



Florida Department of Health

HIV/AIDS Section

CAREWare User Manual

CAREWare User Manual

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INTRODUCTION

What is CAREWare?

CAREWare is free, scalable software for managing and monitoring HIV clinical and supportive care. The HIV/AIDS Section, Florida Department of Health (Department), uses CAREWare to track services funded by Ryan White Part B, Patient Care Network, Housing Opportunities for Persons with AIDS (HOPWA) and General Revenue. A number of agencies that are funded by other sources have joined the Section's CAREWare network. This arrangement contributes greatly to the Section's ability to track service usage and monitor the quality of care across multiple providers. In fact, the Department of Health's CAREWare network is the largest in the world, with over 100 participating agencies.

Comment [SL1]: Removed reference to different Parts

The purpose of this manual is to demonstrate proper methods of data entry into the CAREWare. This manual is not all encompassing of every field and functionality available in the application. There are a number of features/fields that most users will not use that are not detailed. If you have any questions about using CAREWare, please call the Help Desk at 1-850-922-7599. Explain your issue in detail and ask that the ticket be assigned to the CAREWare team.

When submitting a ticket with the Help Desk, do not include any client identifying information in the ticket. If you must make a change to a client's record, inform the Help Desk operator that you need client data changed. CAREWare staff will get the specific client information when they return your call. For a listing of information that is confidential, see [Attachment 4Appendix A](#)—Confidential CAREWare Client Identifiers.

Legend

To help you more easily navigate CAREWare, this manual was written with a color-coded system for the various data entry functions used in the database.

-  Indigo – screens
-  Teal – buttons
-  Orange – tabs
-  Light blue – fields, most of which contain free text
-  Plum – multiple-choice options, such as drop-down menus
-  Green – radio buttons and check boxes
-  Dark red – hyperlinks
-  Lime – selections available under multiple-choice options
-  Pink – forms



Chapter I—Access

Background – In order to work in the State of Florida CAREWare Network, staff must understand, accept and perform the standards of data entry and data protection described in this manual. The highest priority when working with our CAREWare network is to safeguard client information. Only after understanding and accepting that responsibility will individuals be granted log in credentials to the database.

Part 1) Confidentiality of CAREWare Data

Protocol for Breaches of Confidentiality of CAREWare Data

Purpose

This protocol outlines the steps that will be taken when there is a breach of protected health information entered into CAREWare. The protocol is intended to supplement DOHP 50-10-10 Information and Security Policy or local policies written to conform to the security requirements of Department of Health HIV/AIDS patient care contracts and subcontracts. More restrictive state or federal rules, regulations or laws take precedent over this protocol.

Definitions

1. *Breach of confidentiality of CAREWare data*—Occurs when individual identifiers, as described in “Confidential CAREWare Client Identifiers” ([Attachment 1 Appendix A](#)), are accessed by or shared with person(s) who are not legally authorized to know a client’s HIV status or other protected health information.
2. *Electronic breach of confidentiality of CAREWare data*—Occurs when individual identifiers, as described in “Confidential CAREWare Client Identifiers” ([Attachment 1 Appendix A](#)), are electronically transmitted unencrypted, or accessed or shared with person(s) who are not legally authorized to know a client’s HIV status or other protected health information.

Procedure

1. For a first offense of breach of confidentiality of CAREWare data:
 - a. The HIV/AIDS Section (HAS) will notify the user of the breach and the user will be locked out of CAREWare until the steps in paragraphs 1.b-d are completed.
 - b. HAS will notify the user’s supervisor and/or the executive administrator of the user’s organization of the seriousness of this issue and require an acknowledgement by their supervisor/administrator in writing. An email to the HAS staff making the notification is acceptable written acknowledgement.
 - c. HAS staff will report the breach to HAS’s Information Security and Privacy Coordinator, who will submit an Incident Report. Depending on the severity of the breach, the Incident Report will be sent to the Division of Disease Control and Health Protection’s (Division) security officer or the Department’s Inspector General for review.

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- d. If an electronic breach of confidentiality of CAREWare data is by unencrypted transmission via email, the sender and all recipients will be instructed to double- or triple-delete the email, depending on the sender's and recipients' email program(s). The HAS staff member who reports the breach is responsible for notifying Department staff to delete the email. The user is responsible for notifying all other recipients.

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2. For a second offense of breach of confidentiality of CAREWare data:
 - a. HAS will notify the CAREWare user of the breach and the user will be locked out of CAREWare.
 - b. HAS will notify the user's supervisor and/or the executive administrator of the user's organization of the seriousness of this issue and require an acknowledgement by their supervisor/administrator in writing. An email to the HAS staff making the notification is acceptable written acknowledgement.
 - c. HAS staff will report the breach to the HAS' Information Security and Privacy Coordinator, who will submit an Incident Report. Depending on the severity of the breach, the Incident Report will be sent to the Division security officer or the Department's Inspector General for review.
 - d. If an electronic breach of confidentiality of CAREWare data is by unencrypted transmission via email, the sender and all recipients will be instructed to double- or triple-deleted the email, depending on the sender's and recipients' email program(s). The HAS staff member who reports the breach is responsible for notifying Department staff to delete the email. The user is responsible for notifying all other recipients.
 - e. If the supervisor/executive director wants the user to have access to the system after the second breach, the supervisor/executive director will send in a written request (email is acceptable) to HAS asking that the user be granted access to CAREWare.
 - f. An internal HAS panel comprised of representatives of the Division's information security officers, the HIV/AIDS Surveillance Unit and the HIV/AIDS Patient Care Community Programs Unit will review the incident. The panel will meet as soon as possible and decide the appropriate remedy for the violation.
 - g. If the user or their organization disagrees with the decision of the panel, they may appeal the decision to the HAS administrator.
3. For a third or subsequent offense of breach of confidentiality of CAREWare data:
 - a. HAS will notify the CAREWare user of the breach and the user will be **permanently** locked out of CAREWare.
 - b. HAS will notify the user's supervisor and/or the executive administrator of the user's organization and require an acknowledgement by their supervisor/administrator in writing. An email to the HAS staff making the notification is acceptable written acknowledgement.
 - c. HAS staff will report the breach to the HAS' Information Security and Privacy Coordinator, who will submit an Incident Report. Depending on the severity of the breach, the Incident Report will be sent to the division security officer or the Department's Inspector General for review.
 - d. If an electronic breach of confidentiality of CAREWare data is by unencrypted transmission via email, the sender and all recipients will be instructed to double- or triple-deleted the email, depending on the sender's and recipients' email program(s). The HAS staff member who reports the breach is responsible for notifying Department staff to delete the email. The user is responsible for notifying all other recipients.

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- e. The user or their organization may appeal the permanent lock-out to the HAS administrator.

Part 2) Access to CAREWare

Adding a New User to CAREWare

For employees required to use the CAREWare database, call the **Help Desk at 850-922-7599** to request the creation of a new CAREWare account.

If the employee requesting access is a Department employee:

1. A local CAREWare provider administrator contacts the Help Desk and requests the assignment of a new CAREWare user ID. The Help Desk creates a ticket and emails it to the requestor. This email includes the ~~CAREWare~~ New User Packet comprised of the CAREWare Account Request Form, Confidential CAREWare Client Identifiers (~~Attachment 1 Appendix A~~) and the ~~Protocol for Breaches of Confidentiality of CAREWare Data and the Protocol for Breaches of Confidentiality of CAREWare Data Acknowledgement form~~.
2. Complete the CAREWare Account Request Form ~~along with the Protocol for Breaches of Confidentiality of CAREWare Data Acknowledgement form~~; scan the completed documents; attach ~~them~~ to the ticket; and email ~~them~~ back to the Help Desk.
3. The Reporting Unit creates a CAREWare user ID and notifies the individual when their account is established.
4. All necessary application files will be made available to the new user so they may have their local IT department install the software.

If the employee requesting access is not a Department employee:

1. A local CAREWare provider administrator contacts the Help Desk and requests the assignment of a new CAREWare user ID. The Help Desk creates a ticket and emails it to the requestor. This email includes the ~~CAREWare~~ New User Packet comprised of the CAREWare Account Request Form, Confidential CAREWare Client Identifiers (~~Attachment 1 Appendix A~~) and the ~~Protocol for Breaches of Confidentiality of CAREWare Data and the Protocol for Breaches of Confidentiality of CAREWare Data Acknowledgement form~~.
2. Complete the CAREWare Account Request Form ~~along with the Protocol for Breaches of Confidentiality of CAREWare Data Acknowledgement form~~; scan the completed documents; attach ~~it them~~ to the ticket; and email ~~them~~ back to the Help Desk.
3. After receipt of the documents listed in Step 2, a network user name is created and a Citrix Request form is completed by the Reporting Unit and emailed to the user through the Help Desk ticket.
4. The requestor signs the Citrix Request form, scans it, attaches it to the ticket and emails the signed form to the Help Desk.
5. Once Citrix rights have been granted, the user will be notified that their account is established and the link to the Citrix Receiver will be emailed to them.
6. The user or their local IT staff will install the Citrix Receiver.

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Removing Users from CAREWare

It is the responsibility of the local agencies to notify the Reporting Unit and their contract manager when an employee should no longer have access to CAREWare.

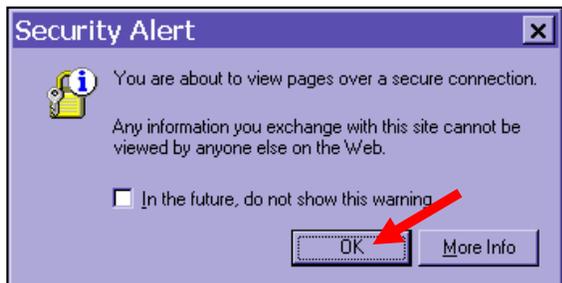
1. The local agency's CAREWare provider administrator must immediately lock out the user from the application.
2. Once the user is locked out, the provider administrator must call the Help Desk (850-922-7599) and request a CAREWare user ID close out.
3. The Help Desk creates a ticket and emails it to the requestor. This email includes the CAREWare Request form.
4. The requestor completes the CAREWare Account Request form, scans it, attaches it to the ticket and emails the signed form to the Help Desk.
5. The Reporting Unit revokes the user ID from the domain/domains.
6. The agency's local CAREWare Provider -aAdministrator contacts contract manager to notify of deletion.

Comment [SL2]: Need to reword

Part 3) Citrix Log-on for Staff of Private Agencies

Users who work on a computer that is not directly connected to the Department network must access the system through Citrix. Download the Citrix Receiver from <http://receiver.citrix.com/> and run the CitrixReceiverWeb.exe file to install. Citrix uses pop-ups, so Internet Explorer pop-up blocker should be turned off. If you have any questions, please call the Help Desk at 850-922-7599.

1. Citrix Log-on: Open your Internet browser and enter the following address:
dohaccess.state.fl.us
2. Click **OK** if the screen below appears. If the screen does not appear, move to the next step.



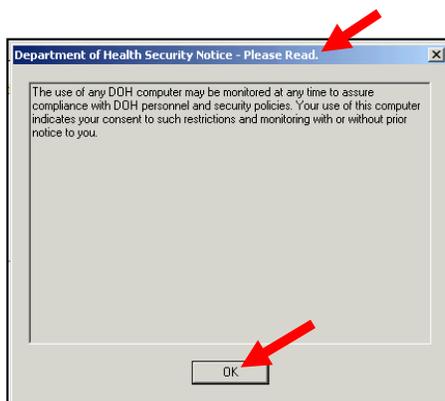
3. The site will take you to **Citrix Access Platform** screen. Enter your Department account **User Name** and **Password** and click **Log On**.



4. Click on the **CAREWare Production** icon.



5. The **Department of Health Security Notice – Please Read** screen will appear as the Citrix client connects to the Department’s network. Click **OK**.



6. Select the **Full Access** and **Never ask me again** options if the **Client File Security** screen appears. If the screen does not appear, move to the next step. Click **OK**.

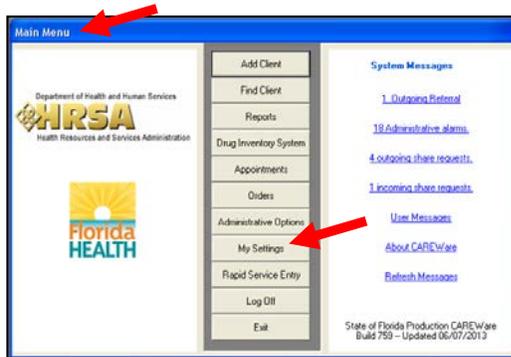


Part 4) CAREWare Login

1. Go to the **RW CAREWare Login** screen. Enter your **User Name** and temporary **Password** (assigned by the system administrator). Click **Login**.



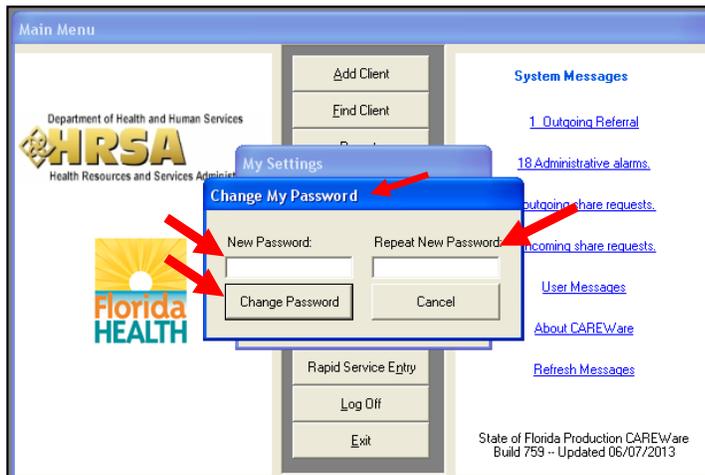
2. To change the temporary password provided, select **My Settings** from the **Main Menu**.



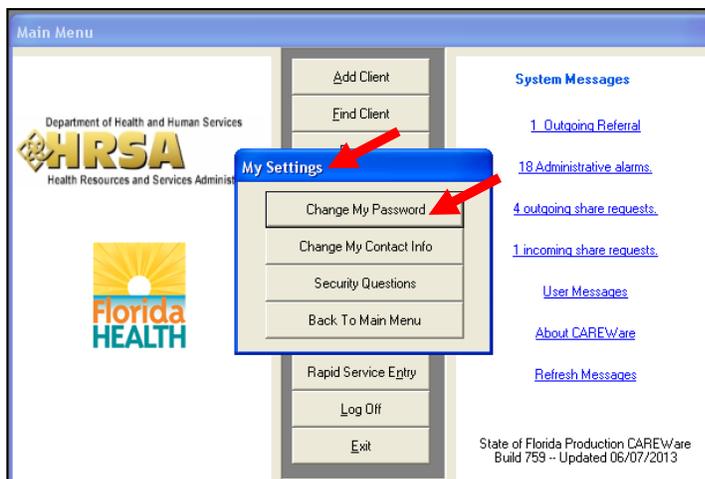
3. From the **My Settings** screen, select **Change My Password**.



- The **Change My Password** screen will prompt you to enter a **New Password** and **Repeat New Password**. Click on the **Change Password** button when completed.



- Select **Change My Contact Info** from the **My Settings** screen.



6. Enter your **First Name**, **Last Name**, **Phone** (including extension) and **Email** address in the **Contact Information** screen. Click **Save**.

The screenshot shows a web application interface with a 'Main Menu' header. The menu includes 'Add Client', 'Find Client', 'Log Off', and 'Exit'. A 'System Messages' link is also visible. The 'Contact Information' form is the central focus, with a blue header and a white body. It contains the following fields and buttons:

- User Name / Login ID:** A text box containing 'S1'.
- First Name:** A text box with a red arrow pointing to it.
- Last Name:** A text box with a red arrow pointing to it.
- Phone:** A text box with a red arrow pointing to it.
- Email:** A text box with a red arrow pointing to it.
- Save:** A button with a red arrow pointing to it.
- Cancel:** A button.

At the bottom right of the application, the text reads: 'State of Florida Production CAREWare Build 759 -- Updated 06/07/2013'.

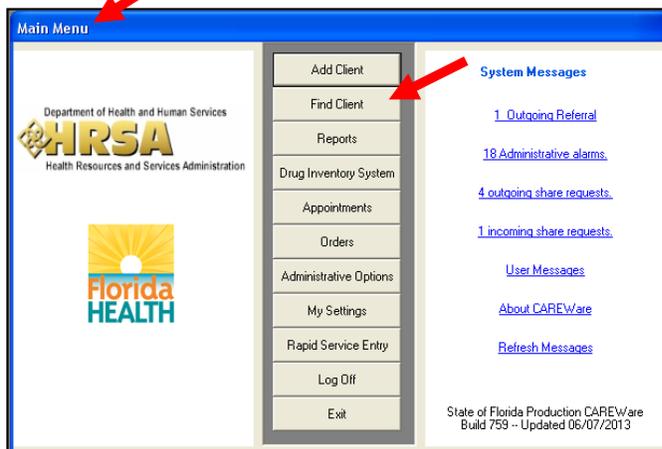
Chapter II – Client Data

Background – Following standards of data entry is a very important step in order to have valid and reliable data. By inputting accurate data properly, we can greatly increase the quality of our reporting. HRSA requires client level data be submitted yearly for individuals receiving HRSA funding. The State of Florida also mandates a number of data point be submitted for clients. The data captured in CAREWare is used ~~not only~~ to meet these needs, ~~but also to assist in determining HIV/AIDS funding allocation.~~ Thus, it is critical that our users follow a standard method of inputting information into CAREWare. If any portion of this chapter is unclear, please submit a Help Desk ticket by calling 850-922-7599. Tell the operator “you have some questions on data entry.” Have the ticket assigned to the CAREWare Team. Make sure to **NOT PUT ANY** client information in the ticket as the database the Help Desk uses is not secure. A CAREWare Team member will call you back to answer any of your questions. A note about saving. Some fields in CAREWare do not require the clicking of a **Save** button, while other fields do. An indicator of whether or not inputted data requires the selection of a **Save** button is your inability to select any other option on the screen. Only by pressing the **Save** button are you able to move into other areas of CAREWare.

Comment [SL3]: Need to remove; may be a historical reference

Part 5) Finding a Client

1. To search for a client, select **Find Client** from the **Main Menu**.



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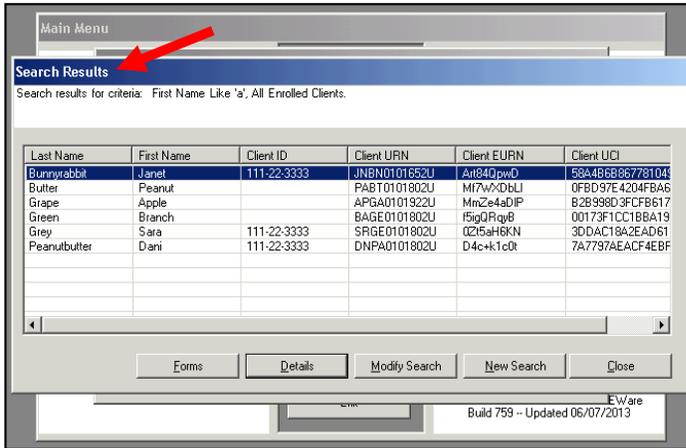
- When the **Find Client** screen appears, enter search text into any of the fields: **Last Name**, **First Name**, **Client ID**, **Client URN** (Unique Record Number) or **Client UCI** (Unique Client Identifier, auto-generated by CAREWare), and select **Search**.

The screenshot shows a 'Find Client' dialog box with the following fields and controls:

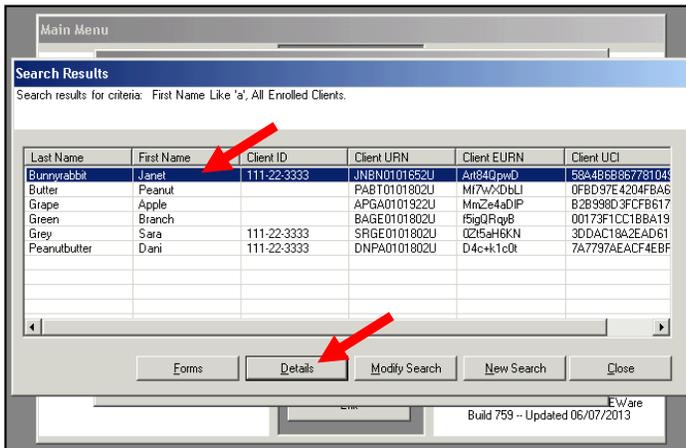
- Last Name:** Text input field with a red arrow pointing to it.
- First Name:** Text input field with a red arrow pointing to it.
- Client ID:** Text input field with a red arrow pointing to it.
- Client URN:** Text input field with a red arrow pointing to it.
- Client UCI:** Text input field with a red arrow pointing to it.
- View Active Clients Only** checkbox with a red arrow pointing to it.
- Maximum Results:** Text input field containing the value '1000'.
- Search** button with a red arrow pointing to it.
- Cancel** button.

At the bottom right of the dialog box, the text 'Build 759 -- Updated 06/07/2013' is visible.

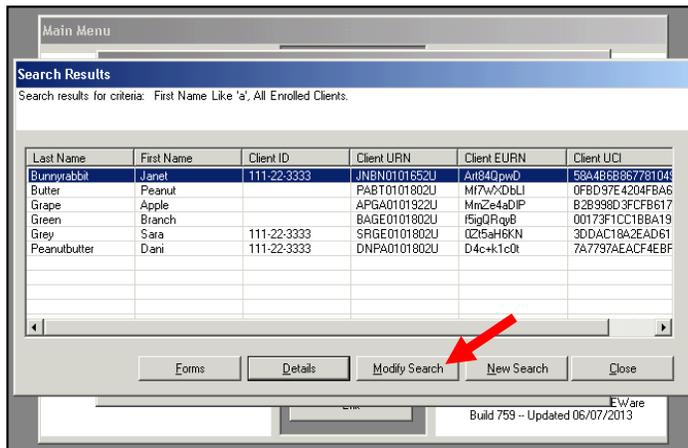
- The **Search Results** screen will provide a list of clients who match the criteria entered into the search screen. Be aware that the results will not begin with the search criteria entered, but will contain the same character string. For example, below a search of "a" was performed in the **First Name** field. The results contain names that have an "a" somewhere in the first name, not necessarily at the beginning.



- Select the record for which you are searching and double-click, or highlight and select **Details** to view the client's record.

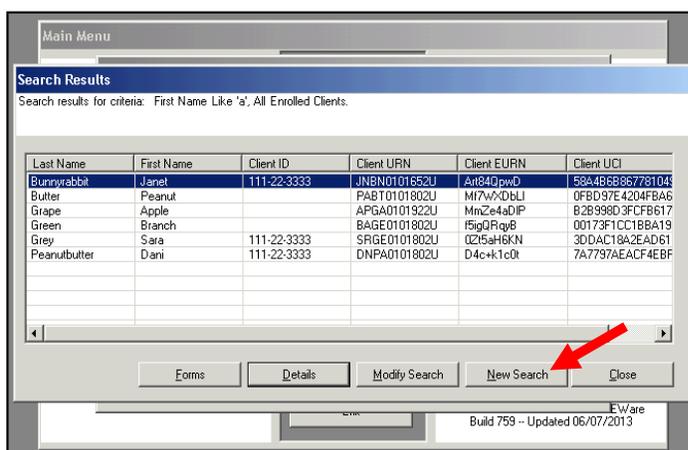


- If the results do not contain the client for whom you are searching, select **Modify Search** and edit your search criteria.

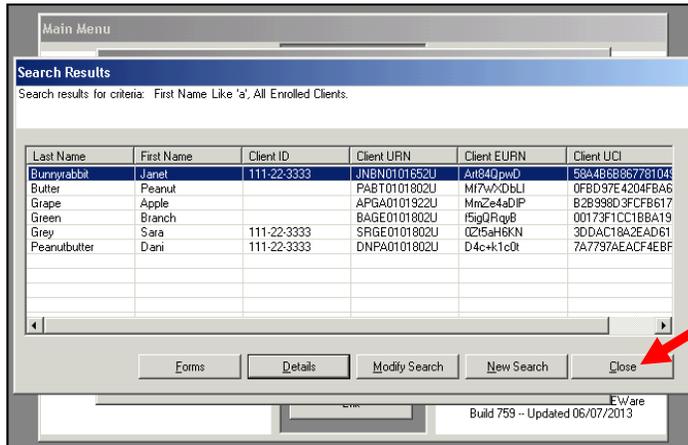


- When conducting a search to verify that a client does not already exist in the database, input only a few letters of the last name and a letter or two of the first name. This will give you a greater chance of catching the client under a different spelling of the name. For example, if you type "Gray" in the **Last Name** field, you would miss that the client could be in the system under the spelling of "Grey." It is always better to put in fewer characters in the search because it improves your chances of finding the client under a different spelling of their name. This will reduce duplications in the system.

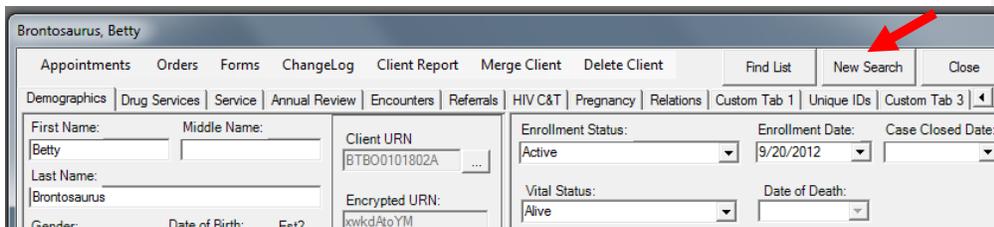
- To start over, select **New Search**.



8. To leave the search process, select **Close**.



9. You can also access the **Find Client** function from the client screen (example below), by selecting **New Search**.



Part 6) Adding a New Client

1. Before adding a new client, search the database to ensure the client has not already been entered into the system.
2. To add a new client, select **Add Client** from the **Main Menu**.



3. At the **Add Client** screen, enter the client's FULL LEGAL NAME, **Last Name** and **First Name**. Do not enter nicknames.

The screenshot shows the 'Add Client' form. At the top left, the title 'Add Client' is displayed with a red arrow pointing to it. Below the title, there are two input fields: 'Last Name:' with the value 'Public' and 'First Name:' with the value 'Jack', both with red arrows pointing to them. Below these are 'Middle Name:' with the value 'Q' and 'Gender:' with a dropdown menu set to 'Male'. At the bottom left, there is a 'BirthDate:' field with the value '02/21/1970' and an 'Estimated?' checkbox. At the bottom right, there is a 'Generated URN:' field with the value 'JCPB022170MU'. At the very bottom, there are two buttons: 'Add Client' and 'Cancel'.

- 4. Enter the client's **Gender** and **Birth Date** in mm/dd/yyyy format. Once all the information is entered, click **Add Client**.

The screenshot shows the 'Add Client' form with the following fields and values: Last Name: Public, First Name: Jack, Middle Name: Q, Gender: Male (dropdown), BirthDate: 02/21/1970, Estimated? (checkbox), and Generated URN: JCPB022170MU. Red arrows point to the Gender dropdown, the BirthDate text box, and the Add Client button.

- 5. CAREWare will create a **Generated URN** based on the first and third letters of the first name, the first and third letters of the last name, the date of birth, and a code for gender.

This screenshot is identical to the previous one, but with a red arrow pointing to the Generated URN field, which contains the value JCPB022170MU.

CAREWare uses the URN to determine if the client is already in the database and to generate an unduplicated client count for the state. Therefore, it is **very important** that all **Add Client** screen entries are accurate. Note the difference between the URNs in the two screens below for John Public and Jack Public.

The image shows two side-by-side screenshots of the 'Add Client' form. Both forms have the same layout with fields for Last Name, First Name, Middle Name, Gender, BirthDate, and Generated URN. The left form is for John Public, and the right form is for Jack Public. Red arrows point to the 'Generated URN' field in both forms, highlighting the difference: 'JHPB022170MU' for John and 'JCPB022170MU' for Jack.

Part 7) Duplicate Clients and Duplicate URNs

It is likely that a client will receive services from multiple providers within a network. It is also likely in a provider network with many clients that two individuals will have the same URN. If a provider enters the URN of a client who is new to them but has been seen by another provider and is already in the central database, the **Possible Duplicate Client List** screen will appear.

The image shows a screenshot of the 'Possible Duplicate Client List' screen. The title bar says 'Main Menu' and the window title is 'Possible Duplicate Client List'. A red arrow points to the title. Below the title is a message: 'The new client information you have entered generates a URN that is shared by at least one existing client. View the details of the possible matching client(s) listed below to determine whether or not the client you are entering is really a new client.' Below this is a table with one row of data:

Last Name:	First Name:	Client URN:
Boop	Betty	BTB00101802U

Below the table are two buttons: 'View more information about the selected client.' and 'Cancel the add client process.'. At the bottom right, it says 'Build 753 -- Updated 06/07/2013'.

1. Click **View more information about the selected client** to see if your new client is an existing client at another provider.

Main Menu

Possible Duplicate Client List

The new client information you have entered generates a URN that is shared by at least one existing client. View the details of the possible matching client(s) listed below to determine whether or not the client you are entering is really a new client.

Last Name:	First Name:	Client URN:
Boop	Betty	BTB00101802U

[View more information about the selected client.](#)

[Cancel the add client process.](#)

Build 759 -- Updated 06/07/2013

2. The **Possible Duplicate Client Information** screen on the client will appear with three options.

Possible Duplicate Client Information.

URN Fields:

First Name: Middle Name: Last Name:

Date of Birth: Gender: Client URN:

Address Fields:

Address: City:

State: County: Zip Code: Phone Number:

Ethnicity:

Hispanic Non-Hispanic Unknown

Race

White American Indian or Alaska Native Other

Black or African American Native Hawaiian or Other Pacific Islander Unknown

Asian

[Return to the list of possible matches to view another client.](#)

[This is the client I was attempting to add. Continue to client screen.](#)

[The client I am adding is not on the list. Create a new client record.](#)

- If, after a review of the demographic screen, you determine that this is the same client, select **This is the client I was attempting to add** and you'll be taken to that client's record.

Return to the list of Possible matches to view another client.

This is the client I was attempting to add. Continue to client screen.

The client I am adding is not on the list. Create a new client record.

- If the client is not in the database, select either **Return to the list of possible matches** or **The client I am adding is not on the list. Create a new client record**.

Return to the list of Possible matches to view another client.

This is the client I was attempting to add. Continue to client screen.

The client I am adding is not on the list. Create a new client record.

- If you select **The client I am adding is not on the list. Create a new client record** option, the **Duplicate URN Resolution** screen will appear.

Duplicate URN Resolution

Change the last character of the matching URNs in order to ensure that each client has a unique record number. Modify the new client's final URN letter by selecting it in the combo box. To modify the URN for the matching client whose URN ends with "U", double click the client row in the list, select their new URN and press the Set URN button.

New Client

First Name: [Betty] Last Name: [Bronkosausus] Base URN: [BTB00101802]

Matching Clients

First Name: Last Name: Select URN: [U] [Set URN]

Last Name	First Name	Client URN
Boop	Betty	BTB00101802U

[Edit Selected Client's URN]

[Finish] [Cancel Add Client]

- Because the new client you were trying to add—Betty Brontosaurus—has the same URN as Betty Boop, you must add another character to the end of the URN to distinguish this client in the database. In this case, we've added the letter **A** in the drop-down menu next to **Base URN**. If that letter was already in use, then you could use **B**, and so on.

Duplicate URN Resolution

Change the last character of the matching URNs in order to ensure that each client has a unique record number. Modify the new client's final URN letter by selecting it in the combo box. To modify the URN for the matching client whose URN ends with "U", double click the client row in the list, select their new URN and press the Set URN button.

New Client

First Name: Last Name: Base URN:

Matching Clients

First Name: Last Name: Select URN:

Last Name	First Name	Client URN
Boop	Betty	BTB00101802U

- Click **Finish**. **NOTE:** All URNs in the database initially have the letter "U" placed at the end of the URN by default, as in the example below.

Duplicate URN Resolution

Change the last character of the matching URNs in order to ensure that each client has a unique record number. Modify the new client's final URN letter by selecting it in the combo box. To modify the URN for the matching client whose URN ends with "U", double click the client row in the list, select their new URN and press the Set URN button.

New Client

First Name: Last Name: Base URN:

Matching Clients

First Name: Last Name: Select URN:

Last Name	First Name	Client URN
Boop	Betty	BTB00101802U

Part 8) Demographics

1. After finding or adding a client, the file will open to the **Demographics** tab.

The screenshot shows the 'Demographics' tab for a client named 'Brontosaurus, Betty'. The 'Client ID' field is highlighted with a red arrow and contains the value '1234'. Other fields include First Name (Betty), Last Name (Brontosaurus), Gender (Female), Date of Birth (1/1/1980), and various medical and demographic details.

- a. **Client ID**: This field is for use at the local level. If your agency uses an internal client or chart number, enter it in this field. A client may have different values in the field at different agencies.

This is a second screenshot of the same 'Demographics' tab, showing the same data as the first screenshot. A red arrow points to the 'Client ID' field, which contains the value '1234'.

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- b. Contact information: Enter the client's **Address, City, State, Zip Code, County** and **Phone Number**. You must select "Florida" from the **State** drop-down menu before you can select the appropriate county.

The screenshot shows the 'Brontosaurus, Betty' client record form. The 'Street Address' field is populated with '987 Blue Road'. The 'City' is 'Tallahassee', 'State' is 'Florida', and 'Zip Code' is '32389'. The 'County' is 'Leon' and 'Phone Number' is '850-555-4444'. The 'Include on label report' checkbox is unchecked. A red arrow points to this checkbox.

- c. **Include on label report**: This field is not checked by default, indicating that it is not permissible to use this client's name and address when running mailing labels from CAREWare. If the client wants to receive mail at their address, check this box.

The screenshot shows the same client record form as above, but the 'Include on label report' checkbox is now checked. A red arrow points to this checkbox.

- d. **Race:** Enter the client's self-reported race categories. If Asian is selected, make sure to enter the Asian Subgroup.

Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | *Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

First Name: Betty Middle Name: Client URN: BTB00101802A
Last Name: Brontosaurus Encrypted URN: jwkkdAoYM

Gender: Female Date of Birth: 1/1/1980 Est?

Sex at Birth: Female Encrypted UCI: [6C2AD91C340E36A880C4D80B98EA400B1184F473A]

Client ID: 1234

Street Address: 987 Blue Road Include on label report

City: Tallahassee State: Florida Zip Code: 32399

County: Leon Phone Number: 850-555-4444

Race(s): White, Asian Asian Subgroup: Filipino

Ethnicity: Hispanic Hispanic Subgroup: Cuban

Enrollment Status: Active Enrollment Date: 9/20/2012 Case Closed Date:
Vital Status: Alive Date of Death:
HIV Status: HIV-positive (not AIDS) HIV+ Date: 7/1/2012 Est? AIDS Date: Est?

HIV Risk Factors: Heterosexual Contact

Common Notes | Provider Notes | User Messages | Case Notes

- e. **Ethnicity:** Enter the client's self-reported ethnicity (Hispanic or non-Hispanic). If Hispanic is selected, make sure to enter the Hispanic Subgroup.

Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | *Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

First Name: Betty Middle Name: Client URN: BTB00101802A
Last Name: Brontosaurus Encrypted URN: jwkkdAoYM

Gender: Female Date of Birth: 1/1/1980 Est?

Sex at Birth: Female Encrypted UCI: [6C2AD91C340E36A880C4D80B98EA400B1184F473A]

Client ID: 1234

Street Address: 987 Blue Road Include on label report

City: Tallahassee State: Florida Zip Code: 32399

County: Leon Phone Number: 850-555-4444

Race(s): White, Asian Asian Subgroup: Filipino

Ethnicity: Hispanic Hispanic Subgroup: Cuban

Enrollment Status: Active Enrollment Date: 9/20/2012 Case Closed Date:
Vital Status: Alive Date of Death:
HIV Status: HIV-positive (not AIDS) HIV+ Date: 7/1/2012 Est? AIDS Date: Est?

HIV Risk Factors: Heterosexual Contact

Common Notes | Provider Notes | User Messages | Case Notes

f. **Enrl Status:** Indicate the client's enrollment status.

