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.

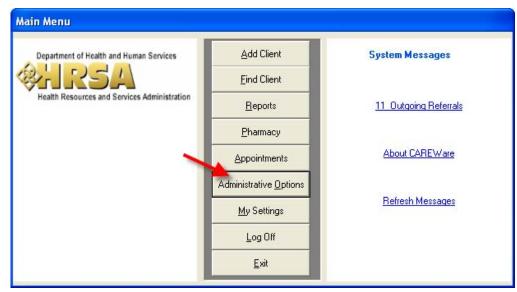
Customizing Clinical Data

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.

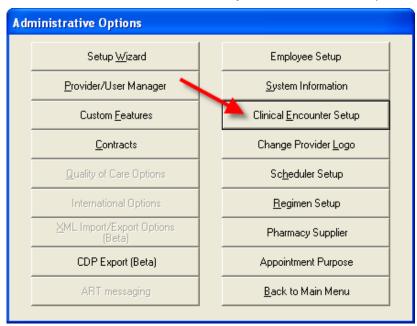
1. Log into CAREWare. If you have administrative privileges and are asked to choose between Central Administration and Provider ("Default" until you change the name), log in as a Provider.

Da	main Selection	
	Central Administration Default	

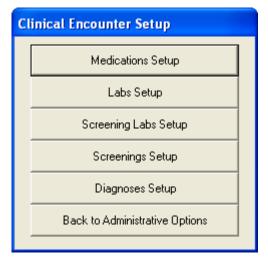
2. Select Administrative Options from the main menu.



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



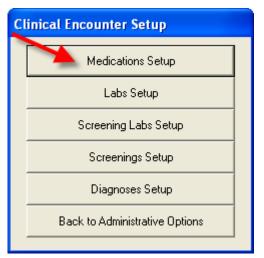
4. Select the appropriate clinical information setup.



Page 4

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.

M	Medication Activation Setup				
	Filter by Medication:				
	Activated	Active Ingredient	^		
		acyclovir			
		Agenerase (amprenavir)	=		
		albendazole			
		amoxicillin (as trihydrate)			
		atenolol			
		Bactrim			
		beta-carotene			
		chlorothiazide sodium			
		Combivir (zidovudine/lamivudine)			
	Crixivan (indinavir)				
	Emtriva (emtricitabine)				
		Epivir (lamivudine)	M		
	<u>A</u> ctivate A	All Deactivate All Advanced Options Close			

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 I 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.

M	Medication Activation Setup				
	Filter by Medica	on:			
	Activated	Active Ingredient	^		
		acyclovir			
		Agenerase (amprenavir)			
		albendazole			
		amoxicillin (as trihydrate)	-		
		atenolol			
		Bactrim			
		beta-carotene			
		chlorothiazide sodium			
	Combivir (zidovudine/lamivudine)				
	☑ Crixivan (indinavir)				
		Ebivir (lamivudine)	~		
	<u>A</u> ctiva	e All Deactivate All Advanced Options Close			

4. You'll see a prompt related to the HRSA-created file that contains all available medication definitions.

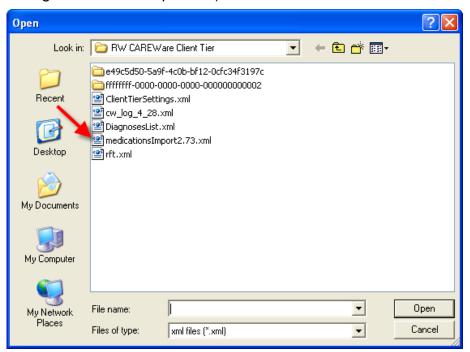
Quality Check
Enter a full path and file name into Import File text box to load list of available medication definitions.
ОК

Click **OK** to continue.

Medication Import Setup	: Client Tier\medica	itions/mood* xml	
List of Medications Available for Import		Current List of Medications	
		Active Ingredient	^
		acyclovir Agenerase (amprenavir) albendazole	
	Add	amoxicillin (as trihydrate) atenolol	
	<u>R</u> emove	Bactrim beta-carotene chlorothiazide sodium	
		Combivir (zidovudine/lamivudine) Crixivan (indinavir)	
		delavirdine Emtriva (emtricitabine) Epivir (lamivudine)	- 1
		Epzicom(abacavir/lamivudine) Fortovase (saquinavir mesylate)	_
		Edit custom name for selected medication	
		Clos	e

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**.

