

Entering Annual Review Data

Annual review data includes screenings for primary care, HIV risk reduction counseling, housing arrangement, and substance abuse, as well as the poverty level assessment and insurance information necessary for the RSR. Insurance assessment and poverty level assessments are required for the ADR. Quarterly review tabs are available for updating this data for clients more frequently.

The screenshot shows a software interface with a navigation menu on the left and a main content area on the right. The navigation menu includes items like 'Personal', 'Client Report', 'Encounter Report', 'Services', 'Annual Review', 'Case Notes', 'Forms', 'Vital Signs', 'Hospital Admissions', 'Medications', 'Labs', 'Screenings', 'Screening Labs', 'Immunizations', and 'Problem List'. The 'Annual Review' item is highlighted in yellow. The main content area is titled 'Annual Review / Annual Screenings' and contains a toolbar with 'View', 'Add', 'Edit', 'Delete', and 'Print or Export' buttons. Below the toolbar is a section titled 'Annual Screenings' with a table that has a 'Result' column.

This screenshot shows the 'Annual Review / Annual Screenings' section in more detail. It includes a search bar labeled 'Search:' and a table with columns for 'Date', 'Type', 'Result', and 'Counseled By'. The 'Type' column header has a dropdown arrow. A yellow callout box with a black border points to this dropdown arrow and contains the text: 'Click the drop down arrow for any column header to adjust which columns are available.' The dropdown menu is open, showing a list of items with checkboxes: 'PK', 'Date', 'Test Patient Code', 'Test Definition Code', 'Type', 'Qualitative Test Result Code', 'Result', 'Action/Treatment Code', and 'Counseled By'. The 'Date', 'Type', 'Result', and 'Counseled By' items are checked.

Annual Screenings

1. Click *Add*.
2. Enter the *Date*.
3. Click the drop down arrow to select the *Type* of screening.

Annual Review / Annual Screenings > Add

Save Back

Date: 4/3/2018

Type: ↓ Click here to select from 5 choices.

Result: HIV Primary Care
HIV Risk Reduction Counseling

Counseled By: Housing Arrangement
Mental Health
Substance Abuse

Annual Review / Annual Screenings > Add

Save Back

Date: 4/3/2018

Type: HIV Primary Care ↓

Result: ↓ Click here to select from 7 choices.

Counseled By: Emergency Room
Hospital outpatient center
No primary source of care
Other
Private practice
Publicly-funded clinic or health dept.
Unknown

Each Type of screening has a unique list of results. These are the HIV Primary Care results.

4. Click the drop down to select the *Result* of the screening.
5. Click *Save*.

Note: For *HIV Risk Reduction Counseling* select a *Counseled By* option.

Annual Screenings > Add

Save Back

Date: 4/3/2018

Type: HIV Risk Reduction Counseling

Result: Click here to select from 2 choices.

Counseled By: No
Yes

HIV Risk Reduction Counseling results

Annual Screenings > Add

Save Back

Date: 4/3/2018

Type: HIV Risk Reduction Counseling

Result:

Counseled By: Click here to select from 4 choices.

Case mgr/social worker
Other trained counselor
Primary care clinician
Unknown

HIV Risk Reduction Counseling Counseled By options

Annual Review / Annual Screenings > Add

Save Back

Date: 4/19/2018

Type: Housing Arrangement

Result: Click here to select from 3 choices.

Counseled By: Stable/Permanent
Temporary
Unstable

Housing Arrangement results

Annual Screenings > Add

Save Back

Date: 4/3/2018

Type: Mental Health

Result: Click here to select from 3 choices.

Counseled By: No
Not medically indicated
Yes

Mental Health results

Annual Screenings > Add

Save Back

Date: 4/3/2018

Type: Substance Abuse

Result: Click here to select from 3 choices.

Counseled By: No
Not medically indicated
Yes

Substance Abuse results

Note: The annual screenings are required information for the RSR if the client receives an Outpatient Ambulatory Health Service, a Medical Case Management Service, a Case Management Non-Medical service, or a Housing Service. In the case of the Housing Service, only the Housing Status is required.

Insurance Assessments

Annual Review / Insurance Assessments

[View](#) [Add](#) [Edit](#) [Delete](#) [Print or Export](#)

Insurance Assessments

Search:

Date Primary Insurance Other Insurance Private - Individual

Annual Review / Insurance Assessments

[View](#) [Add](#) [Edit](#) [Delete](#) [Print or Export](#)

Insurance Assessments

Search:

Date Primary Insurance Other Insurance Private - Individual

PK

Date

Primary Insurance RFK

Primary Insurance

Other Insurance

Private - Individual

Private

Private - Employer

Medicare Part A/B

Medicare Part D

Full LIS

Click the drop down arrow for any column header to adjust which columns are available.

1. Click Add.
2. Enter the *Date*.
3. Click the drop down arrow to select *Primary Insurance*.
4. Check the box for all secondary insurances that apply.
5. Click Save.

Annual Review / Insurance Assessments > Add

Save Back

Insurance Assessment Date: 4/4/2018

Primary Insurance: Click here to select from 10 choices.