Brontosaurus, Betty

Appointments | Orders | Forms | Changelog | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | *Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | **Enrl** | Custom Tab 1 | Unique IDs | Custom Tab 3

First Name: Betty Middle Name: Client URN: BTBO0101802A
Last Name: Brontosaurus Encrypted URN: kwkdNoYM

Gender: Female Date of Birth: 1/1/1980 Est?
Sex at Birth: Female Encrypted UCI: 6C2AD91C340E36A880C4D80B98EA400B1184F473A

Client ID: 1234

Street Address: 987 Blue Road Include on label report
City: Tallahassee State: Florida Zip Code: 32399
County: Leon Phone Number: 850-555-4444

Race(s): White, Asian Asian Subgroup: Filipino
Ethnicity: Hispanic Hispanic Subgroup: Cuban

Enrollment Status: Active Enrollment Date: 9/20/2012 Case Closed Date:
Vital Status: Alive Date of Death:
HIV Status: HIV-positive (not AIDS) HIV+ Date: 7/1/2012 Est? AIDS Date: Est?
HIV Risk Factors: Heterosexual Contact

Common Notes | Provider Notes | User Messages | Case Notes

g. **Enrl Date:** The enrollment date should be equal to the date of the first service the client received at the agency.

Brontosaurus, Betty

Appointments | Orders | Forms | Changelog | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | *Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

First Name: Betty Middle Name: Client URN: BTBO0101802A
Last Name: Brontosaurus Encrypted URN: kwkdNoYM

Gender: Female Date of Birth: 1/1/1980 Est?
Sex at Birth: Female Encrypted UCI: 6C2AD91C340E36A880C4D80B98EA400B1184F473A

Client ID: 1234

Street Address: 987 Blue Road Include on label report
City: Tallahassee State: Florida Zip Code: 32399
County: Leon Phone Number: 850-555-4444

Race(s): White, Asian Asian Subgroup: Filipino
Ethnicity: Hispanic Hispanic Subgroup: Cuban

Enrollment Status: Active Enrollment Date: 9/20/2012 Case Closed Date:
Vital Status: Alive Date of Death:
HIV Status: HIV-positive (not AIDS) HIV+ Date: 7/1/2012 Est? AIDS Date: Est?
HIV Risk Factors: Heterosexual Contact

Common Notes | Provider Notes | User Messages | Case Notes

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- h. **Case Closed:** If the enrollment status is **Not Active** or **Unknown**, add a **Case Closed** date.

The screenshot shows the client record for Betty Brontosaurus. The Enrollment Status is set to 'Active', and the Enrollment Date is 9/20/2012. The Case Closed Date field is empty. A red arrow points to this field. Other fields include: First Name: Betty, Last Name: Brontosaurus, Gender: Female, Date of Birth: 1/1/1980, Encrypted UCI: 6C2AD91C340E36A880C4D80B98EA400B1184F473A, Client ID: 1234, Street Address: 987 Blue Road, City: Tallahassee, State: Florida, Zip Code: 32399, County: Leon, Phone Number: 850-555-4444, Race(s): White, Asian, Ethnicity: Hispanic, and HIV Status: HIV-positive (not AIDS).

- i. **Vital Status:** Indicate the vital status—**Alive** or **Deceased**—of the client.

The screenshot shows the client record for Betty Brontosaurus. The Enrollment Status is 'Active' and the Enrollment Date is 9/20/2012. The Vital Status is set to 'Alive'. A red arrow points to the Vital Status dropdown menu. Other fields are the same as in the previous screenshot.

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j. **Date of Death:** If the client's vital status is **Deceased**, input the date of death.

The screenshot shows the 'Brontosaurus, Betty' client record form. The 'Date of Death' field is highlighted with a red arrow. The form includes fields for Demographics, Client URN, Enrollment Status, Vital Status, HIV Status, and Address.

First Name: Betty	Middle Name:	Client URN: BTB00101802A	Enrollment Status: Active	Enrollment Date: 9/20/2012	Case Closed Date:
Last Name: Brontosaurus		Encrypted URN: jwkdAoYM	Vital Status: Alive	Date of Death:	
Gender: Female	Date of Birth: 1/1/1980	Sex at Birth: Female	HIV Status: HIV-positive (not AIDS)	HIV+ Date: 7/1/2012	AIDS Date:
Encrypted UCI: 6C2AD91C340E36A880C4D80B98EA400B1184F473A			HIV Risk Factors: Heterosexual Contact		
Client ID: 1234					
Street Address: 987 Blue Road					
City: Tallahassee	State: Florida	Zip Code: 32399			
County: Leon	Phone Number: 850-555-4444				
Race(s): White, Asian	Asian Subgroup: Filipino				
Ethnicity: Hispanic	Hispanic Subgroup: Cuban				

k. **HIV Status:** Enter the client's current HIV status from among the options in the drop-down menu.

The screenshot shows the 'Brontosaurus, Betty' client record form. The 'HIV Status' field is highlighted with a red arrow. The form includes fields for Demographics, Client URN, Enrollment Status, Vital Status, HIV Status, and Address.

First Name: Betty	Middle Name:	Client URN: BTB00101802A	Enrollment Status: Active	Enrollment Date: 9/20/2012	Case Closed Date:
Last Name: Brontosaurus		Encrypted URN: jwkdAoYM	Vital Status: Alive	Date of Death:	
Gender: Female	Date of Birth: 1/1/1980	Sex at Birth: Female	HIV Status: HIV-positive (not AIDS)	HIV+ Date: 7/1/2012	AIDS Date:
Encrypted UCI: 6C2AD91C340E36A880C4D80B98EA400B1184F473A			HIV Risk Factors: Heterosexual Contact		
Client ID: 1234					
Street Address: 987 Blue Road					
City: Tallahassee	State: Florida	Zip Code: 32399			
County: Leon	Phone Number: 850-555-4444				
Race(s): White, Asian	Asian Subgroup: Filipino				
Ethnicity: Hispanic	Hispanic Subgroup: Cuban				

- I. **HIV+ Date:** Enter the date the client was identified as HIV-positive. If the date is an estimate, check the **Est?** box.

Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV CAT | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

First Name: Betty | Middle Name: | Client URN: BTBC0101802A

Last Name: Brontosaurus | Encrypted URN: jvkl4NoYM

Gender: Female | Date of Birth: 1/1/1980 | Est?

Sex at Birth: Female | Encrypted UCI: 6C2AD91C340E36A880C4D80898EA400B1184F473A

Client ID: 1234

Street Address: 887 Blue Road | Include on label report

City: Tallahassee | State: Florida | Zip Code: 32399

County: Leon | Phone Number: 850-555-4444

Race(s): White, Asian | Asian Subgroup: Filipino

Ethnicity: Hispanic | Hispanic Subgroup: Mexican

Enrollment Status: Active | Enrollment Date: 9/20/2012 | Case Closed Date: |

Vital Status: Alive | Date of Death: |

HIV Status: HIV+ (not AIDS) | HIV+ Date: 7/1/2012 | Est? | AIDS Date: | Est?

HIV Risk Factors: Heterosexual Contact

Common Notes | Provider Notes | User Messages | Case Notes

- m. **AIDS Date:** Enter the date the client was diagnosed with AIDS. If the date is an estimate, check the **Est?** box.

Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV CAT | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

First Name: Betty | Middle Name: | Client URN: BTBC0101802A

Last Name: Brontosaurus | Encrypted URN: jvkl4NoYM

Gender: Female | Date of Birth: 1/1/1980 | Est?

Sex at Birth: Female | Encrypted UCI: 6C2AD91C340E36A880C4D80898EA400B1184F473A

Client ID: 1234

Street Address: 887 Blue Road | Include on label report

City: Tallahassee | State: Florida | Zip Code: 32399

County: Leon | Phone Number: 850-555-4444

Race(s): White, Asian | Asian Subgroup: Filipino

Ethnicity: Hispanic | Hispanic Subgroup: Mexican

Enrollment Status: Active | Enrollment Date: 9/20/2012 | Case Closed Date: |

Vital Status: Alive | Date of Death: |

HIV Status: HIV+ (not AIDS) | HIV+ Date: 7/1/2012 | Est? | AIDS Date: 7/1/2012 | Est?

HIV Risk Factors: Heterosexual Contact

Common Notes | Provider Notes | User Messages | Case Notes

- p. The **Provider Notes** field can be used to collect additional information about the client. The information in this field is only available to the agency entering the data.

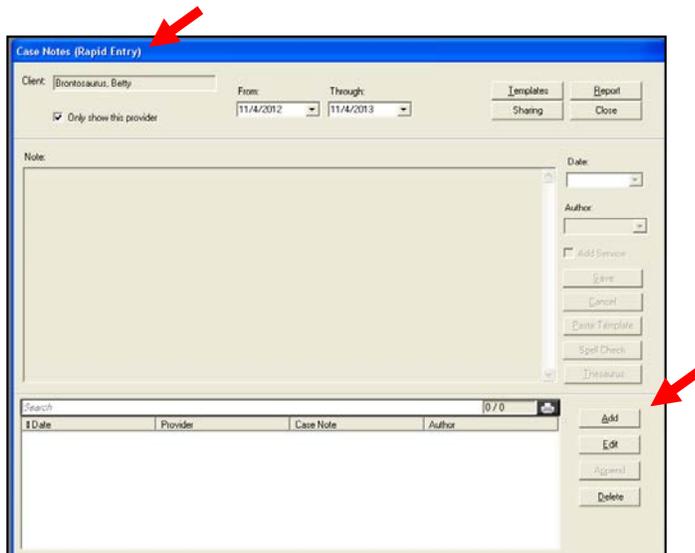
The screenshot shows a client record for Betty Brontosaurus. The form includes fields for Demographics, Enrollment Status, Vital Status, HIV Status, and HIV Risk Factors. The 'HIV Risk Factors' dropdown menu is open, and a red arrow points to the 'Heterosexual Contact' option.

- q. To input multiple notes that are viewable only by your agency, use **Case Notes**.
NOTE: If you are entering a long series of case notes at one sitting for one client, it is advisable to save your changes after each paragraph or risk losing the entered notes.

The screenshot shows the same client record for Betty Brontosaurus. The 'Case Notes' tab is selected, and a red arrow points to the 'Case Notes' tab.

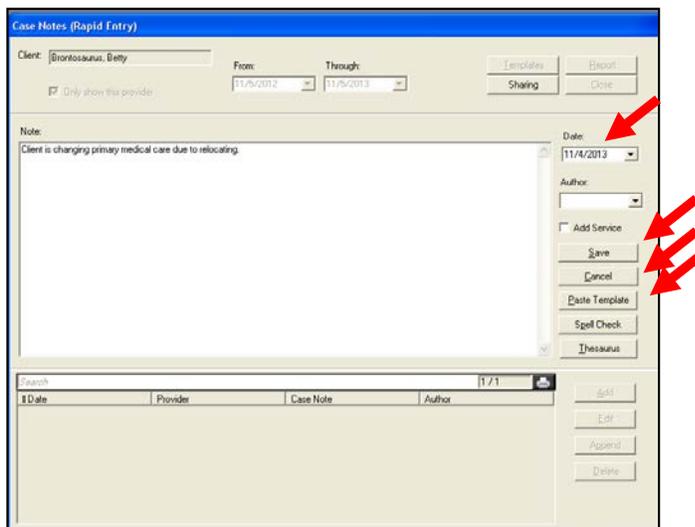
Case Notes

1. Select the **Case Notes** button, which will take you to the **Case Notes (Rapid Entry)** screen. Click on the **Add** button. This will allow you to add a new case note.



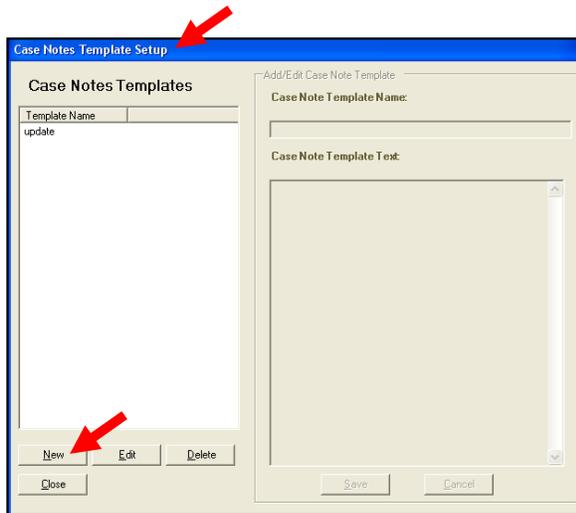
The screenshot shows the 'Case Notes (Rapid Entry)' window. At the top, the title bar reads 'Case Notes (Rapid Entry)'. Below it, the 'Client' field contains 'Brontosaurus, Betty'. There are 'From' and 'Through' date pickers set to '11/4/2012' and '11/4/2013' respectively. A checkbox labeled 'Only show this provider' is checked. On the right side, there are buttons for 'Templates', 'Report', 'Sharing', and 'Close'. The main area is a large text box for the 'Note'. To the right of the text box are fields for 'Date' (a dropdown menu), 'Author' (a dropdown menu), and an 'Add Service' checkbox. Below these are buttons for 'Save', 'Cancel', 'Paste Template', 'Spell Check', and 'Thesaurus'. At the bottom, there is a search bar and a table with columns 'ID', 'Date', 'Provider', 'Case Note', and 'Author'. The 'Add' button is highlighted with a red arrow.

2. After adding the Case Note, choose the date of the note by clicking on the **Date** drop-down menu. Select **Save** when completed. Also note the **Paste Template** option below the **Cancel** button. Clicking on this button will allow you to save a standard Case Note that you can use repeatedly without having to retype the same language.

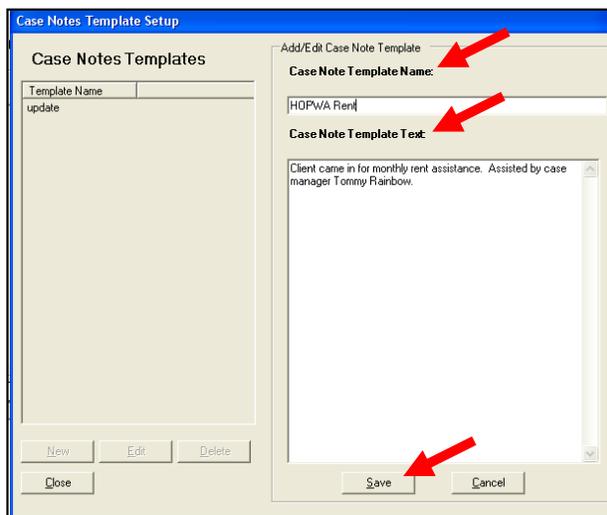


The screenshot shows the 'Case Notes (Rapid Entry)' window after a note has been added. The 'Note' field now contains the text 'Client is changing primary medical care due to relocating.'. The 'Date' dropdown menu is set to '11/4/2013'. The 'Author' field is empty. The 'Add Service' checkbox is unchecked. The 'Save', 'Cancel', 'Paste Template', 'Spell Check', and 'Thesaurus' buttons are visible. The 'Add', 'Edit', 'Append', and 'Delete' buttons are also present at the bottom. Red arrows point to the 'Date' dropdown menu and the 'Save', 'Cancel', and 'Paste Template' buttons.

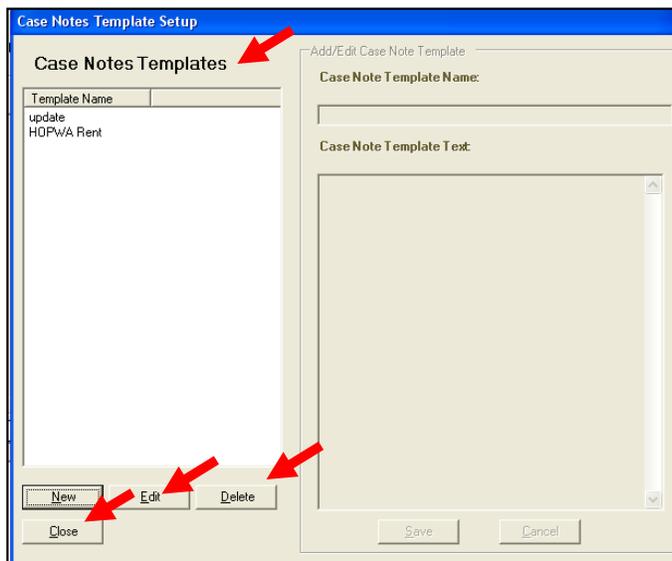
3. On the **Case Notes Template Setup** screen, select **New**.



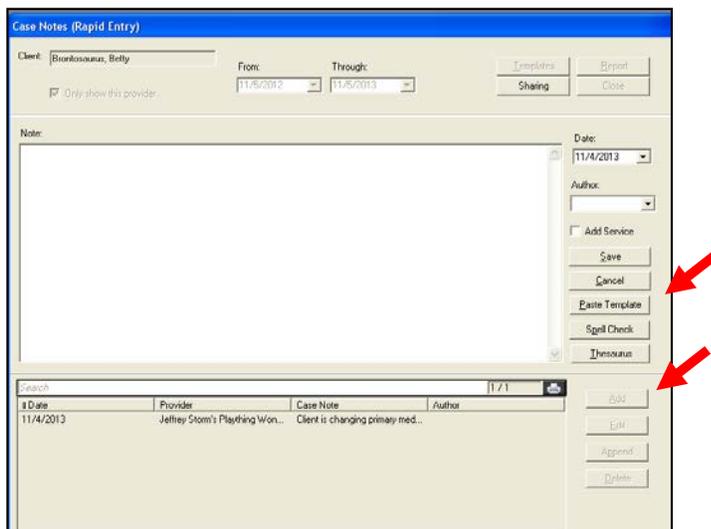
4. Add a **Case Note Template Name** and **Case Note Template Text**. Select **Save**.



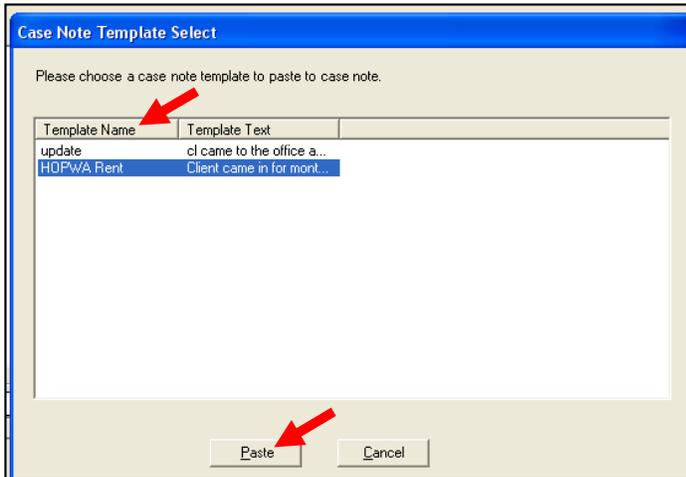
5. **Case Note Templates** will appear on the left side of the screen. **NOTE:** If you need to adjust a template, select **Edit**. If you need to remove a template, select **Delete**. Select **Close** to leave the screen.



6. To add a **Case Note Template**, select **Paste Template** after hitting **Add** on the **Case Note** screen.



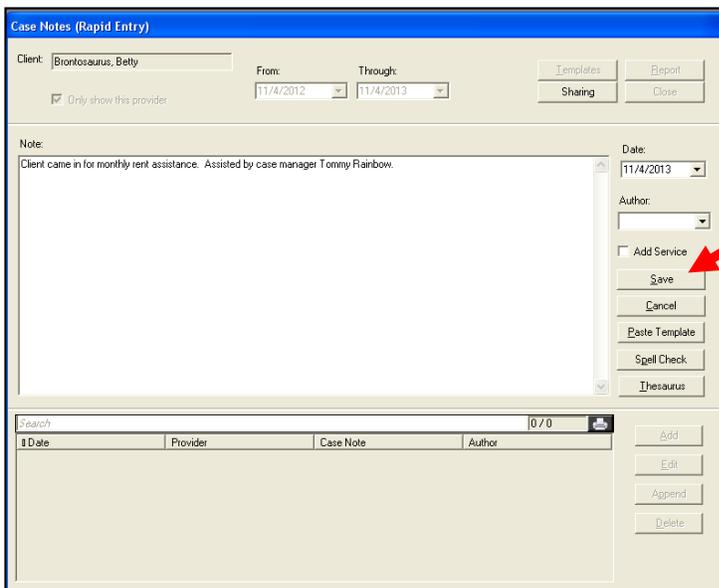
7. Choose the **Template Name** you want to use and select **Paste**.



The dialog box is titled "Case Note Template Select" and contains the instruction "Please choose a case note template to paste to case note." It features a table with two columns: "Template Name" and "Template Text". The "HDPWA Rent" template is selected. At the bottom, there are "Paste" and "Cancel" buttons. Red arrows point to the "Template Name" column header and the "Paste" button.

Template Name	Template Text
update	cl came to the office a...
HDPWA Rent	Client came in for mont...

8. **Save** the template. The Case Note Template is added to the client record.



The "Case Notes (Rapid Entry)" form shows a client record for "Bronxosaurus, Betty" with a date range from 11/4/2012 to 11/4/2013. The note text is "Client came in for monthly rent assistance. Assisted by case manager Tommy Rainbow." The "Date" is set to 11/4/2013 and the "Author" is blank. The "Add Service" checkbox is checked. The "Save" button is highlighted with a red arrow. Below the note is a table with columns for "Date", "Provider", "Case Note", and "Author".

Client: Bronxosaurus, Betty From: 11/4/2012 Through: 11/4/2013

Note: Client came in for monthly rent assistance. Assisted by case manager Tommy Rainbow.

Date: 11/4/2013

Author:

Add Service

Save

Cancel

Paste Template

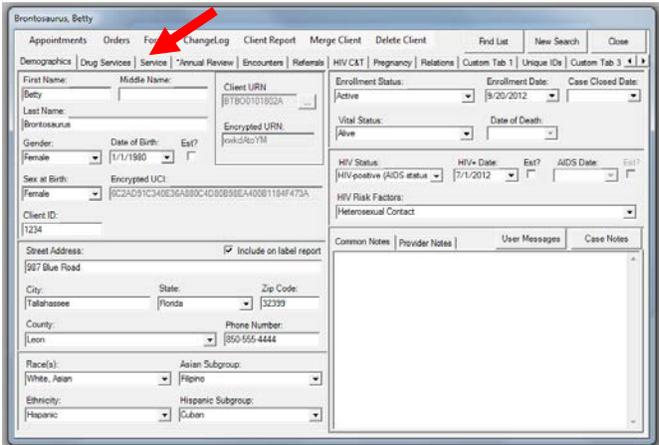
Spell Check

Thesaurus

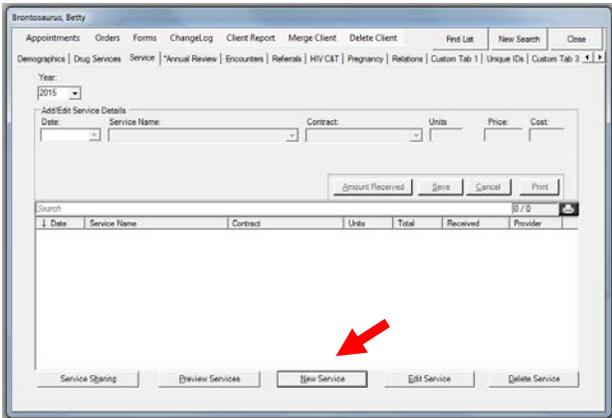
Date	Provider	Case Note	Author
------	----------	-----------	--------

Part 9) Service

1. From the client's details screen, select the **Service** tab.



1. Click on the **New Service** button to begin entering a new service.



2. Enter the **Date** of the service. You can do this manually using the mm/dd/yyyy format or by selecting a date from the drop-down calendar.

The screenshot shows the 'Add/Edit Service' form in the Brontosaurus Betty application. The form is titled 'Add/Edit Service' and has a 'Year' dropdown set to '2015'. Below the year, there are fields for 'Date', 'Service Name', 'Contract', 'Units', 'Price', and 'Cost'. A red arrow points to the 'Date' field. Below these fields are buttons for 'Amount Received', 'Save', 'Cancel', and 'Print'. At the bottom of the form is a search table with columns: Date, Service Name, Contract, Units, Total, Received, and Provider. The table is currently empty. At the very bottom of the window are buttons for 'Service Starting', 'Review Services', 'New Service', 'Edit Service', and 'Delete Service'.

3. Enter the **Service Name**. You can use the drop-down menu or type the first few letters of the service.

The screenshot shows the 'Add/Edit Service' form in the Brontosaurus Betty application. The form is titled 'Add/Edit Service Details' and has a 'Year' dropdown set to '2015'. Below the year, there are fields for 'Date', 'Service Name', 'Contract', 'Units', 'Price', and 'Cost'. A red arrow points to the 'Service Name' field. Below these fields are buttons for 'Amount Received', 'Save', 'Cancel', and 'Print'. At the bottom of the form is a search table with columns: Date, Service Name, Contract, Units, Total, Received, and Provider. The table is currently empty. At the very bottom of the window are buttons for 'Service Starting', 'Review Services', 'New Service', 'Edit Service', and 'Delete Service'.

4. Enter the **Contract** that funds the service. The contracts under which this service can be provided will be displayed on the drop-down menu. If your agency has a single contract to provide the service you selected, only that contract name will appear.

The screenshot shows the 'Brontosaurus, Betty' software interface. The 'Add/Edit Service Details' form is displayed with the following fields: Date, Service Name, Contract, Units, Price, and Cost. A red arrow points to the 'Contract' field. Below the form are buttons for 'Amount Received', 'Save', 'Cancel', and 'Print'. A search table is visible below the buttons with columns: Date, Service Name, Contract, Units, Total, Received, and Provider. At the bottom of the window are buttons for 'Service Starting', 'Review Services', 'New Service', 'Edit Service', and 'Delete Service'.

5. The number of **Units**, **Price** and **Cost**, if any, is set by default when the contract is entered into CAREWare. Unit cost is for internal use; it is not a required field. If tracked, your agency will be able to keep a detailed accounting of service costs. Both fields may be adjusted from the default values if necessary.

The screenshot shows the 'Brontosaurus, Betty' software interface. The 'Add/Edit Service Details' form is displayed with the following fields: Date, Service Name, Contract, Units, Price, and Cost. Three red arrows point to the 'Units', 'Price', and 'Cost' fields. Below the form are buttons for 'Amount Received', 'Save', 'Cancel', and 'Print'. A search table is visible below the buttons with columns: Date, Service Name, Contract, Units, Total, Received, and Provider. At the bottom of the window are buttons for 'Service Starting', 'Review Services', 'New Service', 'Edit Service', and 'Delete Service'.

6. Click the **Save** button when finished entering data.

Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | **Service** | *Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

Year: 2015

Add/Edit Service Details

Date	Service Name	Contract	Units	Price	Cost
1/1/2015	Ambulatory/Outpatient Medical Care	Hills 09823	1		\$0.00

Amount Received | **Save** | Cancel | Print

7. Additional field on the **Service** tab:

- a. **Year:** CAREWare separates services by year. If you want to see what services the client received in another year, choose that year in the drop-down menu.

Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | **Service** | *Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

Year: 2015

Add/Edit Service Details

Date	Service Name	Contract	Units	Price	Cost

Amount Received | Save | Cancel | Print

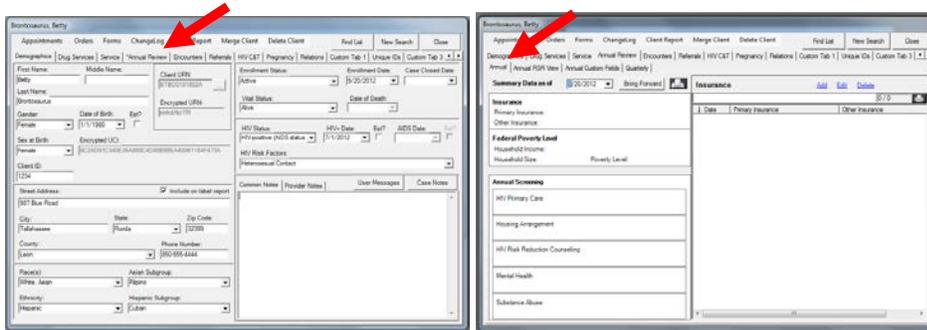
Search: 0 / 0

Date	Service Name	Contract	Units	Total	Received	Provider
1/1/2015	Ambulatory/Outpatient Medical Care	Hills 09823	1	\$0.00	\$0.00	Jeffrey Stor...

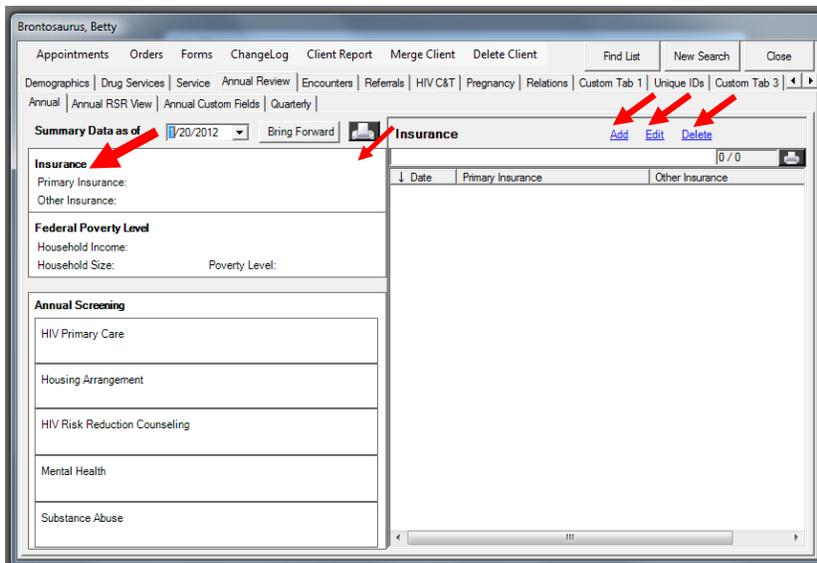
Service Sharing | Preview Services | New Service | Edit Service | Delete Service

Part 10) Annual Review

1. From the client's details screen, select the **Annual Review** tab, then the **Annual** sub-tab.



2. **Insurance:** Indicate the client's primary insurance provider, if any. Click on the **+** in the upper right corner of the **Insurance** field (it will appear when the cursor hovers near the date). Or, you can select the blue **Add** hyperlink on the right. Both options work the same. If you have to adjust an existing Insurance record, select the record and click on **Edit**. If you have to remove an existing Insurance record, select the record and click on **Delete**. These actions are the same for all of the **Annual Review** options.



- The **Insurance Assessment** screen will appear with a **Primary Insurance** drop-down menu that contains the most common types of insurance, such as **Medicaid** or **Private - Insurance**. Similar options are available for **Other Insurance**.

Comment [SL4]: Need to update with private/employer and private/individual

Note: Clients with insurance plans purchased through the Federal Marketplace should be coded as Private-Individual.

Formatted: Font: (Default) Arial, 11 pt

NOTE: Need to include reference to Marketplace plans (private/individual)

Comment [SL5]: Add instructions on marketplace plans

- Federal Poverty Level:** Indicate the total household income and number in household. CAREWare will calculate the client's Federal Poverty Level.



Erntosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

Annual | Annual RSR View | Annual Custom Fields | Quarterly

Summary Data as of 1/20/2012 Bring Forward

Insurance Add Edit Delete

Insurance

Primary Insurance:

Other Insurance:

Federal Poverty Level 

Household Income:

Household Size: Poverty Level:

Annual Screening

HIV Primary Care

Housing Arrangement

HIV Risk Reduction Counseling

Mental Health

Substance Abuse

Date	Primary Insurance	Other Insurance
0 / 0		

5. Annual Screening

- a. **HIV Primary Care:** Indicate where the client receives his or her primary medical care. Click on the **+** in the upper right corner of the **HIV Primary Care** field (it will appear when the cursor hovers near the date).

The screenshot shows a software window titled 'Bromosaurus, Betty'. The main area is the 'Insurance' form. On the left, there are sections for 'Insurance', 'Federal Poverty Level', and 'Annual Screening'. The 'Annual Screening' section contains several fields: 'HIV Primary Care', 'Housing Arrangement', 'HIV Risk Reduction Counseling', 'Mental Health', and 'Substance Abuse'. A red arrow points to the 'HIV Primary Care' field. The 'Insurance' table on the right is empty.

- b. The **Annual Screening** screen will appear with drop-down menus for the **Date**, **Type** and **Result**. In the **Type** menu, choose **HIV Primary Care**. **Save** your entries.

The screenshot shows a dialog box titled 'Annual Screening:'. It contains three drop-down menus: 'Date' (set to 11/4/2013), 'Type' (set to HIV Primary Care), and 'Result' (empty). At the bottom, there are 'Save' and 'Cancel' buttons. Red arrows point to the Date, Type, Result fields, and the Save button.

{ }

- c. **Housing Arrangement**: Indicate the client's housing status. Click on the + in the upper right corner of the **Housing Arrangement** field (it will appear when the cursor hovers near the date).

The screenshot shows a software window titled 'Bromtosaurus, Betty'. The 'Annual Screening' section is expanded, and a red arrow points to the 'Housing Arrangement' field. Other fields in this section include 'HIV Primary Care', 'HIV Risk Reduction Counseling', 'Mental Health', and 'Substance Abuse'. The 'Insurance' section is also visible, with a table for 'Primary Insurance' and 'Other Insurance'.

- d. The **Annual Screening** screen will appear with drop-down menus for the **Date**, **Type** and **Result**. In the **Type** menu, choose **Housing Arrangement**. **Save** your entries.

The screenshot shows the 'Annual Screening' dialog box. It contains three drop-down menus: 'Date' (set to 11/4/2013), 'Type' (set to Housing Arrangement), and 'Result' (empty). Red arrows point to each of these fields. At the bottom, there are 'Save' and 'Cancel' buttons, with a red arrow pointing to the 'Save' button.

- e. **HIV Risk Reduction Counseling**: Indicate if the client received HIV risk reduction counseling. Click on the **+** in the upper right corner of the **HIV Risk Reduction Counseling** field (it will appear when the cursor hovers near the date).

Insurance

Summary Data as of 11/20/2012

Insurance

Primary Insurance

Other Insurance

Federal Poverty Level

Household Income

Household Size

Poverty Level

Annual Screening

HIV Primary Care

Housing Arrangements

HIV Risk Reduction Counseling

Mental Health

Substance Abuse

- f. The **Annual Screening** screen will appear with drop-down menus for the **Date**, **Type**, **Result** and **Counseled by**. In the **Type** menu, choose **HIV Risk Reduction Counseling**. **Save** your entries.

Annual Screening

Date : 11/4/2013

Type : HIV Risk Reduction Counseling

Result :

Counseled by :

Save Cancel

- g. **Mental Health**: Indicate if a mental health screening was performed. Click on the **+** in the upper right corner of the **Mental Health** field (it will appear when the cursor hovers near the date).

The screenshot shows a software window titled 'Bronchosaurus, Betty'. The menu bar includes 'Appointments', 'Orders', 'Forms', 'ChangeLog', 'Client Report', 'Merge Client', 'Delete Client', 'Find List', 'New Search', and 'Close'. Below the menu bar, there are tabs for 'Annual Review', 'Encounters', 'Referrals', 'HIV/C&T', 'Pregnancy', 'Relations', 'Custom Tab 1', 'Unique IDs', and 'Custom Tab 3'. The main area is divided into sections: 'Insurance', 'Federal Poverty Level', and 'Annual Screening'. The 'Annual Screening' section has fields for 'HIV Primary Care', 'Housing Arrangement', 'HIV Risk Reduction Counseling', 'Mental Health', and 'Substance Abuse'. A red arrow points to the 'Mental Health' field.

- h. The **Annual Screening** screen will appear with drop-down menus for the **Date**, **Type** and **Result**. In the **Type** menu, choose **Mental Health**. **Save** your entries

The screenshot shows a dialog box titled 'Annual Screening'. It has three drop-down menus: 'Date' (set to 11/4/2013), 'Type' (set to Mental Health), and 'Result' (empty). At the bottom, there are 'Save' and 'Cancel' buttons. Red arrows point to the 'Date', 'Type', 'Result', and 'Save' fields.

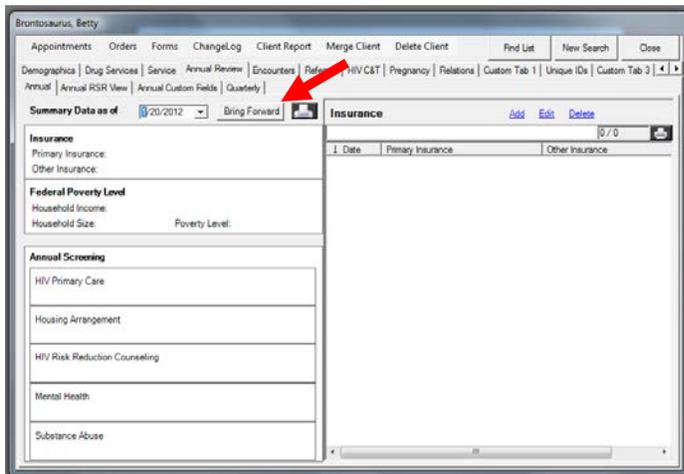
- i. **Substance Abuse**: Indicate if a substance abuse screening was performed. Click on the **+** in the upper right corner of the **Substance Abuse** field (it will appear when the cursor hovers near the date).

