

Welcome!

CAREWare Quick Start guides will walk you through the basics of setting up, managing and using the main CAREWare functions. It is intended for non-technical users who just need to get basic information in and out of CAREWare.

About This Guide #5: Customizing Clinical Data



PLEASE NOTE: The client data used in these manuals is purely fictional.

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 RSR)*
7. *Creating basic custom reports*
8. *Creating more advanced reports*
9. *User and System Administration*

For additional information:

Please refer to the **Frequently Asked Questions** page on the CAREWare programmers' website:

<http://www.jprog.com/wiki/>

Or contact the help desk at cwhelp@jprog.com.

Revision date: September 21, 2012

First Things First

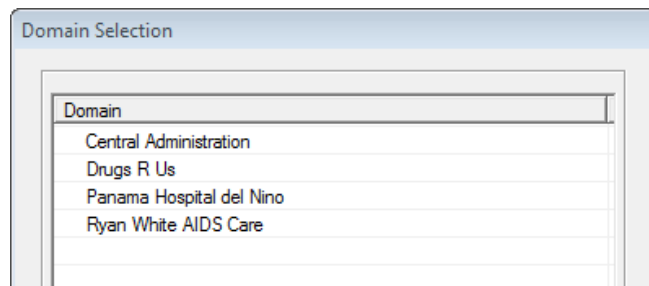
What do I need to get started?

- 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.

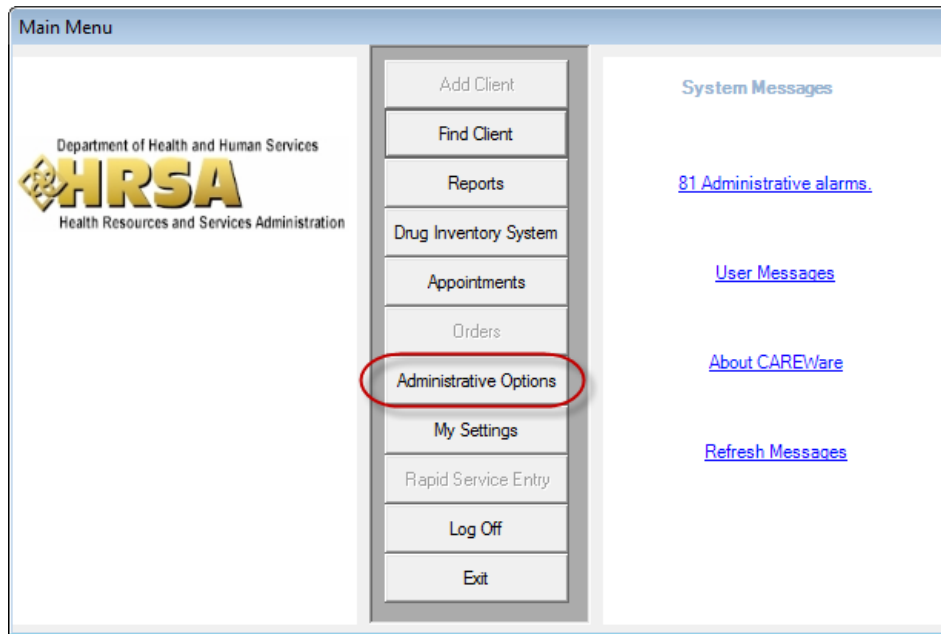
Customizing Clinical Data

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.

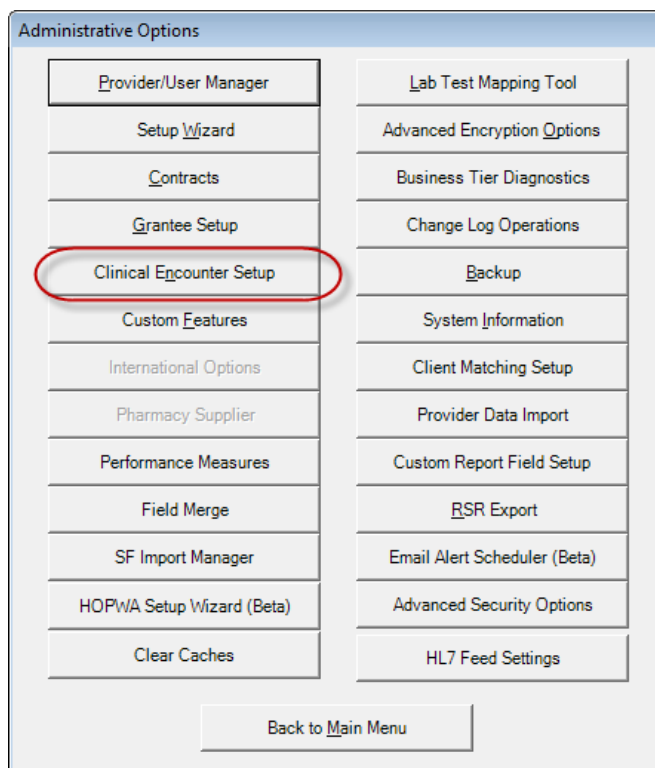
1. Log into CAREWare. If you have administrative privileges and are asked to choose between Central Administration and Provider ("Default" until you change the name), you may wish to log in as Central Admin to provide the most control over provider data permissions.



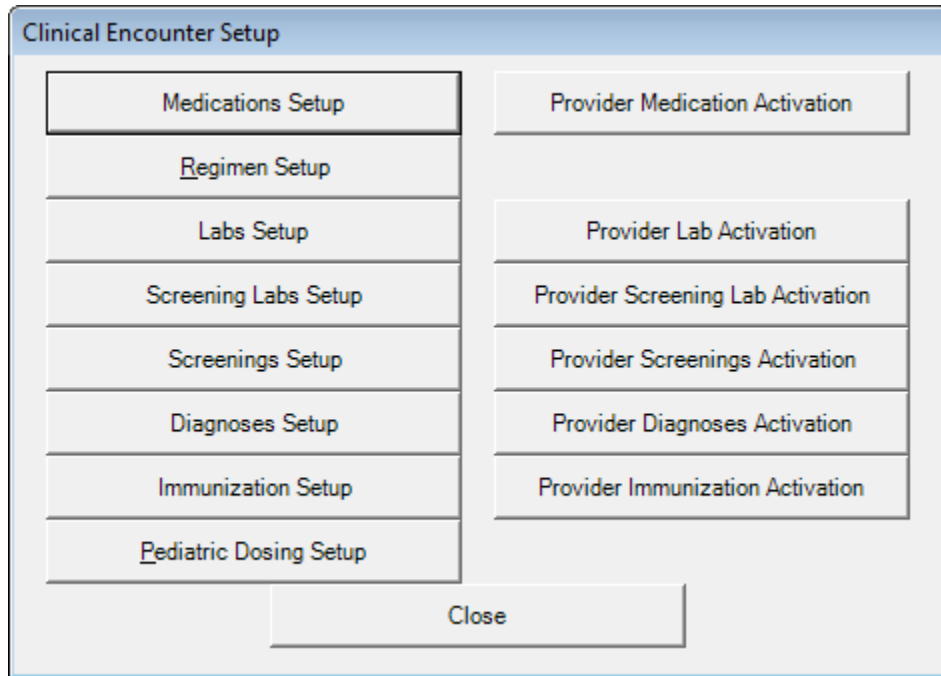
2. Select **Administrative Options** from the main menu.