Private - Individual: IHS

Private - Employer: Medicaid

Medicare Part A/B: Medicare (unspecified)

Medicare Part D: Medicare Part A/B

Medicare Part D: Medicare Part D

Full LIS: No Insurance

Medicare (Part unspecified): Other

Medicaid: Private - Employer

VA, Other Military: Private - Individual

IHS: VA, Tricare and other military health care

Other Public:

Other: **If *Other* is checked, enter the details in *Other Insurance Specify*.**

Other Insurance Specify:

High Risk Insurance Pool:

Insurance Assessments

View Add Edit Delete Bring Forward Print or Export

Insurance Assessments

Search:

Date	Primary Insurance	Other Insurance	Private - Individual	Private
4/4/2018	Medicare Part A/B			

Note: The insurance assessment is required information for the ADR.

Note: The insurance assessment is required information for the RSR if the client receives an Outpatient Ambulatory Health Service, Medical Case Management Service, or a Case Management Non-Medical Service.

Poverty Level Assessments

Annual Review / Poverty Level Assessments

[View](#) [Add](#) [Edit](#) [Delete](#) [Print or Export](#)

Poverty Level Assessments

Search:

Date	Household Size	Household Income	Federal Poverty Level
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Annual Review / Poverty Level Assessments

[View](#) [Add](#) [Edit](#) [Delete](#) [Print or Export](#)

Poverty Level Assessments

Search:

Date	Household Size	Household Income	Federal Poverty Level
------	----------------	------------------	-----------------------

- PK
- Date
- Household Size
- Household Income
- Federal Poverty Level

Click the drop down arrow for any column header to adjust which columns are available.

1. Click *Add*.
2. Enter the *Date*.
3. Enter the *Household Size* (minimum one).
4. Enter the *Household Income*.
5. Click *Save*.

Personal >
 Services
 Annual Review >
 Case Notes
 Vital Signs
 Hospital Admissions
 Medications >
 Labs
 Screenings
 Screening Labs
 Immunizations
 Immunization Export
Immunization HL7 File
 Problem List >
 Counseling and Testing
 Orders
 Hobbies
 Appointments
 User Messages
 Close

Save Cancel

Annual Review / Poverty Level Assessments

Date: 09/01/2016

Household Size: 1

Household Income: 200.00 \$

The minimum value for Household size is 1. A zero will generate a negative federal poverty level and cause errors in CAREWare.

Poverty Level Assessments

View Add Edit Delete Bring Forward Print or Export

Poverty Level Assessments

Search:

Date	Household Size	Household Income	Federal Poverty Level
4/4/2018	1	\$1,000.00	8%

Note: Providers/grantees in Hawaii and Alaska, which have different cost of living calculations, must indicate the appropriate state in the Grantee setup wizard in Central Administration.

Note: When the US Department of Health and Human Services issues new Federal Poverty Guidelines each year, typically in February or March, CAREWare will incorporate them and post a new business tier build. You will need to install this update each year to correctly calculate annual poverty levels. This is usually the build for the ADR.

Note: The poverty level assessment is required information for the ADR.

Note: The poverty level assessment is required information for the RSR if the client receives an Outpatient Ambulatory Health Service, Medical Case Management Service, or a Case Management Non-Medical Service.

Annual Custom

Annual Review / Annual Custom > Add

View Add Edit Print or Export

Annual Custom

Search:

Year	Alcohol
2018	

Annual Review / Annual Custom > Add

View Add Edit Print or Export

Annual Custom

Search:

Year	Alcohol
2018	

- PK
- ClientPK
- Year
- Alcohol

Annual Custom > Edit

Save Cancel

Year:

Alcohol:

Annual Custom

View Add Edit Print or Export

Annual Custom

Search:

Year	Alcohol
2018	X

To add an Annual Custom record:

1. Click *Add*.
2. Select the year.
3. Enter a value for each custom field.
4. Click *Save*.

To add fields to Annual Custom:

1. Click *Administrative Options*.
2. Click *Custom Features*.
3. *Annual Custom Fields*.
4. Click the field to be added.
5. Click *Activate*.

Annual Review Quarterly Custom

Annual Review / Quarter 1

View Add Edit Print or Export

Annual Quarterly Custom 1

Search:

Year	Substance Abuse History	Substance Abuse Treatment Stat	Mental Healty History	Mental Health Treatment Status
2018				

Annual Review / Quarter 1

View Add Edit Print or Export

Annual Quarterly Custom 1

Search:

Year	Substance Abuse History	Substance Abuse Treatment Status	Mental Healty History	Mental Health Treatment Status
2018	<input type="checkbox"/> PK			

Click the drop down arrow for any column header to adjust which columns are available.

1. Click *Add*.
2. Enter the *Year*.
3. Click the drop down for each field and select a value.
4. Click *Save*.

Personal > Services > Annual Review > Case Notes > Vital Signs > Hospital Admissions > Medications > Labs > Screenings > Screening Labs > Immunizations > Immunization Export > Immunization HL7 File > Problem List > Counseling and Testing > Orders > Hobbies > Appointments > User Messages > Close

Save Cancel

Annual Review / Quarter 1

Year: 201

Substance Abuse History: 2010 2011 2012 2013 2014 2015 2016

Substance Abuse Treatment Status:

Mental Healty History:

Mental Health Treatment Status:

Type the first few characters to search through 27 choices.