The screenshot shows a software window titled 'Bronfossaurus, Betty'. The main area is divided into two panes. The left pane is titled 'Summary Data as of 11/20/2012' and contains sections for 'Insurance', 'Federal Poverty Level', and 'Annual Screening'. The 'Substance Abuse' field in the 'Annual Screening' section is highlighted with a red arrow. The right pane is titled 'Insurance' and contains a table with columns for 'Date', 'Primary Insurance', and 'Other Insurance'.

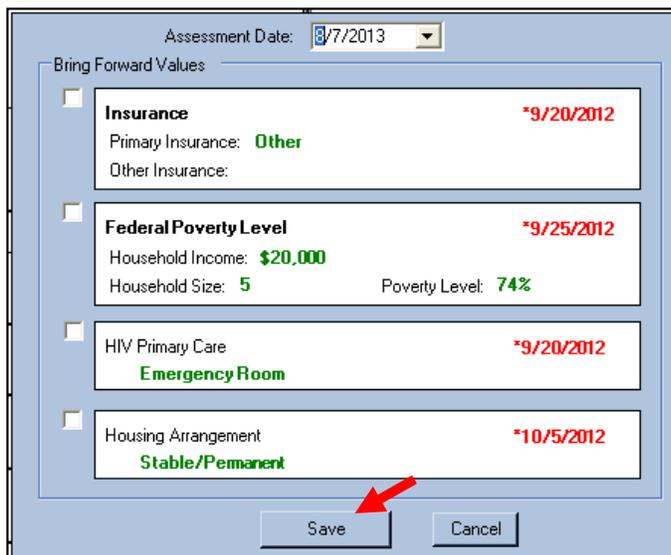
- j. The **Annual Screening** screen will appear with drop-down menus for the **Date**, **Type** and **Result**. In the **Type** menu, choose **Substance Abuse**. **Save** your entries.

The screenshot shows a dialog box titled 'Annual Screening'. It contains three drop-down menus: 'Date' (set to 11/4/2013), 'Type' (set to Substance Abuse), and 'Result'. A red arrow points to each of these fields. At the bottom of the dialog box are two buttons: 'Save' and 'Cancel'. A red arrow points to the 'Save' button.

6. If the values for **Insurance**, **Federal Poverty Level**, **HIV Primary Care** or **Housing Arrangement** have not changed from the last assessment, you may update the current assessment with those values by selecting the **Bring Forward** button.



7. The **Bring Forward Values** screen appears. Place a checkmark in the boxes of the values that you want to bring forward and press **Save**.



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Part 11) Encounter

A. Entering Clinical Encounter Information

When entering data about an encounter, remember that the information applies only to the specific date of that encounter, whether it is today or a prior visit.

B. Rapid Entry Screens in Encounters

Rapid entry screens allow for quick additions and changes to clinical encounter information entered from any date. The encounter-by-encounter screens allow providers to see current information, as well as some information from the previous encounter. By default, all rapid entry screens show you the entire previous year of data, but you can modify this to any date range.

Rapid entry screens give providers an overview of a client's historical data in each clinical area. Users can readily produce charts and progress reports that allow for quick review of the medical history for any date range selected. Charting options are available in sub-tabs to plot quantitative values that change over time, such as lab results for CD4 count and viral load or other tests and vital signs.

You can add, edit or delete information in any of the rapid entry screens. We recommend that you use rapid entry only for minor additions and corrections to clinical information; for example, a client stops or changes a medication between visits. Using dated clinical encounters to enter information makes it easier for you and others to access that information in the future.

The Rapid Entry screen for each encounter sub-tab is presented here after the sub-tab's instructions.

C. Encounters

1. To begin entry on a new encounter, select the **Encounters** tab. Click on **Create Encounter**.

The screenshot shows a software window titled 'Betty'. The top menu bar includes 'Appointments', 'Orders', 'Forms', 'ChangeLog', 'Client Report', 'Manage Client', and 'Delete Client'. Below the menu, there are several tabs: 'Demographics', 'Drug Services', 'Service', 'Annual Review', 'Encounters', 'History', 'Pregnancy', 'Relations', 'Custom Tab 1', 'Unique IDs', and 'Custom Tab 3'. The 'Encounters' tab is selected and highlighted with a red arrow. Below the tabs, there is a section for 'Encounter Date' set to '01/20/2015' and 'Jeffrey S'. There are buttons for 'Create Encounter', 'Delete Encounter', and 'Encounter Report'. A checkbox labeled 'Only show data for this provider' is checked. Below this, there are several sub-tabs: 'Vital Signs', 'Hospital/ER Admissions', 'Medications', 'Labs', 'Screening Labs', 'Screenings', 'Immunizations', 'Diagnoses', and 'Case Note'. The 'Vital Signs' sub-tab is active, showing a table with columns for 'Prior Value', 'Date Taken', 'Current Value', and 'Current Value Provider'. The table has rows for 'Height(Inches)', 'Weight(lbs)', 'Pulse (bpm)', 'Temperature(F)', and 'B.P. Syst/Dia'. There are also radio buttons for 'English' and 'Metric' and a 'Rapid Entry' button.

2. The **Create Encounter** screen will appear. Enter the **Encounter Date** and click on **Create Encounter** on that screen. The date shown will default to today's date.

Create Encounter

Encounter Date: 8/7/2013

Create Encounter Cancel

3. To access a prior encounter, use the drop-down menu in the **Encounter Date** menu to find the previous encounter date.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

Encounter Date: 01/20/2015 | Jeffrey S Create Encounter Delete Encounter Encounter Report Sharing Options

Only show data for this provider

Vital Signs Hospital/ER Admissions Medications Labs Screening Labs Screenings Immunizations Diagnoses Case Note

Vital Signs Values are in: English Metric Rapid Entry

	Prior Value:	Date Taken:	Current Value:	Current Value Provider:
Height(inches)				
Weight(lbs)				
Pulse (bpm)				
Temperature(F)				
B.P. Sys/Dia:				

Pregnant?
 Last visit Currently View/Edit History

D. Vital Signs

1. **Vital Signs** can be entered in **English** or **Metric** values. Height is entered in inches or centimeters, weight in pounds or kilograms, and temperature in Fahrenheit or Celsius. Pulse and blood pressure are not affected. For each vital sign, CAREWare has set a “normal” range. If the value you enter is outside of that range, you’ll be asked if you want to correct it.

Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

Encounter Date: 01/20/2015 | Jeffrey S. | Create Encounter | Delete Encounter | Encounter Report | Sharing Options

Show data for this provider

Vital Signs | Hospital/ER Admissions | Medications | Labs | Screening Labs | Screenings | Immunizations | Diagnoses | Case Note

Vital Signs

Values are: English Metric

Rapid Entry

Prior Value:	Date Taken:	Current Value:	Current Value Provider:
Height(inches)			
Weight(lbs)			
Pulse (bpm)			
Temperature(F)			
B.P. Sys/Dia:			

Pregnant?

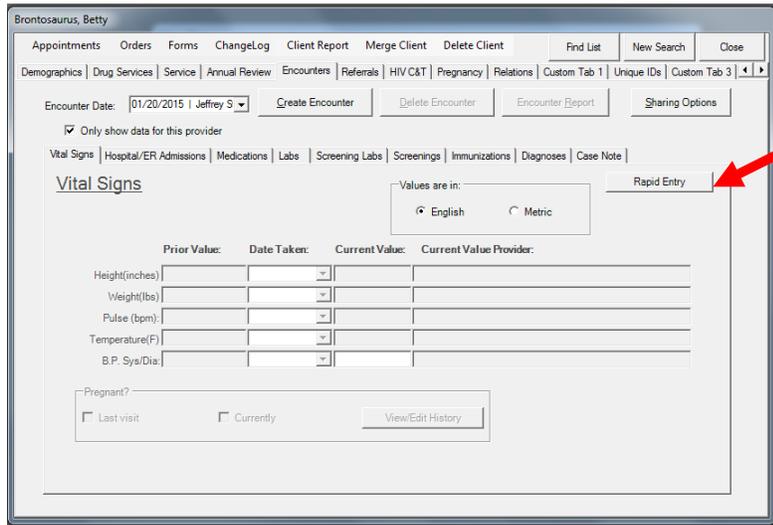
Last visit Currently

- a. Below is an example of a **Quality Check** message when a value is outside of the range.

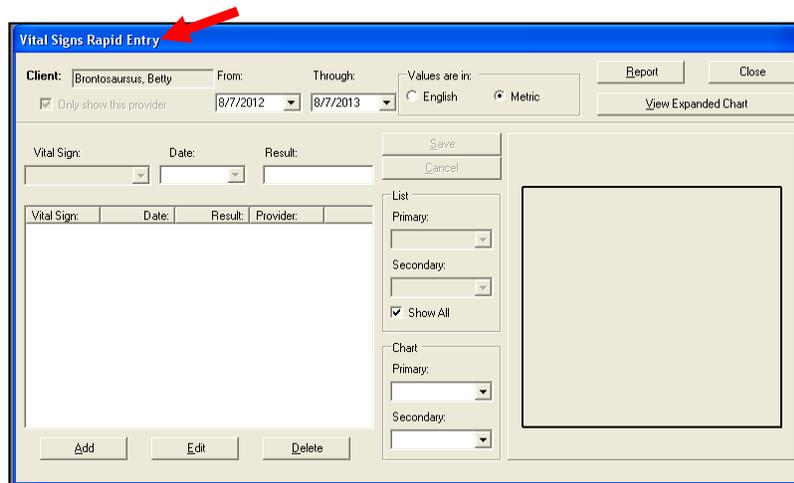
Quality Check

500 is out of the normal range for Pulse. Are you sure you want to use this value?

2. To use the rapid entry feature, click on the **Rapid Entry** button.



3. The **Vital Signs Rapid Entry** screen will appear.



- By default, all vital signs from the last year are shown. Un-checking the **Show All** button will allow you to see only one or two (**Primary** and/or **Secondary**) values from the drop-down menus in the **List**.

The screenshot shows the 'Vital Signs Rapid Entry' window for patient 'Brontosaurus, Betty'. The date range is from 8/7/2012 to 8/7/2013. The 'Values are in' section is set to 'Metric'. The 'List' section on the right has a 'Show All' checkbox checked. Red arrows point to the 'List' section, the 'Primary' and 'Secondary' dropdown menus, and the 'Show All' checkbox.

- You can also choose **Primary** and/or **Secondary** values from the drop-down menus from which to run a **Chart**.

The screenshot shows the 'Vital Signs Rapid Entry' window for patient 'Brontosaurus, Betty'. The date range is from 8/7/2012 to 8/7/2013. The 'Values are in' section is set to 'Metric'. The 'List' section on the right has a 'Show All' checkbox checked. The 'Chart' section on the right has 'Primary' and 'Secondary' dropdown menus. Red arrows point to the 'Chart' section, the 'Primary' and 'Secondary' dropdown menus, and the 'Show All' checkbox.

- The **View Expanded Chart** button allows you to see a larger version of the chart and choose whether to see it three-dimensionally. The expanded chart is not printable from this window.

The screenshot shows the 'Vital Signs Rapid Entry' window. At the top, the client name is 'Brontosaurus, Betty'. The date range is from 8/7/2012 to 8/7/2013. The 'Values are in' section has radio buttons for 'English' and 'Metric', with 'Metric' selected. There are buttons for 'Report', 'Close', and 'View Expanded Chart'. A red arrow points to the 'View Expanded Chart' button. Below the filters, there are sections for 'Vital Sign', 'Date', and 'Result' with dropdown menus. A table with columns 'Vital Sign', 'Date', 'Result', and 'Provider' is present. To the right of the table are 'List' and 'Chart' sections, each with 'Primary' and 'Secondary' dropdown menus. At the bottom are 'Add', 'Edit', and 'Delete' buttons.

- The **Report** button allows you to generate a printable report based on the filters you've selected.

This screenshot is identical to the one above, showing the 'Vital Signs Rapid Entry' window with the same filters and layout. However, a red arrow points to the 'Report' button instead of the 'View Expanded Chart' button.



- Change the **From** and **Through** dates and the graph will automatically re-plot using the new date range.

E. Hospital/ER Admissions

- Information on a client's HIV-related hospital and emergency room (ER) admissions, number of days in hospital and reason for ER visit/diagnosis are entered under the **Hospital/ER Admissions** sub-tab. Historical information entered during encounters will appear on the bottom half of the screen. **Save** your entries.

Encounter	Hospital ad...	Hospital da...	ER visits	Reason/Di...	Provider
11/4/2012	2	5	1	extreme we...	Jeffrey Stor...

F. Medications

1. Enter the client's complete medication prescription history under the **Medications** sub-tab of **Encounters**.

The screenshot shows the 'Medications' sub-tab within the 'Encounters' section. The interface includes a navigation bar at the top with tabs for Demographics, Drug Services, Service, Annual Review, Encounters, Referrals, HIV C&T, Pregnancy, Relations, Custom Tab 1, Unique IDs, and Custom. Below the navigation bar, there is a section for 'Encounter Date' (08/07/2013 | Jeffrey S.) and buttons for 'Create Encounter', 'Delete Encounter', 'Encounter Report', and 'Sharing Options'. A checkbox labeled 'Only show data for this provider' is checked. The 'Medications' sub-tab is active, showing a 'Current Medications:' section with a 'Date ART 1st Prescribed' field and a 'Pre-ART Reason' dropdown menu. Below this is an 'Allergies:' field and a table for 'Medications' with columns for Medication, Abbreviation, Class, Units, Strengths, Dose, Frequency, and Daily Dose. At the bottom, there are buttons for 'Start', 'Stop', 'Correct Data Error', and 'Change Dose'. A red arrow points to the 'Create Encounter' button.

2. **Date ART 1st Prescribed** (antiretroviral therapy) defaults to the date of the first HIV medication entered into CAREWare. However, because many clients may have started ART before they came into your agency's care, this field is editable in the **Rapid Entry** screen.

The screenshot shows the 'Medications' sub-tab within the 'Encounters' section. The interface is identical to the previous screenshot, but with two red arrows. One red arrow points to the 'Date ART 1st Prescribed' field, and another red arrow points to the 'Rapid Entry' button. The 'Rapid Entry' button is located in the top right corner of the 'Current Medications:' section.

3. **Allergies:** Enter any medication allergies in this field. This information will carry over into future clinical encounters.

The screenshot shows a software interface with a top navigation bar containing tabs like 'Demographics', 'Drug Services', 'Service', 'Annual Review', 'Encounters', 'Referrals', 'HIV CLT', 'Pregnancy', 'Relations', 'Custom Tab 1', 'Unique IDs', and 'Cust...'. Below this, there are buttons for 'Encounter Date: 08/07/2013 | Jeffrey S', 'Create Encounter', 'Delete Encounter', 'Encounter Report', and 'Sharing Options'. A checkbox labeled 'Only show data for this provider' is checked. A secondary navigation bar includes 'Vital Signs', 'Hospital/ER Admissions', 'Medications', 'Labs', 'Screening Labs', 'Screenings', 'Immunizations', 'Diagnoses', and 'Case Note'. The 'Current Medications:' section has fields for 'Date ART 1st Prescribed', 'Pre-ART Reason', and buttons for 'Setup' and 'Rapid Entry'. A red arrow points to the 'Allergies:' text input field. Below this is a table with columns: Medication, Abbreviation, Class, Units, Strength, Dose, Frequency, and Daily Dose. At the bottom are buttons for 'Start', 'Stop', 'Correct Data Error', and 'Change Dose'.

4. To use the rapid entry feature, click on the **Rapid Entry** button.

This screenshot is identical to the one above, showing the same software interface. However, a red arrow now points to the 'Rapid Entry' button located in the 'Current Medications:' section.

5. The **Medications Rapid Entry** screen will appear.

The screenshot shows the 'Medications Rapid Entry' window. At the top, the title bar reads 'Medications Rapid Entry'. Below it, the 'Client' field is populated with 'Broniosaurus, Betty'. To the right of the client name are fields for 'HIV+ Date', 'Date ART 1st Prescribed', and 'Pre-ART Reason'. A 'Setup' button is located to the right of these fields. Below the client information is an 'Allergies' field. A 'Filter' section contains 'From' and 'Through' date pickers (set to 8/7/2012 and 8/7/2013), an 'Indication' dropdown menu, and an 'OI' dropdown menu. A 'Show All' button and a checkbox for 'Only Include Current Medications On Report' are also present. The main area contains a table with columns: Medication, Abbrev., Units, Str, Dose, Frq, Total Daily, Indication, and OI. One row is visible: acetaminop... | | 2 | 25 | 50 | tid | 150 | Other. To the right of the table are buttons for 'Start', 'Stop', 'Change Dose', and 'Zoom/Correct Error'.

6. By default, all medications prescribed for the client are shown. You can filter them using the **Indication** drop-down menu to show only medications for **ART**, **OI prophylaxis**, **OI treatment** or **Other**. You can also modify the **Date ART 1st Prescribed** entry if the client began ART treatment prior to becoming your client. Otherwise, CAREWare will populate this field with the earliest ARV start date entered. You can also check **Only Include Current Medications On Report** for medications for which there is no stop date (or a stop date after the date range selected). This will shorten the printout for clients with many non-active medications.

This screenshot is identical to the one above but includes three red arrows pointing to specific UI elements: one points to the 'Indication' dropdown menu in the filter section, another points to the 'Date ART 1st Prescribed' field, and a third points to the 'Only Include Current Medications On Report' checkbox.

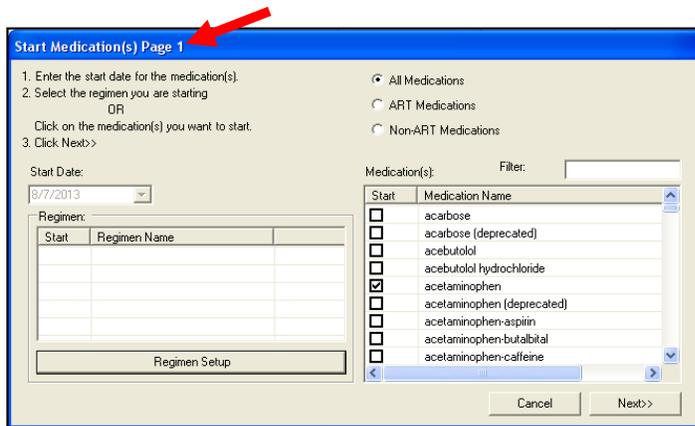
G. Starting Medications

1. To start medications, press the **Start** button.



The screenshot shows a software window titled 'Brontosaurus, Betty'. It has a menu bar with options like 'Appointments', 'Orders', 'Forms', 'ChangeLog', 'Client Report', 'Merge Client', 'Delete Client', 'Find List', 'New Search', and 'Close'. Below the menu bar are several tabs: 'Demographics', 'Drug Services', 'Service', 'Annual Review', 'Encounters', 'Referrals', 'HIV/CAT', 'Pregnancy', 'Relations', 'Custom Tab 1', 'Unique IDs', and 'Custom Tab 3'. The 'Encounters' tab is active, showing 'Encounter Date: 7/1/2012' and buttons for 'Create Encounter', 'Delete Encounter', 'Encounter Report', and 'Sharing Options'. There is a checkbox for 'Only show data for this provider'. Below this are tabs for 'Vital Signs', 'Hospital/ER Admissions', 'Medications', 'Labs', 'Screening Labs', 'Screenings', 'Immunizations', 'Diagnoses', and 'Case Note'. The 'Medications' tab is selected, displaying 'Current Medications:' with fields for 'Date ART 1st Prescribed' (7/1/2012), 'Pre-ART Reason', and 'Setup'/'Rapid Entry' buttons. Below this is an 'Allergies' section with a 'Test' button. A table for 'Medication' is shown with columns: 'Medication', 'Abbrevi...', 'Class', 'Units', 'Strength', 'Dose', and 'Freq.'. At the bottom of the medication list area, there are buttons for 'Start', 'Stop', 'Correct Data Error', and 'Change Dose'. A red arrow points to the 'Start' button.

2. The **Start Medication(s) Page 1** screen will appear.



The screenshot shows a dialog box titled 'Start Medication(s) Page 1'. It contains the following elements:

- Instructions: '1. Enter the start date for the medication(s).', '2. Select the regimen you are starting OR Click on the medication(s) you want to start.', '3. Click Next>>'.
- 'Start Date:' field with a dropdown menu showing '8/7/2013'.
- 'Regimen:' section with a table:

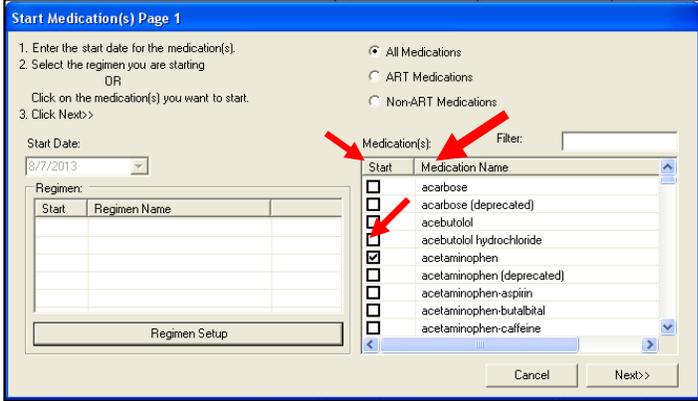
Start	Regimen Name

Below the table is a 'Regimen Setup' button.
- 'Medication(s):' section with a 'Filter:' field and a list of medications with checkboxes:
 - acarbose
 - acarbose (deprecated)
 - acebutolol
 - acebutolol hydrochloride
 - acetaminophen
 - acetaminophen (deprecated)
 - acetaminophen-aspirin
 - acetaminophen-butalbital
 - acetaminophen-caffeine
- 'Cancel' and 'Next>>' buttons at the bottom.

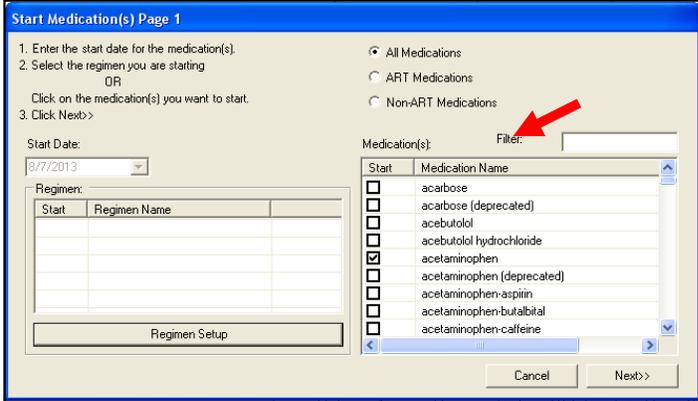
A red arrow points to the title bar of the dialog box.

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- 3. Enter the medication(s). Select the medication(s) by checking the box to the left of the name in the **Start** column of the scroll-down **Medication Name** menu.



- 4. You can also search for the medication by typing a string of letters from its name into the **Filter** field. All medications with that string of letters will appear in the **Medication Name** menu.



7. After selecting all medications, click **Next**.

Start Medication(s) Page 1

1. Enter the start date for the medication(s).
2. Select the regimen you are starting
OR
Click on the medication(s) you want to start.
3. Click Next>>

Start Date: 8/7/2013

Regimen:

Start	Regimen Name

Medication(s): Filter:

Start	Medication Name
<input type="checkbox"/>	acarbose
<input type="checkbox"/>	acarbose (deprecated)
<input type="checkbox"/>	acebutolol
<input type="checkbox"/>	acebutolol hydrochloride
<input checked="" type="checkbox"/>	acetaminophen
<input type="checkbox"/>	acetaminophen (deprecated)
<input type="checkbox"/>	acetaminophen-aspirin
<input type="checkbox"/>	acetaminophen-butalbital
<input type="checkbox"/>	acetaminophen-caffeine

Cancel Next>>

8. The **Start Medication** screen will appear.

Start Medication

4. Enter the strength, frequency and other related information for each medication.
5. Click Finish.

Medication: Units: Form: Strength: Frequency: Dose: Indication: Ot: Comment: Instructions:

acetaminophen

<<Back Finish

9. Add the **Units**, **Form**, **Strength** and **Frequency**.

Start Medication

4. Enter the strength, frequency and other related information for each medication.
5. Click Finish.

Medication: Units: Form: Strength: Frequency: Dose: Indication: Ot: Comment: Instructions:

acetaminophen

<<Back Finish

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10. From the **Indication** drop-down menu, select **ART** (antiretrovirals), **OI** (opportunistic infection) **prophylaxis**, **OI treatment** or **Other** (for other medications you may enter not related to HIV care).

The screenshot shows the 'Start Medication' form with the 'Indication' dropdown menu open. The form fields include Medication, Units, Form, Strength, Frequency, Dose, Indication, OI, Comment, and Instructions. The 'Indication' dropdown menu is highlighted with a red arrow, and its options are listed in a separate box: ART, OI Prophylaxis, OI Treatment, and Other.

11. If the indication is **OI Prophylaxis** or **OI Treatment**, the **OI** drop-down menu will activate. Select the relevant opportunistic infection for which the medication(s) is being prescribed.

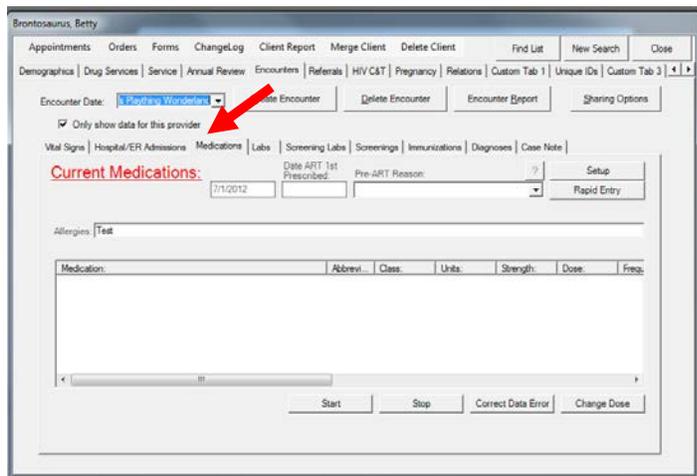
The screenshot shows the 'Start Medication' form with the 'OI' dropdown menu open. The form fields include Medication, Units, Form, Strength, Frequency, Dose, Indication, OI, Comment, and Instructions. The 'OI' dropdown menu is highlighted with a red arrow, and its options are listed in a separate box: Pneumocystis carinii pneumonia (PCP), M. avium complex (Mac), M. tuberculosis (Mtb), Candida, Cytomegalovirus (CMV), Toxoplasma gondii, Varicella zoster virus (VZV), and Other.

12. Click **Finish** to save.

The screenshot shows a window titled "Start Medication" with a blue header. Below the header, there are two numbered instructions: "4. Enter the strength, frequency and other related information for each medication." and "5. Click Finish." The main area of the window contains a form with several fields: "Medication:" (a dropdown menu with "paralaminophen" selected), "Units:" (a dropdown menu), "Form:" (a dropdown menu), "Strength:" (a text input field), "Frequency:" (a dropdown menu), "Dose:" (a text input field), "Indication:" (a dropdown menu), "Qt:" (a dropdown menu), "Comment:" (a text input field), and "Instructions:" (a text input field). At the bottom right of the window, there are two buttons: "<Back" and "Finish". A red arrow points to the "Finish" button.

H. Stopping Medications

1. To stop a medication, return to the **Medications** tab.



Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3 | < | >

Encounter Date: **Playboy Wonderlin** | Create Encounter | Delete Encounter | Encounter Report | Sharing Options

Only show data for this provider

Vital Signs | Hospital/ER Admissions | **Medications** | Labs | Screening Labs | Screenings | Immunizations | Diagnoses | Case Note |

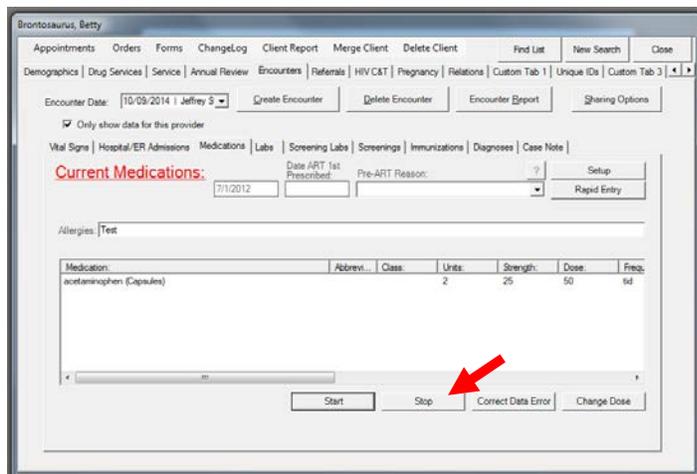
Current Medications: Date ART 1st Prescribed: 7/1/2012 | Pre-ART Reason: | Setup | Rapid Entry

Allergies: Test

Medication	Abbrev.	Class	Units	Strength	Dose	Freq.

Start | Stop | Correct Data Error | Change Dose

2. Click on **Stop**.



Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3 | < | >

Encounter Date: 10/09/2014 | Jeffrey S | Create Encounter | Delete Encounter | Encounter Report | Sharing Options

Only show data for this provider

Vital Signs | Hospital/ER Admissions | **Medications** | Labs | Screening Labs | Screenings | Immunizations | Diagnoses | Case Note |

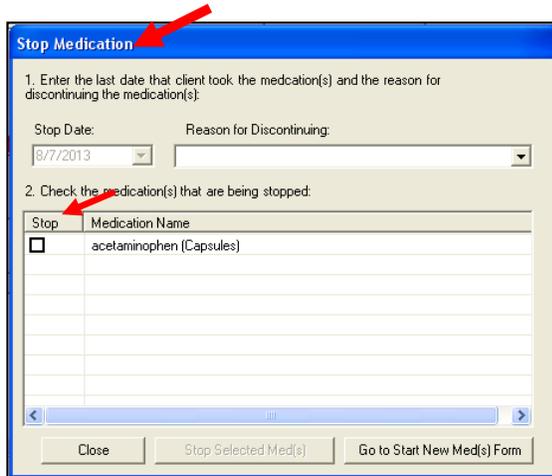
Current Medications: Date ART 1st Prescribed: 7/1/2012 | Pre-ART Reason: | Setup | Rapid Entry

Allergies: Test

Medication	Abbrev.	Class	Units	Strength	Dose	Freq.
acetaminophen (Capsules)			2	25	50	tid

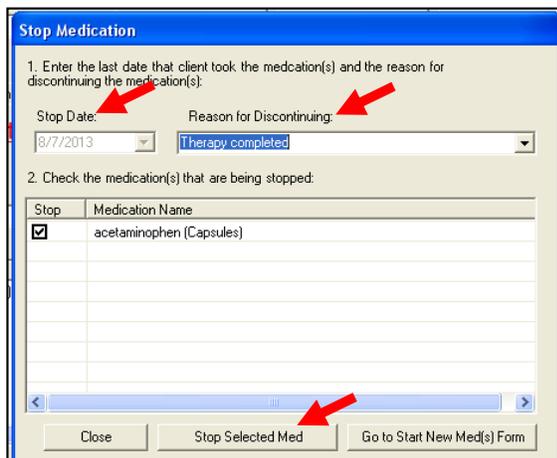
Start | **Stop** | Correct Data Error | Change Dose

3. The **Stop Medication** screen will appear. Place a checkmark in the box next to the medication you wish to stop.



The screenshot shows the 'Stop Medication' window. At the top, a red arrow points to the title bar. Below the title bar, there are two instructions: '1. Enter the last date that client took the medication(s) and the reason for discontinuing the medication(s):' and '2. Check the medication(s) that are being stopped:'. The first instruction is followed by two drop-down menus: 'Stop Date:' (showing 8/7/2013) and 'Reason for Discontinuing:'. The second instruction is followed by a table with two columns: 'Stop' and 'Medication Name'. The first row has an unchecked checkbox and the text 'acetaminophen (Capsules)'. At the bottom, there are three buttons: 'Close', 'Stop Selected Med(s)', and 'Go to Start New Med(s) Form'.

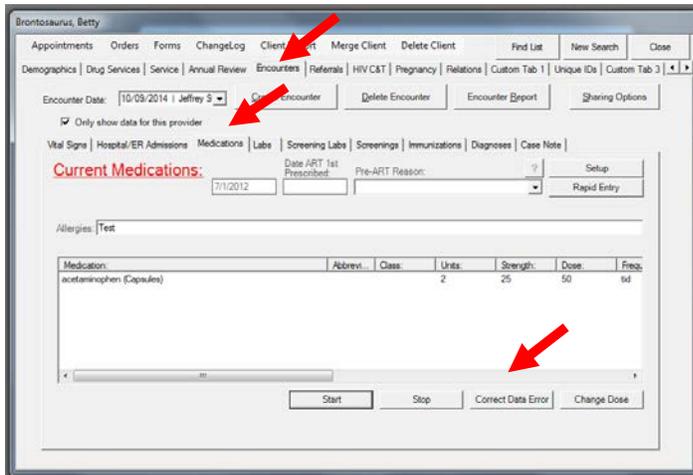
4. Select the **Stop Date** and the **Reason for Discontinuing** from the drop-down menus, then press the **Stop Selected Med** button.



The screenshot shows the 'Stop Medication' window after some changes. A red arrow points to the 'Stop Date:' drop-down menu, which now shows 8/7/2013. Another red arrow points to the 'Reason for Discontinuing:' drop-down menu, which now shows 'Therapy completed'. In the table, the checkbox for 'acetaminophen (Capsules)' is now checked. At the bottom, a red arrow points to the 'Stop Selected Med' button.

I. Correcting a Medication Data Error

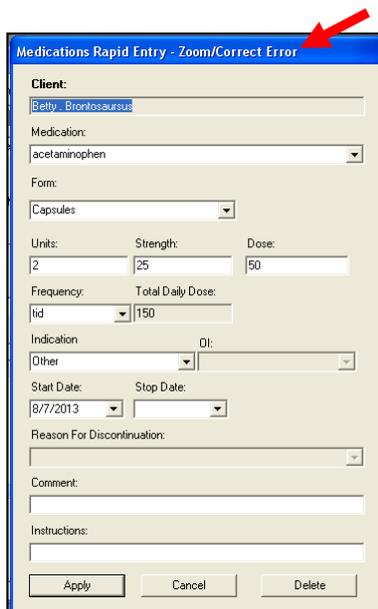
1. To correct a medication data entry error, return to the **Encounters** tab, **Medications** sub-tab. Select the medication you wish to correct and click the **Correct Data Error** button.



The screenshot shows the 'Brontosaurus, Betty' client record. The 'Encounters' tab is selected, and the 'Medications' sub-tab is active. The 'Current Medications' section displays a table with one entry: acetaminophen (Capsules). The table has columns for Medication, Abbrev., Class, Units, Strength, Dose, and Freq. Below the table, there are buttons for 'Start', 'Stop', 'Correct Data Error', and 'Change Dose'. A red arrow points to the 'Correct Data Error' button.

Medication	Abbrev.	Class	Units	Strength	Dose	Freq.
acetaminophen (Capsules)			2	25	50	tid

2. The **Medications Rapid Entry – Zoom/Correct Error** screen will appear. Changes can be made to any of the fields on this screen.



The screenshot shows the 'Medications Rapid Entry - Zoom/Correct Error' dialog box. The title bar is highlighted in blue. A red arrow points to the title bar. The dialog contains the following fields:

- Client: Betty - Brontosaurus
- Medication: acetaminophen
- Form: Capsules
- Units: 2, Strength: 25, Dose: 50
- Frequency: tid, Total Daily Dose: 150
- Indication: Other, DI: Other
- Start Date: 8/7/2013, Stop Date: (empty)
- Reason For Discontinuation: (empty)
- Comment: (empty)
- Instructions: (empty)

Buttons: Apply, Cancel, Delete

{ }

3. The **Medications Rapid Entry – Zoom/Correct Error** screen can also be accessed from the **Medications Rapid Entry** screen by clicking on the **Zoom/Correct Error** button.

The screenshot shows the 'Medications Rapid Entry' window. At the top, the title bar is highlighted with a red arrow. Below it, the 'Client' field is set to 'Brontosaurus, Betty'. There are fields for 'HIV+ Date', 'Date ART 1st Prescribed', and 'Pre-ART Reason'. A 'Filter' section includes 'From' (8/7/2012) and 'Through' (8/7/2013) dates, and an 'Indication' dropdown set to 'Other'. A table lists medication entries with columns for Medication, Abbrev., Units, Str., Dose, Frq., Total Daily, Indication, and OI. The first entry is 'acetaminop...' with Units: 2, Str.: 25, Dose: 50, Frq.: tid, and Total Daily: 150. On the right side, there are buttons for 'Setup', 'Report', 'Chart', 'Close', 'Start', 'Stop', 'Change Dose', and 'Zoom/Correct Error'. A red arrow points to the 'Zoom/Correct Error' button.

