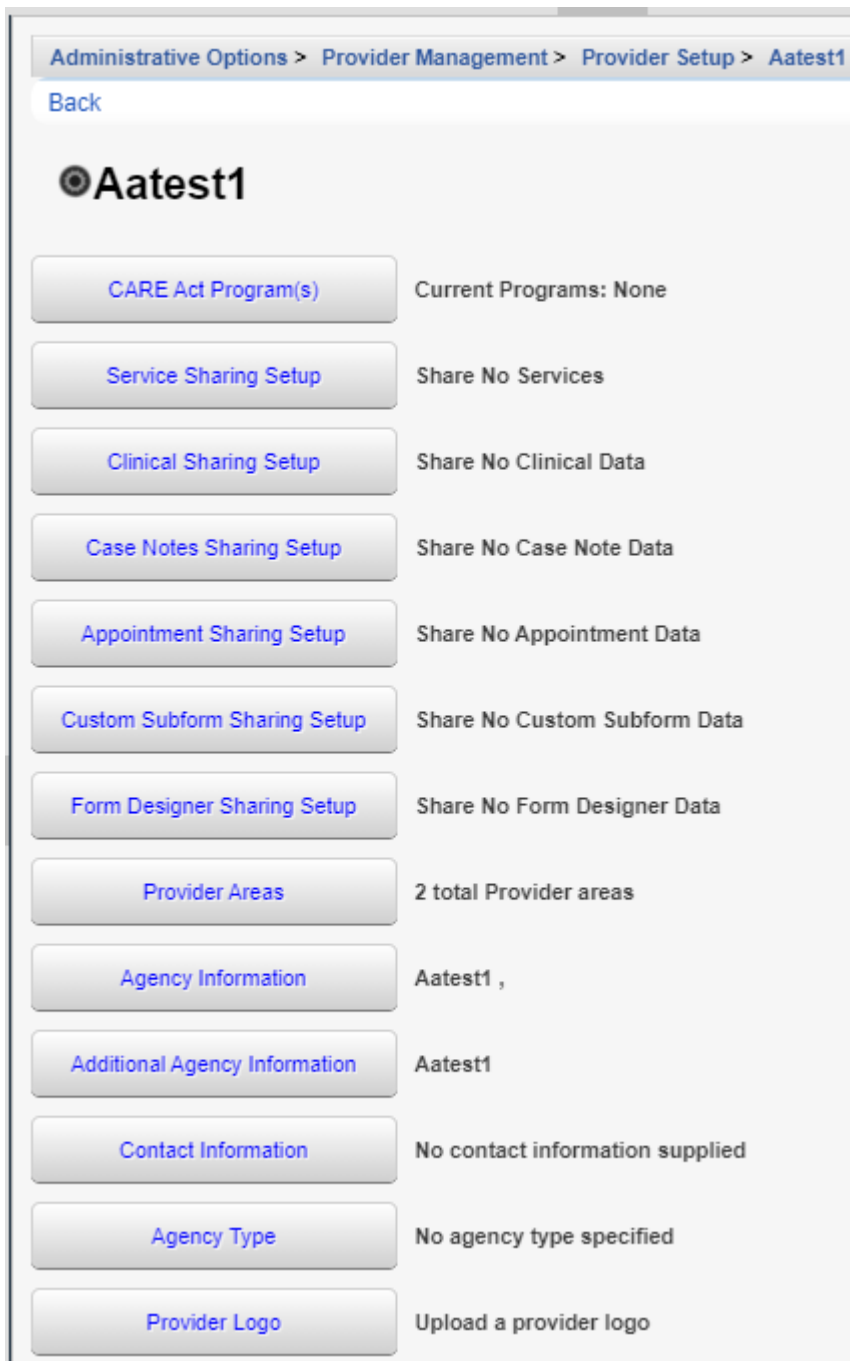


Provider Setup includes settings for Provider funding, data sharing, and agency information. Provider Setup should be completed prior to adding contracts and client data for new providers.