Medication Import Setup				
Import File: C:\Program Files\CAREWare	∋\RW CAREWa	re Client Tier\medication	sImport2.73.xml	
List of Medications Available for Import			urrent List of Medications	
Search:			Use Custom Names	
Active Ingredient	~		Active Ingredient	~
abciximab		5	acyclovir	
acarbose		F	Agenerase (amprenavir)	
acebutolol hydrochloride			albendazole	
acetaminophen			amoxicillin (as trihydrate)	
acetate			atenolol	
acetazolamide		E	Bactrim	
acetic acid		Remove	peta-carotene	
acetohexamide		C	chlorothiazide sodium	
acetohydroxamic acid		0	Combivir (zidovudine/lamivudine)	
acetylcysteine			Crixivan (indinavir)	
acitretin		0	delavirdine	
acrivastine		E	Emtriva (emtricitabine)	
activated charcoal			Epivir (lamivudine)	
acyclovir sodium		E	Epzicom(abacavir/lamivudine)	
adapalene			Fortovase (saquinavir mesylate)	
adenosine			Transie (State and State)	
adiastatic barley malt extract				>
alatrofloxacin mesulate	~		Edit custom name for selected medication	
<	>		Edit custom name for selected medication	

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.

Medication Import Setup			
Import File: C:\Program Files\CAREWare\RW CAREWare	Client Tier\medica	tionsImport2.73.xml	
List of Medications Available for Import Search: bar		Current List of Medications	
Active Ingredient		Active Ingredient	
adiastatic barley malt extract amobarbital sodium barium sulfate butabarbital sodium mephobarbital phenobarbital sodium secobarbital sodium	<u>A</u> dd <u>R</u> emove	acyclovir Agenerase (amprenavir) albendazole amoxicillin (as trihydrate) atenolol Bactrim beta-carotene chlorothiazide sodium Combivir (zidovudine/lamivudine) Crixivan (indinavir) delavirdine Emtriva (emtricitabine) Epizom(abacavir/lamivudine) Fortowas (saquinavir mesylate) Edit custom name for selected medication	
		Close	

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

Medication Import Setup			
Import File: C:\Program Files\CAREWare\RW CAREWare	Client Tier\medical	tionsImport2.73.xml	
List of Medications Available for Import Search: bar		Current List of Medications	
Active Ingredient adiastatic barley malt extract amobarbital sodium barium sulfate butabarbital sodium phenobarbital phenobarbital sodium secobarbital sodium	<u>A</u> dd <u>R</u> emove	Active Ingredient acyclovir Agenerase (amprenavir) albendazole amoxicillin (as trihydrate) atenolol Bactrim beta-carotene chlorothiazide sodium Combivir (zidovudine/lamivudine) Crixivan (indinavir) delavirdine Emtriva (emtricitabine) Epizicom(abacavir/lamivudine) Fortovase (saquinavir mesylate) Comment (entricitabile) Epizene (entricitabile) 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**.

Medication Import Setup				
Import File: C:\Program Files\CAREWare\RW CAREWare	e Client Tier\medical	tionsImport2.73.xml		
List of Medications Available for Import Search: bar		Current List of Medications		
Active Ingredient amobarbital sodium barium sulfate butabarbital sodium mephobarbital pentobarbital phenobarbital sodium secobarbital sodium	<u>A</u> dd <u>R</u> emove	Active Ingredient acyclovir adiastatic barley malt extract Agenerase (amprenavir) albendazole amoxicillin (as trihydrate) atenolol Bactrim beta-carotene chlorothiazide sodium Combivir (cidovudine/lamivudine) Cixivan (indinavir) delavirdine Emitiva (entricitabine) Epivir (lamivudine) Epiver (lamivudine)		
		Clos	e	

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

Custom Medication Name		
Standard Name:	HRSA ID:	
adiastatic barley malt extract	H00019	
Custom Name:		
Gleemonex		
Save	<u>C</u> ancel	