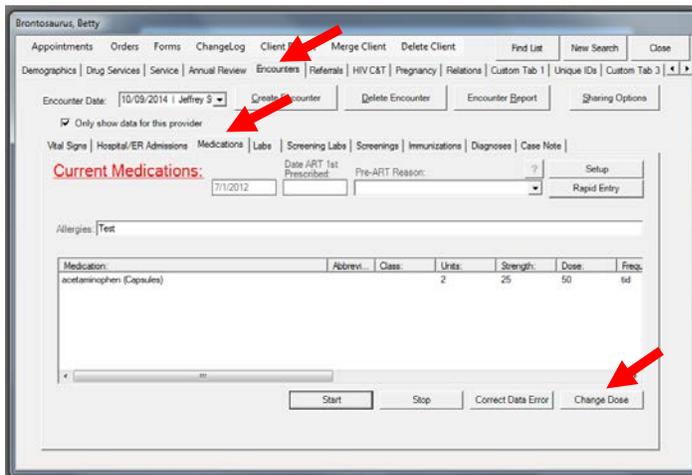
4. Click **Apply** to save changes.

The screenshot shows the 'Medications Rapid Entry - Zoom/Correct Error' window. The 'Client' field is 'Betty, Brontosaurus'. The 'Medication' dropdown is set to 'acetaminophen'. The 'Form' dropdown is set to 'Capsules'. The 'Units' field is '2', 'Strength' is '25', and 'Dose' is '50'. The 'Frequency' dropdown is set to 'tid' and 'Total Daily Dose' is '150'. The 'Indication' dropdown is set to 'Other'. The 'Start Date' is '8/7/2013'. There are fields for 'Reason For Discontinuation' and 'Comment'. At the bottom, there are three buttons: 'Apply', 'Cancel', and 'Delete'. A red arrow points to the 'Apply' button.

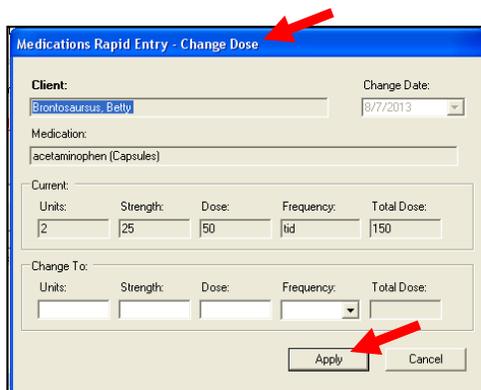
J. Change Dose

The **Change Dose** button allows you to change a medication's dose without having to stop the medication and restart it at a different dose. Information on the prior dose will be retained. The change date defaults to the date of the current encounter.

1. The **Change Dose** button is on the **Encounters** tab, **Medications** sub-tab. Select the medication for which you wish to change the dose and click on **Change Dose**.



2. The **Medications Rapid Entry - Change Dose** screen will appear. Changes can be made to any of the fields on this screen. Click **Apply** to save changes.



3. The **Medications Rapid Entry – Change Dose** screen can also be accessed from the **Medications Rapid Entry** screen by clicking on the **Change Dose** button.

The screenshot shows the 'Medications Rapid Entry' window. At the top, there are fields for 'Client' (Brontosaurus, Betty), 'HIV+ Date', 'Date ART 1st Prescribed', and 'Pre-ART Reason'. Below these are 'Allergies' and a 'Filter' section with 'From' (8/7/2012), 'Through' (8/7/2013), 'Indication', and 'OI' dropdowns, along with 'Show All' and 'Only Include Current Medications On Report' checkboxes. A table lists medication details:

Medication	Abbrev.	Units	Str	Dose	Frq	Total Daily	Indication	OI
acelaminop...		2	25	50	tid	150	Other	

On the right side, there are buttons for 'Setup', 'Report', 'Chart', 'Close', 'Start', 'Stop', 'Change Dose', and 'Zoom/Correct Error'. A red arrow points to the 'Change Dose' button.



K. Entering Laboratory Results

1. To enter a lab, go to the **Encounters** tab, **Labs** sub-tab.

Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV CAT | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

Encounter Date: 10/09/2014 | Jeffrey S | Create Encounter | Delete Encounter | Encounter Report | Sharing Options

Only show data for this provider

Vital Signs | Hospital/ER Admissions | Medications | Labs | Screening Labs | Screenings | Immunizations | Diagnoses | Case Note

Labs | Rapid Entry | Setup

Add/Edit

Current Test: CD4 Count (cells/mm³) | Result: 250 | Save | Delete

Test	Date of Pt.	Prior Result	Current Re.	Provider	Comment
Albumin (g/dL)					
ALT (IU/L)					
AST (IU/L)					
CD4 Count (cells/mm³)					
CD4 Percent					
Creatinine (mg/dL)					
Glucose (mg/dL)					
HDL (mg/dL)					
Hemoglobin (g/dL)					
LDL (mg/dL)					
Platelets (cells/mm³)					
Total Cholesterol (mg/dL)					
Triglycerides (mg/dL)					
Viral Load (Copies/mL)					
WBC (x 10³/mm³)					

2. Type the first few letters of the name of the test in the **Current Test** drop-down menu or select a lab from the **Test** menu.

Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV CAT | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

Encounter Date: 10/09/2014 | Jeffrey S | Create Encounter | Delete Encounter | Encounter Report | Sharing Options

Only show data for this provider

Vital Signs | Hospital/ER Admissions | Medications | Labs | Screening Labs | Screenings | Immunizations | Diagnoses | Case Note

Labs | Rapid Entry | Setup

Add/Edit

Current Test: CD4 Count (cells/mm³) | Result: 250 | Save | Delete

Test	Date of Pt.	Prior Result	Current Re.	Provider	Comment
Albumin (g/dL)					
ALT (IU/L)					
AST (IU/L)					
CD4 Count (cells/mm³)					
CD4 Percent					
Creatinine (mg/dL)					
Glucose (mg/dL)					
HDL (mg/dL)					
Hemoglobin (g/dL)					
LDL (mg/dL)					
Platelets (cells/mm³)					
Total Cholesterol (mg/dL)					
Triglycerides (mg/dL)					
Viral Load (Copies/mL)					
WBC (x 10³/mm³)					

3. Enter the value in the **Results** field. **NOTE:** The drop-down menu to the left of the **Results** field allows for values of = (equal to), < (less than), > (greater than), >= (greater than or equal to) or <= (less than or equal to). **Save** your entries.

Brontosaurus, Betty

Appointments | Orders | Forms | Change Log | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV CBT | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3 |

Encounter Date: 10/09/2014 | Jeffrey S | Create Encounter | Delete Encounter | Encounter Report | Sharing Options

Only show data for this provider

Vital Signs | Hospital/ER Admissions | Medications | Labs | Screening Labs | Screenings | Immunizations | Diagnoses | Case Note

Labs | Rapid Entry | Setup

Add/Edit

Current Test: CD4 Count (cells/mm³) | Result: 250 | Save | Delete

Test	Date of Pt.	Prior Result	Current Re.	Provider	Comment
Albumin (g/dL)					
ALT (IU/L)					
AST (IU/L)					
CD4 Count (cells/mm³)					
CD4 Percent					
Creatinine (mg/dL)					
Glucose (mg/dL)					
HDL (mg/dL)					
Hemoglobin (g/dL)					
LDL (mg/dL)					
Platelets (cells/mm³)					
Total Cholesterol (mg/dL)					
Triglycerides (mg/dL)					
Viral Load (Copies/mL)					
WBC (x 10³/mm³)					

4. To use the rapid entry feature, click on the **Rapid Entry** button.

Brontosaurus, Betty

Appointments | Orders | Forms | Change Log | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV CBT | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3 |

Encounter Date: 10/09/2014 | Jeffrey S | Create Encounter | Delete Encounter | Encounter Report | Sharing Options

Only show data for this provider

Vital Signs | Hospital/ER Admissions | Medications | Labs | Screening Labs | Screenings | Immunizations | Diagnoses | Case Note

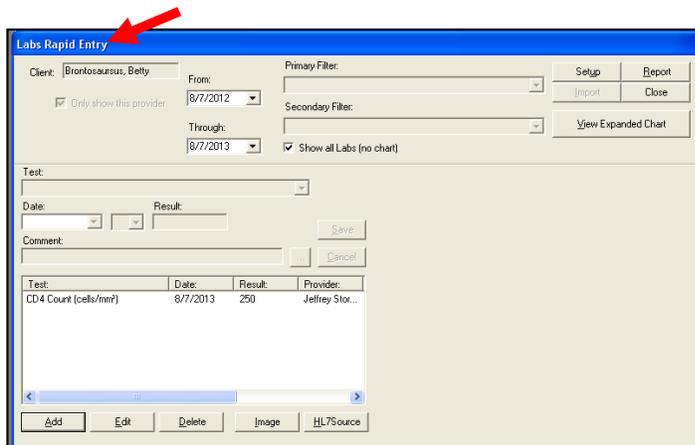
Labs | Rapid Entry | Setup

Add/Edit

Current Test: CD4 Count (cells/mm³) | Result: 250 | Save | Delete

Test	Date of Pt.	Prior Result	Current Re.	Provider	Comment
Albumin (g/dL)					
ALT (IU/L)					
AST (IU/L)					
CD4 Count (cells/mm³)					
CD4 Percent					
Creatinine (mg/dL)					
Glucose (mg/dL)					
HDL (mg/dL)					
Hemoglobin (g/dL)					
LDL (mg/dL)					
Platelets (cells/mm³)					
Total Cholesterol (mg/dL)					
Triglycerides (mg/dL)					
Viral Load (Copies/mL)					
WBC (x 10³/mm³)					

5. The **Labs Rapid Entry** screen will appear.

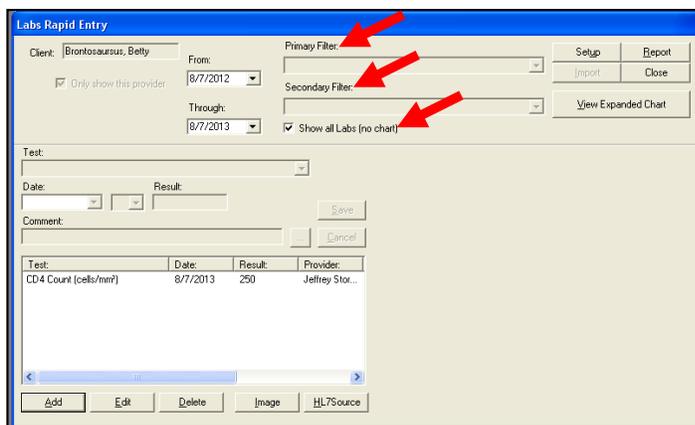


The screenshot shows the 'Labs Rapid Entry' window. A red arrow points to the title bar. The window contains the following fields and controls:

- Client: Brontosaurus, Betty
- From: 8/7/2012
- Through: 8/7/2013
- Primary Filter: (empty)
- Secondary Filter: (empty)
- Show all Labs (no chart)
- Buttons: Setup, Report, Import, Close, View Expanded Chart
- Test: (empty)
- Date: (empty), Result: (empty)
- Comment: (empty)
- Buttons: Save, Cancel
- Table:

Test	Date	Result	Provider
CD4 Count (cells/mm ³)	8/7/2013	250	Jeffrey Stor...
- Buttons: Add, Edit, Delete, Image, HL7Source

6. **Show all Labs (no chart)** is selected by default. You can apply **Primary** and **Secondary Filters** (for instance, CD4 and viral load) to view only one or two labs, view charts and run reports by selecting the filter(s) and un-checking **Show all Labs (no chart)**.



The screenshot shows the 'Labs Rapid Entry' window with three red arrows pointing to the Primary Filter, Secondary Filter, and the 'Show all Labs (no chart)' checkbox. The window contains the following fields and controls:

- Client: Brontosaurus, Betty
- From: 8/7/2012
- Through: 8/7/2013
- Primary Filter: (empty)
- Secondary Filter: (empty)
- Show all Labs (no chart)
- Buttons: Setup, Report, Import, Close, View Expanded Chart
- Test: (empty)
- Date: (empty), Result: (empty)
- Comment: (empty)
- Buttons: Save, Cancel
- Table:

Test	Date	Result	Provider
CD4 Count (cells/mm ³)	8/7/2013	250	Jeffrey Stor...
- Buttons: Add, Edit, Delete, Image, HL7Source

3. Enter relevant data for the test in the **Result**, **Titer** and **Treatment** fields. **Save** entries.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV CAT | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

Encounter Date: 10/09/2014 | Jeffrey S | Create Encounter | Delete Encounter | Encounter Report | Sharing Options

Only show data for this provider

Vital Signs | Hospital/ER Admissions | Medications | Labs | Screening Labs | Screenings | Immunizations | Diagnoses | Case Note

Screening Labs

Add/Edit | Rapid Entry | Setup

Current Test: Chlamydia | Result: Negative | Titer: 1: | Treatment: AZ | Save | Delete

Test	Date of Pt.	Prior Result	Current Re...	Titer	Treatment	Provider	C
Chlamydia							
Cytomegalovirus (CMV)							
Epstein Barr Virus (EBV)							
Genital Herpes							
Gonorrhea							
HIV-1b							
HIV-1Ag							
HIV(DNA)							
HIV(VRNA)							
Hepatitis A Ab-igm							
Hepatitis A Ab-Total							
Hepatitis B core antibody IgM (HBeAb)							
Hepatitis B core antibody total							

4. To use the rapid entry feature, click on the **Rapid Entry** button.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV CAT | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

Encounter Date: 10/09/2014 | Jeffrey S | Create Encounter | Delete Encounter | Encounter Report | Sharing Options

Only show data for this provider

Vital Signs | Hospital/ER Admissions | Medications | Labs | Screening Labs | Screenings | Immunizations | Diagnoses | Case Note

Screening Labs

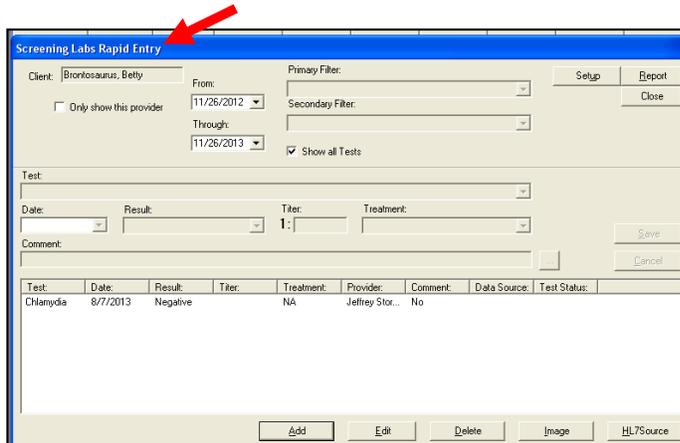
Add/Edit | Rapid Entry | Setup

Current Test: Chlamydia | Result: Negative | Titer: 1: | Treatment: AZ | Save | Delete

Test	Date of Pt.	Prior Result	Current Re...	Titer	Treatment	Provider	C
Chlamydia							
Cytomegalovirus (CMV)							
Epstein Barr Virus (EBV)							
Genital Herpes							
Gonorrhea							
HIV-1b							
HIV-1Ag							
HIV(DNA)							
HIV(VRNA)							
Hepatitis A Ab-igm							
Hepatitis A Ab-Total							
Hepatitis B core antibody IgM (HBeAb)							
Hepatitis B core antibody total							

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5. The **Screening Labs Rapid Entry** screen will appear.



The screenshot shows the 'Screening Labs Rapid Entry' window. A red arrow points to the title bar. The window contains the following fields and controls:

- Client: Brontosaurus, Betty
- From: 11/26/2012
- Through: 11/26/2013
- Primary Filter: (empty)
- Secondary Filter: (empty)
- Only show this provider
- Show all Tests
- Buttons: Setup, Report, Close
- Test: (empty)
- Date: (empty), Result: (empty), Titer: 1, Treatment: (empty)
- Comment: (empty)
- Buttons: Save, Cancel
- Table with columns: Test, Date, Result, Titer, Treatment, Provider, Comment, Data Source, Test Status
- Table row: Chlamydia, 8/7/2013, Negative, NA, Jeffrey Stor..., No
- Buttons: Add, Edit, Delete, Image, HL7Source

6. **Show all Tests** is selected by default. You can apply **Primary** and **Secondary Filters** to view only one or two screening labs and run reports by selecting the filter(s) and unchecking **Show all Tests**.



The screenshot shows the 'Screening Labs Rapid Entry' window with three red arrows pointing to the Primary Filter, Secondary Filter, and Show all Tests checkbox. The window contains the following fields and controls:

- Client: Brontosaurus, Betty
- From: 11/26/2012
- Through: 11/26/2013
- Primary Filter: (empty)
- Secondary Filter: (empty)
- Only show this provider
- Show all Tests
- Buttons: Setup, Report, Close
- Test: (empty)
- Date: (empty), Result: (empty), Titer: 1, Treatment: (empty)
- Comment: (empty)
- Buttons: Save, Cancel
- Table with columns: Test, Date, Result, Titer, Treatment, Provider, Comment, Data Source, Test Status
- Table row: Chlamydia, 8/7/2013, Negative, NA, Jeffrey Stor..., No
- Buttons: Add, Edit, Delete, Image, HL7Source

Entering Annual Screenings

Screenings are tests typically performed annually, such as a Pap smear or a TB skin test (PPD). **NOTE:** Pap smear and pelvic exam options will not appear for female clients.

Comment [SL6]: Do the PAP smears appear for transgender clients?

1. To enter a screening lab, go to the **Encounters** tab, **Screenings** sub-tab.

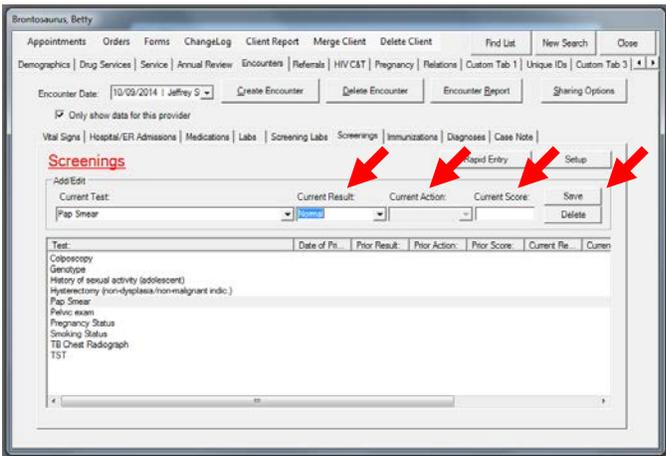
The screenshot shows the EHR interface for a client named Brontosaurus, Betty. The 'Encounters' tab is selected, and the 'Screenings' sub-tab is active. The 'Current Test' dropdown menu is set to 'Pap Smear', and the 'Current Result' is 'Normal'. The 'Test' list includes various screening tests such as Colposcopy, Genotype, History of sexual activity (adolescent), Hysterectomy (non-dysplasia/non-malignant indic.), Pap Smear, Pelvic exam, Pregnancy Status, Smoking Status, TB Chest Radiograph, and TST.

2. Select the screening you wish to enter by either typing the first few letters of the test name in the **Current Test** drop-down menu or by selecting the test from the list in the **Test** menu.

The screenshot shows the EHR interface for a client named Brontosaurus, Betty. The 'Encounters' tab is selected, and the 'Screenings' sub-tab is active. The 'Current Test' dropdown menu is set to 'Pap Smear', and the 'Current Result' is 'Normal'. The 'Test' list includes various screening tests such as Colposcopy, Genotype, History of sexual activity (adolescent), Hysterectomy (non-dysplasia/non-malignant indic.), Pap Smear, Pelvic exam, Pregnancy Status, Smoking Status, TB Chest Radiograph, and TST.

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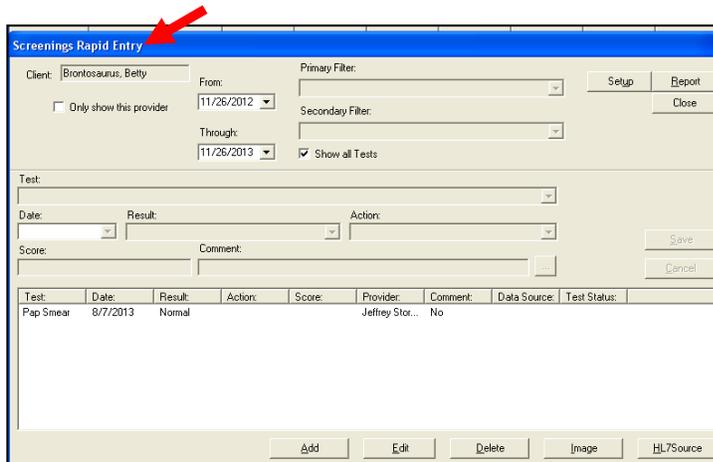
- 3. Enter relevant data for the test in the **Current Result**, **Current Action** and **Current Score** fields. **Save** your entries.



- 4. To use the rapid entry feature, click on the **Rapid Entry** button.



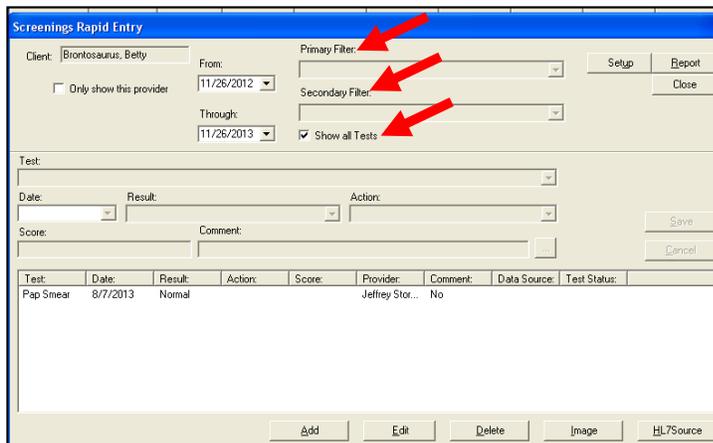
5. The **Screenings Rapid Entry** screen will appear.



The screenshot shows the 'Screenings Rapid Entry' window. A red arrow points to the title bar. The form includes fields for Client (Brontosaurus, Betty), From (11/26/2012), Through (11/26/2013), Primary Filter, Secondary Filter, and a checked 'Show all Tests' checkbox. There are buttons for Setup, Report, Close, Save, and Cancel. Below the form is a table with one row of data.

Test:	Date:	Result:	Action:	Score:	Provider:	Comment:	Data Source:	Test Status:
Pap Smear	8/7/2013	Normal			Jeffrey Stor...	No		

6. **Show all Tests** is selected by default. You can apply **Primary** and **Secondary Filters** to view only one or two screenings and run reports by selecting the filter(s) and un-checking **Show all Tests**.



This screenshot is identical to the previous one but has three red arrows pointing to the Primary Filter, Secondary Filter, and the 'Show all Tests' checkbox.

Test:	Date:	Result:	Action:	Score:	Provider:	Comment:	Data Source:	Test Status:
Pap Smear	8/7/2013	Normal			Jeffrey Stor...	No		



M. Entering Immunizations

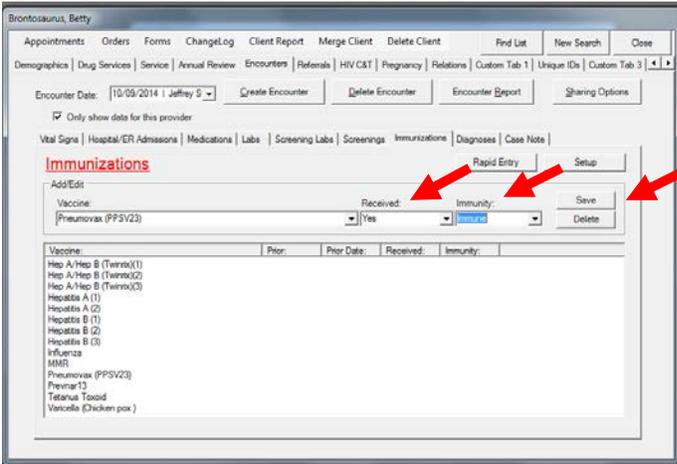
1. To enter an immunization, go to the **Encounters** tab, **Immunizations** sub-tab.

The screenshot shows the Brontosaurus Betty software interface. The top navigation bar includes 'Appointments', 'Orders', 'Forms', 'ChangeLog', 'Client Report', 'Merge Client', and 'Delete Client'. Below this, a secondary navigation bar shows 'Demographics', 'Drug Services', 'Service', 'Annual Review', 'Encounters', 'Referrals', 'HIV/C&T', 'Pregnancy', 'Relations', 'Custom Tab 1', 'Unique IDs', and 'Custom Tab 3'. The 'Encounters' tab is selected, and the 'Immunizations' sub-tab is active. The 'Encounter Date' is set to '10/09/2014 | Jeffrey S.'. The 'Add/Edit' form shows 'Vaccine' as 'Pneumovax (PPSV23)', 'Received' as 'Yes', and 'Immunity' as 'None'. A list of vaccines is displayed below, including Hep A/Hep B (Twins)(1), Hep A/Hep B (Twins)(2), Hep A/Hep B (Twins)(3), Hepatitis A (1), Hepatitis A (2), Hepatitis B (1), Hepatitis B (2), Hepatitis B (3), Influenza, MMR, Pneumovax (PPSV23), Prevnar13, Tetanus Toxoid, and Varicella (Chicken pox).

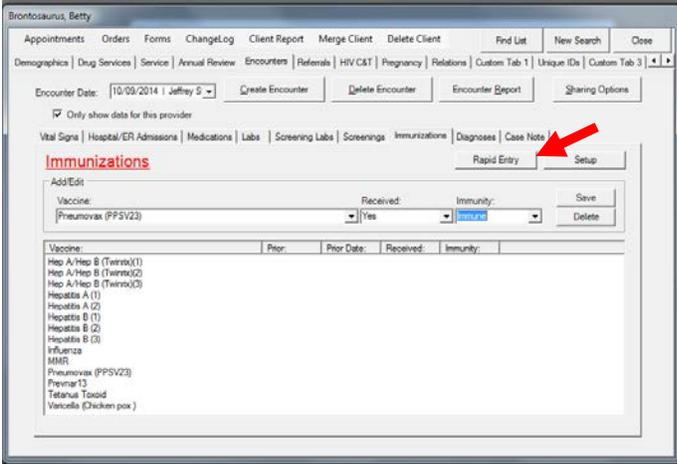
2. Select the immunization you wish to enter by either typing the first few letters of the vaccine name in the **Vaccine** drop-down menu or by selecting the test from the list in the **Vaccine** menu.

This screenshot is identical to the one above, but with red arrows pointing to the 'Vaccine' drop-down menu and the vaccine list, illustrating the selection process.

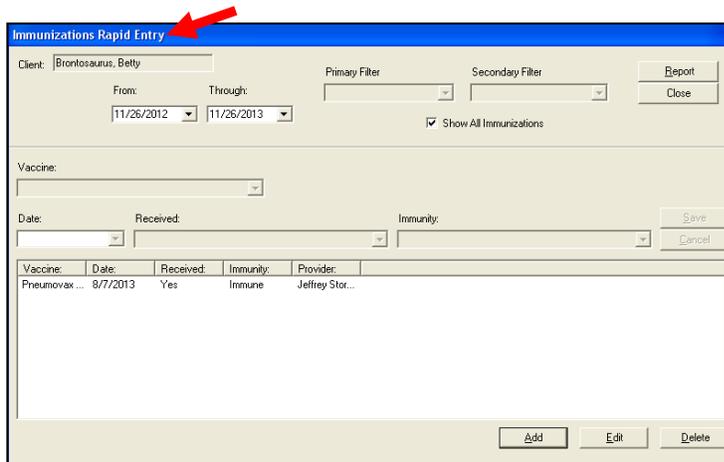
3. Select the appropriate value from **Received** and **Immunity** menus. **Save** your entries.



4. To use the rapid entry feature, click on the **Rapid Entry** button.



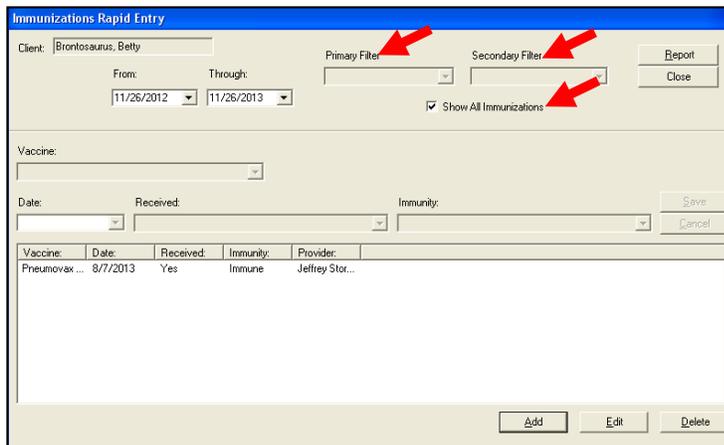
5. The **Immunizations Rapid Entry** screen will appear.



The screenshot shows the 'Immunizations Rapid Entry' window. At the top, the title bar reads 'Immunizations Rapid Entry'. Below it, the 'Client' field is populated with 'Brontosaurus, Betty'. There are 'From' and 'Through' date pickers set to '11/26/2012' and '11/26/2013' respectively. There are also 'Primary Filter' and 'Secondary Filter' dropdown menus. A 'Show All Immunizations' checkbox is checked. Below these fields are 'Report' and 'Close' buttons. The main area contains a 'Vaccine' dropdown, 'Date', 'Received', and 'Immunity' fields, along with 'Save' and 'Cancel' buttons. At the bottom, there is a table with one row of data and 'Add', 'Edit', and 'Delete' buttons.

Vaccine	Date	Received	Immunity	Provider
Pneumovax ...	8/7/2013	Yes	Immune	Jeffrey Stor...

6. **Show all Immunizations** is selected by default. You can apply **Primary** and **Secondary Filters** to view only one or two immunizations and reports by selecting the filter(s) and un-checking **Show all Immunizations**.



This screenshot is identical to the previous one, but with three red arrows pointing to the 'Primary Filter', 'Secondary Filter', and 'Show All Immunizations' checkbox. The 'Show All Immunizations' checkbox is checked.

Vaccine	Date	Received	Immunity	Provider
Pneumovax ...	8/7/2013	Yes	Immune	Jeffrey Stor...



N. Entering Diagnoses

1. To enter a diagnosis, go to the **Encounters** tab, **Diagnoses** sub-tab.

The screenshot shows the 'Encounters - Diagnoses' sub-tab in a medical software interface. The 'Diagnoses' sub-tab is selected, and the 'Add/Edit' section is visible. The 'Condition' dropdown menu is set to '(133.0) (Acariasis) Scabies'. The 'Diagnosis' dropdown menu is set to 'Definitive'. The 'Comments' field is empty. The 'Save' and 'Delete' buttons are visible. Below the 'Add/Edit' section is a scrollable list of conditions, including '(003.1) (Other salmonella infections) Salmonella septicemia', '(007.0) (Other protozoal intestinal diseases) Blastocystosis', '(007.1) (Other protozoal intestinal diseases) Giardiasis', '(007.4) (Other protozoal intestinal diseases) Cryptosporidiosis', '(009.3) (Ill-defined intestinal infections) Diarrhea of presumed infectious origin', '(011) Pulmonary tuberculosis', '(012) Other respiratory tuberculosis', '(013) Tuberculosis of meninges and central nervous system', '(014) Tuberculosis of intestines, peritoneum, and mesenteric glands', '(015) Tuberculosis of bones and joints', '(016) Tuberculosis of genitourinary system', and '(017) Tuberculosis of other organs'. Red arrows point to the 'Diagnoses' sub-tab and the 'Diagnosis' dropdown menu.

2. Select the diagnosis you wish to enter by either typing an open parenthesis "(" and the first few numbers of the ICD-10 code in the **Condition** drop-down menu or by selecting the diagnosis from the list in the **Condition** scroll-down menu. ICD-10 codes are used to report medical diagnoses and inpatient procedures

The screenshot shows the 'Encounters - Diagnoses' sub-tab in a medical software interface. The 'Diagnoses' sub-tab is selected, and the 'Add/Edit' section is visible. The 'Condition' dropdown menu is set to '(133.0) (Acariasis) Scabies'. The 'Diagnosis' dropdown menu is set to 'Definitive'. The 'Comments' field is empty. The 'Save' and 'Delete' buttons are visible. Below the 'Add/Edit' section is a scrollable list of conditions, including '(003.1) (Other salmonella infections) Salmonella septicemia', '(007.0) (Other protozoal intestinal diseases) Blastocystosis', '(007.1) (Other protozoal intestinal diseases) Giardiasis', '(007.4) (Other protozoal intestinal diseases) Cryptosporidiosis', '(009.3) (Ill-defined intestinal infections) Diarrhea of presumed infectious origin', '(011) Pulmonary tuberculosis', '(012) Other respiratory tuberculosis', '(013) Tuberculosis of meninges and central nervous system', '(014) Tuberculosis of intestines, peritoneum, and mesenteric glands', '(015) Tuberculosis of bones and joints', '(016) Tuberculosis of genitourinary system', and '(017) Tuberculosis of other organs'. Red arrows point to the 'Condition' dropdown menu and the list of conditions.

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- From the **Diagnosis** drop-down menu, select whether the condition is **Definitive**, **Presumptive** or **Unknown**.

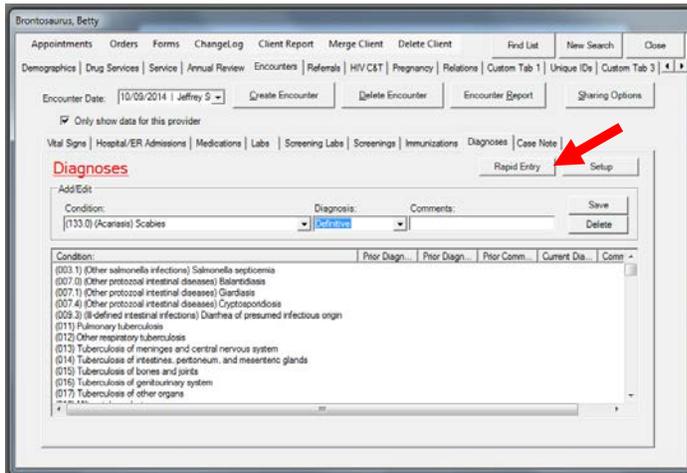
The screenshot shows the 'Diagnoses' section of a medical software interface. The 'Diagnosis' dropdown menu is highlighted with a red arrow and is set to 'Definitive'. The 'Condition' dropdown is set to '(133.0) (Acariasis) Scabies'. The 'Comments' field is empty. Below the form, a list of conditions is visible, including '(003.1) (Other salmonella infections) Salmonella septicemia', '(007.0) (Other protozoal intestinal diseases) Balantidiasis', and '(013) Tuberculosis of meninges and central nervous system'.

- Enter any **Comments**. **Save** your entries.

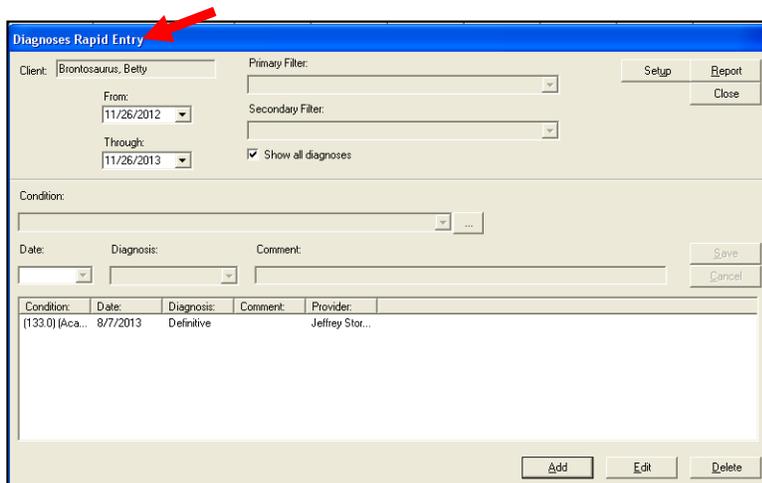
The screenshot shows the 'Diagnoses' section of a medical software interface. The 'Diagnosis' dropdown menu is set to 'Definitive'. The 'Comments' field is highlighted with a red arrow, indicating where to enter any comments. The 'Condition' dropdown is set to '(133.0) (Acariasis) Scabies'. The 'Save' button is visible next to the 'Comments' field.

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5. To use the rapid entry feature, click on the **Rapid Entry** button.



