

CAREWARE 6

WHAT IS CAREWARE 6

CAREWare 6 is the newest version of CAREWare. It has a new interface that runs in an internet browser rather than a program installed on your computer. CAREWare 6 can be used with the following browsers:

- Chrome
- Firefox
- Microsoft Edge
- Safari

Internet Explorer cannot be used to access CAREWare 6.

WHAT'S NEW IN CAREWARE 6

MENU OF LINKS



Customize

Add Client

Find Client

Reports

Rapid Entry

My Settings

System Information

Administrative Options

Switch Providers

Log Off

Upon logging into CAREWare, you will find a **Menu of Links** on the left-hand side of the screen.

Simply click on the item you wish to access.

BREADCRUMBS



The screenshot shows a web application interface. At the top, a breadcrumb trail is displayed: [Find Client](#) > [Search Results](#) > [Demographics](#). Below this, there are links for [Delete Client](#) and [Back](#). The main content area is titled **Demographics** with a gear icon. On the left side, there is a sidebar menu with four buttons: [Personal Info](#), [Change URN](#), [Contact Information](#), and [Race/Ethnicity](#).

Breadcrumbs or Breadcrumb Trails allow users to keep track and maintain awareness of their locations within CAREWare 6. In this example: [Find Client](#) > [Search Results](#) > [Demographics](#) is considered the Breadcrumb Trail

Find Client > Search Results > Demographic

[Save](#) [Cancel](#)

Personal Info

First Name:

Middle Name:

Last Name:

If the items in the Breadcrumb trail are blue (as in the example), click on the item link to return to that section. If they are black, you must either click [Save](#) or [Cancel](#) to return to the previous section.

CUSTOMIZATION

Customize menu items > Personal Menu Settings

Save **Back** Print or Export

Menu Item Customization

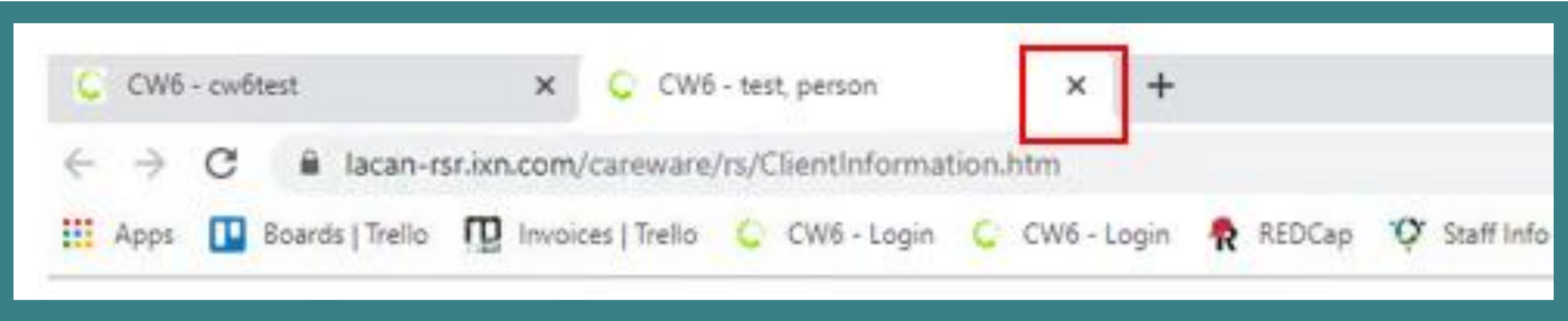
Search:

Show	Menu Item
<input checked="" type="checkbox"/>	Add Client
<input checked="" type="checkbox"/>	Administrative Optic
<input checked="" type="checkbox"/>	Appointments
<input checked="" type="checkbox"/>	Find Client
<input checked="" type="checkbox"/>	My Settings
<input checked="" type="checkbox"/>	Rapid Entry
<input checked="" type="checkbox"/>	Reports
<input checked="" type="checkbox"/>	Switch Providers

You can customize which menu items are visible by clicking on the Customize button and uncheck any items you don't want on the menu then click **Save**.