To complete Provider Setup, follow these instructions:

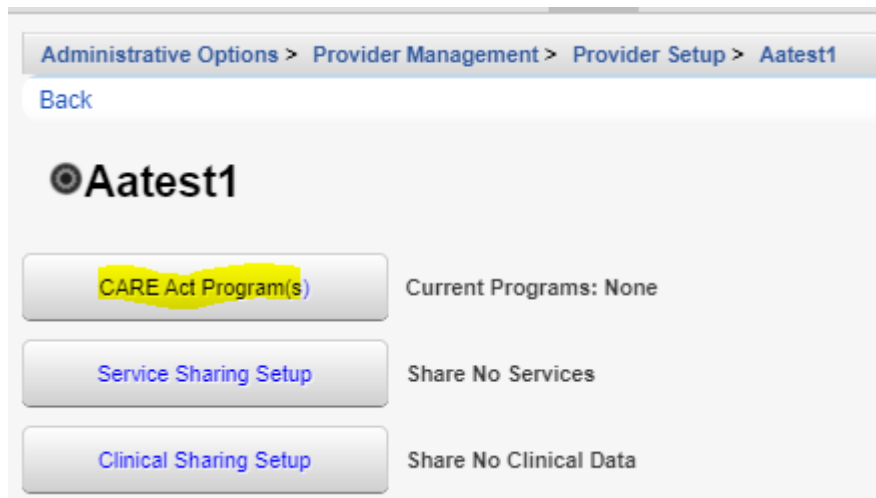
1. Log into Central Administration.
2. Click *Administrative Options*.
3. Click *Provider Management*.
4. Click *Provider Setup*.
5. Select a *Provider*.
6. Click *Manage Selected Provider*.



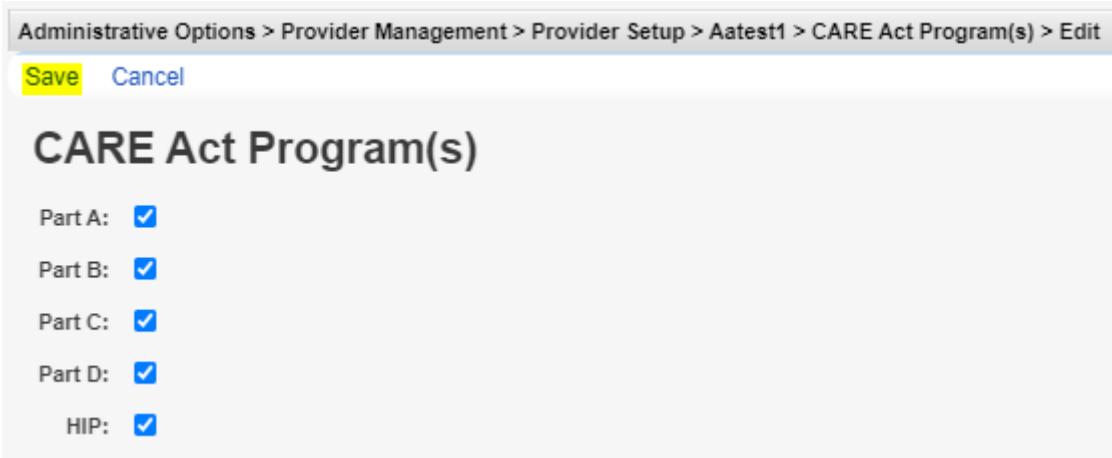
Setting	Status
CARE Act Program(s)	Current Programs: None
Service Sharing Setup	Share No Services
Clinical Sharing Setup	Share No Clinical Data
Case Notes Sharing Setup	Share No Case Note Data
Appointment Sharing Setup	Share No Appointment Data
Custom Subform Sharing Setup	Share No Custom Subform Data
Form Designer Sharing Setup	Share No Form Designer Data
Provider Areas	2 total Provider areas
Agency Information	Aatest1 ,
Additional Agency Information	Aatest1
Contact Information	No contact information supplied
Agency Type	No agency type specified
Provider Logo	Upload a provider logo

Set the program(s) for the *Provider* by selecting the *CARE Act Program(s)* by following these instructions:

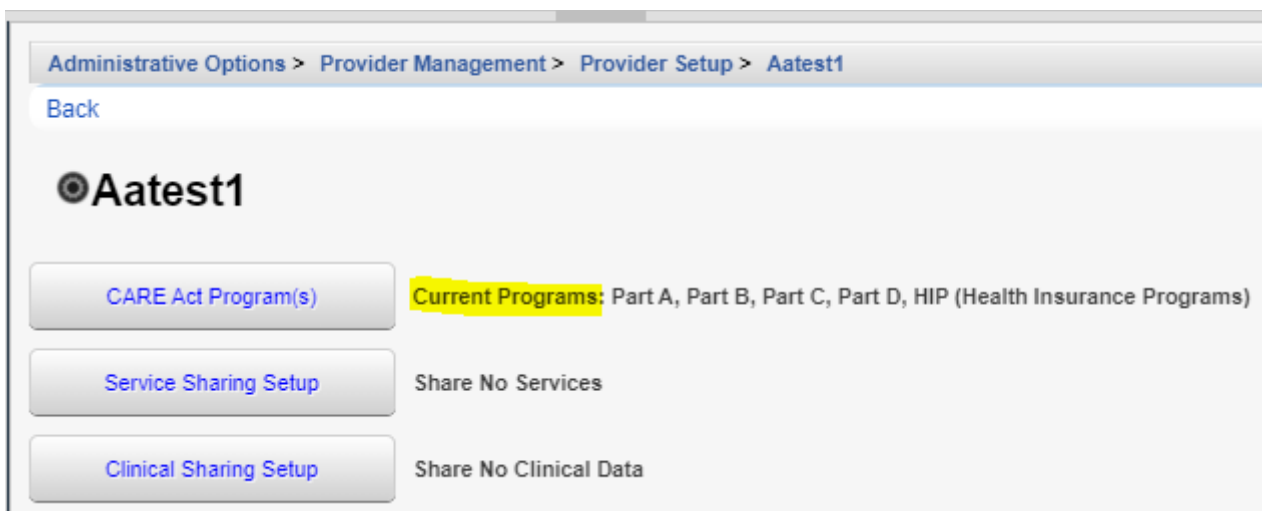
1. Click *CARE Act Program(s)*.



2. Click *Edit*.
3. Check each program.
4. Click *Save*.



The *Current Programs* are now listed for this provider.



Once the *CARE Act Program(s)* are set other *Agency Information* can be completed by following these instructions:

1. Click *Agency Information*.

A screenshot of a software interface showing a vertical list of menu items. The items are: 'Provider Areas' (with '2 total Provider areas' to its right), 'Agency Information' (highlighted in yellow), 'Additional Agency Information' (with 'Aatest1' to its right), 'Contact Information' (with 'No contact information supplied' to its right), 'Agency Type' (with 'No agency type specified' to its right), and 'Provider Logo' (with 'Upload a provider logo' to its right).

2. Click *Edit*.

A screenshot of the 'Agency Information' edit form. The breadcrumb trail at the top reads: 'Administrative Options > Provider Management > Provider Setup > Aatest1 > Agency Information > Edit'. Below the breadcrumb are 'Save' and 'Cancel' buttons. The form title is 'Agency Information'. The fields are: Name: Aatest1; Street Address: [empty]; City: [empty]; State: [dropdown menu]; County: [dropdown menu]; Area: [dropdown menu]; Zip: [empty]; Org ID#: [empty]; Grant #: [empty]; Region: [dropdown menu].

3. Complete each field.
4. Click *Save*.

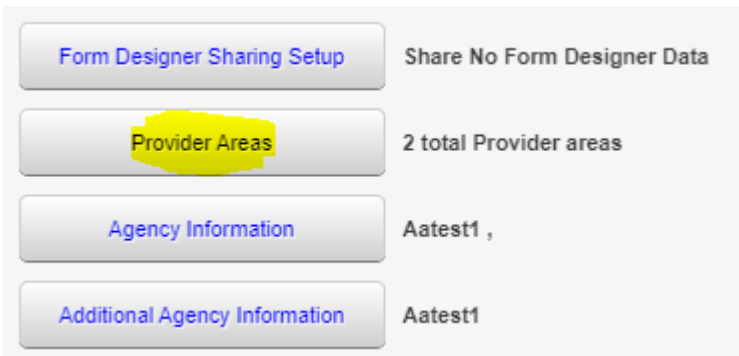
Note: *Area* are regions listed in *Provider Areas*. The region field is used to group providers together in an area when running *Performance Measures*.