6. The **Diagnoses Rapid Entry** screen will appear.



7. **Show all diagnoses** is selected by default. You can apply **Primary** and **Secondary Filters** to view only one or two diagnoses and run reports by selecting the filter(s) and un-checking **Show all diagnoses**.

Diagnoses Rapid Entry

Client: Brontosaurus, Betty Primary Filter: [] Setup Report

From: 11/26/2012 Secondary Filter: [] Close

Through: 11/26/2013 Show all diagnoses

Condition: []

Date: [] Diagnosis: [] Comment: [] Save Cancel

Condition:	Date:	Diagnosis:	Comment:	Provider:
(133.0) (Aca...	8/7/2013	Definitive		Jeffrey Stor...

Add Edit Delete

O. Entering Medical Case Notes

1. To enter a case notes, go to the **Encounters** tab, **Case Note** sub-tab.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client **Encounter** Merge Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

Encounter Date: 10/09/2014 | Jeffrey S Create Encounter Delete Encounter Encounter Report Sharing Options

Only show data for this provider

Vital Signs Hospital/ER Admissions Medications Labs Screening Labs Screenings Immunizations Diagnoses **Case Note**

Case Note (for the selected encounter date):

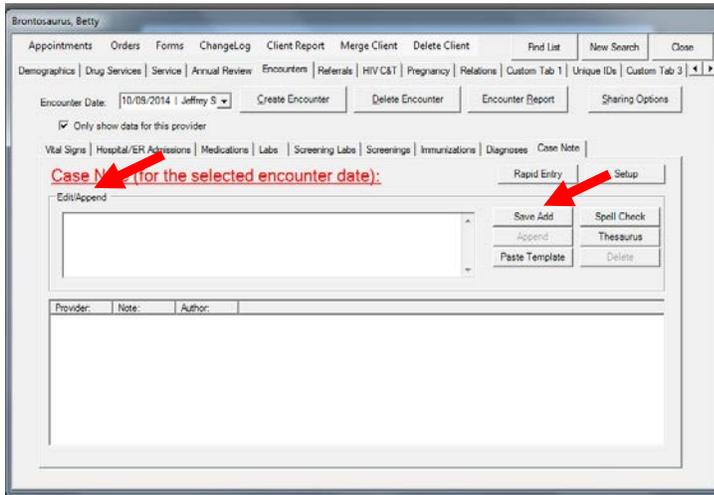
Rapid Entry Setup

Edit/Append Save Add Spell Check Append Thesaurus Paste Template Delete

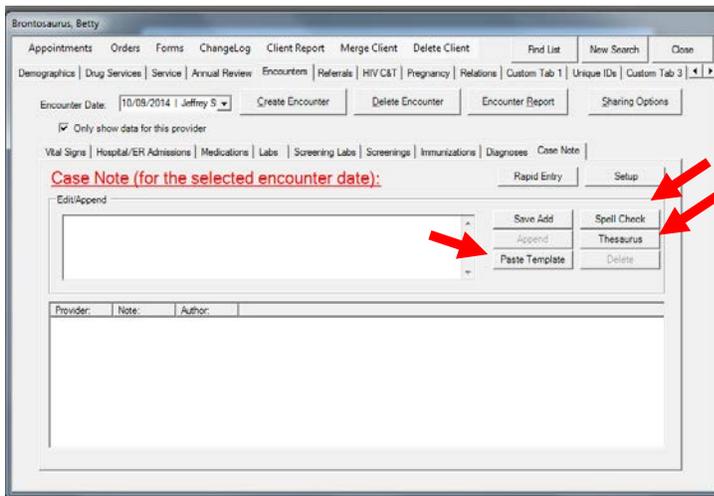
Provider:	Note:	Author:
-----------	-------	---------

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2. Type case notes in the **Edit/Append** field and click the **Save Add** button when done. **NOTE:** If you are entering a long series of case notes at one sitting for one client, you may wish to save your changes after each paragraph.

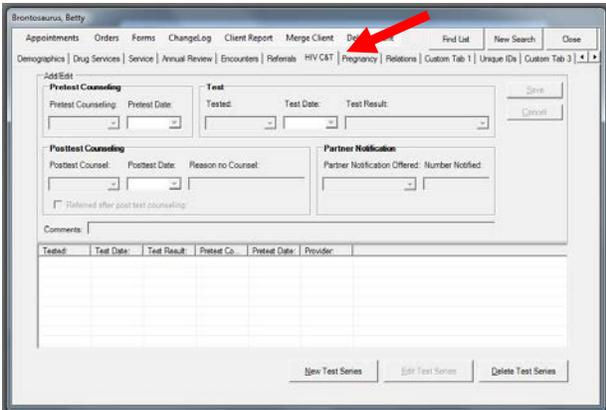


3. Note the **Spell Check**, **Thesaurus** and **Paste Template** features.



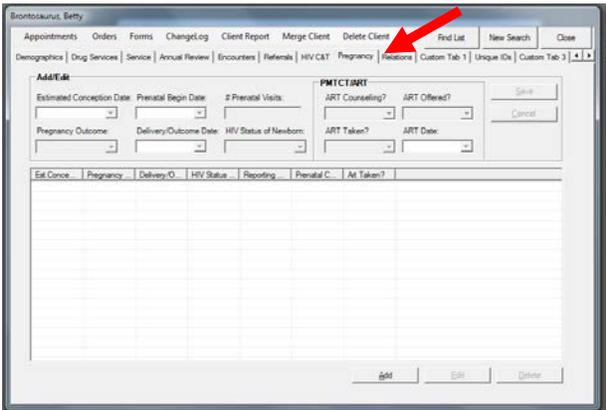
Part 12) HIV Counseling & Testing

The **HIV C&T** (Counseling and Testing) tab can be used to track clients who enter care through an agency's counseling and testing program. The menu options are all yes/no, with the exception of test result.



Part 13) Pregnancy

Input information tied to **Pregnancy** on this tab.

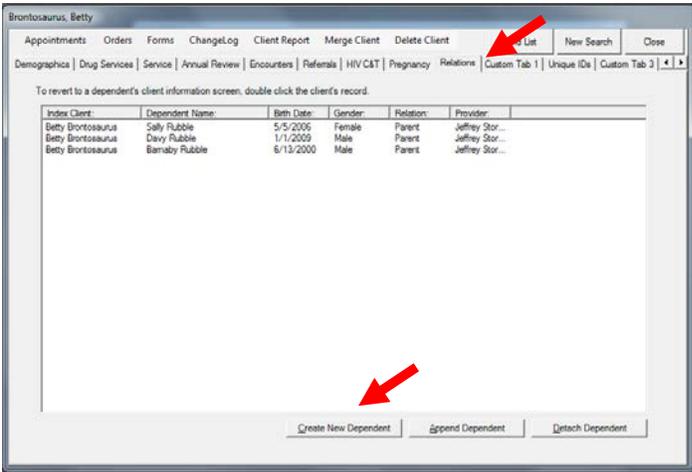


Part 14) Relations

Entering Relations

The **Relations** tab allows you to enter HIV-negative/affected members of the index client's family into the database in order to provide them services. The process of entering the HIV-negative/affected family member as a new client is similar to entering an HIV-positive client.

1. From the client's details screen, select the **Relations** tab and click the **Create a New Dependent** button.



2. The **Add Client** screen will appear. The **Dependant Of** and **Generated URN** fields will self-populate with the index client's information. Complete the remaining fields for the client's dependant as you did for the client. Click **Add Client** when finished with the data entry.

Add Client

Dependant Of: Brontosaurus, Betty Generated URN: SLB0999992U

Last Name: Brontosaurus First Name: Sally

Middle Name: Gender: Female

BirthDate: 01/01/2012 Estimated?

Forms **Add Client** Cancel

3. If the dependant is less than two years old, the **Quality Check** screen will appear when you click on **Add Client**. This is to ensure that you have correctly entered the date of birth.

Quality Check

Is the client you are entering an infant?

Yes No

4. If the dependent is not younger than two or older than 70 years of age and you clicked on the **Add Client** button, the **Specify Relation** screen will appear. When establishing a relationship between the index client and a dependent, a full list of relations is available in the **Is the** drop-down menu.

Specify Relation

Please specify the correct relation between the following clients.

The INDEX client:
Betty Brontosaurus

Is the Parent of

The DEPENDENT:
Sally Brontosaurus

Apply Cancel

5. **The INDEX client** and the **The DEPENDANT** fields will self-populate with the names that were entered previously.

Specify Relation

Please specify the correct relation between the following clients.

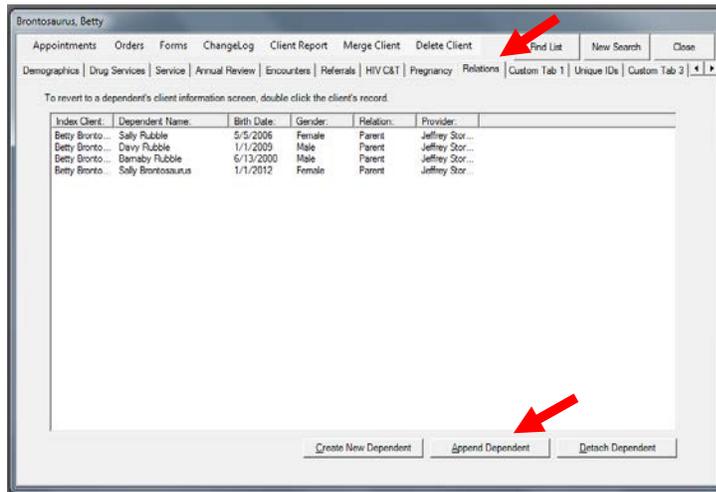
The INDEX client:
Betty Brontosaurus

Is the Parent of

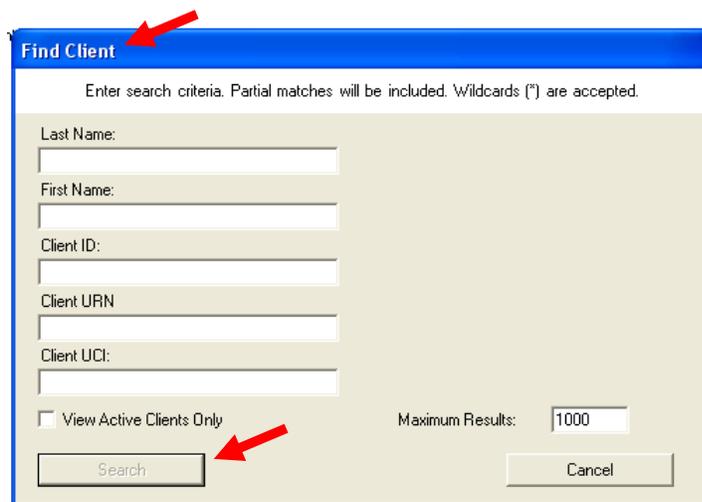
The DEPENDENT:
Sally Brontosaurus

Apply Cancel

- To identify a relationship with an existing client, select **Append Dependent** from the **Relations** tab.



- The **Find Client** screen will appear. This is the same screen that is used to find any client. Enter search text into any of the fields: **Last Name**, **First Name**, **Client ID**, **Client URN** or **Client UCI** and click on **Search**.



8. The **Search Results** screen is the same as any client search results. Select the client you wish to add as a relation and click on **Attach**.

Last Name	First Name	Client ID	Client URN	Client EURN
Brontosaurus	Fred		FEB00101781U	Qe55a+Gwy

9. The **Specify Relation** screen will appear. Select the proper relationship identifier in the **Is the** drop-down menu and click **Apply**.

Please specify the correct relation between the following clients.

The INDEX client:
Betty Brontosaurus

Is the **Spouse/Partner** of

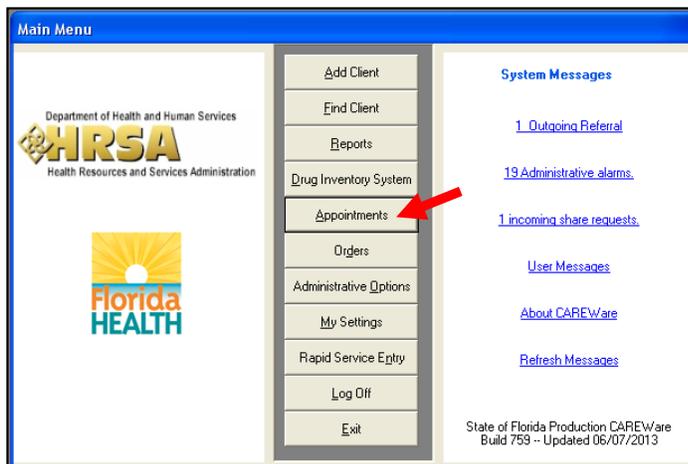
The DEPENDENT:
Fred Brontosaurus

Apply Cancel

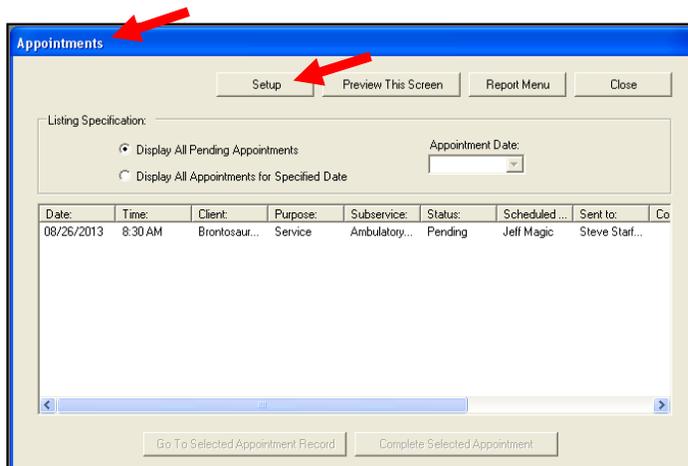
Part 15) Scheduler

A. Scheduler

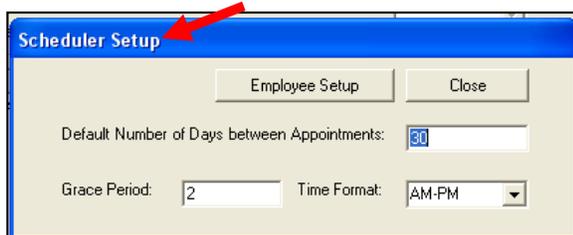
1. To use the Scheduler, click on the **Appointments** button from the **Main Menu**.



2. Select the **Setup** button in the **Appointments** screen.



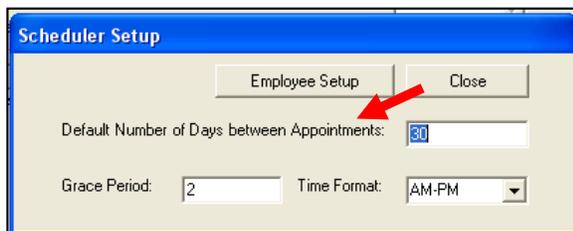
3. The **Scheduler Setup** screen will appear.



The screenshot shows a dialog box titled "Scheduler Setup" with a blue header. Below the header are two buttons: "Employee Setup" and "Close". The main area contains three fields: "Default Number of Days between Appointments:" with a text box containing "30", "Grace Period:" with a text box containing "2", and "Time Format:" with a dropdown menu set to "AM-PM". A red arrow points to the "Scheduler Setup" title bar.

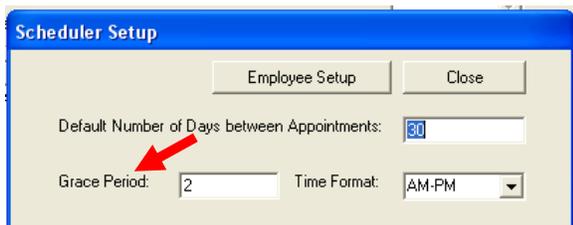
4. Complete the following fields:

- a. **Default Number of Days between Appointments:** CAREWare will automatically schedule another visit in the designated number of days.



The screenshot shows the "Scheduler Setup" dialog box. A red arrow points to the "Default Number of Days between Appointments:" text box, which contains the value "30".

- b. **Grace Period:** This is the number of days after which, upon logging in, CAREWare will automatically set the visit status from **Pending** to **Missed** in the **Status** column on the **Scheduler** tab (see below).



The screenshot shows the "Scheduler Setup" dialog box. A red arrow points to the "Grace Period:" text box, which contains the value "2".



Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Merge Client | Delete Client | Find List | **New Search** | Close

Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3 | Subform | Pharmacy | Scheduler | Performance Measures

Client URN: BTB00101802A
 Client ID: 1234 Client Uses Scheduler Default Number of Days between Appointments: 30

Add/Edit Appointment:

Date: Time: Subservice: Status: Scheduled by: Sent to:

Comment: Save Cancel

Date:	Time:	Purpose:	Subservice:	Status:	Scheduled ...	Sent to:	Comments:	Provider:	Client L
07/08/2013	8:45 AM	Service	Ambulatory...	Missed	Jeff Magic	Steve Staf...		Jeffrey Stor...	

Add Edit Delete

c. **Employee Setup**: Click on this button to access the **Employee** screen.

Scheduler Setup

Employee Setup Close

Default Number of Days between Appointments: 30

Grace Period: 2 Time Format: AM-PM



- d. **Employee**: Add clinic employees to the list. Visits can be scheduled with individuals and reports generated to show which patients are scheduled to see each employee. The **Active** box must be checked for the employee to show up in the drop-down menus mentioned below. Once an employee has left the agency, do not delete the person from the **Employee** screen; simply uncheck the **Active** box. This way you will retain their historic data.

The screenshot shows the 'Employee' window with the 'Add/Edit Employee' form. The 'Active' checkbox is checked. A table below the form lists three employees: Magic, Starfish, and Tuna. The 'Active' column for all three is 'Yes'.

CW/ User Na...	Last Name:	First Name:	Can Prescribe:	Is Dispenser:	Can Schedule:	Active:	Case Note A...
	Magic	Jeff	Yes	Yes	Yes	Yes	Yes
	Starfish	Steve	No	No	Yes	Yes	No
	Tuna	Terry	No	No	Yes	Yes	No

- e. By checking **Can Prescribe**, the employee will show up on the **Pharmacy** tab under **Clinician** (see below).

The screenshot shows the 'Employee' window with the 'Add/Edit Employee' form. The 'Can Prescribe' checkbox is checked. The table below the form lists three employees: Magic, Starfish, and Tuna. The 'Can Prescribe' column for Magic and Starfish is 'Yes', and for Tuna it is 'No'.

CW/ User Na...	Last Name:	First Name:	Can Prescribe:	Is Dispenser:	Can Schedule:	Active:	Case Note A...
	Magic	Jeff	Yes	Yes	Yes	Yes	Yes
	Starfish	Steve	No	No	Yes	Yes	No
	Tuna	Terry	No	No	Yes	Yes	No



f. By checking **Can Schedule**, the employee will show up on the **Scheduler** tab under **Scheduled by** (see below).

DW User Na...	Last Name	First Name	Can Prescribe	Is Dispenser	Can Schedule	Active	Case Note A...
Magic	Jeff	Jeff	Yes	Yes	Yes	Yes	Yes
Starfish	Steve	Steve	No	No	Yes	Yes	No
Tuna	Terry	Terry	No	No	Yes	Yes	No

Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3 | Subform | Pharmacy | Scheduler | Performance Measures

Client URN: 81B00101802A
 Client ID: 1234 Client Uses Scheduler Default Number of Days between Appointments: 30

Add/Edit Appointment:

Date: Time: Subservice: Status: Scheduled by: Sent to:

Comment:

Jeff Magic
 Steve Starfish
 Terry Tuna

Cancel

Date:	Time:	Purpose:	Subservice:	Status:	Scheduled ...	Sent to:	Comments:	Provider:	Client L
[Empty Table]									

Add Edit Delete

g. By checking **Case Note Author**, the employee will show up on the **Case Notes** screen under **Author** (see below).

Employee

Add/Edit Employee

Last Name: First Name: Can Prescribe Case Note Author

Phone 1: Phone 2: Is Dispenser Can be Sent to

Can Schedule Active

Email Address:

CAREWare User Name:

CW User Na...	Last Name:	First Name:	Can Prescribe:	Is Dispenser:	Can Schedule:	Active:	Case Note A...
Magic	Jeff	Jeff	Yes	Yes	Yes	Yes	Yes
Starfish	Steve	Steve	No	No	Yes	Yes	No
Tuna	Terry	Terry	No	No	Yes	Yes	No

New Edit Delete Close

Case Notes (Rapid Entry)

Client: From: Through:

Only show this provider

Buttons: Templates, Report, Sharing, Close

Note:

Date:

Author:

Buttons: Save, Cancel, Paste Template, Spell Check, Thesaurus

Search:

ID	Date	Provider	Case Note	Author

Buttons: Add, Edit, Append, Delete

h. By checking **Can be Sent to**, the employee will show up on the **Scheduler** tab under **Sent to** (see below).

Employee

Add/Edit Employee

Last Name: First Name:

Can Prescribe: Is Dispenser: Can Schedule: Case Note Author: Can be Sent to: Active:

Phone 1: Phone 2:

Email Address:

CAREWare User Name:

DW User Na...	Last Name	First Name	Can Prescribe	Is Dispenser	Can Schedule	Active	Case Note A...
Magic	Jeff	Steve	Yes	No	Yes	Yes	Yes
Starfish	Steve	Steve	No	No	Yes	Yes	No
Tuna	Tery	Tery	No	No	Yes	Yes	No

Buttons: New, Edit, Delete, Close

{ }

Client URN: BTR00101800A
 Client ID: 1234 Client Uses Scheduler Default Number of Days between Appointments: 30

Add/Edit Appointment

Date: [] Time: [] Subservice: [] Status: [] Scheduled by: [] Sent to: []
 Comment: [] Save

Sent to dropdown: Jeff Magic, Steve Starfish, Terry Tuna

Date	Time	Purpose	Subservice	Status	Scheduled	Sent to	Comments	Provider	Client I
[Empty Table]									

Add Edit Delete

5. Once complete, click **Close**.

Scheduler Setup

Employee Setup Close

Default Number of Days between Appointments: 30

Grace Period: 2 Time Format: AM-PM

6. You will be returned to the **Appointments** screen. You can view all outstanding appointments from this screen.

Appointments

Setup Preview This Screen Report Menu Close

Listing Specifications

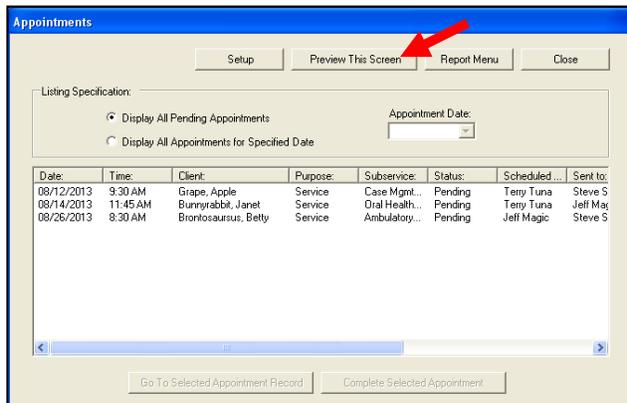
Display All Pending Appointments Appointment Date: []
 Display All Appointments for Specified Date

Date	Time	Client	Purpose	Subservice	Status	Scheduled	Sent to
08/12/2013	9:30 AM	Grape, Apple	Service	Case Man...	Pending	Terry Tuna	Steve S
08/14/2013	11:45 AM	Bunyrabbit, Janet	Service	Oral Health...	Pending	Terry Tuna	Jeff Mag
08/25/2013	8:30 AM	Brontosaurus, Betty	Service	Ambulatory...	Pending	Jeff Magic	Steve S

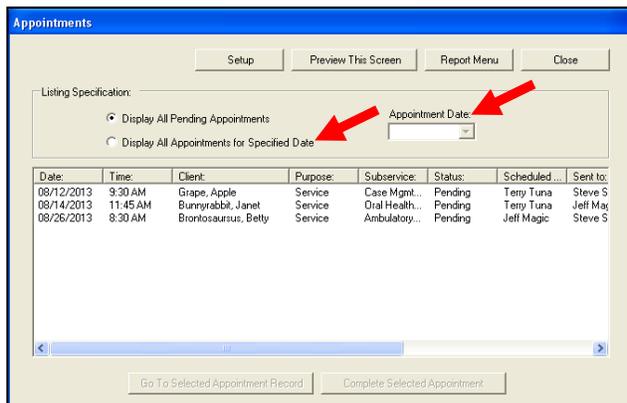
Go To Selected Appointment Record Complete Selected Appointment

7. From the **Appointments** screen, you can:

- a. Preview all pending visits by clicking the **Preview This Screen** button.



- b. **Display All Appointments for Specified Date** by clicking on this option and selecting the date from the **Appointment Date** drop-down menu. (You may want to generate a list for the next day's activities.)



c. Other reports are available by selecting the **Report Menu** button.

The screenshot shows the 'Appointments' window. At the top, there are buttons for 'Setup', 'Preview This Screen', 'Report Menu', and 'Close'. A red arrow points to the 'Report Menu' button. Below the buttons is a 'Listing Specification' section with two radio buttons: 'Display All Pending Appointments' (selected) and 'Display All Appointments for Specified Date'. To the right of these is an 'Appointment Date' dropdown menu. Below this is a table with columns: Date, Time, Client, Purpose, Subservice, Status, Scheduled by, and Sent to. The table contains three rows of appointment data. At the bottom, there are two buttons: 'Go To Selected Appointment Record' and 'Complete Selected Appointment'.

Date:	Time:	Client:	Purpose:	Subservice:	Status:	Scheduled ...	Sent to:
08/12/2013	9:30 AM	Grape, Apple	Service	Case Mgmt...	Pending	Tony Tuna	Steve S
08/14/2013	11:45 AM	Bunnyrabbit, Janet	Service	Oral Healths...	Pending	Tony Tuna	Jeff May
08/26/2013	8:30 AM	Brontosaurus, Betty	Service	Ambulatory...	Pending	Jeff Magic	Steve S

d. The **Scheduler Reports** screen will appear. This screen offers a number of options, such as **Clients without Appointments** and **Scheduled by**, from which customized reports regarding appointments can be run. After selecting the preferred options, click on **Run Report**.

The screenshot shows the 'Scheduler Reports' window. At the top, there are buttons for 'Run Report' and 'Close'. A red arrow points to the 'Run Report' button. The window contains several sections: 'Report:' with radio buttons for 'Appointments' (selected) and 'Clients without Appointments' (highlighted by a red arrow); 'Appointment Date Span:' with 'From:' and 'Through:' dropdown menus; 'Subservice:', 'Status:', 'Scheduled by:', and 'Sent to:' dropdown menus; and 'Report Filter:' with checkboxes for 'Apply Custom Filter' (with an 'Edit Filter' link) and 'Hide Personal Identifying Information'.

B. Scheduling an Appointment

1. To schedule an appointment, enter a client's record and select the **Scheduler** sub-tab. You may have to scroll to the right (▶) on the sub-tab bar to locate the **Scheduler** sub-tab.

Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3 | Subform | Pharmacy | Scheduler | Performance Measures

Client URN: BTB00101802A
Client ID: Client Uses Scheduler Default Number of Days between Appointments: 30

Add/Edit Appointment:
Date: 8/26/2013 Time: 8:30 AM Subservice: Ambulatory/Outpatient Medical Care Status: Scheduled by: Jeff Magic Sent to: Steve Starfish
Comment: Save Cancel

Date	Time	Purpose	Subservice	Status	Scheduled ...	Sent to	Comments	Provider	Client L
------	------	---------	------------	--------	---------------	---------	----------	----------	----------

Add Edit Delete

2. Check the **Client Uses Scheduler** option.

Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3 | Subform | Pharmacy | Scheduler | Performance Measures

Client URN: BTB00101802A
Client ID: 1234 Client Uses Scheduler Default Number of Days between Appointments: 30

Add/Edit Appointment:
Date: Time: Subservice: Status: Scheduled by: Sent to:
Comment: Save Cancel

Date	Time	Purpose	Subservice	Status	Scheduled ...	Sent to	Comments	Provider	Client L
------	------	---------	------------	--------	---------------	---------	----------	----------	----------

Add Edit Delete

3. Click **Add** to add new appointment.

The screenshot shows the Scheduler interface with the following fields and controls:

- Client URN: BTB00101802A
- Client ID: 1234
- Client Uses Scheduler
- Default Number of Days between Appointments: 30
- Add/Edit Appointment:**
 - Date: [dropdown]
 - Time: [dropdown]
 - Subservice: [dropdown]
 - Status: [dropdown]
 - Scheduled by: [dropdown]
 - Sent to: [dropdown]
 - Comment: [text area]
 - Save [button] Cancel [button]
- Table header: Date, Time, Purpose, Subservice, Status, Scheduled..., Sent to, Comments, Provider, Client L
- Table: [empty]
- Buttons: Add, Edit, Delete

A red arrow points to the **Add** button.

4. In the **Add/Edit Appointment** field, select the **Date** and enter the **Time**.

The screenshot shows the Scheduler interface with the following fields and controls:

- Client URN: BTB00101802A
- Client ID: [dropdown]
- Client Uses Scheduler
- Default Number of Days between Appointments: 30
- Add/Edit Appointment:**
 - Date: 8/26/2013
 - Time: 8:30 AM
 - Subservice: Ambulatory/Outpatient Medical Care
 - Status: [dropdown]
 - Scheduled by: Jeff Magic
 - Sent to: Steve Starfish
 - Comment: [text area]
 - Save [button] Cancel [button]
- Table header: Date, Time, Purpose, Subservice, Status, Scheduled..., Sent to, Comments, Provider, Client L
- Table: [empty]
- Buttons: Add, Edit, Delete

Red arrows point to the Date and Time fields.

5. Select the **Subservice** for which the appointment is scheduled from the drop-down menu.

The screenshot shows a software interface for adding or editing an appointment. At the top, there are several tabs: Referrals, HIV C&T, Pregnancy, Relations, Custom Tab 1, Unique IDs, Custom Tab 3, Subform, Pharmacy, Scheduler, and Performance Measures. Below the tabs, there are fields for Client URN (BTB00101802A) and Client ID. A checkbox labeled 'Client Uses Scheduler' is checked, and a field for 'Default Number of Days between Appointments' is set to 30. The main section is titled 'Add/Edit Appointment' and contains several dropdown menus: Date (8/26/2013), Time (8:30 AM), Subservice (Ambulatory/Outpatient Medical Care), Status, Scheduled by (Jeff Magic), and Sent to (Steve Starfish). A red arrow points to the Subservice dropdown menu. Below these fields is a 'Comment' field and 'Save' and 'Cancel' buttons. At the bottom, there is a table with columns: Date, Time, Purpose, Subservice, Status, Scheduled..., Sent to, Comments, Provider, and Client L. The table is currently empty. Below the table are 'Add', 'Edit', and 'Delete' buttons.

6. Select the staff who scheduled the appointment in **Scheduled by** drop-down menu.

This screenshot is identical to the one above, showing the 'Add/Edit Appointment' form. In this version, a red arrow points to the 'Scheduled by' dropdown menu, which is currently set to 'Jeff Magic'. All other elements, including the 'Subservice' dropdown, are the same as in the previous image.

7. Select the provider the client will be seeing from the **Sent to** drop-down menu and click **Save**.

The screenshot shows a software window with a menu bar at the top containing: Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3 | Subform | Pharmacy | Scheduler | Performance Measures. Below the menu bar, there are fields for Client URN (E1B00101802A) and Client ID. A checkbox labeled 'Client Uses Scheduler' is checked, and a text field for 'Default Number of Days between Appointments' contains the value 30.

The 'Add/Edit Appointment' section contains the following fields:

- Date: 8/26/2013
- Time: 8:30 AM
- Subservice: Ambulatory/Outpatient Medical Care
- Status: (empty)
- Scheduled by: Jeff Magic
- Sent to: Steve Starfish

Below these fields is a 'Comment:' text area and two buttons: 'Save' and 'Cancel'. A red arrow points to the 'Sent to' dropdown menu, and another red arrow points to the 'Save' button.

At the bottom of the window is a table with the following columns: Date, Time, Purpose, Subservice, Status, Scheduled..., Sent to, Comments, Provider, Client L. The table is currently empty. Below the table are three buttons: 'Add', 'Edit', and 'Delete'.



Chapter III – Specialty Data And Functionality

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Background – CAREWare allows some customization. In order to cut down on the number of different data systems our customers have to input data into, the HIV/AIDS Section has customized our instance of CAREWare to track HOPWA and Eligibility data. By including HOPWA data in our system, we can produce portions of the HOPWA APR. This can help relieve agencies of the burden of maintaining an additional data system to collect HOPWA information. The same is true of our Eligibility Module. Staff across the state can verify eligibility by reviewing the client's record electronically within the database. Additionally, some functionality crosses between agencies. Two examples are referrals and data sharing. Agencies may send each other referrals for service and requests for sharing of client data.

Part 16) Referrals

1. To send a client referral to another agency, enter the client's record. From the **Referrals** tab, select the **F1: Add Referral** hyperlink.

2. In the **Add/Edit Referral Information** field, enter:
 - a. **Referral Date**
 - b. **Type**. An **Internal** referral allows you to send to another agency in the state's CAREWare network. An **External** referral represents an agency that is not on our network. An **External** referral does not actually go to anyone; it is simply a way to track referrals. When an **Internal** referral is sent, the receiving agency will be notified the client has been referred to them for service.
 - c. **Refer-To Provider**
 - d. **Requested Service Category Type**: For what type of service is the referral?

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- e. **Referral Class**: An additional level of specification for the referral. This field is optional.

The screenshot shows the 'Add/Edit Referral Information' form. Red arrows point to the following fields: Referral Date (8/12/2013), Type (Internal), Refer-To Provider (Richs Clinic), Requested Service Category Type (Outpatient/Ambulatory Medical Care), and Referral Class (Cardiology). Other fields include Referral Status (Pending), Referral Complete Date, and Referral Comments. Buttons for 'Save' and 'Cancel' are visible at the bottom right.

- 3. Once all the data is entered, click **Save**.

This screenshot is identical to the previous one, but a red arrow points specifically to the 'Save' button at the bottom right of the form.

- 4. You will return to the **Referrals** tab. Note that the **Status** is pending and the **Completed Date** is blank.

The screenshot shows the 'Referrals' tab selected in the application. A table displays the following data:

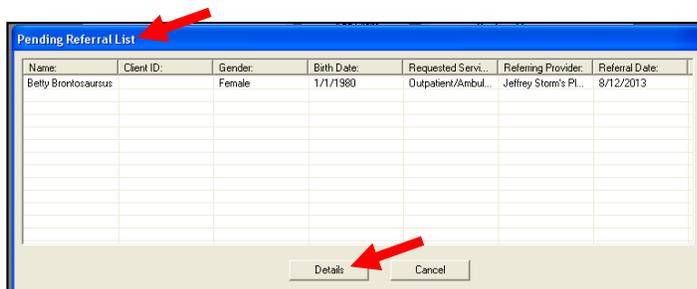
Direction	Referral Date	Provider	Service Category	Status	Completed Date	Referral Class	Comments
Outgoing	8/12/2013	Richs Clinic	Outpatient/Ambulatory Medical Care	Pending		Cardiology	

Red arrows point to the 'Referrals' tab at the top, and the 'Status' and 'Completed Date' columns in the table below.

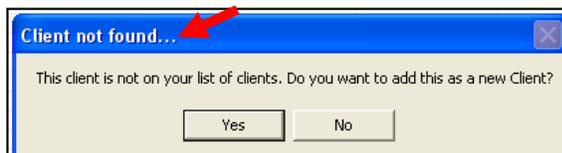
5. The agency that receives your referral will have an **Incoming Referral** hyperlink under **System Messages** on their **Main Menu**.



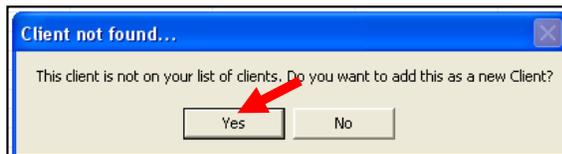
6. When the receiving agency clicks on the **Incoming Referral** hyperlink, the **Pending Referral List** screen will appear. Click on the **Details** button.



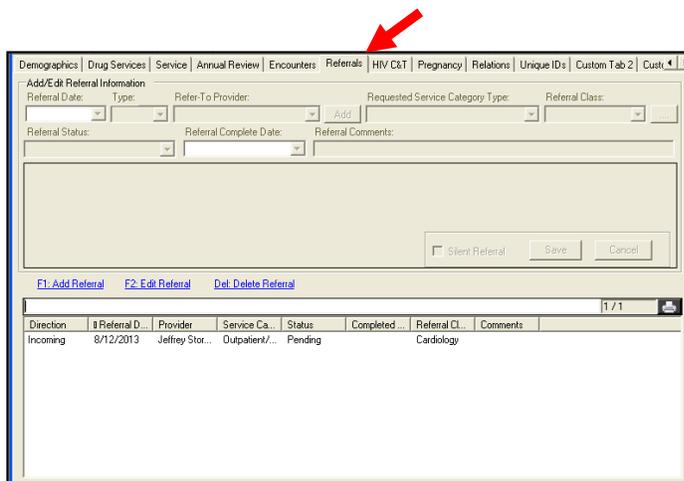
7. If the individual has not been entered into the receiving agency's domain, the **Client not found...**



8. The client will be brought into the receiving agency's domain by clicking **Yes** on the **Client not found...** screen.