CLIENT RECORDS

Client records open in a separate tab on your browser. When you have finished with a client's record, make sure to close out of that tab.



LOGGING INTO CAREWARE 6

01 Open your browser and enter lacan.ixn.com

02 Enter your CAREWare username and click **Submit**.



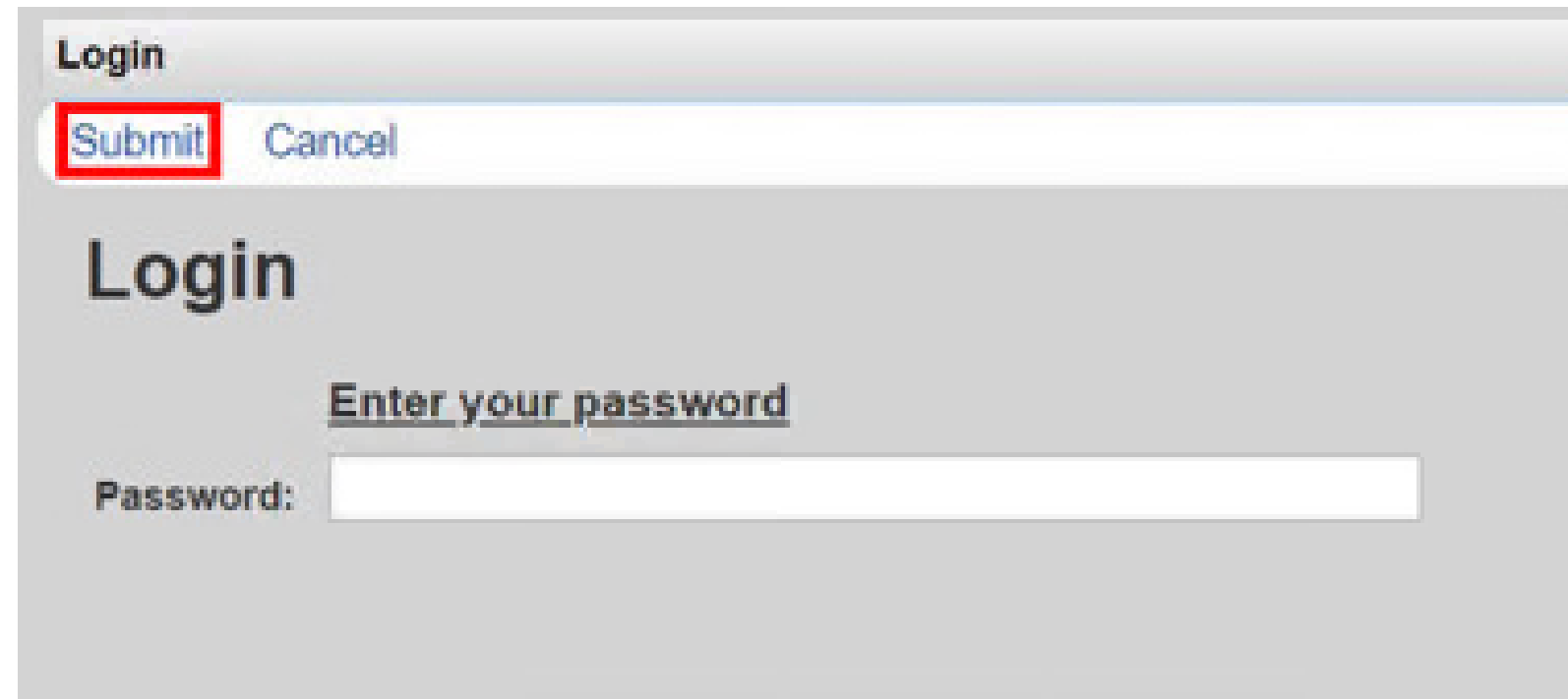
Submit lacan.ixn.com

Login

Enter your CAREWare Username

Username:

03 Enter your CAREWare password and click **Submit**.



Login

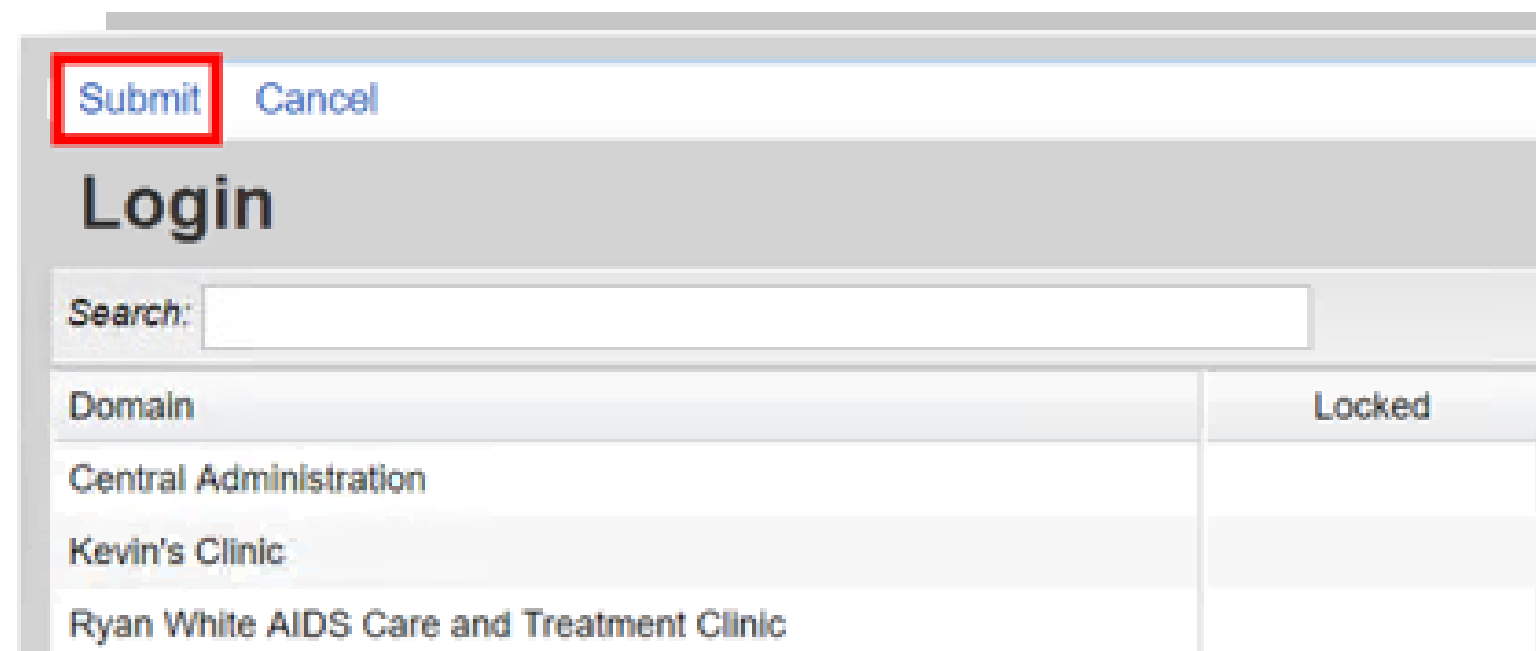
Submit Cancel

Login

Enter your password

Password:

04 (If Applicable) Select the Domain you would like to use and click **Submit**.