A screenshot of the 'Selected Providers' table. The breadcrumb trail at the top reads: 'CAREWare Reports > Performance Measures > Evaluate Measures > Performance Measure Settings > Selected Providers'. Below the breadcrumb are 'Save', 'Select All', 'Clear Selection', 'Cancel', and 'Print or Export' buttons. The table has a search bar and the following data:

Select	Provider Name	Area
<input checked="" type="checkbox"/>	Kevin's Clinic	Region 2
<input type="checkbox"/>	Ryan White AIDS C	
<input type="checkbox"/>	Johns AIDS Service	

To add a *Provider Area*, follow these instructions:

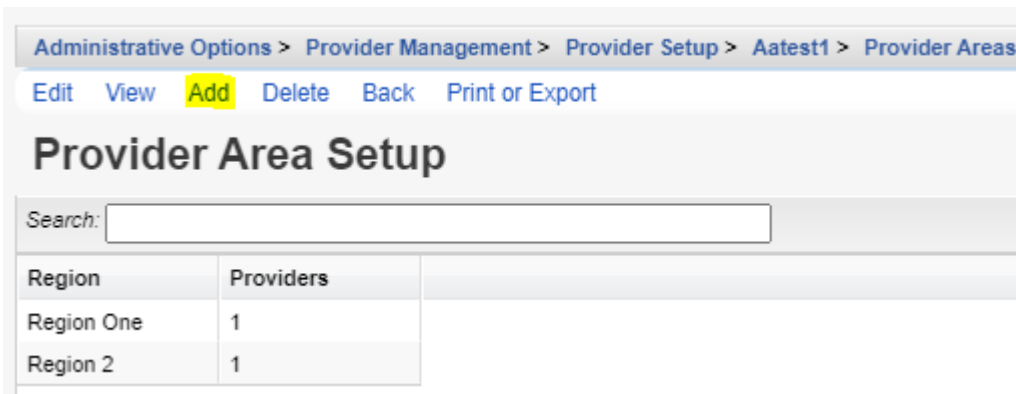
1. Click *Provider Areas*.



A screenshot of a configuration menu with four items. The second item, 'Provider Areas', is highlighted with a yellow box. To the right of each item is a status or count.

Form Designer Sharing Setup	Share No Form Designer Data
<b>Provider Areas</b>	2 total Provider areas
Agency Information	Aatest1 ,
Additional Agency Information	Aatest1

2. Click *Add*.

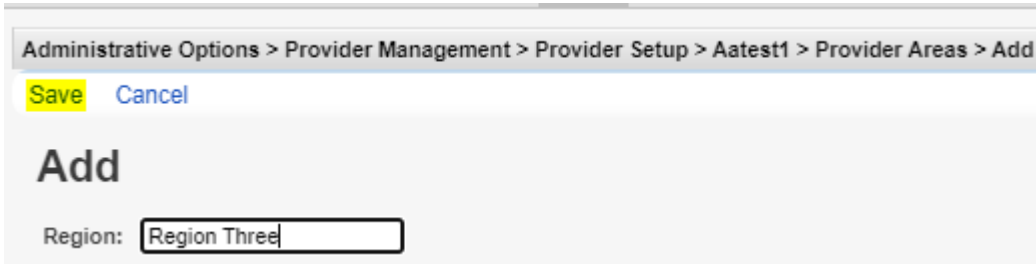


A screenshot of the 'Provider Area Setup' page. The breadcrumb trail is 'Administrative Options > Provider Management > Provider Setup > Aatest1 > Provider Areas'. Below the breadcrumb are links for 'Edit', 'View', 'Add', 'Delete', 'Back', and 'Print or Export'. The 'Add' link is highlighted. Below the links is a search box and a table with two columns: 'Region' and 'Providers'.