Annual Review / Quarter 1 > Edit

Save Cancel

Year: 2018

Substance Abuse History: No Unknown

Substance Abuse Treatment Status: Yes, active history within last 3 months

Mental Healty History: Yes, but not active within last 3 months

Mental Health Treatment Status:

Click here to select from 4 choices.

Substance Abuse History results

Annual Review / Quarter 1 > Edit

Save Cancel

Year: 2018

Substance Abuse History:

Substance Abuse Treatment Status: Completed Treatment Dropped out of treatment In Treatment No active treatment or counseling Not applicable Other Pre-treatment process Refused Treatment Unknown Waiting list for treatment

Mental Healty History:

Mental Health Treatment Status:

Click here to select from 10 choices.

Substance Abuse Treatment Status results

Annual Review / Quarter 1 > Edit

Save Cancel

Year: 2018

Substance Abuse History:

Substance Abuse Treatment Status:

Mental Healty History:

Mental Health Treatment Status:

- No
- Unknown
- Yes, active history within last 3 months
- Yes, but not active within last 3 months

Click here to select from 4 choices.

Mental Health History results

Annual Review / Quarter 1 > Edit

Save Cancel

Year: 2018

Substance Abuse History:

Substance Abuse Treatment Status:

Mental Healty History:

Mental Health Treatment Status:

- Completed Treatment
- Dropped out of treatment
- In Treatment
- No active treatment or counseling
- Not applicable
- Other
- Pre-treatment process
- Refused Treatment
- Unknown
- Waiting list for treatment

Click here to select from 10 choices.

Mental Health Treatment Status results

Annual Quarterly Custom 1

View Add Edit Print or Export

Annual Quarterly Custom 1

Search:

Year	Substance Abuse History	Substance Abuse Treatment Status	Mental Healty History	Mental Health Treatment Status
2018	Yes, active history within l	Completed Treatment	Yes, active history withi	Completed Treatment

Annual Review Summary

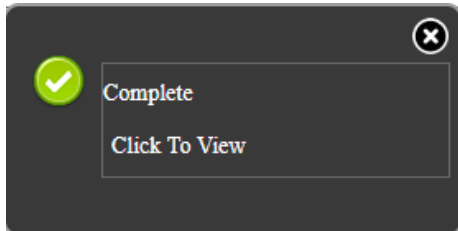
To generate the Annual Review Summary:

1. Click *Edit*.
2. Select an *As of Date*.
3. Click *Run*.
4. *Click to View* results.

Annual Review Summary Report

Edit Run

As Of Date: 4/4/2018



Annual Review Summary

Client: testing, tester
As of Date: 4/4/2018

Insurance Assessment	4/4/2018
Primary Insurance	Medicare Part A/B
Other Insurance	
Poverty Level Assessment	4/4/2018
Household Income	\$1,000
Household Size	1
Federal Poverty Level	8%
HIV Primary Care	4/3/2018
Result:	Hospital outpatient center
Housing Arrangement	
Result:	No value found
HIV Risk Reduction Counseling	
Result:	No value found
Mental Health	
Result:	No value found
Substance Abuse	
Result:	No value found

To print values in a window click *Print or Export* to get to the *Report Setup*.

Client Search > Report Setup

[Back](#)

Print or Export

Print Current Page	Generate a report for the current page in a printable format
Print All Pages	Generate a report for the current list in a printable format
View Current Page as a PDF document	Generate a PDF document for the current page in a printable format
View All Pages as a PDF document	Generate a PDF document for the current list in a printable format
Printable List Format Options	Customize the report format
CSV Export (All Pages)	Download the list as a CSV File

Click *Printable List Format Options* to edit the format of printed pages.

Client Search > Report Setup > Report Format

[Edit](#) [Back](#)

Title Font:	<input type="text" value="Georgia"/>
Title Font Size:	<input type="text" value="12"/>
Bold Title:	<input checked="" type="checkbox"/>
Italicize Title:	<input type="checkbox"/>
Underline Title:	<input checked="" type="checkbox"/>
Report Header Font:	<input type="text" value="Times New Roman"/>
Report Header Font Size:	<input type="text" value="12"/>
Bold Report Header:	<input type="checkbox"/>
Italicize Report Header:	<input type="checkbox"/>
Column Header Font:	<input type="text" value="Times New Roman"/>
Column Header Font Size:	<input type="text" value="10"/>
Bold Column Headers:	<input checked="" type="checkbox"/>
Italicize Column Headers:	<input type="checkbox"/>
Underline Column Headers:	<input checked="" type="checkbox"/>
Data Row Font:	<input type="text" value="Times New Roman"/>
Data Row Font Size:	<input type="text" value="10"/>
Bold Data Rows:	<input type="checkbox"/>
Italicize Data Rows:	<input type="checkbox"/>