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



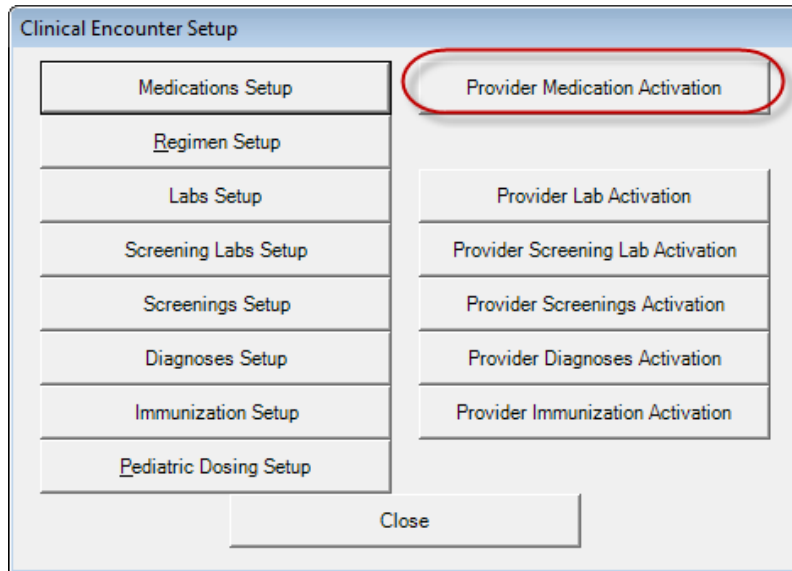
4. Select the appropriate clinical information setup.



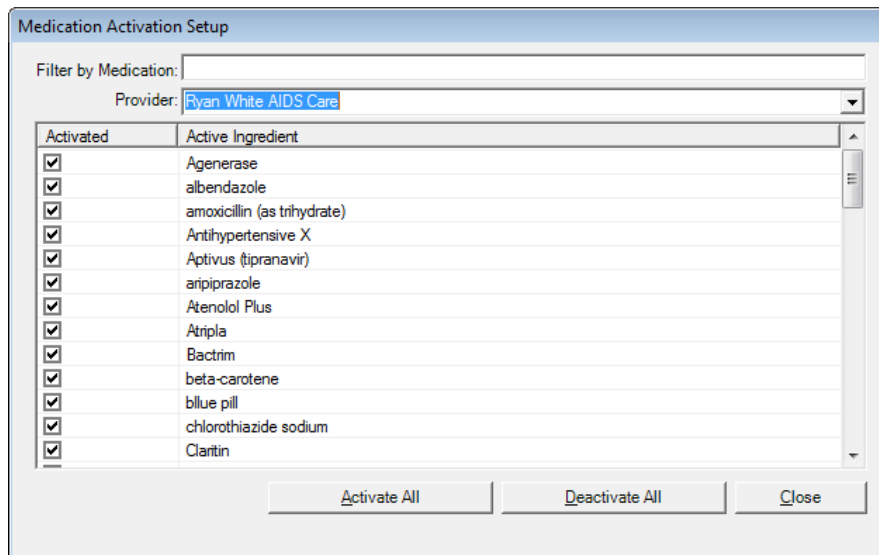
Medications Setup

Adding a medication to the active list

1. From the **Clinical Encounter Setup** menu, select **Provider Medication Activation**.

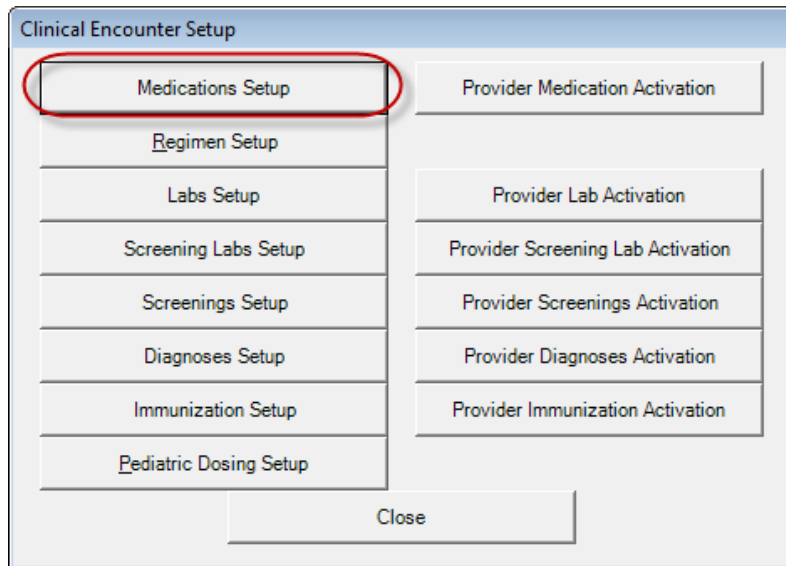


2. The **Medication Activation Setup** window will open. Use the **Provider** drop down to choose the provider for whom you are activating a medication.