Submit Cancel

Login

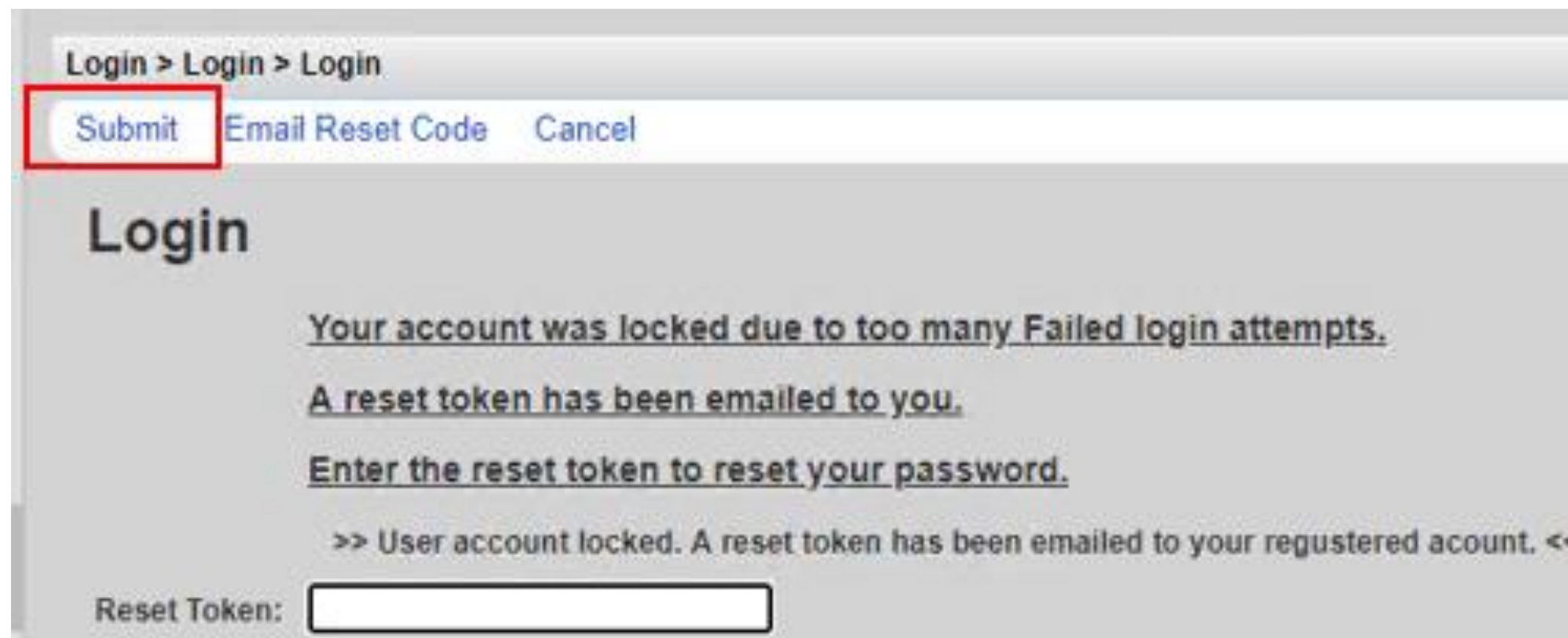
Search:

Domain	Locked
Central Administration	
Kevin's Clinic	
Ryan White AIDS Care and Treatment Clinic	

RESETTING PASSWORDS

After three failed login attempts your account will be locked.

- 01 Click [Email Reset Code](#)
- 02 Check your email for the Reset Token.
- 03 Enter the Reset token and click [Submit](#).



The screenshot shows a web interface for a login page. At the top, there is a breadcrumb trail: "Login > Login > Login". Below this, there are three buttons: "Submit", "Email Reset Code", and "Cancel". The "Submit" button is highlighted with a red rectangular border. The main content area is titled "Login" and contains the following text: "Your account was locked due to too many Failed login attempts.", "A reset token has been emailed to you.", and "Enter the reset token to reset your password.". Below this text, there is a line of smaller text: ">> User account locked. A reset token has been emailed to your registered account. <<". At the bottom, there is a label "Reset Token:" followed by an empty text input field.

- 04 Enter your new password, then retype it and click [Submit](#).

05 You will then be asked to log in with your new password.

Login > Login > Login

Submit Cancel

Login

Enter a new password

>> Password failed validation: The minimum password requirements are:

Minimum Length: 12

Minimum Lower Case Characters: 1

Minimum Upper Case Characters: 1

Minimum Numeric Characters: 1

Minimum Special Characters: 1

<<

New Password:

Retype Password:

ACCESSING CAREWARE 6

TWO-FACTOR AUTHENTICATION IN CAREWARE

WHAT IS TWO-FACTOR AUTHENTICATION?