Region	Providers
Region One	1
Region 2	1

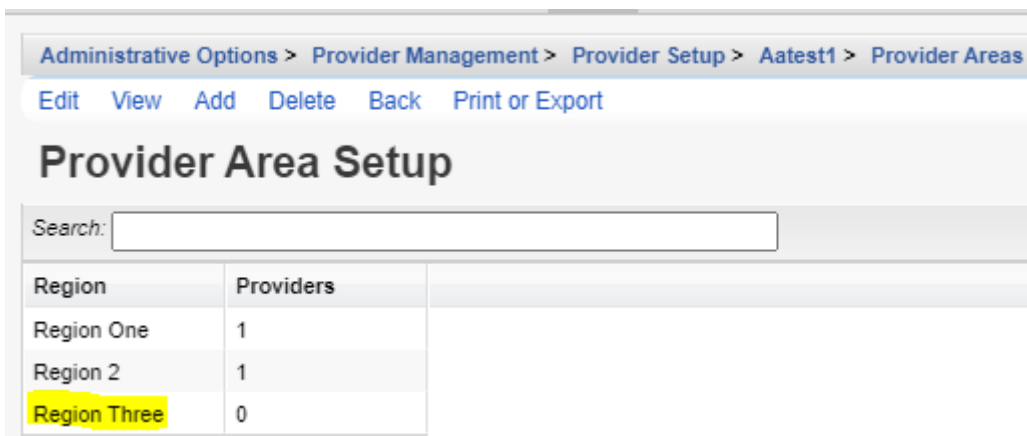
3. Enter a *Region* name.

4. Click *Save*.



A screenshot of the 'Add' form for 'Provider Area Setup'. The breadcrumb trail is 'Administrative Options > Provider Management > Provider Setup > Aatest1 > Provider Areas > Add'. Below the breadcrumb are links for 'Save' and 'Cancel'. The 'Save' link is highlighted. Below the links is a label 'Region:' followed by a text input field containing 'Region Three'.

The number of providers are listed next to each *Area*. That number increases once a *Provider* selects that region in the *Area* field for *Agency Information*.

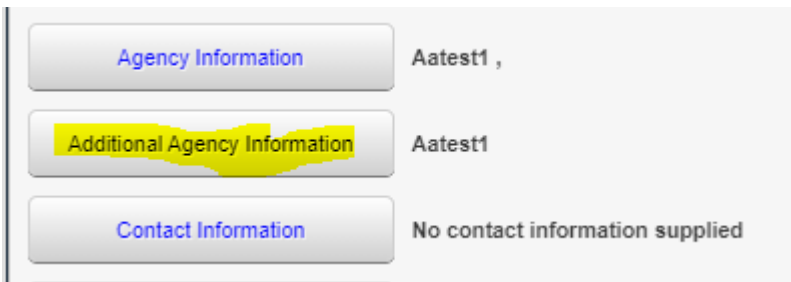


A screenshot of the 'Provider Area Setup' page after adding a new region. The breadcrumb trail is 'Administrative Options > Provider Management > Provider Setup > Aatest1 > Provider Areas'. Below the breadcrumb are links for 'Edit', 'View', 'Add', 'Delete', 'Back', and 'Print or Export'. The 'Add' link is highlighted. Below the links is a search box and a table with two columns: 'Region' and 'Providers'.

Region	Providers
Region One	1
Region 2	1
<b>Region Three</b>	0

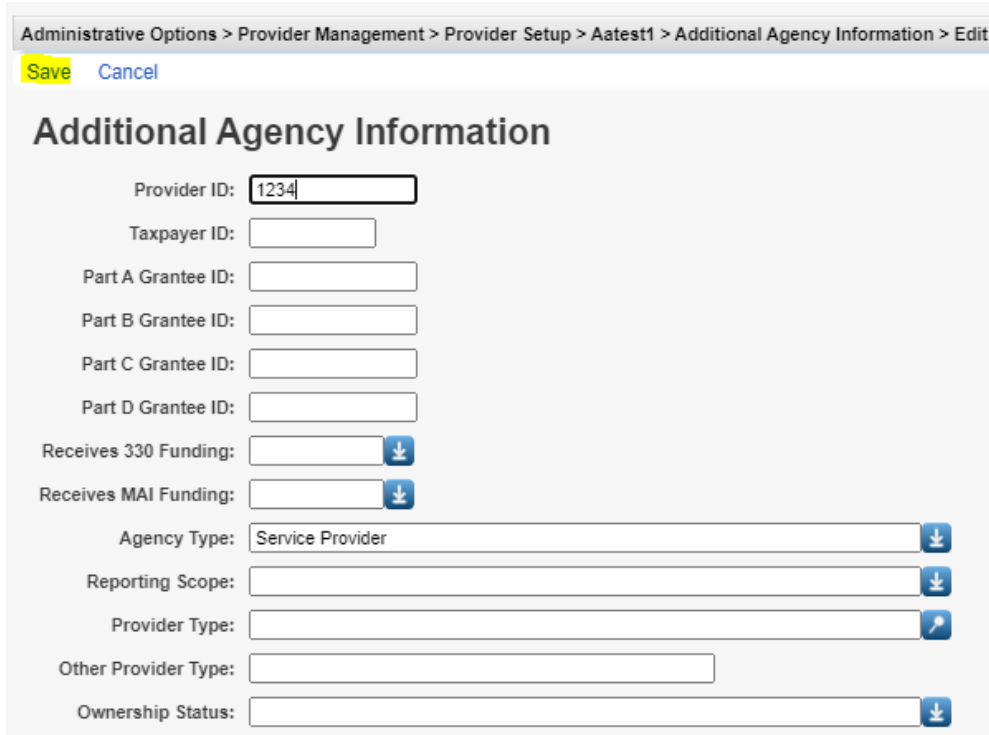
Next, complete any *Additional Agency Information* by following these instructions:

1. Click *Additional Agency Information*.



Agency Information	Aatest1 ,
Additional Agency Information	Aatest1
Contact Information	No contact information supplied

2. Click *Edit*.



Administrative Options > Provider Management > Provider Setup > Aatest1 > Additional Agency Information > Edit

Save Cancel

### Additional Agency Information

Provider ID:

Taxpayer ID:

Part A Grantee ID:

Part B Grantee ID:

Part C Grantee ID:

Part D Grantee ID:

Receives 330 Funding:  ↓

Receives MAI Funding:  ↓

Agency Type:  ↓

Reporting Scope:  ↓

Provider Type:  ↓

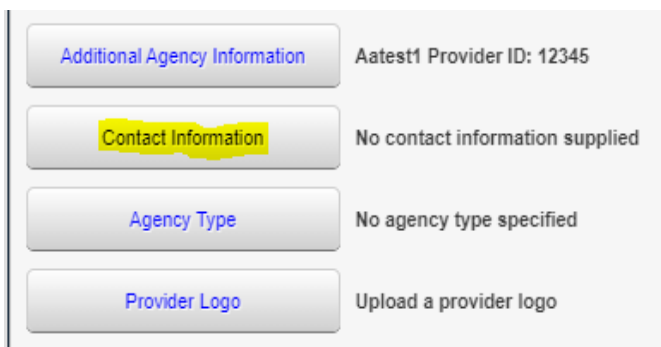
Other Provider Type:

Ownership Status:  ↓

3. Complete each field.
4. Click *Save*.

Follow these instructions to complete Contact Information:

1. Click *Contact Information*.



Additional Agency Information	Aatest1 Provider ID: 12345
Contact Information	No contact information supplied
Agency Type	No agency type specified
Provider Logo	Upload a provider logo

2. Click *Edit*.

Administrative Options > Provider Management > Provider Setup > Aatest1 > Contact Information > Edit

**Save** Cancel

### Contact Information

Contact Name:

Title:

Phone:

Fax:

Email:

3. Complete each field.
4. Click **Save**.

Next, select the *Agency Type* by following these instructions:

1. Click *Agency Type*.

<input type="button" value="Contact Information"/>	No contact information supplied
<input type="button" value="Agency Type"/>	No agency type specified
<input type="button" value="Provider Logo"/>	Upload a provider logo

2. Click *Edit*.

Administrative Options > Provider Management > Provider Setup > Aatest1 > Agency Type > Edit

**Save** Cancel

### Agency Type

An agency in which racial/ethnic minority group members make up greater than 50% of the agency's board members.:

Racial/ethnic minority group members make up greater than 50% of the agency's professional staff members in HIV direct services.:

Solo or group private health care practice in which greater than 50% of the clinicians are racial/ethnic minority group members.:

Other "traditional" provider that has historically served racial/ethnic minority patients/clients but does not meet the criteria above.:

Other type of agency or facility:

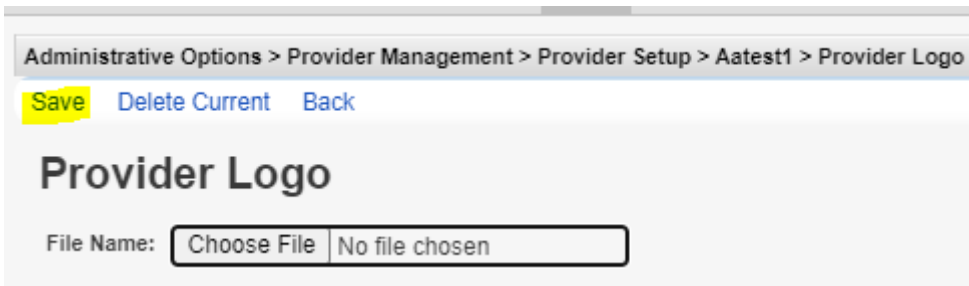
Total Paid HIV Staff in FTE's:

Total Volunteer HIV Staff in FTE's:

3. Check each *Agency Type* for this Provider.
4. Enter the number of Paid HIV Staff.
5. Enter the number of Volunteer HIV Staff.
6. Click **Save**.

Each Provider can have their Logo added to CAREWare by following these instructions:

1. Click *Provider Logo*.



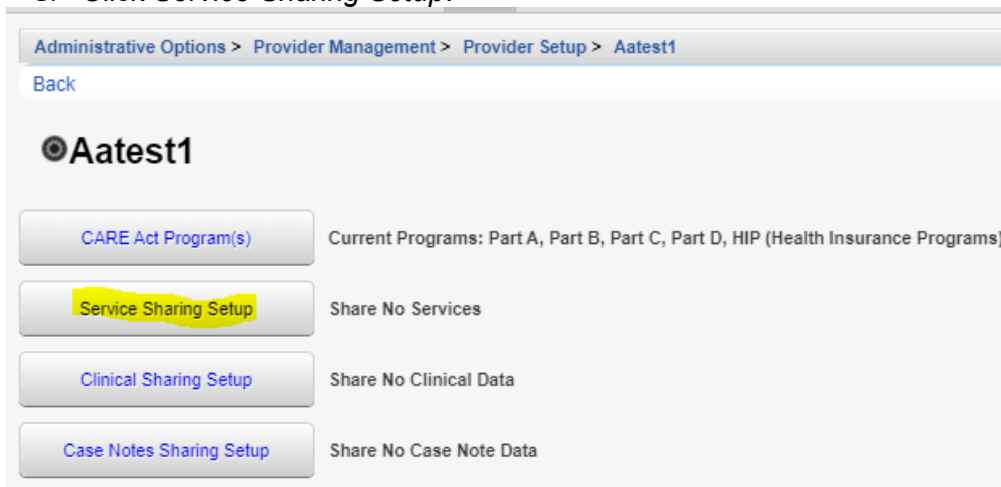
2. Click *Choose File*.
3. Select an image file.
4. Click *Open*.
5. Click *Save*.

If the *Provider Logo* needs to be changed repeat the instructions again to select a new logo The *Provider Logo* can also be deleted by clicking *Delete Current*.

Data sharing settings can be activated under *Provider Setup* by following these instructions:

Select a data type the provider needs to share with other providers. For instance to share services, click *Service Sharing Setup*.

1. Click *Service Sharing Setup*.



2. Click *Edit*.

Administrative Options > Provider Management > Provider Setup > Aatest1 > Service Sharing Setup > Edit

Save Cancel

## Service Sharing Setup

**Service Sharing level with other providers**

Level 1: Share all service records with all providers.:

Level 2: Share service records with providers who provide services in the same category.:

Level 3: Share no service records with any other providers.:

**Advanced Options**

Client-by-client sharing?:

Default agreement length (days):

Require an expiration date for sharing agreements?:

Release of information (ROI) sharing?:

3. Select the *Service Sharing Level*.
4. Select *Advanced Options* for this provider.
5. Click *Save*.

### Service Sharing Level with other Providers

- Level 1 – Turns on *Provider by Provider* sharing. The default setting allows sharing to all providers, however *Provider by Provider* sharing can be set to allow sharing only to specific providers.
- Level 2 – Sets data sharing options to use service categories to determine which providers service data is shared with. Client services that are subservices of the same service category are shared.
- Level 3 – This turns off data sharing for this provider.

### Advanced Options

- Client-by-client sharing? - This activates *Client by Client Sharing* requiring a sharing request and acceptance of that sharing request in the client record to begin sharing services.
- Default agreement length (days) – This sets an expiration date for data sharing.
- Require an expiration date for sharing agreements? - This makes the *Default agreement length (days)* a required value.
- Release of information (ROI) sharing? - This turns on the requirement for a ROI for client by client sharing.