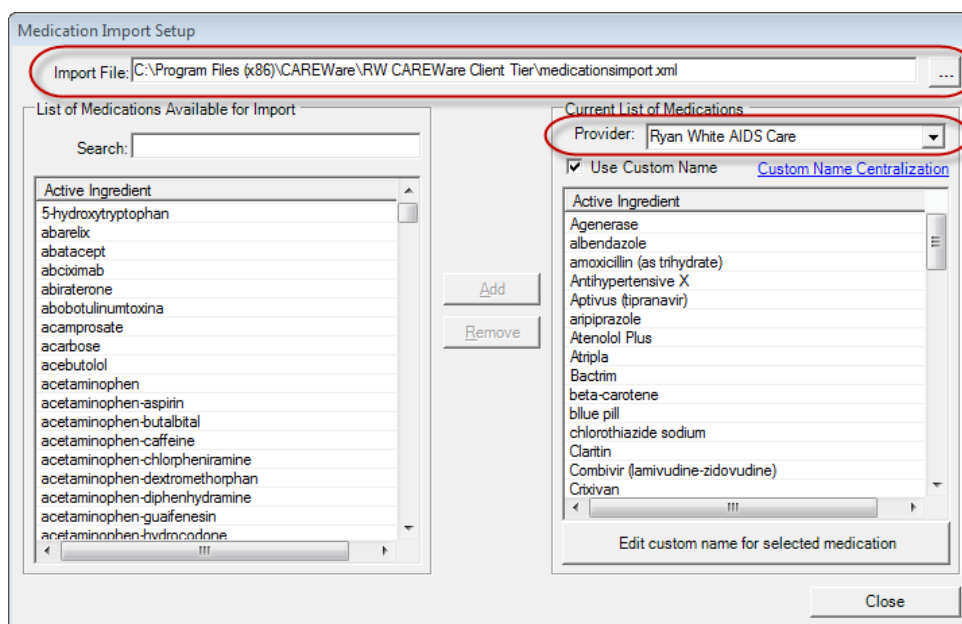


3. From this window, you may **activate** or **deactivate** any medication. By doing this, you are modifying the list of meds available for data entry. You may wish to deactivate a medication that has been recalled or which you are no longer prescribing so that it can't be accidentally entered into a client's record.


4. 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.
5. 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.
6. To add a medication, go back to the Clinical Encounter Setup careen and click the **Medications Setup** button.



7. You'll see the **Medications Import Setup** window. Select the **Provider** for whom you're adding a medication, then navigate to the **Import File** you'll be using to add a medication.



The medicationsimport.xml file will be found in the RW CAREWare Client Tier folder you specified when you set up CAREWare. The **Import File** is the HRSA-generated list of all available medication definitions. It is updated approximately every six months. You can download the most recent file from <http://hab.hrsa.gov/manageyourgrant/careware.html>.

8. The default location is specified, so if you have your Client Tier folder set up differently, use the  button next to the file name to find the most recent edition of the file. It will have a name like “medicationsImport.xml.”



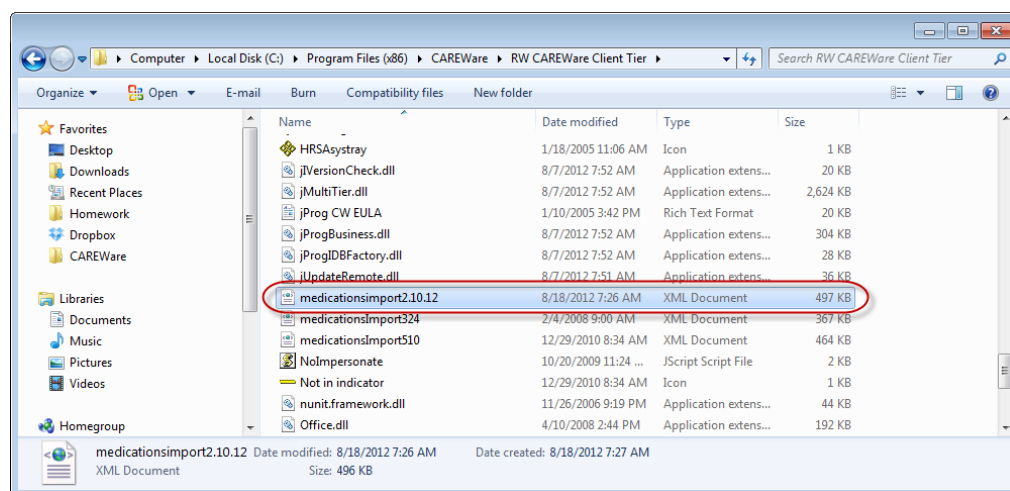
PLEASE NOTE: The medications file on the HRSA website may not contain the release date in the name. We recommend renaming it to add the release date (seen next to the file name on the CAREWare site), so you can quickly check to see if you have the most recent version.

Also, use caution when downloading as the ADAP medications export is just above the Ryan White medications list on the CAREWare website.

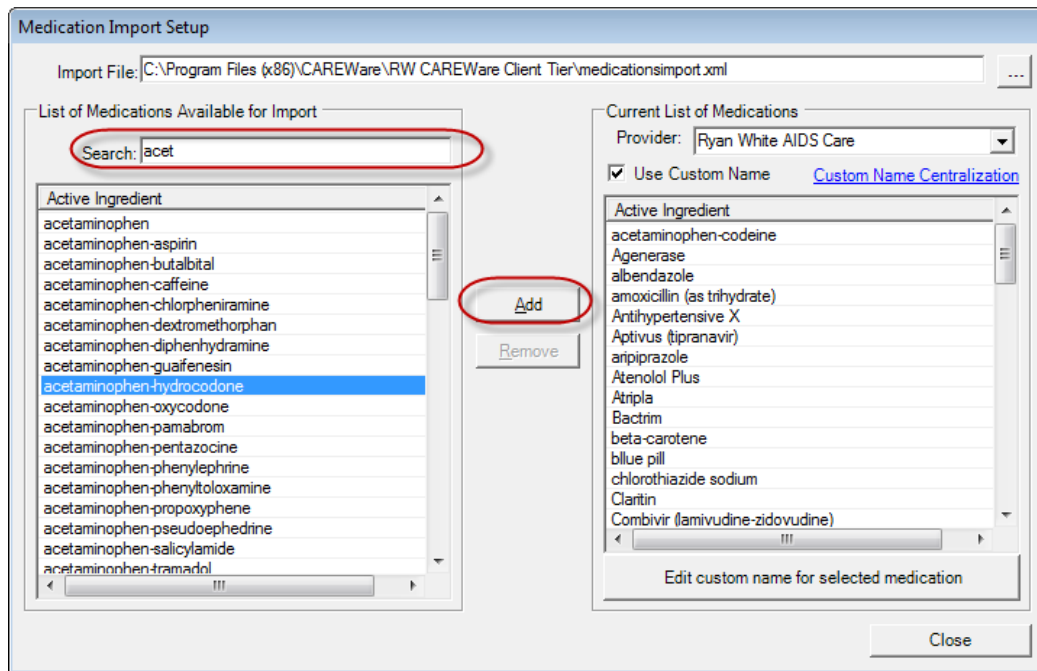
Medications Imports

- [ADAP Medications Import](#) (XML - 47 MB) Updated on 03-06-2012
 - [Medications Import](#) (XML - 489 KB) Updated on 02-10-2012
- Be sure to right-click file and select "Save As"**