9. The **Referrals** tab will appear.



10. Click on the referral from the list in the lower half of the screen and choose the **F2: Edit Referral** hyperlink.

The screenshot shows the 'Add/Edit Referral Information' form. The 'Referral Status' dropdown is open, showing options: Pending, Completed, Lost to follow up, and Rejected. A red arrow points to the 'F2: Edit Referral' link in the navigation bar. Another red arrow points to the first row of the table below, which is highlighted in blue. The table has columns: Direction, Referral D., Provider, Service Ca., Status, Completed..., Referral Cl., and Comments.

Direction	Referral D.	Provider	Service Ca.	Status	Completed...	Referral Cl.	Comments
Incoming	8/12/2013	Jeffrey Stor...	Outpatient/...	Pending		Cardiology	

11. Update the **Referral Status** and **Referral Completed Date**. The **Referral Comments** is an optional field. To add the service that corresponds to the referral, choose **F3: Add/Edit Service**.

The screenshot shows the 'Add/Edit Referral Information' form. Red arrows point to the 'Referral Status' dropdown (set to 'Pending'), the 'Referral Complete Date' field, the 'Referral Comments' field, and the 'F3: Add/Edit Service' button. The table below remains the same as in the previous screenshot.

12. Once a service is added, the **Referrals** tab will become active again. Click **Save**.

The screenshot shows the 'Add/Edit Referral Information' form. The 'Referrals' tab is active in the top menu bar. The form contains the following fields:

- Referral Date: 8/12/2013
- Type: Internal
- Refer-To Provider: Jeffrey Storm's Plaything World
- Requested Service Category Type: Outpatient/Ambulatory Medical Care
- Referral Class: Cardiology
- Referral Status: Completed
- Referral Complete Date: 8/12/2013
- Referral Comments: (empty)

Buttons at the bottom include 'F3: Add/Edit Service', 'Save', and 'Cancel'. Below the form is a table with one row of data:

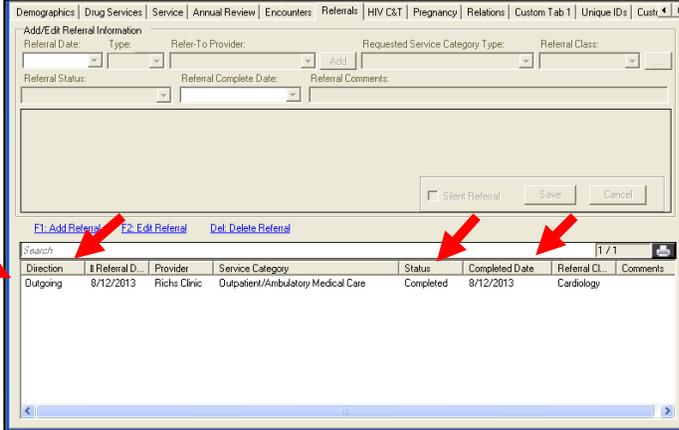
Direction	Referral D...	Provider	Service Category	Status	Completed ...	Referral Cl...	Comments
Incoming	8/12/2013	Jeffrey Stor...	Outpatient/Ambulatory Medical Care	Completed	8/12/2013	Cardiology	

13. The screen below illustrates what the receiving agency sees. Notice that the **Direction** is **Incoming**.

This screenshot is identical to the previous one, but with a red arrow pointing to the 'Incoming' value in the 'Direction' column of the table below the form.

Direction	Referral D...	Provider	Service Category	Status	Completed ...	Referral Cl...	Comments
Incoming	8/12/2013	Jeffrey Stor...	Outpatient/Ambulatory Medical Care	Completed	8/12/2013	Cardiology	

14. Viewing at the **Referrals** tab from the sending agency, the **Status** and **Completed Date** are updated. Notice that the **Direction** is **Outgoing**.



The screenshot shows a software window with a menu bar at the top: Demographics | Drug Services | Service | Annual Review | Encounters | **Referrals** | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Cust. Below the menu bar is a form titled "Add/Edit Referral Information" with fields for Referral Date, Type, Refer-To Provider, Requested Service Category Type, and Referral Class. Below the form are buttons for "F1. Add Referral", "F2. Edit Referral", and "Del. Delete Referral". A table below the buttons displays a single record:

Direction	Referral D.	Provider	Service Category	Status	Completed Date	Referral Cl.	Comments
Outgoing	8/12/2013	Richs Clinic	Outpatient/Ambulatory Medical Care	Completed	8/12/2013	Cardiology	



Part 17) Forms

A. Eligibility Forms

All eligibility forms and information required under Rule 64D-4, *Florida Administrative Code*, must be entered into the state CAREWare database.

Paper Enrollment

Eligibility staff may use paper forms to determine eligibility for new clients if:

- The state CAREWare is not available due to server/network issues
- Eligibility is being conducted off-site and access to CAREWare is not available

All paperwork must be entered and/or scanned into state CAREWare once service has been restored or you have access to the database.

All information must be entered within two weeks of interviewing the client.

State CAREWare Documents

The following documents must be completed in state CAREWare under the Forms tab:

- Eligibility Staff Assessment Worksheet (once at initial appointment or if the file is closed for more than a year)
- Six Month Recertification Review Form (every six months after initial certification)
- Notice of Eligibility or Ineligibility (every six months)
- Insurance Waiver Form (as needed)

All forms are custom sub-forms; that is, these forms are kept each time they are completed and will provide a history over time. When it is time to complete any of the documentation on the **Forms** tab, a new form will be added. DO NOT edit any previous forms.

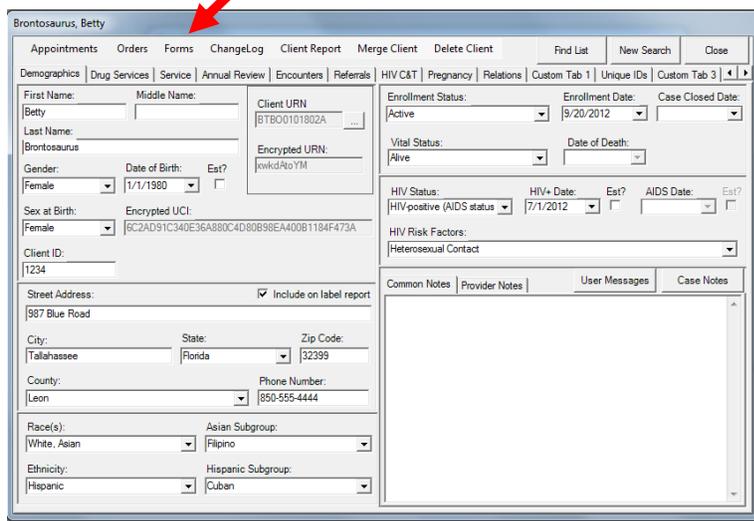
No signatures are required on the **Eligibility Staff Assessment Worksheet**, **Six Month Recertification Review Form** or **Insurance Waiver Form**, **Notice of Ineligibility**.

Print the **Notice of Eligibility** for signatures, scan the signed document, and save in CAREWare under the **Unique ID** tab under **Attachments**.



Adding Forms

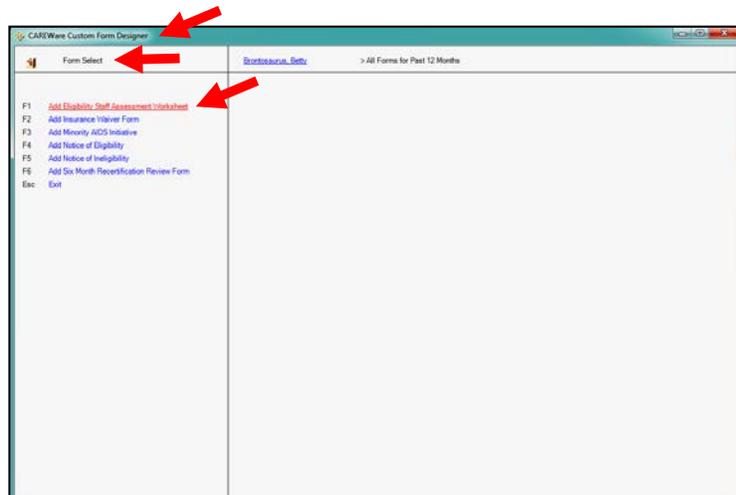
1. Click the **Forms** button



The screenshot shows a patient record form for Betty Brontosaurus. The 'Forms' button in the top navigation bar is highlighted with a red arrow. The form contains various fields for patient information, including name, gender, date of birth, and address.

First Name: Betty	Middle Name:	Client URN: BTBO0101802A	Enrollment Status: Active	Enrollment Date: 9/20/2012	Case Closed Date:
Last Name: Brontosaurus		Encrypted URN: jwkd4toYM	Vital Status: Alive	Date of Death:	
Gender: Female	Date of Birth: 1/1/1980	Est? <input type="checkbox"/>	HIV Status: HIV-positive (AIDS status)	HIV+ Date: 7/1/2012	Est? <input type="checkbox"/>
Sex at Birth: Female	Encrypted UCI: 6C2AD91C340E36A880C4D80B98EA400B1184F473A		HIV Risk Factors: Heterosexual Contact	AIDS Date:	Est? <input type="checkbox"/>
Client ID: 1234					
Street Address: 987 Blue Road					
City: Tallahassee	State: Florida	Zip Code: 32399			
County: Leon		Phone Number: 850-555-4444			
Race(s): White, Asian	Asian Subgroup: Filipino				
Ethnicity: Hispanic	Hispanic Subgroup: Cuban				

2. The **CAREWare Custom Form Designer** screen will appear. Under the **Forms Select** menu, click on the appropriate hyperlink (**Add_____**) to navigate to the desired form. You may also use a keyboard shortcut to open the form by pressing the keyboard's corresponding F key. For example, you can open the **Add Eligibility Staff Assessment Worksheet** by pressing F1.



The screenshot shows the CAREWare Custom Form Designer screen. The 'Forms Select' menu is visible on the left side, and the 'Add Eligibility Staff Assessment Worksheet' option is highlighted with a red arrow. The screen also displays the patient name 'Brontosaurus, Betty' and the number of forms for the past 12 months.

F1	Add Eligibility Staff Assessment Worksheet
F2	Add Insurance Waiver Form
F3	Add Minority AIDS Initiative
F4	Add Notice of Eligibility
F5	Add Notice of Ineligibility
F6	Add Six Month Recertification Review Form
Esc	Exit

- The example below illustrates the **Eligibility Staff Assessment Worksheet**. Begin by clicking the **State** option in the upper left corner. This opens the form's fields for inputting information.

The screenshot shows a software window titled 'CAREWare Custom Form Designer'. The main area displays a form titled 'Eligibility Staff Assessment Worksheet'. The form is designed to be completed by eligibility staff to document an applicant's status. It includes several input fields: 'Applicant Name', 'Address', 'Name of Agency', 'Eligibility Staff', and 'Phone Number'. Below these fields are several sections of checkboxes for documentation requirements, including 'Proof of HIV', 'Living in Florida', and 'No Documentation'. Two red arrows point to the top of the form area.

- Click within each field to enter the required information. You may also use the Tab key on the keyboard to move from one field to the next. To insert check marks, click inside the boxes. You may use Tab to move from one box to the next, pressing the keyboard's space bar to insert the check marks.

This screenshot is similar to the one above, showing the 'Eligibility Staff Assessment Worksheet' form. A red arrow points to the 'Proof of HIV' checkbox, which is currently unchecked. The form is otherwise identical to the previous screenshot.

5. For fields requiring that a number or amount be specified, enter digits instead of words to indicate the numerical value. For example, if two adult household members are counted, enter the number **2** into the field.

The screenshot shows a software window titled "CAREWare Custom Form Designer" with a sub-window "Brontosaurus, Betty > All Forms for Past 12 Months". On the left is a navigation pane with options like "Save/Close", "Previous Page", "Next Page", "Back", "Undo", "Redo", and "Print". The main area contains a form with several sections:

- income: an applicant must have low income (or no income at all)**
Determine Financial Waiver for income. If an application has any of the following they may be waived for the income portion of the application with appropriate documentation. If yes, skip the next section.
 - Medicaid
 - Project AIDS Care
 - Food Stamps
 - SSI (Supplemental Security Income)
 - TANF (Temporary Assistance for Needy Families)
 - WIC (Women, Infant and Children)
 - Local Indigent Program
 - Other (specify):
- Determine Household Size: Applicant, Spouse and Dependent are always counted in the Household Size**
 - How many adult household members are counted (including applicant): (indicated by a red arrow)
 - How many of the applicant's dependent children are in the home:
 - Total Household Size:
- Household Monthly Income: For applicants and COUNTED Household Members (HM) only.**
Determine the applicant's household income and the counted household members income named in the step above. If the applicant is unemployed, use additional paper to document responses to the applicable "no income/unemployed" questions. Complete the list as either annually or monthly, but not mixed.

Income	Applicant	Counted Member
Unemployed	<input type="checkbox"/>	
Employed (where)	<input type="text"/>	<input type="text"/>
Self Employed	<input type="text"/>	<input type="text"/>
Checking Account	<input type="text"/>	<input type="text"/>
Savings Account	<input type="text"/>	<input type="text"/>
Investment Income (i.e. rental properties)	<input type="text"/>	<input type="text"/>
Retirement Income (if accessed)	<input type="text"/>	<input type="text"/>

6. Entering words into numeric fields will result in an error message in the **Quality Check** screen.

The screenshot shows a "Quality Check" dialog box with a title bar containing a close button (X). The main text area contains the message: "A valid number is required for customTextNumber2." At the bottom center is an "OK" button. A red arrow points to the title bar.



- To select the date the client is determined **Eligible** (or **Not Eligible**), click the **Date** drop-down menu.

Form Edit | Bronxaurus, Dety > Edit Eligibility Staff Assessment Worksheet

Child Support: 0
Other (specify):

Total Household Income: \$5,969

Calculating the Federal Poverty Level: Using the most current FPL chart and the household size total, determine the S and FPL for the applicant. Calculate actual FPL, instead of range. Use the total household income based on family size and divide by dollar amount in Column A of the FPL chart. You must use the annual income chart to arrive at the correct FPL. (See section 11 for calculating FPL)

Total Household Income: \$5,969 | Total FPL%: 101

The applicant meets the income requirements.
 The applicant does not meet the income requirement and is not eligible.
 Rights and Responsibilities: An applicant must be willing to cooperate with eligibility staff during the eligibility process and sign and comply with the Rights and Responsibilities established in the application.
 The applicant has initiated each requirement in the Application, provided the required signature and consent with the client during the eligibility process.
 Find the error: Exam the eligibility information, application and required documentation the applicant provided.

Eligible Not Eligible Date: 06/01

- Use the left and right arrows (◀ and ▶) to scroll through the calendar by month/year. Click **Today** to select the current day, or click the correct date on the calendar.

Date: [dropdown]

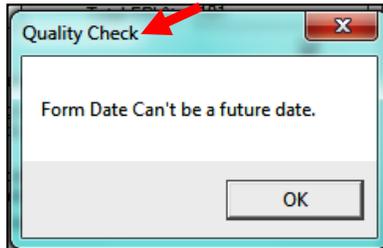
◀ July, 2013 ▶

Su	Mo	Tu	We	Th	Fr	Sa
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

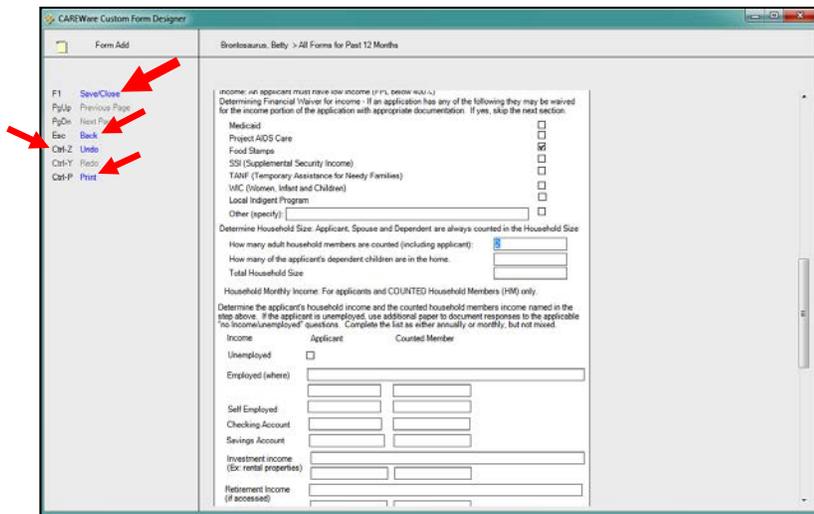
Today Clear



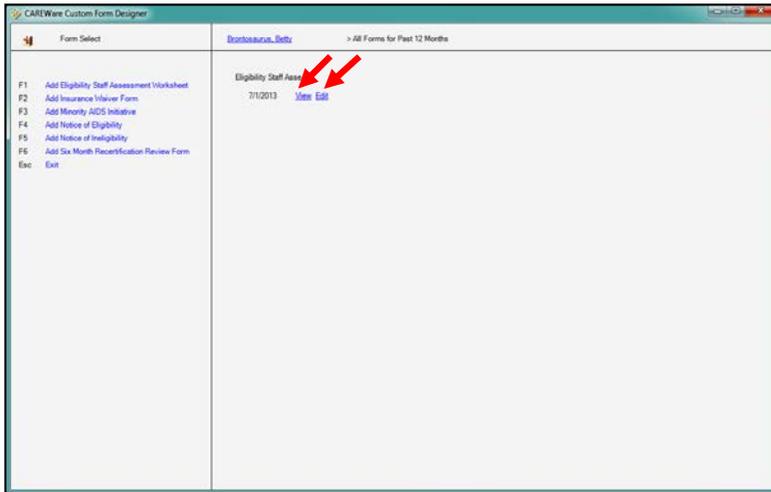
- The form will not allow for future-dating. Only a current or past eligibility determination date may be saved.



- Once information has been entered into all fields and the date has been selected, click the **Save/Close** hyperlink or press F1 on the keyboard to save the completed form. The other menu hyperlinks may be selected to go **Back**, to **Undo** the last action, or to **Print** the form at any point during the completion of the form, if needed.

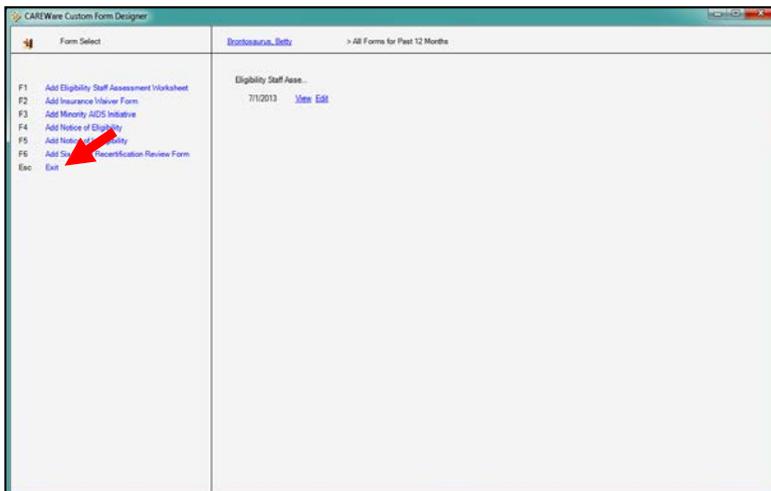


11. After clicking **Save/Close**, links to the completed form will appear on the screen. Click **View** to examine the form or **Edit** to make changes.



12. Follow the previous steps to select, complete and save other forms listed under the **Forms Select** menu.

13. Click **Exit** or the keyboard's Esc key to exit the **CAREWare Custom Form Designer** screen.

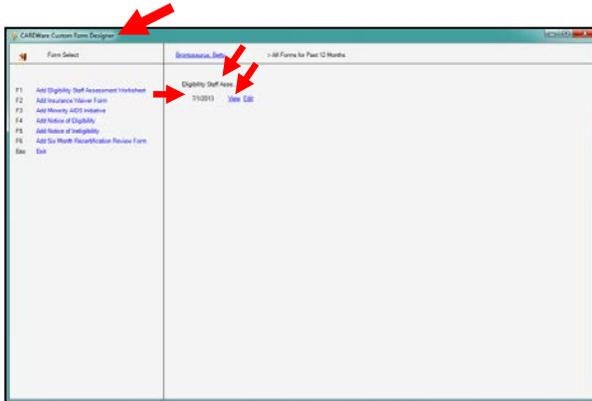


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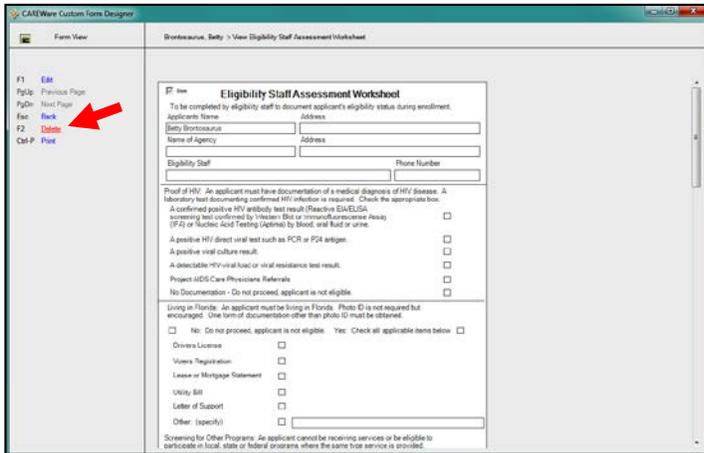
Deleting Forms

Although forms completed under the **Forms** tab can be deleted, forms should not be deleted unless one is completed for the wrong client, under a different client's name, or other unusual circumstance. Forms will save by date and should be kept for tracking and auditing purposes.

1. To delete a saved form, locate the form on the **CAREWare Custom Form Designer** screen by name and/or date of entry. Click **View**.



2. Click the **Delete** hyperlink or use the keyboard's F2 key to remove the form. No warning screen or confirmation window will appear to verify that you want to delete, so be sure you are ready to remove the form before pressing **Delete** or F2. The form will be completely removed.



Part 18) Attachments

Scanning Documents

The following items MUST be scanned into state CAREWare as proof of documentation. See the *Eligibility Procedures Manual* for acceptable proof/documents, as well as requirements for scanning at initial application and six month recertification.

1. Proof of HIV
2. Proof of living in Florida
3. Proof of income
4. Proof of any third party insurance (for example, Medicaid, Medicare, private insurance or Veterans Benefits)
5. Copy of the **signed** application (both sides)
6. Copy of the **signed** Notice of Eligibility
7. Copy of the Insurance Waiver Form (if applicable)
8. Copy of the **signed** releases/consent forms
9. Other identified documents as part of file (if applicable)

Saving Scanned Documents

Scanned documents attached in the state CAREWare MUST be deleted from networks or desktop computers routinely, at least at the end of each day.

Agencies should determine a central location where all scanned documents are stored. It is preferable that all documents be scanned to one file/location and then be deleted each night for security purposes.

NOTE: File uploads (scanning) are limited to 1 MB or smaller. Anything larger will cause problems with the system.



Attaching Scanned Documents

Citrix users—see additional steps subsection.

1. Select the **Unique IDs** tab.

Brontosaurus, Betty

Appointments | Orders | Forms | Change Log | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | *Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

First Name: Betty | Middle Name: | Client URN: BTDC0101802A

Last Name: Brontosaurus | Encrypted URN: [redacted]

Gender: Female | Date of Birth: 1/1/1980 | Est?

Sex at Birth: Female | Encrypted UCI: [redacted]

Client ID: 1234

Street Address: 987 Blue Road | Include on label report

City: Tallahassee | State: Florida | Zip Code: 32399

County: Leon | Phone Number: 850 555 4444

Race(s): White, Asian | Asian Subgroup: Filipino

Ethnicity: Hispanic | Hispanic Subgroup: Cuban

Enrollment Status: Active | Enrollment Date: 9/20/2012 | Case Closed Date: | Vital Status: Alive | Date of Death: | HIV Status: HIV positive (not AIDS) | HIV+ Date: 7/1/2012 | Est? | AIDS Date: | HIV Risk Factors: Heterosexual Contact

Common Notes | Provider Notes | User Messages | Case Notes

2. Click the **Attachments** hyperlink.

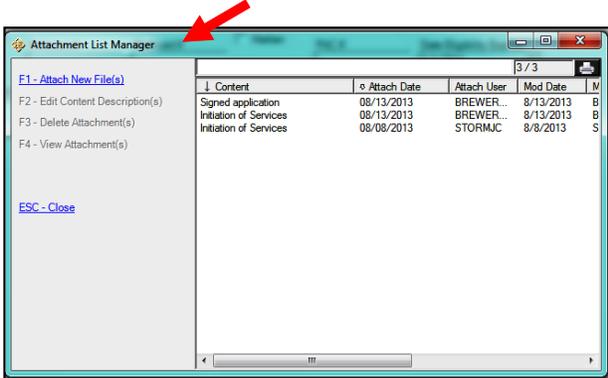
Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3 | Subfc 4

[Attachments](#) | Medicare # | Medicaid # | Haitian | PAC # | Date Eligibility Expires: 1/1/2014

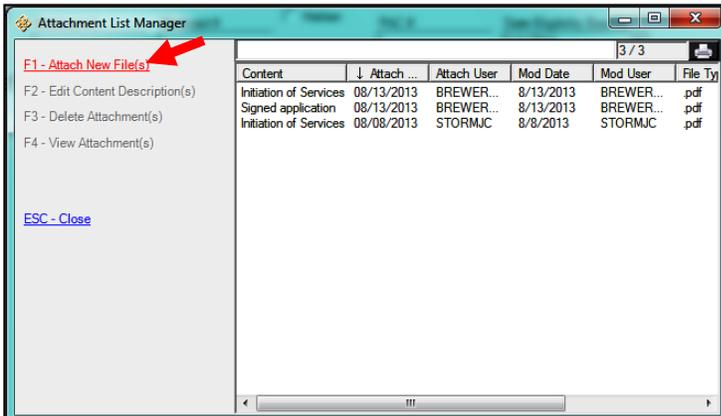
Key Points of Entry: | HOPWA Chronically Homeless | HOPWA Domestic Violence

HOPWA Veteran | State ID | HMSPK

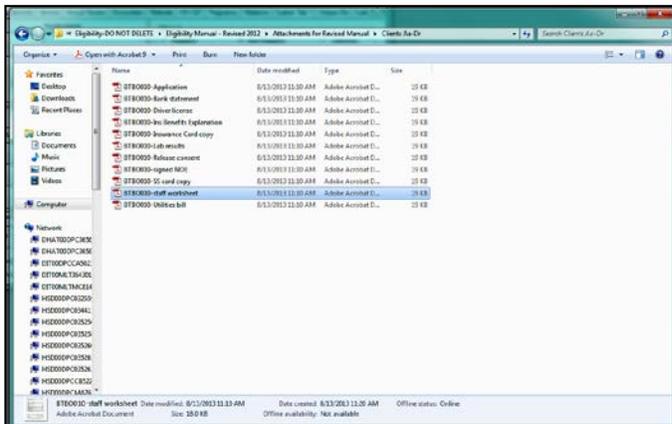
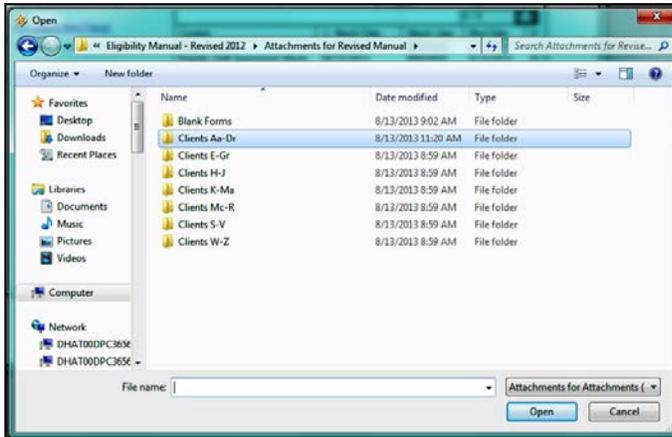
3. If documents have previously been added for the client, they will appear on the **Attachment List Manager** screen.



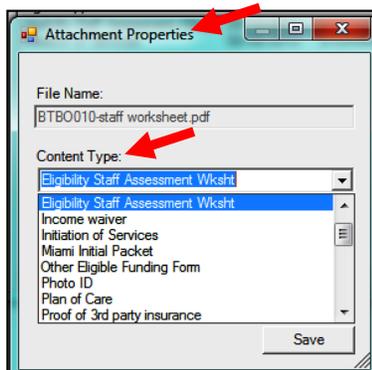
4. To upload a new file, click **F1 - Attach New File(s)** or press the F1 key.



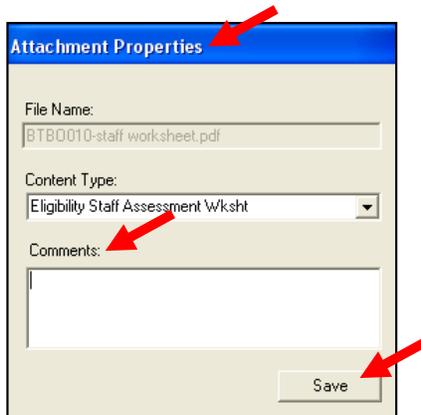
5. Go to the central location where the scanned document is stored. Open the folder and select the document to be uploaded into CAREWare. The screens below are examples of how scanned documents may be temporarily stored.



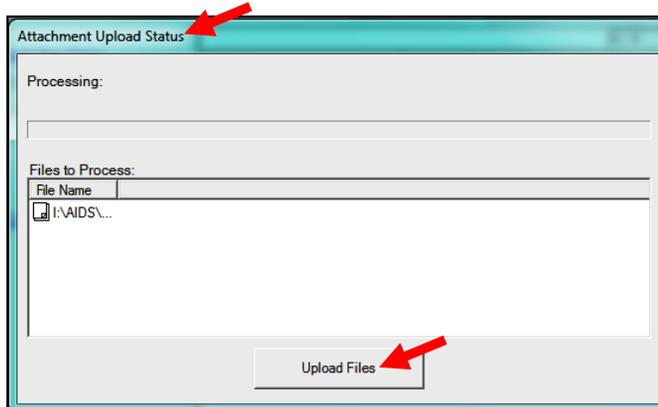
6. Once you have selected a file to upload, the **Attachment Properties** screen will appear. Select a **Content Type** from the drop-down menu. You must choose an available content type because you are not able to type free-text in the drop-down menu.



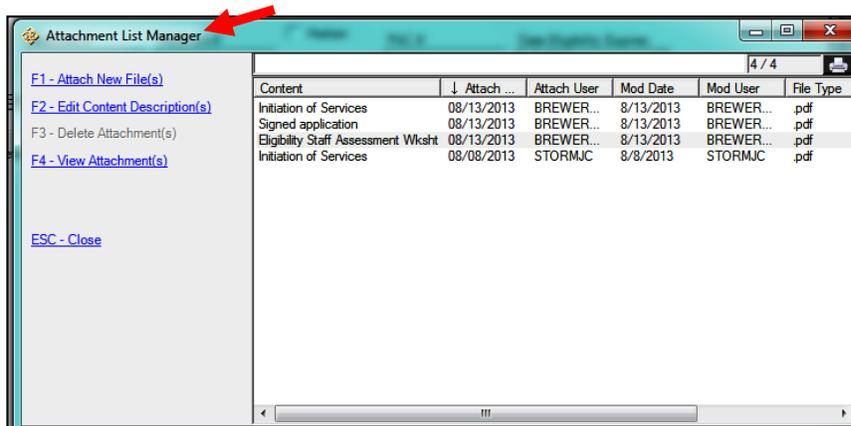
7. Specifics about the document can be noted in the **Comments** field, which will appear on the **Attachment Properties** screen once the **Content Type** has been selected from the menu. **Save** entries.



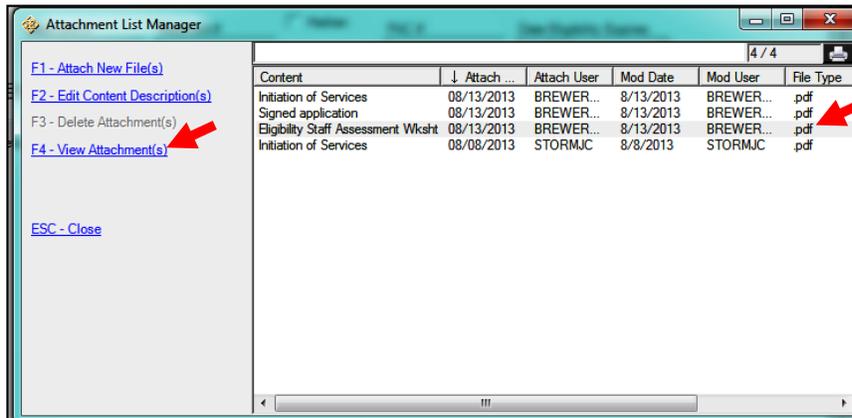
8. The **Attachment Upload Status** screen will appear. Click the **Upload Files** button.



9. The attached document should now appear in the **Attachment List Manager** screen.



10. Once a document has been uploaded, you must verify the upload occurred without error. Highlight the uploaded document and select **F4 - View Attachment(s)** or press the F4 key.



11. If the document opens, the upload occurred properly and you can continue with your data entry. A corrupted file will not open. If the file does not open, have your local provider administrator delete the file from CAREWare and attempt the upload again. This check MUST be done for every document you upload.

Citrix Users Additional Steps

Citrix users must map the drive to where they store their client files for uploads through the Citrix server. Once the drive is mapped, the server will remember the settings and open to that same location when **F1 - Attach New File(s)** is selected.

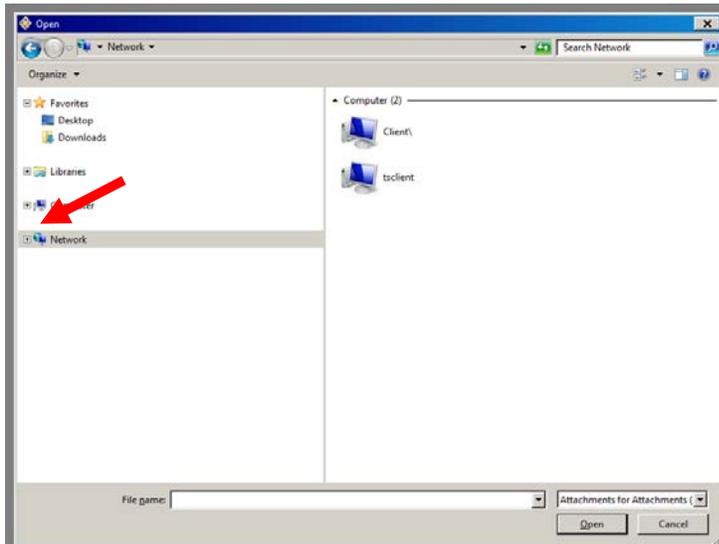
NOTE: The HIV/AIDS Section uses multiple Citrix servers to provide CAREWare access to private agency staff. Each server can accommodate a limited number of users. Therefore, each server must be mapped by following the steps below. The users do not have the ability to pick through which server they access CAREWare—the system automatically makes that choice. Two indicators that will tell you the server needs mapping are:

1. When selecting **F1 - Attach New File(s)**, the pop-up screen that appears does not open to the location where the scanned documents are temporarily stored.
2. After uploading a file, clicking on **F4 - View Attachment(s)** does not open the document.

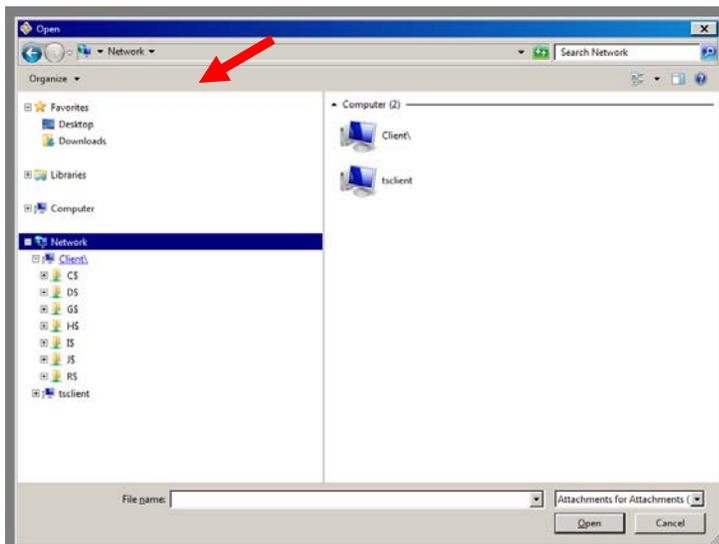
If you experience either one of these indicators, try mapping the server.