Two-factor authentication (2FA) is a type of multi-factor authentication which is a way to protect access to data systems by requiring both something the user knows, like a password, and something the user possesses, such as a code or token to log in. Use of 2FA is required in your organization's installation of CAREWare. This document will instruct you on how to enroll in 2FA with either your mobile device or with an authenticator application that stays on your desktop or computer.

WHAT WILL CHANGE WITH TWO-FACTOR AUTHENTICATION?

CAREWare users will be able to get the two-factor code from one of two places:

- Username
- Password
- Two factor code from the WinAuth application or the Google Authenticator App

WHAT WILL CHANGE WITH TWO-FACTOR AUTHENTICATION?

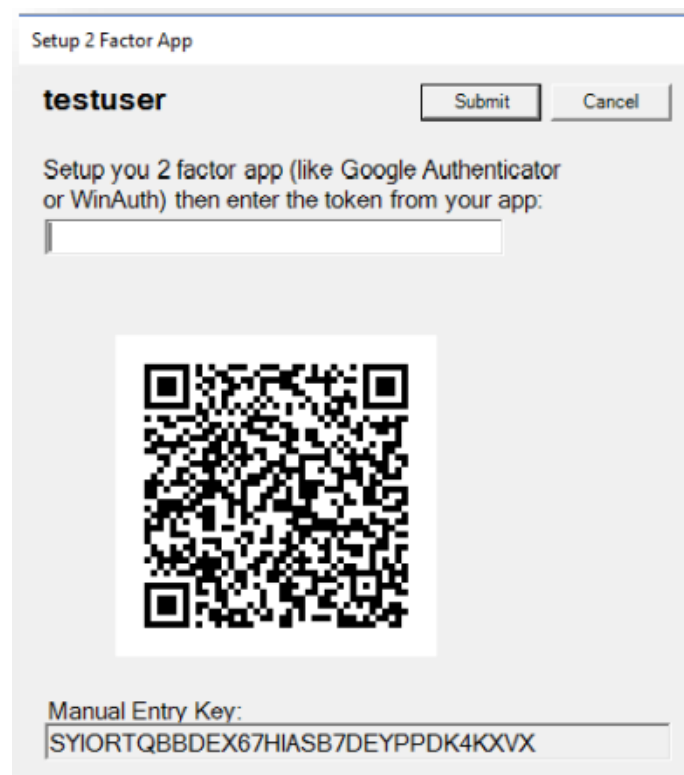
CAREWare users will be able to get the two-factor code from one of two places:

- The Google Authenticator (available free in iOS App Store and the Google Play app store)
- The WinAuth application (available free online)

The WinAuth app is the easier of the two options to use. Using the WinAuth application will require your IT staff to install a program and configure it in order to receive codes to use during the login process.

OPTION 1: GOOGLE AUTHENTICATOR APP ENROLLMENT


- 01 In the App Store or the Google Play app Store, search for and download Google Authenticator.
- 02 Sign into CAREWare as usual. You will be asked to set up your 2-factor app and then enter the code or token to verify that you are the appropriate user of the account.
- 03 On your mobile device open the Google Authenticator app and select **Begin Setup**.
- 04 Select **Scan Barcode**. You may be prompted to allow access to the camera or other resources on your phone. Allow access.
- 05 With your phone, in the Google Authenticator app, take a picture of the QR code to enroll your device.
- 06 You should now see a six-digit number and a countdown. **IMPORTANT:** Wait until the countdown ends and a new number appears before proceeding to the next step.
- 07 Once the number regenerates, type the six-digit number into CAREWare and press **Submit**.



Setup 2 Factor App

testuser

Setup you 2 factor app (like Google Authenticator or WinAuth) then enter the token from your app:



Manual Entry Key:
SYIORTQBBDEX67HIASB7DEYPPDK4KXVX

- 08 You should now be logged into CAREWare.