4. The medication will appear on the list and will be available for data entry.

Medication Import Setup		
Import File: C:\Program Files\CAREWare\RW CAREWare	e Client Tier\medica	tionsImport2.73.xml
List of Medications Available for Import Search: Dar		Current List of Medications
Active Ingredient		Active Ingredient
amobarbital sodium barium sulfate		atenolol Bactrim
butabarbital sodium		beta-carotene
mephobarbital		chlorothiazide sodium =
pentobarbital sodium	Add	Combivir (zidovudine/lamivudine)
phenobarbital		Crixivan (indinavir)
phenobarbital sodium	<u>R</u> emove	delavirdine
secobarbital sodium		Emtriva (emtricitabine)
		Epivir (lamivudine) Epzicom(abacavir/lamivudine)
		Fortovase (saquinavir mesylate)
		Fuzeon (enfuvirtide)
		Gleemonex
		heparase
		HIVID (dideoxycytidine, zalcitabine)
		< >
		Edit custom name for selected medication
		Close

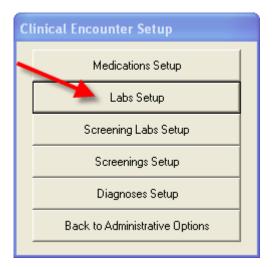
Creating or Altering Tests and Values

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.

La	Lab Activation Setup					
	Active	Test	Low	High	Decimals	~
		CD4 Count	0	1200	0	
		Viral Load	0	100000000	0	
		WBC	2	11	1	
		CD4 Percent	0	100	1	
		Glucose	70	115	0	
		Hemoglobin	12	18	1	
	\square	Platelets	130000	370000	0	
	\square	Albumin	3.5	5.5	1	
	\square	Total Cholesterol	90	200	0	
		LDL	0	0	0	
		HDL	30	90	0	
		Triglycerides	0	200	0	
		ALT	30	C5	0	~
	Activate All Deactivate All Close Close				se	

3. Let's review the options on this menu:

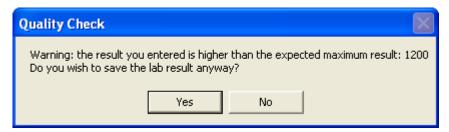
Add/Edit Test Name: CD4 Count Low Value:	Hig 120	h Value:			Add ² Add ³ <u>S</u> ave <u>C</u> ancel	
Test	Low	High	Decimals	Measurment	E ditable*	~
CD4 Count	0	1200	0	(cells/mm ^a)	No	
Viral Load	0	1000000000	Ō	(Copies/mL)	No	
WBC	2	11	1	(x 10 ² /mm ³)	No	
CD4 Percent	0	100	1	`´´	No	
Glucose	70	115	0	(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	~
Add Edit Delete Close *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.

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

		1
Ľ	Jnits (mm/s):	
	cells/mm³) Add 3	
ue: Decimal Pla	aces: <u>S</u> ave Edit	
Ju	<u>C</u> ancel Edit	
1	j(Ilue: Decimal Places: <u>S</u> ave 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:



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

Adding Labs

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

Add/E dit Test Name: Units (mm/s): Add² Hepatitis C Viral Load [(U/mL) Add³ Low Value: High Value: Decimal Places: Save Add 0 10000000 Cancel Add Image: Concel Add	La	b Test Setup					
Low Value: High Value: Decimal Places: Save Add		Add/Edit					
Low Value: High Value: Decimal Places: <u>S</u> ave Add		Test Name:		Units (mm/s)	:	Add ²	
		Hepatitis C Viral Load		(IU/mL)		Add ³	
			 Decima	al Places:			

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**.

Clinical Encounter Setup			
	Medications Setup		
Labs Setup			
	Screening Labs Setup		
	Screenings Setup		
	Diagnoses Setup		
	Back to Administrative Options		

- 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.