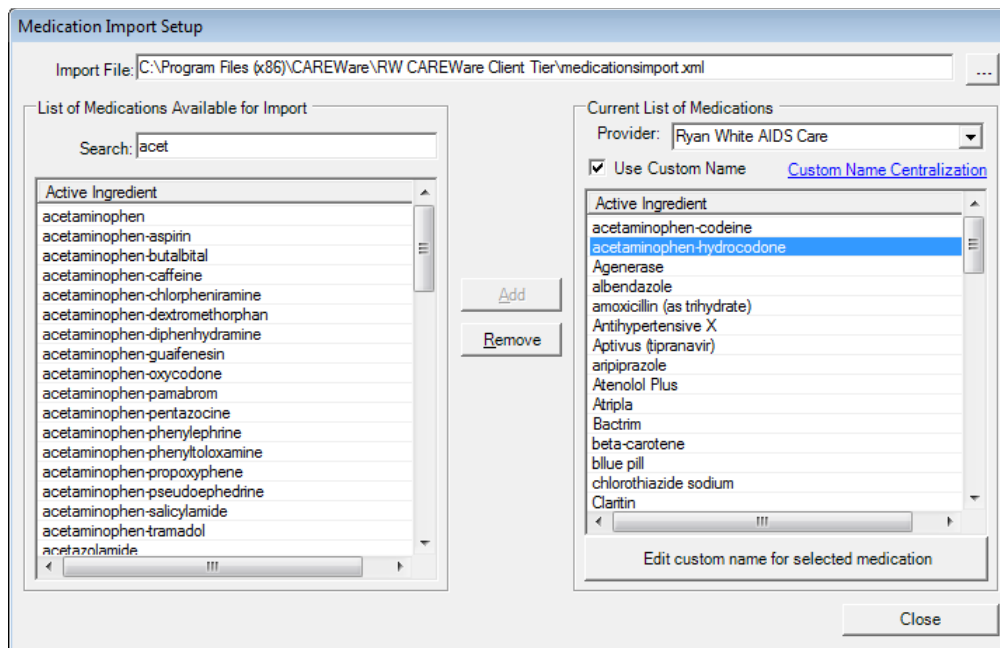
9. Select the file name and click **Open**. Seen here is a renamed file with the update date included:



- 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.



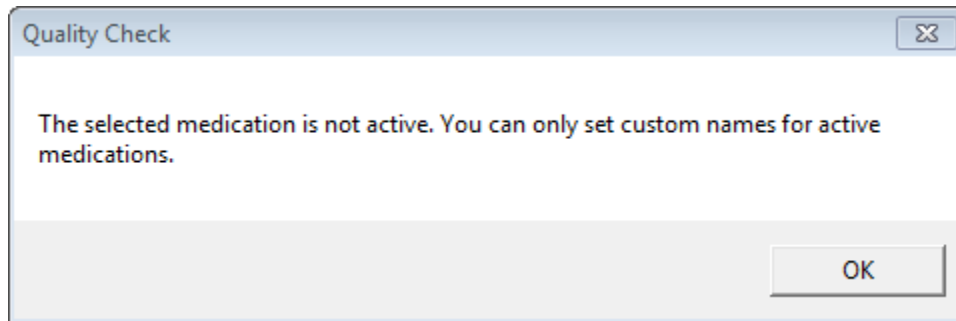
- Click to highlight the ingredient and click **Add**. The ingredient will appear on the current list of medications for this provider.





PLEASE NOTE: At the Central Admin domain, you will be able to import medications under Medications Setup, but will need to activate them under Provider Medication Activation. At the Provider domain, medications you import will be activated automatically.

12. If you are importing at the Central Admin domain, activate the med in the **Medications Activation Setup** window (via the **Provider Medication Activation** button on the **Clinical Encounter Setup** menu). Then you can return to this menu to edit the custom name. If you attempt to go directly to Edit custom name without activating the med, you'll receive an error message:



If you are importing at the Provider domain, you can go directly to editing the custom name.

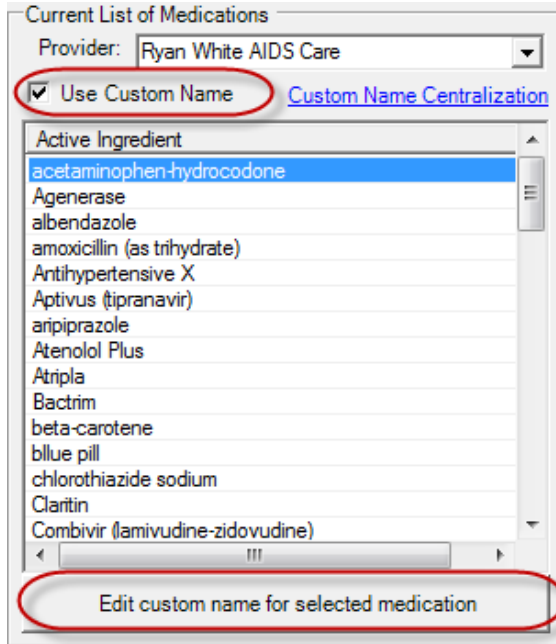
Using custom medication names

Custom medication names make data entry easier by using brand, generic or other custom names (i.e. Fortovase instead of saquinavir mesylate) onscreen.

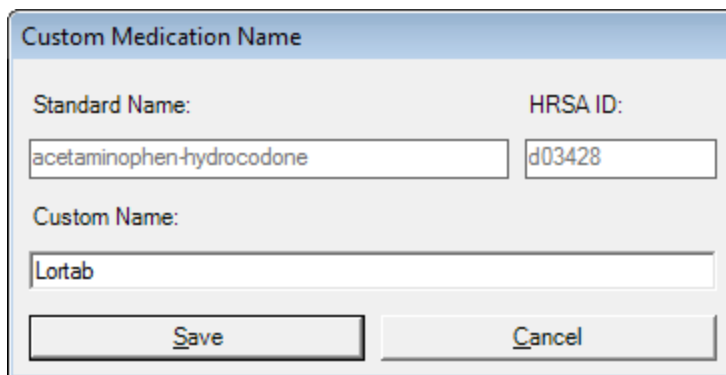


PLEASE NOTE: You must have the **Use Custom Names** check box selected to see the custom names vs. the ingredient names.

1. Click **Edit custom name for selected medication**.



2. You'll be prompted to enter the custom name. Enter it and click **Save**.



3. The medication will appear on the list and will be available for data entry listed by custom name.

Current List of Medications

Provider:

Use Custom Name [Custom Name Centralization](#)

Active Ingredient
indomethacin
Invirase
Isentress
isoniazid
Kaletra
Lexiva
Lortab
Neurontin (gabapentin)
Norvir
ofloxacin
pregablin
Prezista (darunavir)
pyrithione zinc
Rescriptor
Retrovir

Using custom name centralization

Custom medication names can be changed across all providers from the Central Admin domain. This helps eliminate spelling errors or other conflicts between custom names.



PLEASE NOTE: All providers must have the medication activated for this to be available.

1. Select a provider from the drop down list from which you want to extract the correct custom medication name. Make sure **Use Custom Name** is checked.
2. Click the **Custom Name Centralization** link from the **Medications Import Setup** window.