REGULAR LOGIN PROCESS WITH THE GOOGLE AUTHENTICATOR APP

Once you have enrolled your device with the Google Authenticator app, when you log into CAREWare, you will get a code from this application every time you log in and will need to enter it each time you want to access CAREWare.

IMPORTANT: Wait until the countdown ends and a new number appears before entering the six-digit code into CAREWare.

Login process: Username > Password > Authenticator Code

- 01 Start CAREWare as normal. Log in with your usual username and password.
- 02 When prompted for the code, open your Google Authenticator app and wait for the current code to be replaced by a new code.
- 03 When the new code appears, enter the six-digit number into CAREWare and submit it. You should be logged in.

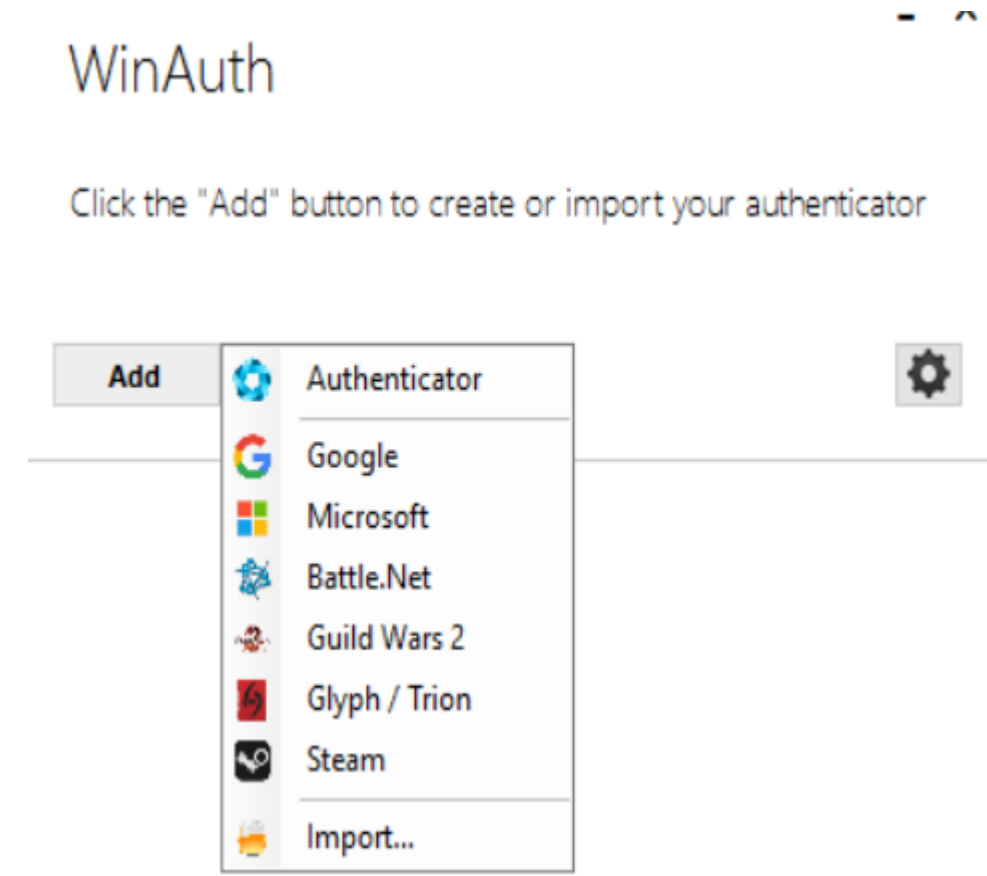
OPTION 2: WINAUTH AUTHENTICATOR APP ENROLLMENT

01 Your IT staff will need to install and set up a shortcut for you to use WinAuth.

02 Sign in to CAREWare as usual. You will be asked to set up your 2 factor app, then enter the token to verify that you are the appropriate user of the account.