1. Select the “+” sign in front of **Network**.



2. At this screen you will see a number of drives that end with a “\$.” This is your network. From here, navigate to the location where you are storing the clients’ files to upload. Only after a document has been successfully uploaded is the drive mapped.



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Attachment Rules and Sorting

1. All documents should be saved individually rather than combined into one PDF file, even if they represent one category. For example, a copy of a client's utility bill may be used as proof of living in Florida. Upload the scanned utility bill by selecting **Proof of living in Florida** from the **Content Type** drop-down menu on the **Attachment Properties** screen. In the **Comments** field, type **utility bill**. Upload the driver's license separately and select **Proof of living in Florida** again as the **Content Type**.

Attachment Properties

File Name:
Utility Bill.pdf

Content Type:
Proof of living in Florida

Comments:
utility bill.

Save

2. Attachments may be sorted by clicking any of the column headings—**Content**, **Attach Date**, **Attach User**, **Mod Date**, **Mod User**, **File Type**, **File Name** or **Comment**—from the **Attachment List Manager** screen.

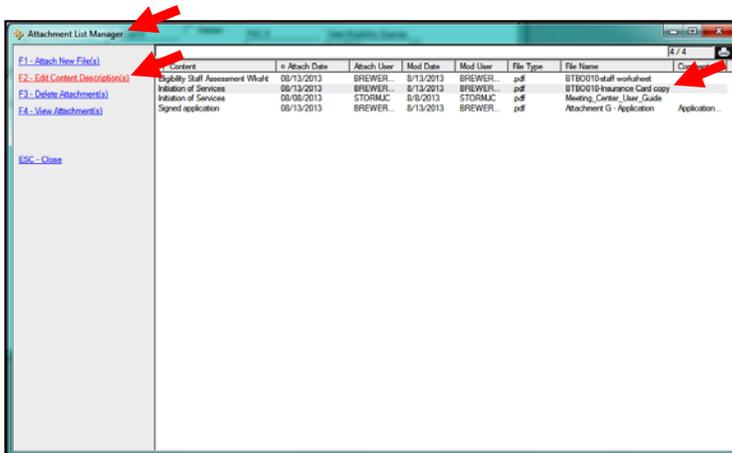
Attachment List Manager

	Content	Attach Date	Attach User	Mod Date	Mod User	File Type	File Name	Comment
F1 - Attach New File(s)	Spread application	08/13/2013	BREWER...	8/13/2013	BREWER...	pdf	Attachment 0 - Application	Application...
F2 - Edit Content Description(s)	Initiation of Services	08/13/2013	BREWER...	8/13/2013	BREWER...	pdf	BT80070Insurance Card copy	
F3 - Delete Attachment(s)	Initiation of Services	08/08/2013	STORMAC...	8/8/2013	STORMAC...	pdf	Meeting_Center_User_Guide	
F4 - View Attachment(s)	Eligibility Staff Assessment Worksheet	08/13/2013	BREWER...	8/13/2013	BREWER...	pdf	BT80070staff worksheet	

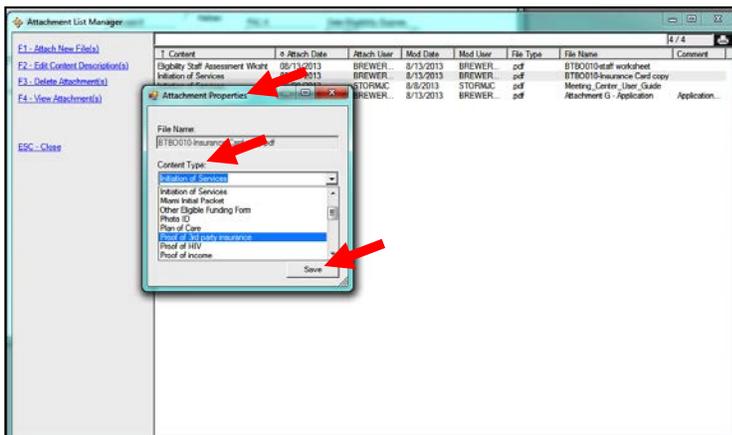
ESC - Close

Editing Content Description

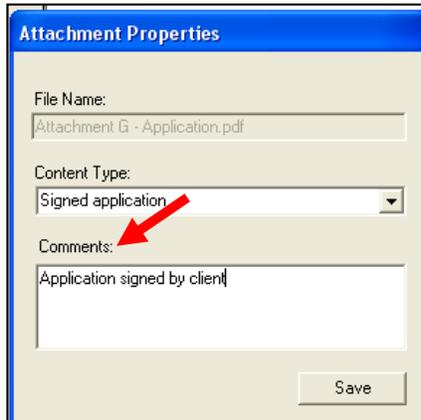
1. To edit the document's description, from the **Attachment List Manager** screen, select one of the listed documents. Click **F2 - Edit Content Description(s)** or press the F2 key.



2. Select the appropriate **Content Type** from the drop-down menu on the **Attachment Properties** screen and click **Save**.



3. You may also add/edit/delete the **Comments** field.



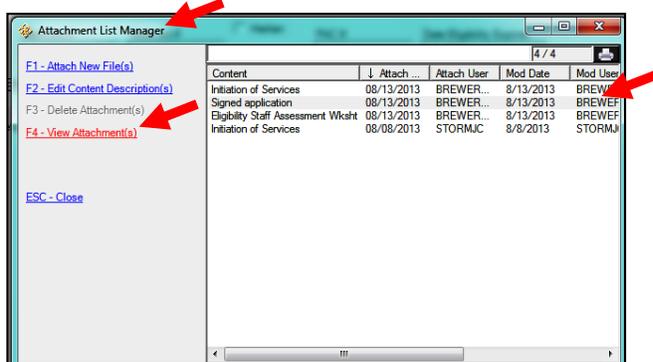
The image shows a dialog box titled "Attachment Properties". It contains the following fields:

- File Name:** Attachment G - Application.pdf
- Content Type:** Signed application (dropdown menu)
- Comments:** Application signed by client (text area)
- Save** button

Red arrows point to the "Content Type" dropdown and the "Comments" text area.

Viewing Attachments

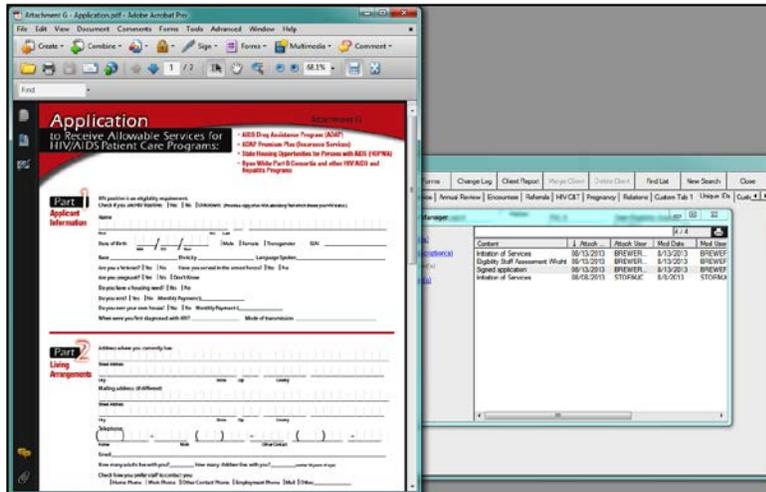
1. To view an attachment, from the **Attachment List Manager** screen, select one of the listed documents. Click **F4 - View Attachment(s)** or press the F4 key.



The image shows the "Attachment List Manager" window. It features a table with columns: Content, Attach, Attach User, Mod Date, and Mod User. The table contains four rows of data. Red arrows point to the "F4 - View Attachment(s)" menu item and the "Mod User" column header.

Content	Attach	Attach User	Mod Date	Mod User
Initiation of Services	08/13/2013	BREWER...	8/13/2013	BREWER...
Signed application	08/13/2013	BREWER...	8/13/2013	BREWER...
Eligibility Staff Assessment Wkcht	08/13/2013	BREWER...	8/13/2013	BREWER...
Initiation of Services	08/08/2013	STORMJIC	8/8/2013	STORMJIC

2. The selected document will appear. In the example below, it is a signed application.



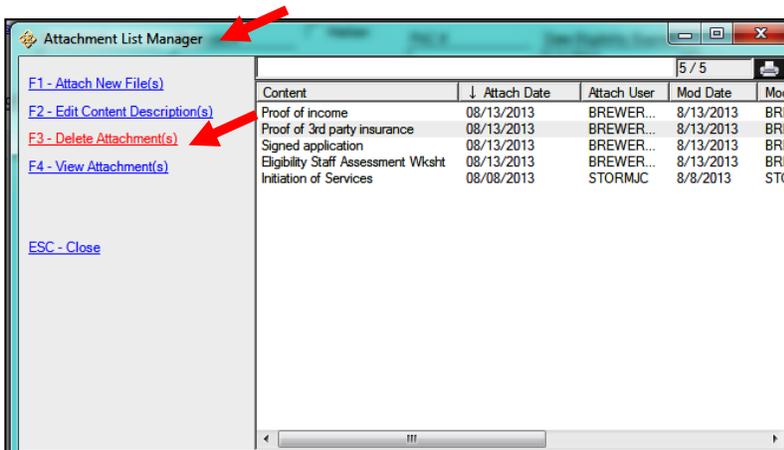
C. Deleting Attachments—for Local Provider CAREWare Administrators ONLY

Documents scanned and saved as attachments under the **Unique IDs** tab should not be deleted, except under the following circumstances:

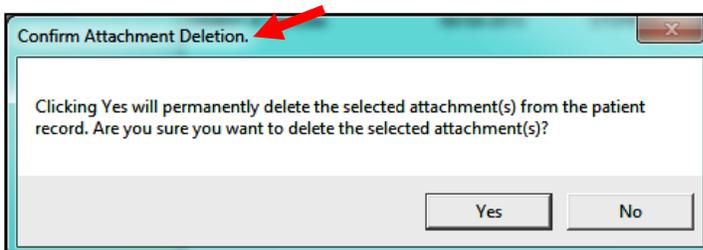
- The document is scanned under the wrong client's name.
- The wrong type of document was scanned by accident.

Deletion of attachments are not allowed at the user level. Documents needing deletion will require a call to the local CAREWare administrator at each agency or program office. Local CAREWare administrators have access privileges to the Delete function and can assist local staff. For questions on access privileges, contact the Help Desk at (850) 922-7599.

1. Administrators: To delete an attachment, from the **Attachment List Manager** screen, click on the document to be deleted. Click **Delete Attachment(s)** or press the F3 key.



2. A message will appear warning the administrator that clicking **Yes** will permanently delete the selected attachment. Click **Yes** or **No**.



Part 19) Housing Opportunities For Persons With AIDS

A. Enrolling a New Client

Most Housing Opportunities for Persons with AIDS (HOPWA) clients are already in the system because they are receiving Ryan White services or have received HOPWA services in the past. For new clients, you must ensure the client meets eligibility criteria for enrollment for services as well as meets program eligibility for HOPWA.

For HOPWA only, please ensure that you enter HOPWA data on the following tabs.

1. **Unique ID Tab:** Click on the appropriate boxes as it relates to the client. If not applicable, leave blank. Options are **HOPWA Chronically Homeless**, **HOPWA Domestic Violence**, or **HOPWA Veteran**.

The screenshot shows the 'Unique IDs' tab in a software application. The tab contains several input fields: Medicaid #, Medicare #, PAC #, and Social Security #. There is a checkbox for 'Haitian'. Below these fields are three checkboxes: 'HOPWA Chronically Homeless', 'HOPWA Domestic Violence', and 'HOPWA Veteran'. There is also a 'Date Eligibility Expires' dropdown menu and a 'Key Points of Entry' dropdown menu. Red arrows point to the Medicare #, PAC #, Social Security #, and the 'HOPWA Veteran' checkbox.

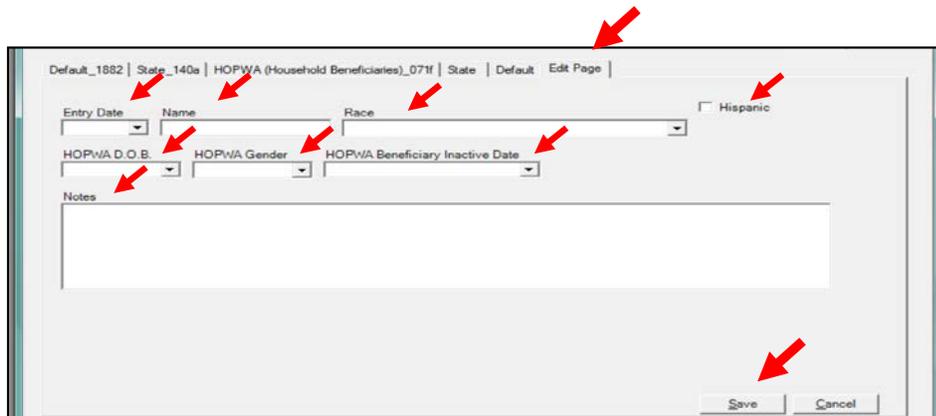
2. Under the **Subform** tab, if the client you are enrolling has beneficiaries, you will enter them under the **HOPWA Household Beneficiaries** tab. All information entered here pertains to the beneficiary, not the client. Click on **Add Row** and add as many rows as there are beneficiaries.

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The screenshot shows the 'HOPWA Household Beneficiaries' tab in a software application. The tab contains a table with the following columns: Entry Date, Name, Race, Hispanic, HOPWA.D., HOPWA.G., Notes, and Domain. Below the table are four buttons: 'Sharing', 'Add Row', 'Edit Row', and 'Delete Row'. Red arrows point to the 'Add Row' button and the 'HOPWA Household Beneficiaries' tab title.

_____ () _____

3. The **Edit Page** tab screen will appear.
 - a. **Entry Date** is the current date
 - b. Enter **Name**
 - c. Select **Race**
 - d. Check **Hispanic** if client identifies as Hispanic
 - e. Select **HOPWA D.O.B.** (date of birth)
 - f. Select **HOPWA Gender**; **Female** or **Male** are the only options available
 - g. **HOPWA Beneficiary Inactive Date** is used only when you know a beneficiary is no longer considered a beneficiary. The CAREWare system will no longer count the individual as a client beneficiary.
 - h. You may enter **Notes** relevant to the beneficiary in this field.
 - i. **Save** entries.



B. HOPWA Service Entry

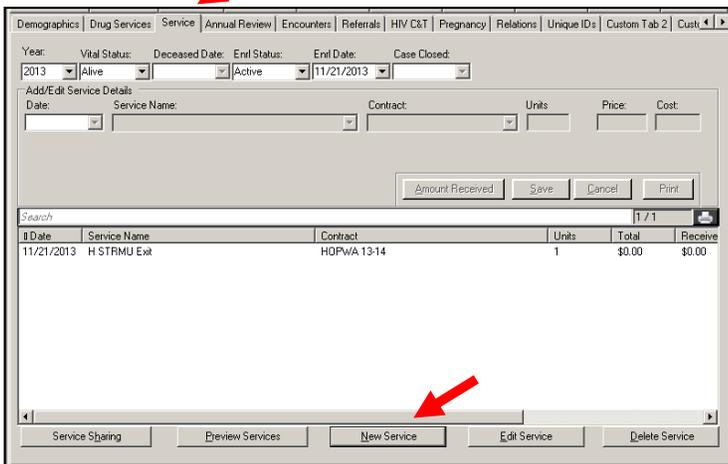
All HOPWA clients must receive an enrollment service after the start of a new HOPWA contract year (July 1 through June 30). The core HOPWA services that have Enrollments, Updates and Exits services associated with them are:

- STRMU
- TBRA

HOPWA STRMU Enrollment

1. From the **Service** tab, click on the **New Service** button.

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The screenshot shows a software window with a menu bar at the top containing 'Demographics', 'Drug Services', 'Service', 'Annual Review', 'Encounters', 'Referrals', 'HIV C&T', 'Pregnancy', 'Relations', 'Unique IDs', 'Custom Tab 2', and 'Custom...'. Below the menu bar, there are several dropdown menus for 'Year' (2013), 'Vital Status' (Alive), 'Deceased Date', 'Enrl Status' (Active), 'Enrl Date' (11/21/2013), and 'Case Closed'. A section titled 'Add/Edit Service Details' contains fields for 'Date', 'Service Name', 'Contract', 'Units', 'Price', and 'Cost', along with buttons for 'Amount Received', 'Save', 'Cancel', and 'Print'. Below this is a search bar and a table with columns 'ID Date', 'Service Name', 'Contract', 'Units', 'Total', and 'Receive'. The table contains one row: '11/21/2013 H STRMU Ext HOPWA 13-14 1 \$0.00 \$0.00'. At the bottom of the window, there are buttons for 'Service Sharing', 'Preview Services', 'New Service', 'Edit Service', and 'Delete Service'. A red arrow points to the 'New Service' button.

ID Date	Service Name	Contract	Units	Total	Receive
11/21/2013	H STRMU Ext	HOPWA 13-14	1	\$0.00	\$0.00

2. On the screen that appears, complete the following:

- a. **Date** authorized by provider; that is, the date service provided to client, which is not always the current date.
- b. **Service Name**:
 - i. **H STRMU Enrollment**—always first entry after the start of new contract year or
 - ii. FIRST mortgage, rent, or utility payment after July 1 (each year)
- c. **Contract**; CAREWare will populate this field automatically. The contract is linked to the appropriate service and/or subservice
- d. **Units**; count units as one unit per transaction. For example, if paying 21 days of rent at \$250/month = cost of \$250 HOPWA pays (see example below).
- e. **Price**; the price per unit. Cost will automatically calculate from the number of **Units** times the **Cost**.

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Relations | Unique IDs | Custom Tab 2 | Chart Number | St

Year: 2013 Vital Status: Alive Deceased Date: Enrl Status: Active Enrl Date: 10/1/2003 Case Closed:

Add/Edit Service Details

Date: 4/1/2013 Service Name: H STRMU Enrollment Contract: HOPWA 1213 Units: 1 Price: \$0.00 Cost: \$0.00

Date Invoice Paid: HOPWASvcType: Rent Had Contact with Primary Health Provider: Has Accessed Insurance or Assistance:

Has Consistent Case Management Contact Has Housing Plan Obtained income producing job from HOPWA effort

Percent Median Income: 0-30% of area median income (extremely low) Pre-Enrollment Housing Situation: Rented room, apartment, or house

Qualified Sources of Income

Amount Received Save Cancel Print

Example:

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Relations | Unique IDs | Custom Tab 2 | Custom Tab 3 | St

Year: 2012 Vital Status: Alive Deceased Date: Enrl Status: Active Enrl Date: 5/12/2011 Case Closed:

Add/Edit Service Details

Date: 1/1/2012 Service Name: H STRMU Enrollment Contract: RICHES HUD Units: 1 Price: \$250.00 Cost: \$250.00

_____ () _____

3. Assessment information as it relates to the client at the time of enrollment must be entered. Begin by selecting either **H STRUM Enrollment** or **H TBRA Enrollment** from the **Service Name** drop-down menu. Once the applicable enrollment is chosen, the following screen appears.

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4. Click on the following options if they pertain to the client:
- Had Contact with Primary Health Provider**
 - Has Housing Plan**; all HOPWA clients must have a housing plan
 - Has accessed Insurance or assistance**
 - Obtained income producing job from HOPWA effort**
 - Has Consistent Case Management Contact**



5. For the **Percent Median Income**; use HOPWA income determination to make appropriate selection

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Relations | Unique IDs | Custom Tab 2 | Custom Tab 3 | Si 4

Year: 2013 Vital Status: Alive Deceased Date: Enrl Status: Active Enrl Date: 5/21/2013 Case Closed:

Add/Edit Service Details

Date: 12/20/2013 Service Name: H TBRA Enrollment Contract: HOPWA 13-14 Units: 1 Price: \$0.00 Cost: \$0.00

Had Contact with Primary Health Provider Has accessed Insurance or Assistance Has Consistent Case Management Contact

Has Housing Plan Obtained income producing job from HOPWA effort

Pre-Enrollment Housing Situation

Qualified Sources of Income

Percent Median Income

- 0-30% of area median income (extremely low)
- 31-50% of area median income (very low)
- 51-60% of area median income (low)
- 61-80% of area median income (low)

Amount Received Save Cancel Print

Service Starting Preview Services New Service Edit Service Delete Service

6. **Pre-Enrollment Housing Situation** refers to the client's living situation when he presents for HOPWA enrollment services. Make the appropriate selection from drop-down menu.

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Relations | Unique IDs | Custom Tab 2 | Custom Tab 3 | Si 4

Year: 2013 Vital Status: Alive Deceased Date: Enrl Status: Active Enrl Date: 5/21/2013 Case Closed:

Add/Edit Service Details

Date: 12/20/2013 Service Name: H TBRA Enrollment Contract: HOPWA 13-14 Units: 1 Price: \$0.00 Cost: \$0.00

Had Contact with Primary Health Provider Has accessed Insurance or Assistance Has Consistent Case Management Contact

Has Housing Plan Obtained income producing job from HOPWA effort

Pre-Enrollment Housing Situation

Qualified Sources of Income

Percent Median Income

- Don't know or refused to answer
- Emergency shelter
- Family/friends
- Foster care home/group home
- Hospital (non-psychiatric)
- Hotel or motel w/o emergency voucher
- House they owned
- Jail, prison or juvenile detention facility

Amount Received Save Cancel Print

Service Starting Preview Services New Service Edit Service Delete Service

{ }

8. From the **HOPWASvc Type** drop-down menu, choose **Mortgage, Rent** or **Utility**.

The screenshot shows a software interface for entering service details. At the top, there are tabs for Demographics, Drug Services, Service, Annual Review, Encounters, Referrals, HIV C&T, Relations, Unique IDs, Custom Tab 2, and Custom Tab 3. Below the tabs, there are fields for Year (2013), Vital Status (Alive), Deceased Date, Enrl Status (Active), Enrl Date (6/21/2013), and Case Closed. The main section is titled 'Add/Edit Service Details' and contains the following fields:

- Date: 12/20/2013
- Service Name: H STRMU Update
- Contract: HOPWA 13-14
- Units: 1
- Price: \$0.00
- Cost: \$0.00

Below these fields are several checkboxes and dropdown menus:

- Had Contact with Primary Health Provider
- Has Housing Plan
- Qualified Sources of Income
- Has accessed Insurance or Assistance
- Obtained income producing job from HOPWA effort (with a red arrow pointing to it)
- HOPWASvcType (dropdown menu with options: Mortgage, Rent, Utility)
- Has Consistent Case Management Contact
- Percent Median Income (dropdown menu)

At the bottom of the form are buttons for Amount Received, Save, Cancel, and Print. Below the main form are navigation buttons: Service Sharing, Review Services, New Service, Edit Service, and Delete Service.

HOPWA STRMU Update

The **H STRMU Update** choice in the **Service Name** field is for all subsequent STRMU services **AFTER** the enrollment service has been entered. **NOTE:** CAREWare will accept an update service even if there is no enrollment service. Be careful and verify that there is an enrollment service first.

None of the information entered at time of enrollment will carry over; the fields will be blank. If nothing has changed since enrollment, there is no need to make changes to the assessment section.

This screenshot is identical to the one above, showing the 'Add/Edit Service Details' form. Two red arrows are added: one pointing to the 'Service Name' field (H STRMU Update) and another pointing to the 'HOPWASvcType' dropdown menu.



HOPWA STRMU Exit

The **H STRMU Exit** service is selected when someone leaves the HOPWA program; for example, moves out of the service area, goes to jail/prison for a long period of time, or dies. The appropriate entry from the **STRMU Exit Outcome** must also be chosen.

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The screenshot shows a software window with the following fields and options:

- Year: 2013
- Vital Status: Alive
- Deceased Date: (empty)
- Enrl Status: Active
- Enrl Date: 6/21/2013
- Case Closed: (empty)
- Add/Edit Service Details:
 - Date: 12/20/2013
 - Service Name: H STRMU Exit
 - Contract: HOPWA 13-14
 - Units: 1
 - Price: \$0.00
 - Cost: \$0.00
- STRMU Exit Outcome: (dropdown menu open with options: Current housing arrangements more STRMU, Deceased, Disconnected, Emergency shelter/streets, Incarcerated, Institution, Other HOPWA support (PH), Other housing subsidy (PH))
- HOPWASvcType: (dropdown menu)
- Buttons: Amount Received, Save, Cancel, Print
- Footer: Service Starting, Preview Services, New Service, Edit Service, Delete Service

Part 20) Sharing

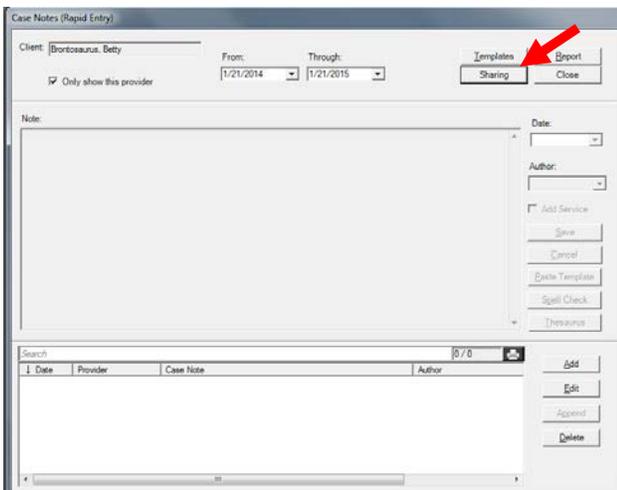
Sharing data (Case Notes, Services, Encounters)

The sharing of certain client data points is available to those agencies that would like to participate. In order to activate sharing, a senior member of the agency must put in a Help Desk ticket. After requesting that sharing be turned on, the agency must identify those individuals who should be given the ability to grant/deny and request share requests for their agency.

IMPORTANT NOTE: If sharing is requested from Agency A and granted by Agency B, that does not mean Agency B can automatically see Agency A's data on the same client. Agency B would have to go through the same process of requesting sharing and Agency A would need to grant those requests in order for Agency B to see Agency A's information.

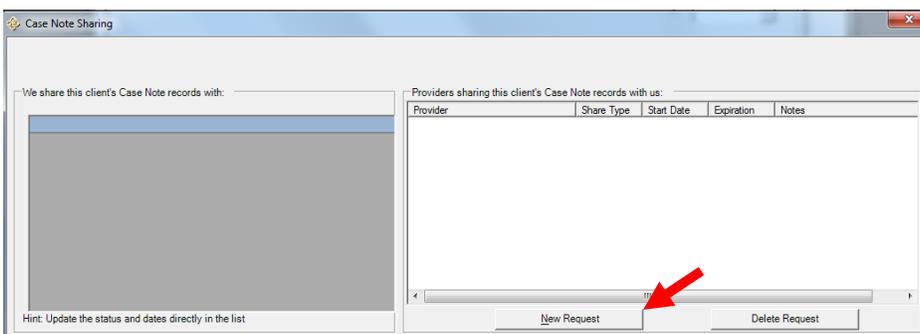
To request sharing of Case Notes data select the **Sharing** button.

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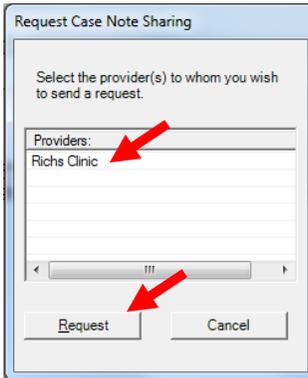


Click **New Request**

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The **Request Case Note Sharing** tab will list all the other agencies that have the client you are requesting to share. Click on the agency and hit **Request**.



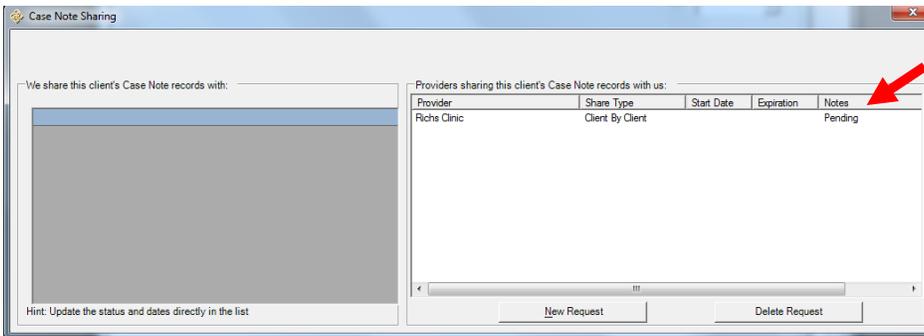
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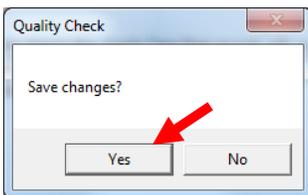
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You will now see a "Pending" request on the **Case Note Sharing** screen.



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Upon closing the Case Note Sharing screen click **Yes** to Save changes.

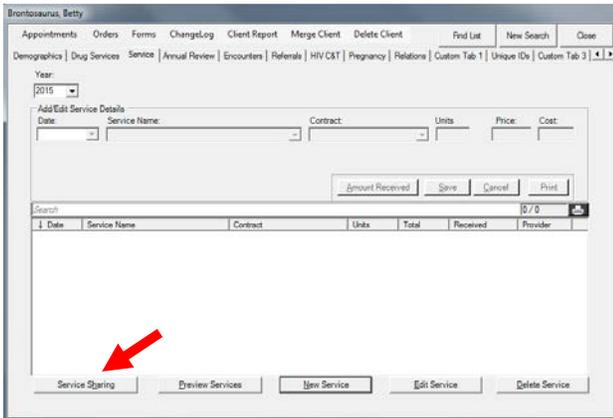


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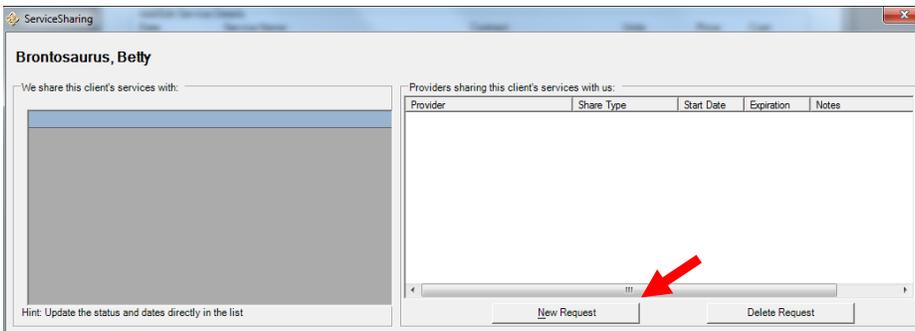
To request sharing of Service information select the **Service Sharing** button.

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Click **New Request**.

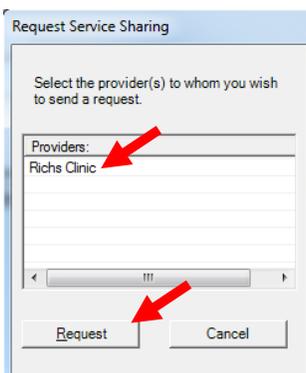
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The **Request Service Sharing** tab will list all the other agencies that have the client you are requesting to share. Click on the agency and hit **Request**.

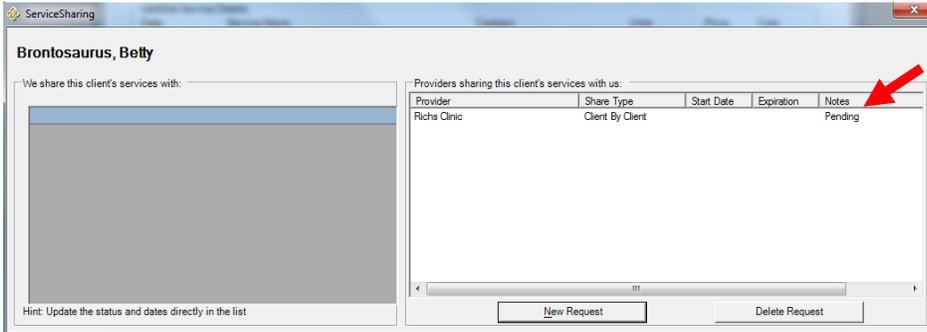
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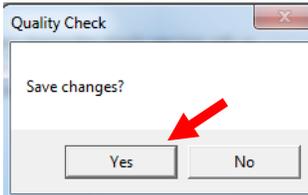
You will now see a "Pending" request on the **Service Sharing** screen.

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Upon closing the Service Sharing screen click **Yes** to Save changes.

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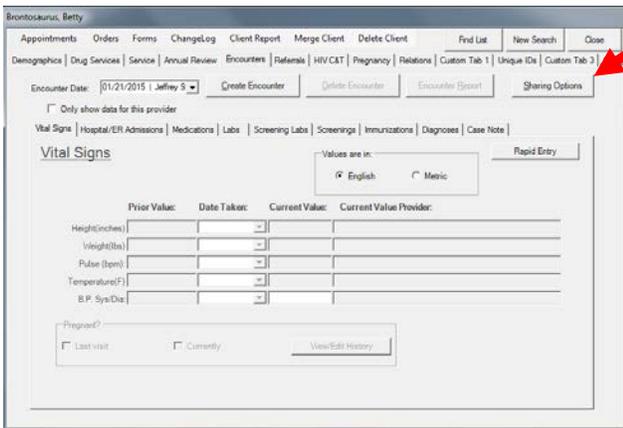


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To request sharing of **Encounters** data select the **Sharing Options** button.

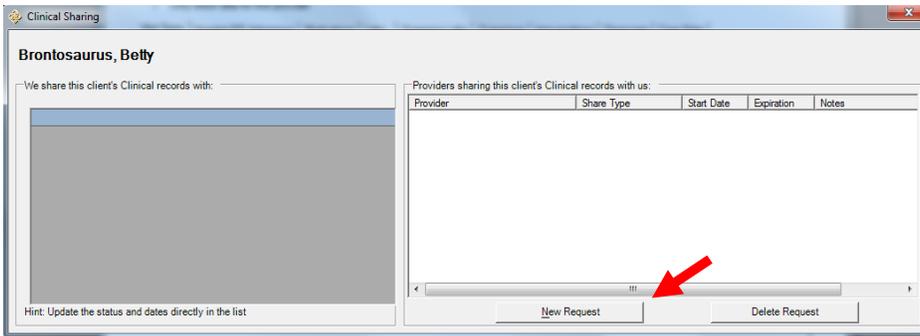
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Click **New Request**

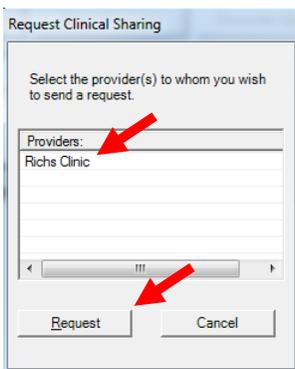
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The **Request Clinical Sharing** tab will list all the other agencies that have the client you are requesting to share. Click on the agency and hit Request.

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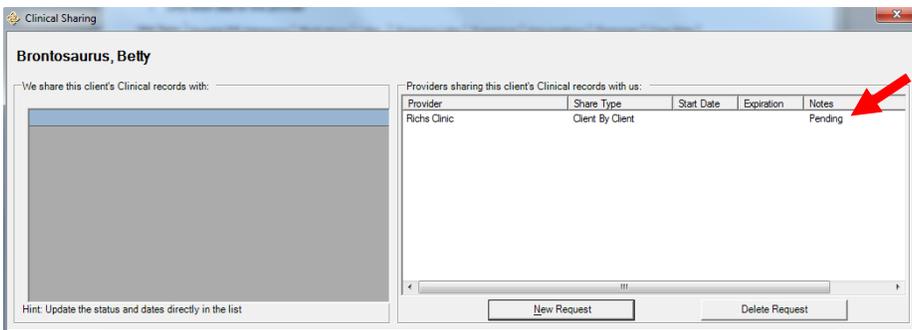
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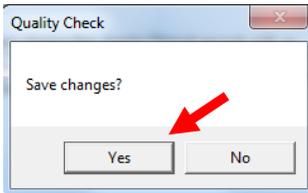
You will now see a "Pending" request on the **Clinical Sharing** screen.

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Upon closing the Clinical Sharing screen click **Yes** to Save changes.