Current List of Medications

Provider: Ryan White AIDS Care

Use Custom Name [Custom Name Centralization](#)

Active Ingredient
indomethacin
Invirase
Isentress
isoniazid
Kaletra
Lexiva
Lortab
Neurontin (gabapentin)
Norvir
ofloxacin
pregablin
Prezista (darunavir)
pyrithione zinc
Rescriptor
Retrovir

Edit custom name for selected medication

3. On this screen, check all providers for whom you want to sync custom names. Under **Seed Provider**, enter the name of the “master” provider whose custom names you want to override the names used by the other agencies. (This also overrides blanks/no choice and creates a custom name for that medication.)

Custom Medication Name Centralization

Seed Provider:

Participating Providers: 3 / 3

↑ Provider:

- Drugs R Us
- Panama Hospital del Nino
- Ryan White AIDS Care

The following providers have medications that are active at one or more of the central group providers and do not have the same custom name. (HINT: Apply custom names from the current seed provider, then change the seed provider to one on this list. Then apply that provider's custom names, etc.):

3 / 3

↑ Provider	Medication	Custom Name
Drugs R Us	Atripla (efavirenz/tenofovir/...	Atripla
Panama Hospital del Nino	Atripla (efavirenz/tenofovir/...	
Ryan White AIDS Care	Atripla (efavirenz/tenofovir/...	Atripla

Results per page: << Prev Page 1 of 1 Next >>

- Click Apply Seed Provider Names. This will “true up” all custom names in the system for the checked providers.



PLEASE NOTE: This is a one time process. After custom names have been centralized, custom drug names can be renamed by ANY provider and will then be renamed for ALL providers.

Creating or Altering Tests and Values

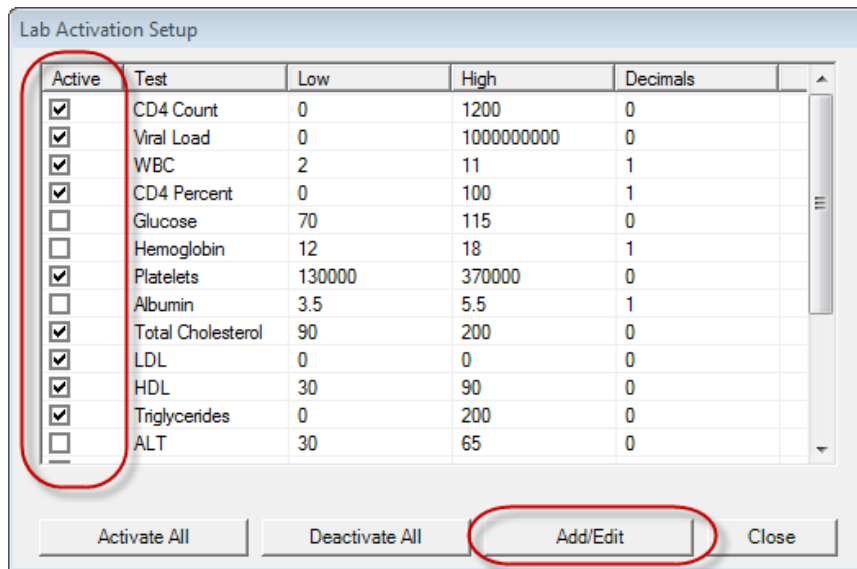
Clinical tests are divided in CAREWare into three categories.

- **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.



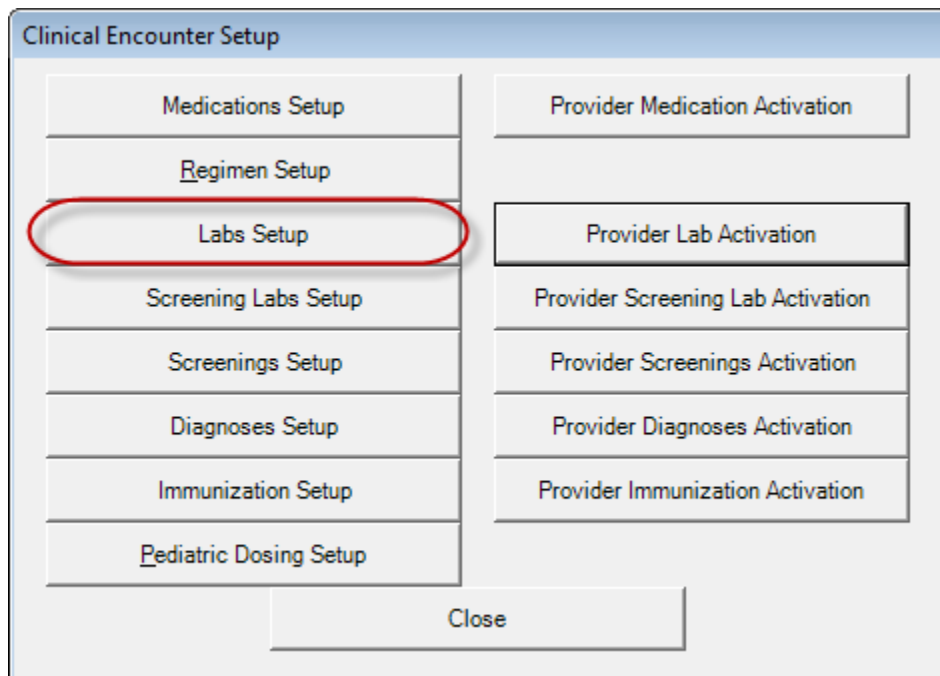
PLEASE NOTE: All custom Immunizations, Labs, Screenings, and Screening Labs must be deactivated before you delete them. If there are reported results, the tests and vaccines cannot be deleted.

As with meds, tests can be activated or deactivated using the appropriate Activation menu and then the check box next to each test. You can also Activate All or Deactivate All. **Deactivating a test does not remove the test from the database, or from the records of clients who have received it.** It only alters whether or not the test is available to the data entry person.



Modifying Labs

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



5. Click **Add/Edit** to make changes to the lab list.

Lab Test Setup

Add/Edit

Test Name: Units (mm/s):

Low Value: High Value: Decimal Places:

Test	Low	High	Decimals	Measurement...	Editable*
CD4 Count	0	1200	0	(cells/mm ³)	No
Viral Load	0	100000000	0	(Copies/mL)	No
WBC	2	11	1	(x 10 ⁹ /mm ³)	No
CD4 Percent	0	100	1		No
Glucose	70	115	0	(mg/dL)	No
Hemoglobin	12	18	1	(g/dL)	No
Platelets	130000	370000	0	(cells/mm ³)	No
Albumin	3.5	5.5	1	(g/dL)	No
Total Cholest...	90	200	0	(mg/dL)	No
LDL	0	0	0	(mg/dL)	No
HDL	30	90	0	(mg/dL)	No
Triglycerides	0	200	0	(mg/dL)	No
ALT	30	65	0	(IU/L)	No
AST	7	40	0	(IU/L)	No

*Low and high value can be edited for any lab.