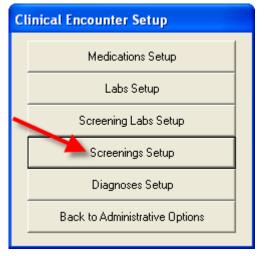
Screening Labs Activation Setup				
Active	Test	Titer	~	
	Hepatitis A Ab-Igm	No		
	Hepatitis A Ab-Total	No		
	Hepatitis B surface-antigen (HBsAg)	No		
	Hepatitis B surface-antibody (HBsAb)	No		
	Hepatitis B core antibody IgM (HBcAb)	No		
	Hepatitis B core antibody, total	No	_	
	Hepatitis C antibody	No		
	Toxoplasma IgG antibody	No		
	MMR	Yes		
	Varicella (Chicken Pox)	No		
	Cytomegalovirus (CMV)	No		
	Epstein Barr Virus (EBV) No			
<			>	
	Activate All Deactivate All Add	d/Edit Cl	ose	

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.

Screening Lab Setup				
Add/Edit				7
Test Name:	Titer?	Treatment?	<u>S</u> ave Add	
Bird Flu		•	<u>C</u> ancel Add	

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.

Sc	Screening Activation Setup					
	Activ Test Result Class			Action Class	Excluding Gender	
		PPD	PPD	PPD		
	Pap Smear Cervical CA			Male		
	\checkmark	Colposcopy	Cervical CA		Male	
	\checkmark	Pelvic exam	Pelvic/Rectal Pap		Male	
	\checkmark	Rectal Pap Smear	Pelvic/Rectal Pap			
	\checkmark	TB Chest Radio	TB Chest Radio			
		Geno/Pheno	Geno/Pheno			
	\checkmark	Anal Pap	analpapres	analpapact	Female	
	\checkmark	Appetite	appetite	analpapact		
	\checkmark	Bowels	bowels	analpapact		
	\checkmark	Mouth	Mouth	analpapact		
		PSA	PSA_res	analpapact		
	Activate All Deactivate All Add/Edit Close					

As with labs and screening labs, there are some screenings that are HRSAdefined 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.

creening Setup				
Add/Edit				
Test Name: Rectal Pap Smear		Re: Pelvic/Re	sult Class: ectal Pap 🚽	Add Edit
Action Class:	▼ Add	Edit Exclu	uding Gender:	<u>S</u> ave Cancel
Test	Result Class	Action Class	Excluding Gender	Editable
PPD	PPD	PPD	Excluding Gender	No
Pap Smear	Cervical CA	FFU	Male	No
Colposcopy	Cervical CA		Male	No
Pelvic exam	Pelvic/Rectal Pap		Male	No
Rectal Pap Smear	Pelvic/Rectal Pap		Maio	Yes
TB Chest Radiograph				No
Geno/Pheno	Geno/Pheno			Yes
Anal Pap	analpapres	analpapact	Female	Yes
Appetite	appetite	analpapact	1 cindle	Yes
Bowels	bowels	analpapact		Yes
Mouth	Mouth	analpapact		Yes
PSA	PSA_res	analpapact		Yes
<u>A</u> dd	<u>E</u> dit		Delete	Close

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

Screening Setup					
Add/Edit					
Test Name: Mental Health Screening	Result Class: Add Edit				
Action Class:	Excluding Gender: Save Add				

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."

Re	Result Setup					
-	Result Class: Mental health					_
Γ	Results					
	Result Name:	Re	sult Code:		<u>S</u> ave	
	J				<u>C</u> ancel	
	Result Name		Result Code			
	Bipolar		002			
	Depression		001			-11
	Schizophrenia		003			- 1
						-11
						-11
						-11
	b <u>A</u>	d)	<u>E</u> dit		<u>D</u> elete	
		De	elete Class		Close	

- 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.

Screening Setup					
Add/Edit					
Test Name: Mental Health Screening	Result Class: Mental health 🗨 Add Edit				
Action Class:	Excluding Gender: Save Add				

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

Action Setup					
Action Class:					
Mental health					
Actions					
Action Name:	Acti	ion Code:		<u>S</u> ave	
1	J			<u>C</u> ancel	
Action Name		Action Code			
Referred to care		001			
Hospitalized Counseled during visit		002			
Counscied daming visit		000			
	4	\dd	Edit	Delete	
	D	elete Class		Close	

- 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.

Screening Setup				
Add/Edit Test Name:			Result Class:	
Mental Health Scre	ening	JM	ental health	Add Edit
Mental health	▼ Add	Edit	Male Female	<u>C</u> ancel Add
Test	Result Class	Action Class		Editable
PPD Pap Smear	PPD Cervical CA	PPD	Unknown	No No

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