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On the main menu, you will now see outgoing share requests. Since sharing on Case Notes, Services and Encounters was requested from Rich's Clinic for the client Betty Brontosaurus, you see **3 outgoing share requests**. Share requests are counted by tab, not by client.



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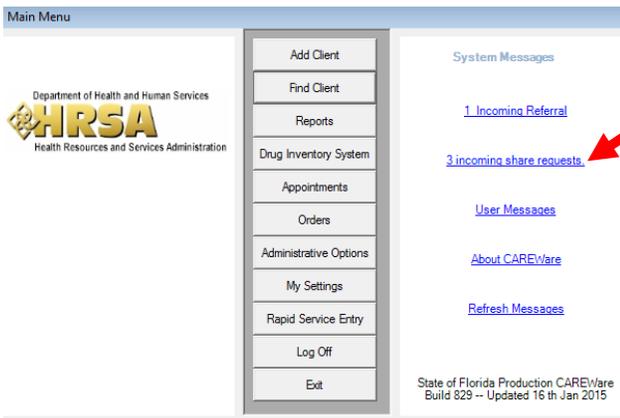


Granting/Denying share requests

The agency you requested the sharing of data from will see incoming requests. Again, due to the fact that sharing on Case Notes, Services and Encounters was requested from Rich's Clinic for the client Betty Brontosaurus, you see **3 incoming share requests**. Share requests are counted by tab, not by client.

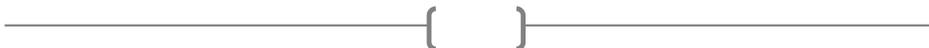
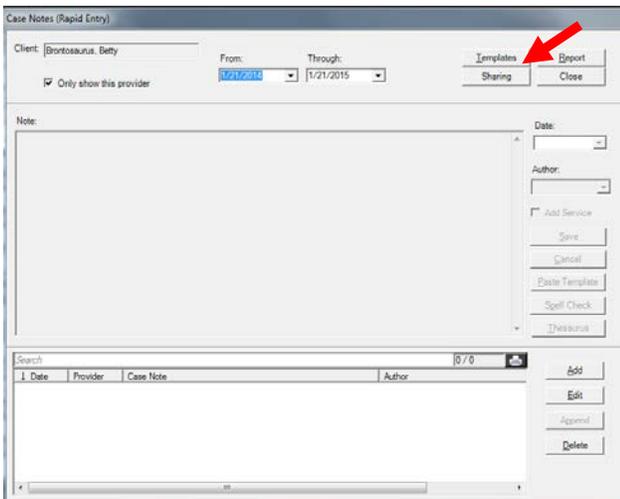
Each agency is responsible for selecting staff members to approve/deny share requests they receive. An agency may change a Granted share request to Denied at any time, and vice versa. That Denied/Granted status goes into effect immediately.

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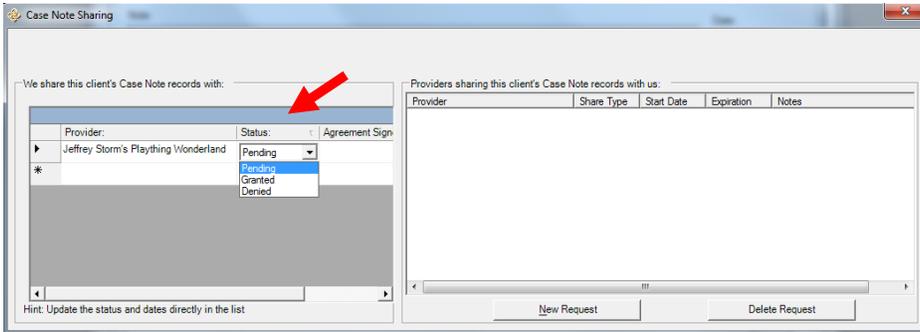


To grant/deny sharing of Case Notes data select the **Sharing** button.

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The **Case Note Sharing** tab will show all the other agencies that are requesting sharing from your agency. Select either **Granted** or **Denied** in the **Status** drop down box. By choosing **Granted**, the other agency will be able to see your client's case notes. Choosing **Denied** results in the other agency not being able to see your case notes. Note, while in **Pending** status the other agency will not be able to see your case notes.



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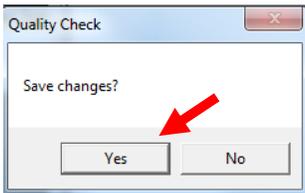
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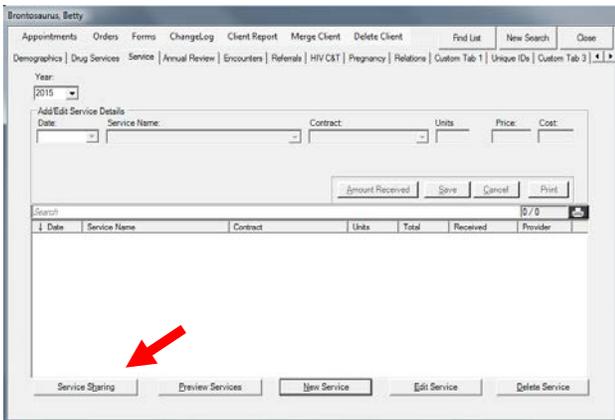
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Upon closing the Case Note Sharing screen click **Yes** to Save changes.



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To grant/deny sharing of **Service** data select the **Service Sharing** button.



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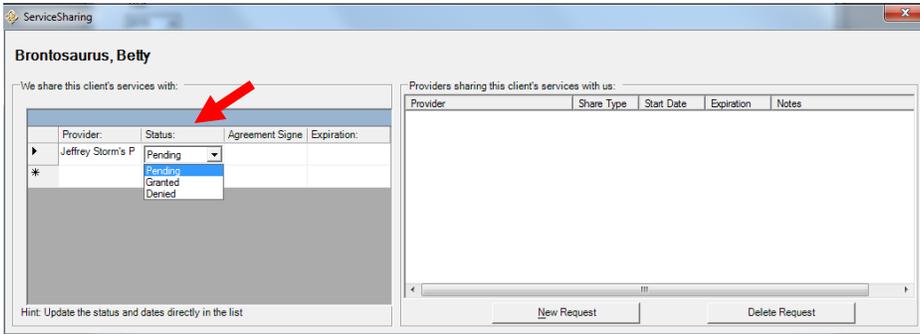
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The **Service Sharing** tab will show all the other agencies that are requesting sharing from your agency. Select either **Granted** or **Denied** in the **Status** drop down box. By choosing **Granted**, the other agency will be able to see your client's case notes. Choosing **Denied** results in the other agency not being able to see your services. Note, while in **Pending** status the other agency will not be able to see your services.



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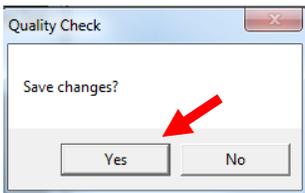
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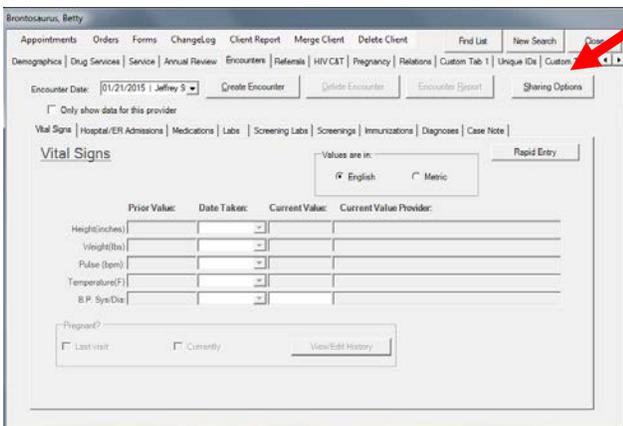
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Upon closing the Service Sharing screen click **Yes** to Save changes.



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To grant/deny sharing of **Encounters** data select the **Sharing Options** button.



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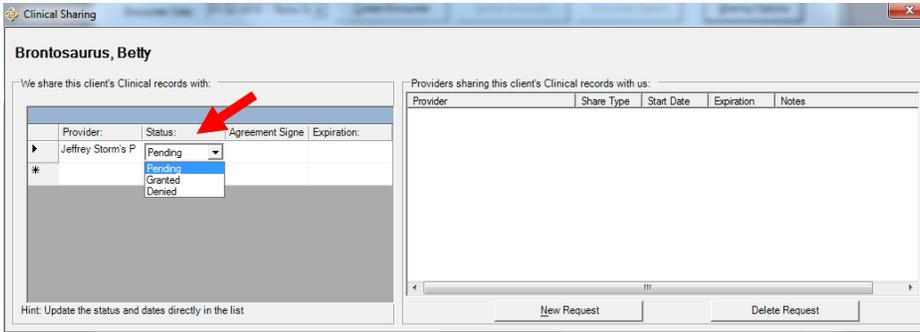
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The **Clinical Sharing** tab will show all the other agencies that are requesting sharing from your agency. Select either **Granted** or **Denied** in the **Status** drop down box. By choosing **Granted**, the other agency will be able to see your client's clinical information. Choosing **Denied** results in the other agency not being able to see your clinical information. Note, while in **Pending Status** the other agency will not be able to see your clinical information.



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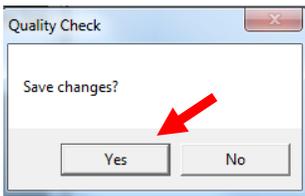
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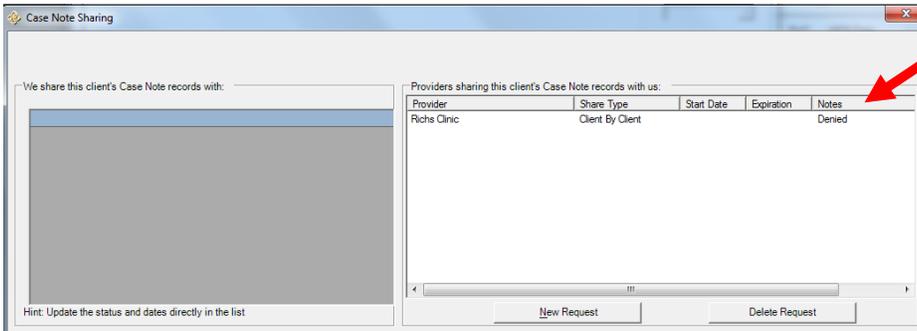
Upon closing the Clinical Sharing screen click **Yes** to Save changes.



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Viewing sharing data

If **Case Note Sharing** is not approved, Denied will be listed in the Notes column.



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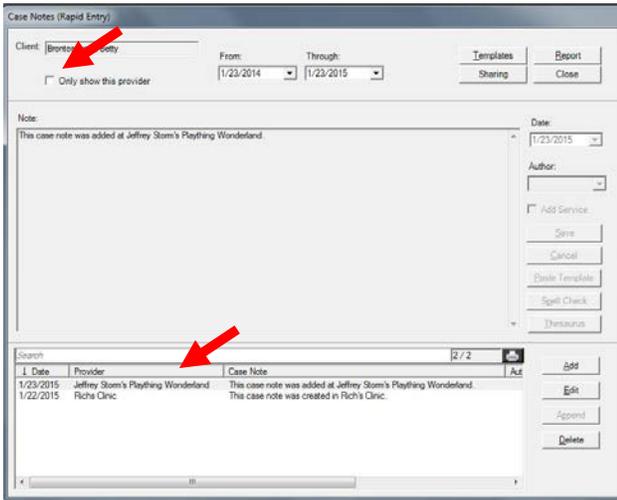
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If Case Notes Sharing is approved, after unchecking **Only show this provider**, case notes will be visible from the agency that approved sharing. Note, you will not be able to edit nor delete the case notes from the other agency.

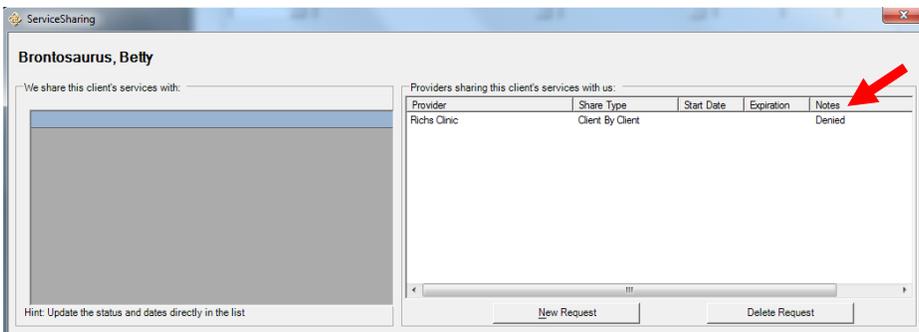
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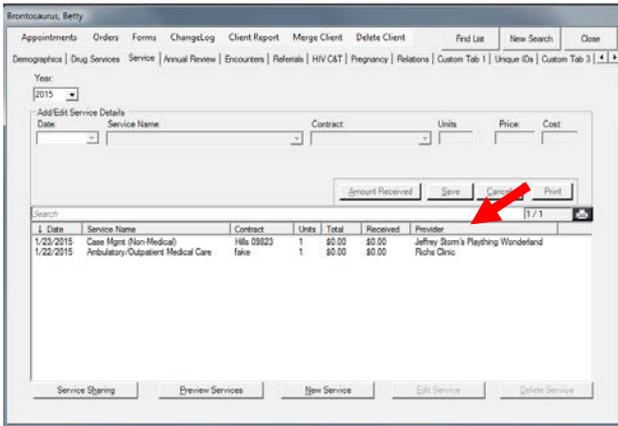
If **Service Sharing** is not approved, Denied will be listed in the Notes column.

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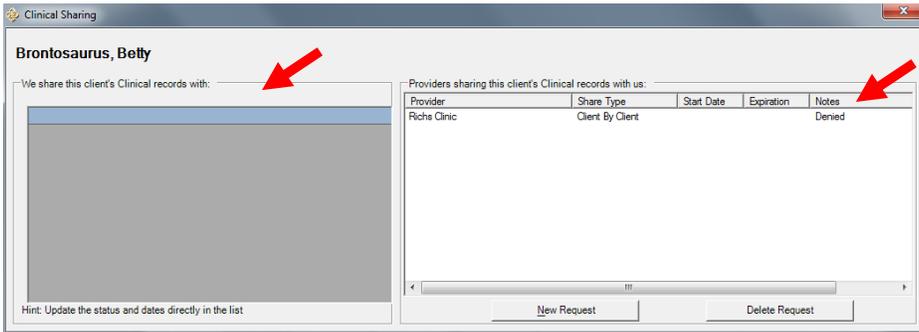
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If Service Sharing is approved, services will be visible from the agency that approved sharing. Note, you will not be able to edit nor delete the services from the other agency.



If **Clinical Sharing** is not approved, Denied will be listed in the Notes column.



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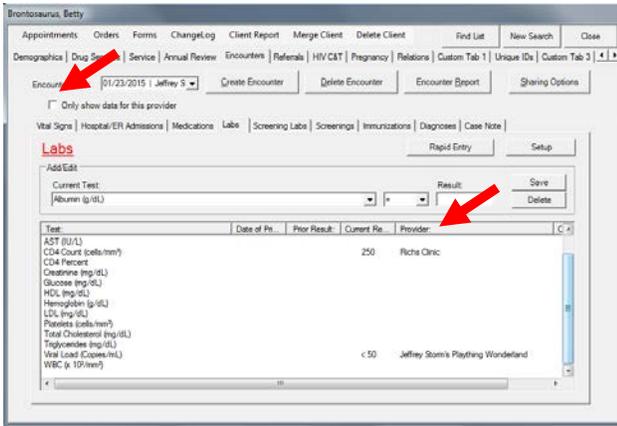
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If **Encounters** Sharing is approved, after unchecking **Only show data for this provider**, Encounters' data will be visible from the agency that approved sharing. Note, you will not be able to edit nor delete the Encounters' data from the other agency.

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Chapter IV – Data Confidentiality/Requirements

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Background – There is no higher priority than maintaining the security of our client’s protected health information. Making sure to use secure methods of communication is a mandate, not a request. If at any time you are unsure of whether or not a method of communication is considered secure, contact the Help Desk at 850-922-7599 and put in a Help Desk ticket (making sure to have the operator assign it to the CAREWare Team) and we will assist you. The same is true if you are uncertain if particular data elements are considered confidential. Again, contact the Help Desk at 850-922-7599 and put in a Help Desk ticket (making sure to have the operator assign it to the CAREWare Team) “requesting assistance with a security issue.” Do not give the Help Desk operator the specific data values you have questions about for the Help Desk data system is not a secure database. Additionally, this chapter includes details concerning what is the information expected to be inputted for clients added to CAREWare.

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Part 21) Appendix A. Confidential CAREWare Client Identifiers

The following identifiers of an individual, or of relatives, employers or household members of an individual, are considered confidential for the purposes of the sharing of CAREWare data. **You cannot share any of these identifiers electronically unless the electronic transmission is encrypted.** This list is not exhaustive; please contact the Help Desk at 850-922-7599 and ask for a member of the CAREWare Team to return your call if you have any questions. If you must make a change to a client's record, inform the Help Desk operator that you need client data changed. Do not give any of the fields identified below to the Help Desk operators when calling in a ticket. If you work for a private agency, contact the Help Desk at 850-922-7599 and ask to have a MOVEit account set up with the CAREWare Team.

CAREWare Data Fields

Information in the DEMOGRAPHICS TAB

- Legal First Name
- Any alias or nickname
- Middle Name
- Legal Last name
- Date of Birth (except year; and all ages over 89 and all elements of dates [including year] indicative of such age, except that such ages and elements may be aggregated into a single category of age 90 or older)
- Address
- City
- Zip Code
- County
- Phone Number
- HIV+ Date (except year)
- AIDS Date (except year)
- Deceased Date (except year)
- Enrl Date (except year)

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Information in the SERVICE TAB

- Service Details
 - Date (except year)

Information in the ENCOUNTERS TAB

1. Vital Signs Sub-Tab

- Estimated Conception Date (except year)
- Prenatal Begin Date (except year)
- Delivery/Outcome Date (except year)

2. Medications Sub-Tab

- Every time medication is prescribed complete as applicable: Start, Stop, Correct Data Error, or Change Dose (except year)

3. Labs Sub-Tab

- Test Date (except year)

4. Screening Labs Sub-Tab

- Test Date (except year)

5. Screening Sub-Tab

- Test Date (except year)
- Action Date (except year)
- Annual TB Screening Date (except year)
- Pap (except year)

6. Immunizations Sub-Tab

- Hep B, Date of Shots (except year)
- Hep C, Date of Shots (except year)

Information in the UNIQUE ID TAB

- **Do not e-mail any scanned document unencrypted**
- Medicaid #
- Medicare #
- PAC #
- Social Security #
- Date eligibility expires (except year)

Required Information in the FORMS TAB

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- Eligibility Staff Assessment Worksheet
- Insurance Waiver Form
- Notice of Eligibility or Ineligibility
- Six Month Recertification

Protected Health Information, as per 45 CFR 164.514

- Names
- All geographic subdivisions smaller than a State, including street address, city, county, precinct and zip code
- All elements of dates (except year) for dates directly related to an individual, including birth date, admission date, discharge date, date of death; and all ages over 89 and all elements of dates (including year) indicative of such age, except that such ages and elements may be aggregated into a single category of age 90 or older
- Telephone numbers
- Fax numbers
- Electronic mail addresses
- Social security numbers
- Medical record number
- Unique Record Number (URNs)
- Health plan beneficiary numbers
- Account numbers
- Certificate/license numbers
- Vehicle identifiers and serial numbers, including license plate numbers
- Device identifiers and serial numbers
- Web Universal Resource Locators (URLs)
- Internet Protocol (IP) address numbers
- Biometric identifiers, including finger and voice prints
- Full face photographic images and any comparable images
- Any other unique identifying number, characteristic or code

Part 22) Appendix B. CAREWare Data Entry Requirements

Purpose

The purpose of this attachment is to identify the information that must be captured and entered into CAREWare. Providers should ensure patient care services paid for by Ryan White Part B, Patient Care Network, and General Revenue are entered into the CAREWare system for reporting purposes. In addition, this attachment provides information on how the collected data must be entered to ensure data consistency and integrity.

Please see the Florida HIV/AIDS Eligibility Procedures Manual for eligibility requirements. HOPWA CAREWare data entry requirements are provided in a separate document.

Yellow highlighted data is mandated due to HRSA RSR and/or



HRSA performance measure requirements. The remaining information is required due to HIV/AIDS Section business needs.

Required Information in the DEMOGRAPHICS TAB

Demographic information must be collected for **all** -eligible clients seeking patient care services by the person determining eligibility, regardless of whether or not the client actually receives a service. Demographic information must include the following, at a minimum:

1. **Legal First Name** (any alias or nickname belongs in Common Notes)
2. Middle Name (if applicable)
3. **Legal Last name**
4. **Gender (including Transgender subgroup)**
5. **Date of Birth (mm/dd/yyyy)**
6. **Sex at Birth**
7. Street Address
8. City
9. State
10. Zip Code
11. County
12. Phone Number (if applicable) (include dashes)
13. **Race**
14. **Asian Subgroup**
15. **Pacific Subgroup**
16. **Ethnicity**
17. **Hispanic Subgroup**
18. **Enrollment Status**
19. **Enrollment Date**
20. **Case Closed Date** (if applicable)
21. **Vital Status**
22. **Date of Death (if applicable)**
23. **HIV Status**
24. **HIV+ Date**
25. **AIDS Date (if applicable)**
26. **HIV risk factors (please note: currently this field can not be uploaded from HMS)**

Required Information in the SERVICE TAB

For any patient care service paid for by

1. Year (select year of service)
2. Add/Edit Service Details
 - a. **Date**
 - b. **Service Name**
 - c. **Contract (current Contract)**
 - d. **Units**

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Ryan White Part B,
Patient Care
Network, General
Revenue, or State
HOPWA

**Required
Information in the
ANNUAL REVIEW
TAB**

Review and update
at every eligibility
determination.

-
1. Primary Insurance
 2. Other Insurance
 3. Household Income
 4. Household Size
 5. Poverty Level (will populate automatically)
 6. HIV Primary Care
 7. Housing Arrangement

For any client receiving Ambulatory/Outpatient Medical Care services (paid for by Ryan White Part B, Patient Care Network, or General Revenue) complete the questions below:

8. HIV Risk Reduction Counseling
9. Result
10. Counseled by
11. Mental Health
12. Counseled by
13. Substance Abuse
14. Result

**Required
Information in the
ENCOUNTERS
TAB**

Create an encounter, as appropriate, for any client receiving Ambulatory/Outpatient Medical Care services ~~and/or Medical Case Management services~~ (paid for by Ryan White Part B, Patient Care Network, or General Revenue) added on the service tab of CAREWare.

1. **Vital Signs Sub-Tab** (For female clients who are pregnant or delivered within the calendar year.)

Select View/Edit History

Add data for the following fields

- a. Estimated Conception Date
 - b. Prenatal Begin Date
 - c. # Prenatal Visits
 - d. Delivery/Outcome Date
 - e. HIV Status of Newborn
 - f. Pregnancy Outcome
 - g. ART Counseling?
 - h. ART Offered?
 - i. ART Taken?
 - j. ART Date?
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2. Medications Sub-Tab

- a. HIV-associated medications including ARVs, OIs, or other
- b. Units, Form, Strength, Frequency, Indication, and OI condition, if applicable
- c. Every time medication is prescribed complete as applicable: Start, Stop, Correct Data Error, or Change Dose

3. Labs Sub-Tab

Current Test and Result (CD4 and Viral Load) for every lab test

4. Screening Labs Sub-Tab

Current Test, Result, Titer and Treatment for Syphilis, if applicable. Also, Hep B, Hep C screening lab data as applicable.

5. Screening Sub-Tab

Current Test, Current Result, Current Action and Current Score for the following screenings, as applicable: Annual TB Screening, Pap Smear

6. Immunizations Sub-Tab

As applicable: Hep B, Hep C

Required Information in the UNIQUE ID TAB

-
1. Select the "Attachments" hyperlink to upload:
 - a. Proof of living in Florida
 - b. Proof of identity
 - c. Verification of income
 - d. Proof of HIV
 - e. Proof the program is payer of last resort
 - f. Signed Application
 - g. Signed Notice of Eligibility (every time eligibility is renewed)
 - h. Signed Notice of Ineligibility (if applicable)
 2. Medicaid # no dashes (if applicable)
 3. Medicare # include dashes (###-##-####) (if applicable)
 4. PAC # no dashes (if applicable)
 5. Social Security # include dashes (###-##-####) (If client has no social security number please use the alternate identification number formula outlined in Section 8 of the Florida HIV/AIDS Eligibility Procedures Manual.)
 6. Date Eligibility Expires
 7. Key Points of Entry

Required

-
1. Eligibility Staff Assessment Worksheet (One time only)
-

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**Information in the
FORMS TAB**

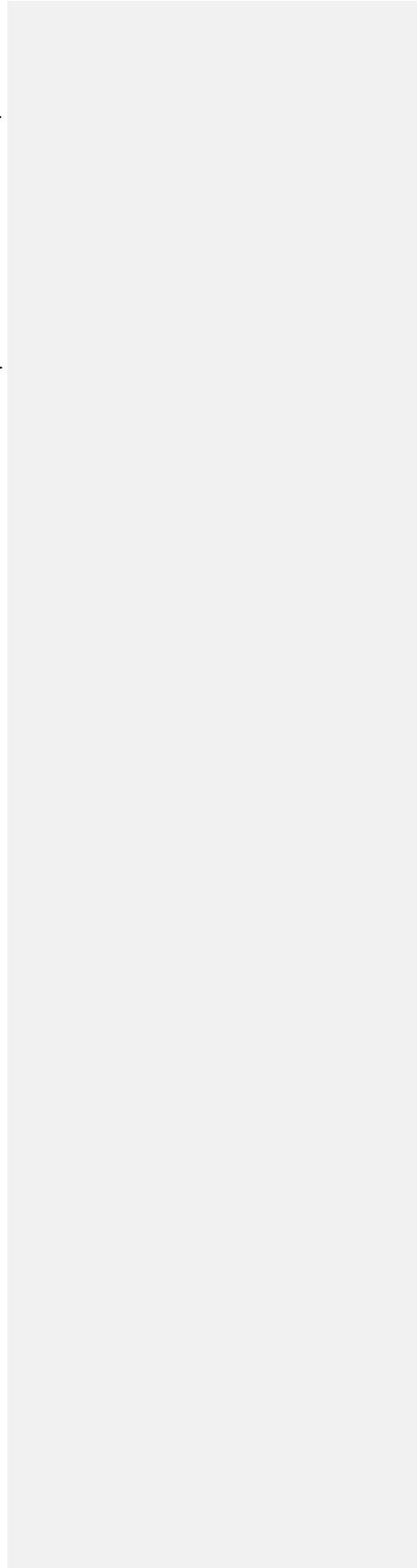
unless the client file is closed for a period of a year or more, then a new application should be completed.)

2. Insurance Waiver Form (if applicable)
3. Notice of Eligibility or Ineligibility (every six months)
4. Six Month Recertification (every six months)

All forms are custom sub forms. This means these forms are kept each time they are completed and will provide a history over time. You must check the box in the top left corner of the form to fill it in and save.

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HIV/AIDS Section CAREWare Account Request Form



HIV/AIDS Section CAREWare Account Request Form

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DOH Help Desk Ticket Number: [Click here to enter text.](#)

New User

For county health department/Department of Health staff, please include the applicant's current Network ID [Click here to enter text.](#)

Close Account Access Additional Domains Adjust User Access Level/Groups Other

For these selections, please include the applicant's current CAREWare User ID [Click here to enter text.](#)

First Name Click here to enter text.	Last Name Click here to enter text.	Middle Initial Click here to enter text.	Job Title Click here to enter text.
Work Phone Click here to enter text.	Extension Click here to enter text.	Email Address Click here to enter text.	Agency Name Click here to enter text.
Agency Address Click here to enter text.		Agency City Click here to enter text.	Agency Zip Click here to enter text.

User Access Level (pick only one)

- Basic User (standard group) View Only Provider Administrator **
 Reporting Section Help Desk Community Programs' Staff Member

** If a user is given Provider Administrator rights, he/she will be able to approve CAREWare Request Forms for future individuals. If you do not want a person to have the ability to approve or request new users, close out accounts, etc., do not grant them the Provider Administrator User Level.

Additional User Groups (multiple options may be selected in this group)

- | | |
|--|--|
| <input type="checkbox"/> Contract Set Up | <input type="checkbox"/> PDI User |
| <input type="checkbox"/> Delete Merge Client | <input type="checkbox"/> Sharing Approver |
| <input type="checkbox"/> Edit Values | <input type="checkbox"/> Sharing Requestor |
| <input type="checkbox"/> Mapping Group | <input type="checkbox"/> User Administration |

Comments box

[Click here to enter text.](#)

Applicant's Signature

Date

I acknowledge that I have read and understand the Department of Health (DOH) Information Security and Privacy Policy (DOHP 50-10-10), the Confidential CAREWare Client Identifiers – Appendix A and the Protocol for Breaches of Confidentiality of CAREWare Data. I will follow all of the rules and regulations outlined in the DOHP 50-10-10 and the Confidential CAREWare Client Identifiers – Appendix A. I further agree to follow the CAREWare Data Entry Requirements – Appendix B along with the rules and standards set down in the CAREWare Manual and in the Protocol for Breaches of Confidentiality of CAREWare Data. I understand that failure to adhere to these rules and regulations may result in disciplinary action up to and including removal of access to CAREWare and/or dismissal.

Supervisor's Signature

Supervisor Print Name

Date

The Agency must notify the Help Desk at least five (5) days prior to any CAREWare User's final day of employment. If termination is unexpected, the Help Desk needs immediate notice. The Help Desk must also be informed of any misuse by a CAREWare User, as well as if a CAREWare User changes positions within the Agency and should no longer have access. The contact number for the Help Desk is 850-922-7599. Make sure to inform the Help Desk technician this call should be assigned to the CAREWare team.

Agency CAREWare Provider Administrator – A CAREWare Provider Administrator must approve any action on a CAREWare Request Form. They must print and sign their name and add their CAREWare user id. An Agency CAREWare Provider Administrator can only approve actions for the agency they belong to.

Agency CAREWare Provider Administrator (Print Name) _____

Agency CAREWare Provider Administrator (Signature) _____

Agency CAREWare Provider Administrator (User ID) _____

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HIV/AIDS Section CAREWare Account Request Form

CAREWare Account Request Form Instructional Guide

The first step in getting a CAREWare Account Request Form (CARF) completed is calling the Help Desk at 850-922-7599. ("NEW" accounts need to be requested by the agency's CAREWare Provider Administrator. If this person is not available, a Supervisor from the agency who is an existing CAREWare user needs to call in the Help Desk ticket.) Tell the Help Desk operator that you want to fill out a CAREWare Account Request Form. The operator will create a ticket for your request. Make sure you tell the operator to assign the ticket to the CAREWare Team. A CAREWare Team member will attach a CARF to the ticket which you will then receive via email. Print off the completed document and have both the applicant and the applicant's supervisor sign and date the form. Open the email you received from the Help Desk and hit reply all. Add the following sentence to the email, "I have attached the CARF." Attach the scanned signed form to the email reply and hit send.

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Fields

DOH Help Desk Ticket Number – Enter the Help Desk ticket number assigned to this request.

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New User – Check this box for staff who do not have a current CAREWare user id.

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Network ID - For County Health Department/Department of Health staff, please include the applicant's current Network ID. This is the id the staff member uses to log into their computer.

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Close Account – To remove access to an agency.

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Access Additional Domains – To grant access to additional agencies for an existing CAREWare user.

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Adjust User Access Level/Groups – To change the User Access Level or add additional User Groups to the user's profile. A person can only belong to one User Access Level per agency.

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Other- If the action you are requesting does not fall under one of the other CARF request items (such as New User, Close Account, Access Additional Domains, or Adjust User Access Level/Groups) then place a check mark in this box. Make sure to add a description to the Comments Box in the middle of the form detailing what you need done.

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Only the CAREWare User ID and Agency Name need to be filled out for **Close Account, Access Additional Domains, Adjust User Access Level/User Groups** and **Other** actions. The following fields may remain blank: Agency Address, Agency City, Agency Zip, First Name, Last Name, Middle Initial, Job Title, Work Phone Number, Extension and Email Address.

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First Name – First name of applicant.

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HIV/AIDS Section CAREWare Account Request Form

▲ **Last Name** – Last name of applicant.

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▲ **Middle Initial** –Middle initial of applicant. This is very important as the DOH I.T. Team use this to create the Network Account for the user.

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▲ **Job Title** – Job title of applicant.

Work Phone Number – Work phone number of applicant. Include area code.

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▲ **Extension** – Work phone number extension of applicant.

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▲ **Email address** – Work email address of applicant.

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▲ **Agency Name** – Name of CAREWare agency user needs to be added to, closed out from, have user level adjusted at, etc.

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▲ **Agency Address** – Address of agency.

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▲ **Agency City** - City where agency is located.

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▲ **Agency Zip** – Zip code of agency.

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▲ **User Access Level** – Identify the level of access the applicant should be given for each corresponding agency. Select one group. (Below descriptions are not complete descriptions of the group rights, they are short synopses to give a quick breakdown between the different groups.)

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▲ **Basic User** – This is the standard group most users are added to. The core functions these users can perform are add/edit/delete data and run reports.

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▲ **View Only** – This user can view data but cannot add/edit/delete it.

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▲ **Provider Administrator** – Users in this group have all the rights of the Basic User with some additional rights. These include the ability to run client merges, unlock/lock users and edit value lists. Additionally, we contact the Provider Administrator of an agency to have them approve adding/removing/adjusting the rights of users within their agency. If you do not want a person to have the ability to approve or request new users, close out accounts, etc., do not grant them the Provider Administrator User level. Each agency should have a maximum number of two Provider Administrators.

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▲ **Reporting Unit** – This group is for the HIV/AIDS Patient CARE Resources Program, Reporting Unit staff.

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▲ **Community Programs Unit** – This group is for the HIV/AIDS Patient CARE Resources Program, Community Programs Unit staff.

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▲ **Help Desk** – This group is for the Tallahassee DOH Help Desk staff.

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▲ **Additional User Groups** – Placing check marks in these boxes will add rights to the user's current profile. Only those groups marked on the current form will be applied to

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HIV/AIDS Section CAREWare Account Request Form

the applicant. If a user previously was a member of the PDI User group and a new CARF was completed with only Edit Values checked under Additional User Groups, then the user would be removed from the PDI User group. If the applicant should still remain a member of the PDI User group, make sure to check that box on the current CARF. Be aware users who are Provider Administrators already are members of the following groups: Contract Set Up, Delete Merge Client, Edit Values and User Administration.

▲ **Contract Set Up** – Allows user to add/edit/delete contract information

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Delete Merge Client – Allows user to run the merge client operation as well as delete clients.

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▲ **Edit Values** – Allows user to adjust data within custom fields, such as a local case manager field. A person in this group can add new or remove inactive case managers in the case manager field.

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▲ **Mapping Group** – User in this group can map values for data imports.

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▲ **PDI User** – Allows user to run the Provider Data Import for their agency.

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▲ **Sharing Approver** – Allows user to approve sharing requests from other agencies.

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▲ **Sharing Requestor** – Allows user to make client sharing requests from other agencies.

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▲ **User Administration** – Allows user to unlock/lock users and change users' passwords.

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▲ **Agency CAREWare Provider Administrator (Print Name, Signature, User ID)** – Forms will not be approved without the signature of a person in authority. Having Provider Administrators sign off on CARFs is our preferred method of approval. However, in certain circumstances we may allow other individuals to approve CARFs. HIV/AIDS Program Coordinators, Agency Executive Directors or the CAREWare System Administrator are some examples of other staff who on occasion may be approved to sign off on CARFs. Provider Administrators can only approve CARFs for their agency. For example, the Duval CHD Provider Administrator cannot approve adding a new user to the Palm Beach CHD agency.

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▲ **Comments box** – When "Other" is selected as the request item, please detail what action you need completed for the user.

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▲ **General Notes:**

If an applicant is requesting access to multiple agencies, a separate CARF must be completed for each individual agency. The exception is when the same person is the CAREWare Provider Administrator at each additional agency. For example, if Barney Ruble is an applicant requesting access to 5 domains and Fred Flintstone is the CAREWare Provider Administrator at all 5 domains then one form may be completed. The primary agency Barney Ruble belongs to will be inputted in the Agency Name field. The additional agencies will be added to the comments box. The User Access Level and Additional Groups marked on the CARF will be applied to all of the agencies. Fred Flintstone has the authority to sign this document as he is a CAREWare Provider Administrator at each location. However, if Barney Ruble is requesting access to 5



HIV/AIDS Section CAREWare Account Request Form

domains with different User Level Access or different Additional User Groups at each site then a separate form needs to be completed.

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