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.

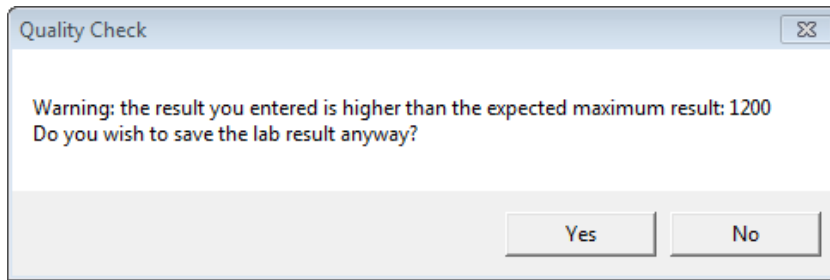
- As an example, select **CD4 Count** and click **Edit**.

Add/Edit

Test Name: Units (mm/s):

Low Value: High Value: Decimal Places:

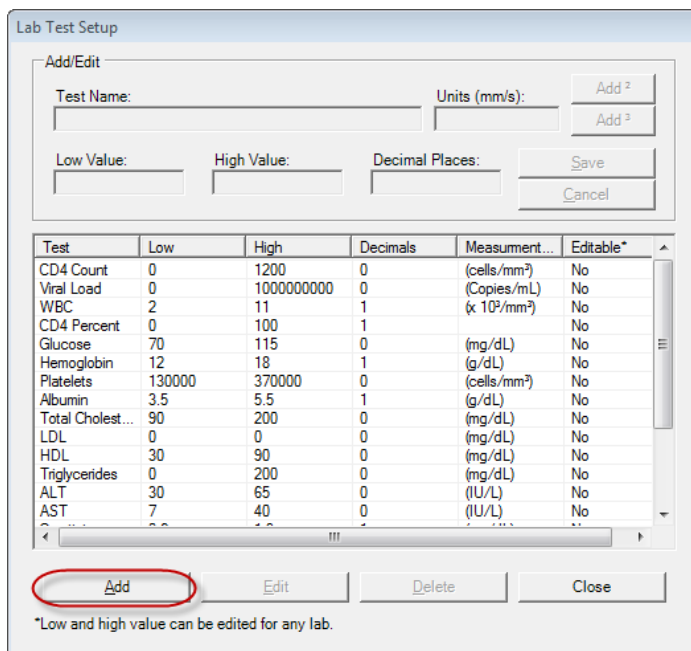
You’ll see that the low and high value are available for modification. You may have a disproportionate number of clients with high (over 1200) CD4 counts. You can modify the high value to a greater number to prevent the popup warning that CAREWare will generate if you exceed the listed value:



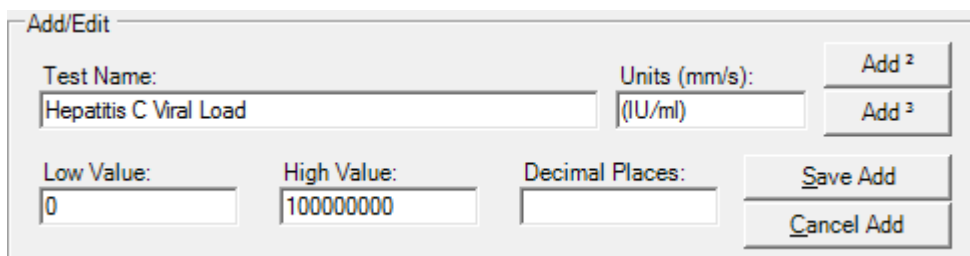
7. Enter a higher value and click **Save Edit**.

Adding Labs

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



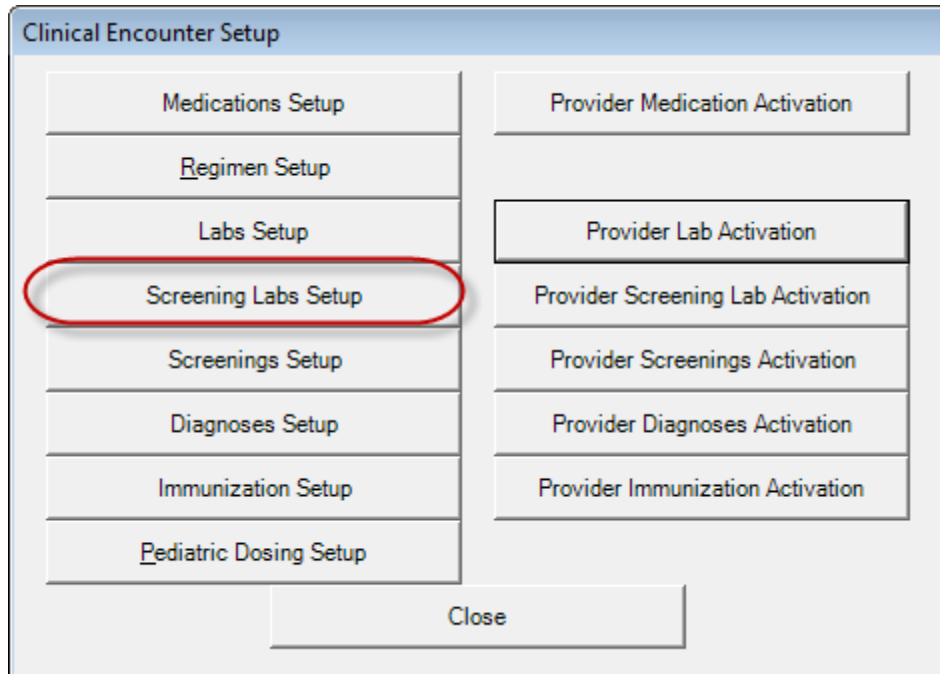
2. Enter the name, units of measurement and high/low values for the test. Use the **Add²** or **Add³** buttons to add a superscripted 2 or 3 within your units of measurement definition, if necessary.



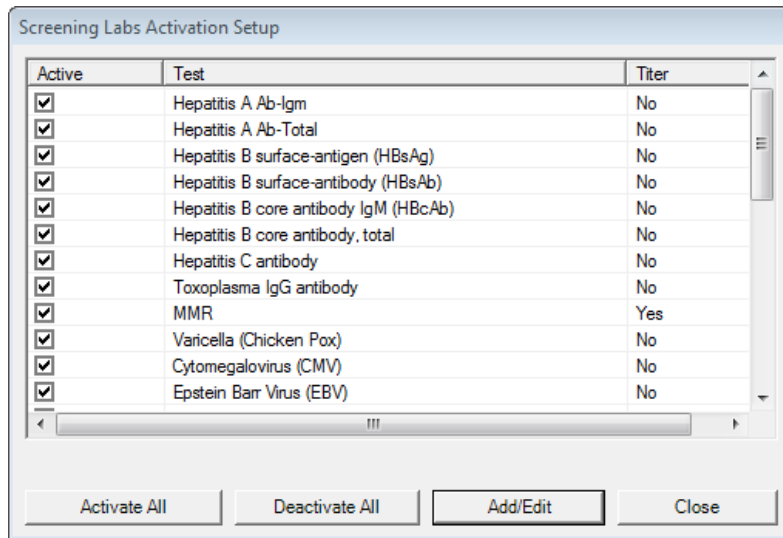
3. Click **Save Add** when done.

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.

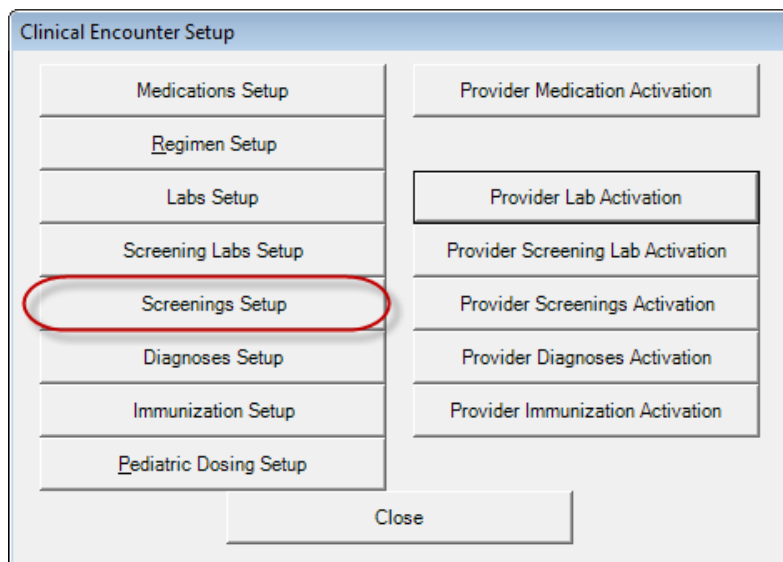


4. Enter the name of the test, and use the check boxes to indicate whether a titer needs to be entered, and whether to activate the Treatment Yes/No option.

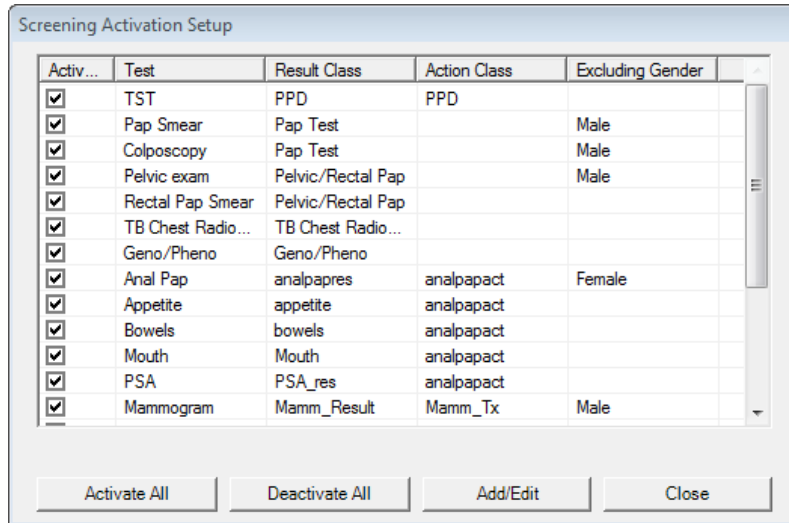


Modifying and Adding Screenings

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

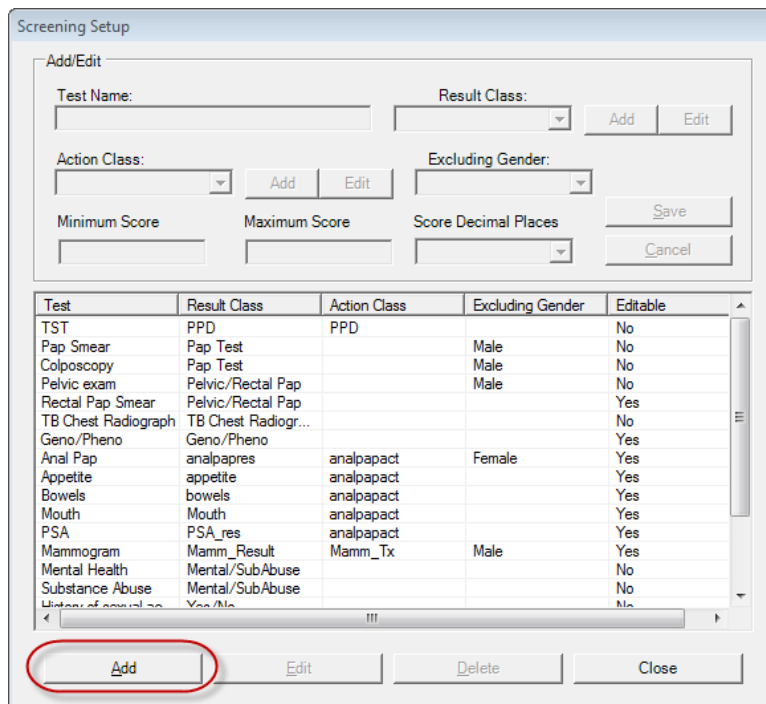


- Use the check boxes to activate or deactivate a screening lab, or the **Activate All** or **Deactivate All** buttons.
- Select the **Add/Edit** button to make changes.



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.

- Click **Add/Edit**, then **Add** to create a new screening.



5. Enter the Test Name. In this case, we’re going to add a Tobacco Use 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 tobacco use screening, we’ll create new classes.

6. Click **Add** next to **Result Class**.
7. Enter a name for the Result Class. Since tobacco is taken in various forms, we’ll call it **Method of Intake**.
8. Click **Add** to enter **Result Name** and **Result Code** for each outcome and **Save** each one. 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.

Result Name	Result Code
Cigarette	CIG
Chew	CHE
Other	OTH

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.

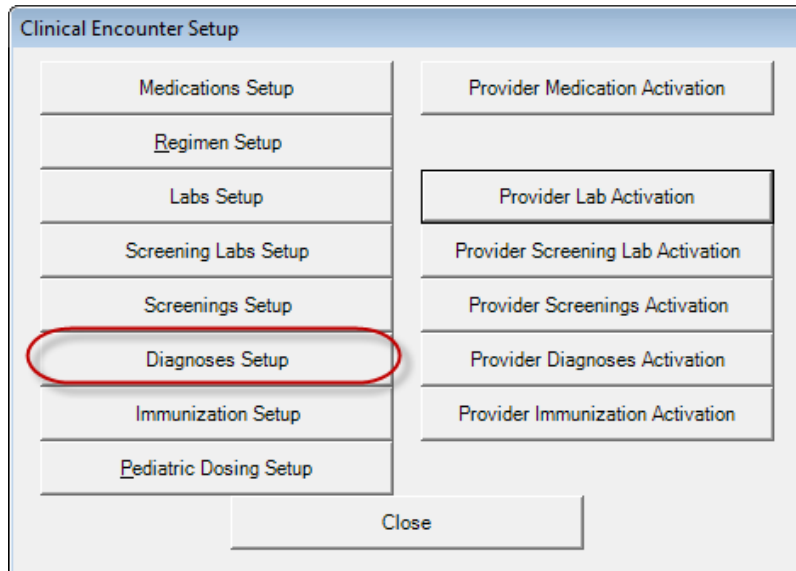
Action Name	Action Code
Nicorette	NIC
Wellbutrin	WEL
Counseling	COU

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.

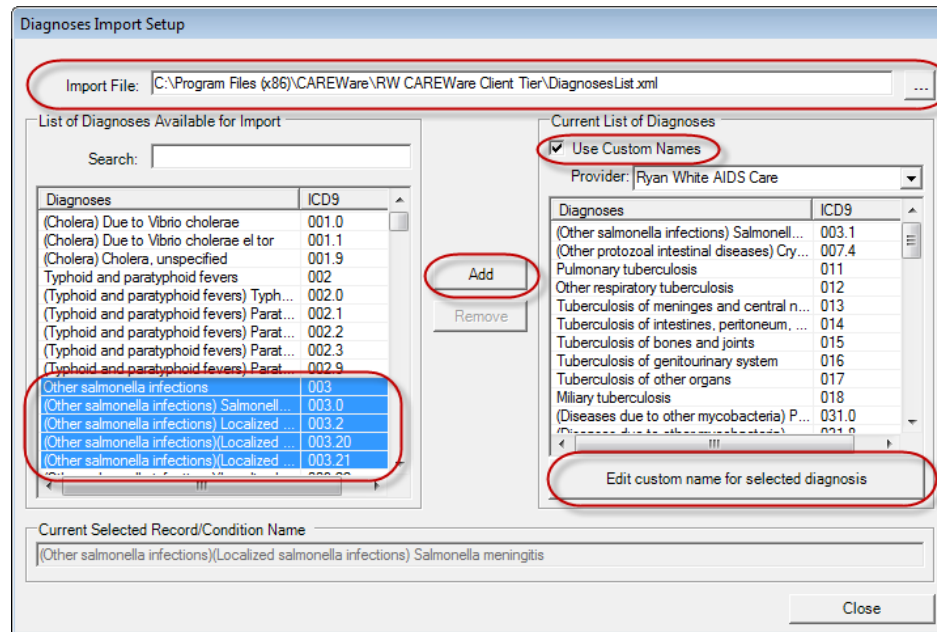
14. Click **Save Add** to complete the custom addition.

Modifying and Adding Diagnoses

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

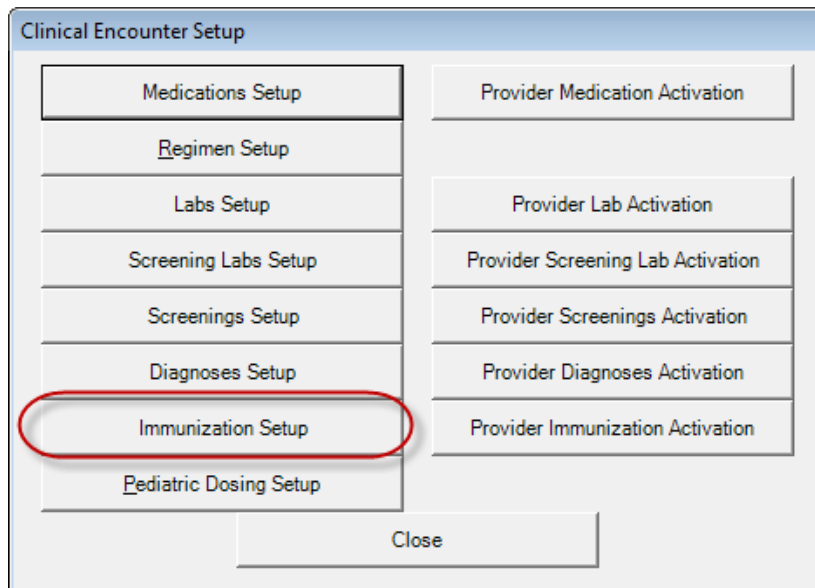


2. The process is similar to Medications Setup:
 - Choose ICD-9 Diagnoses to add to a provider
 - Use the DiagnosesList.xml file to import diagnoses
 - Edit custom names if desired



Modifying and Adding Immunizations

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



2. Click the Add button to add a vaccine.

Vaccine Definition Setup

Add/Edit

Vaccine Name: [H1N1] Save Cancel

Vaccine	Editable	Deletable
Varicella (Chicken pox)	No	No
MMR	No	No
Hepatitis A (1)	No	No
Gardasil	Yes	Yes
Pneumovax (Pneumococcal pneumonia)	No	No
Hepatitis B (1)	No	No
Hep A/Hep B (Twinrix)(1)	No	No
Hep A/Hep B (Twinrix)(2)	No	No
Hepatitis B (3)	No	No
Hepatitis B (2)	No	No
Influenza	No	No
Hepatitis A (2)	No	No
tickling level	Yes	Yes
Hep A/Hep B (Twinrix)(3)	No	No
Tetanus Toxoid	No	No

Add Edit Delete Close

3. Click **Save** to add to the vaccine list.
4. Select the **Add/Edit** button to make changes.

Again, immunizations that are HRSA-defined cannot be edited or deleted. These appear with “No” in the Editable/Deletable columns on the screen above.



TIP: You can delete any custom vaccine, if client data has not been entered. You can edit any editable screening (including any you’ve created yourself) or add a new screening.

Clinical Encounter Setup

Medications Setup	Provider Medication Activation
Regimen Setup	
Labs Setup	Provider Lab Activation
Screening Labs Setup	Provider Screening Lab Activation
Screenings Setup	Provider Screenings Activation
Diagnoses Setup	Provider Diagnoses Activation
Immunization Setup	Provider Immunization Activation
Pediatric Dosing Setup	

Close

As with meds, tests can be activated or deactivated using the appropriate Activation menu and then the check box next to each test. You can also Activate All or Deactivate All. **Deactivating a test does not remove the test from the database, or from the records of clients who have received it.** It only alters whether or not the test is available to the data entry person.