03 Launch WinAuth. Click Add to set up the CAREWare authenticator. Select the top option-Authenticator.

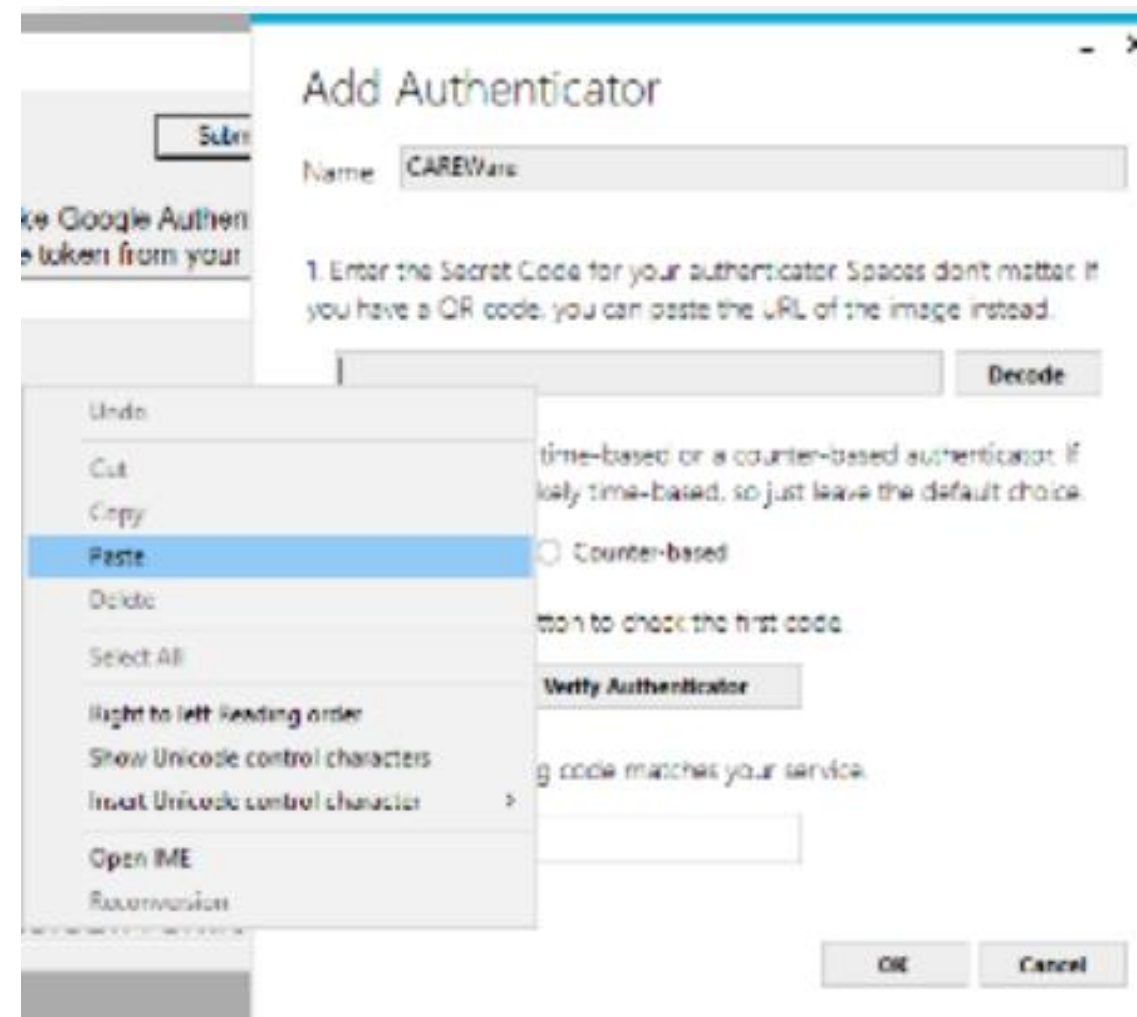


04 On the next screen, add the name CAREWare for the Name.

Add Authenticator

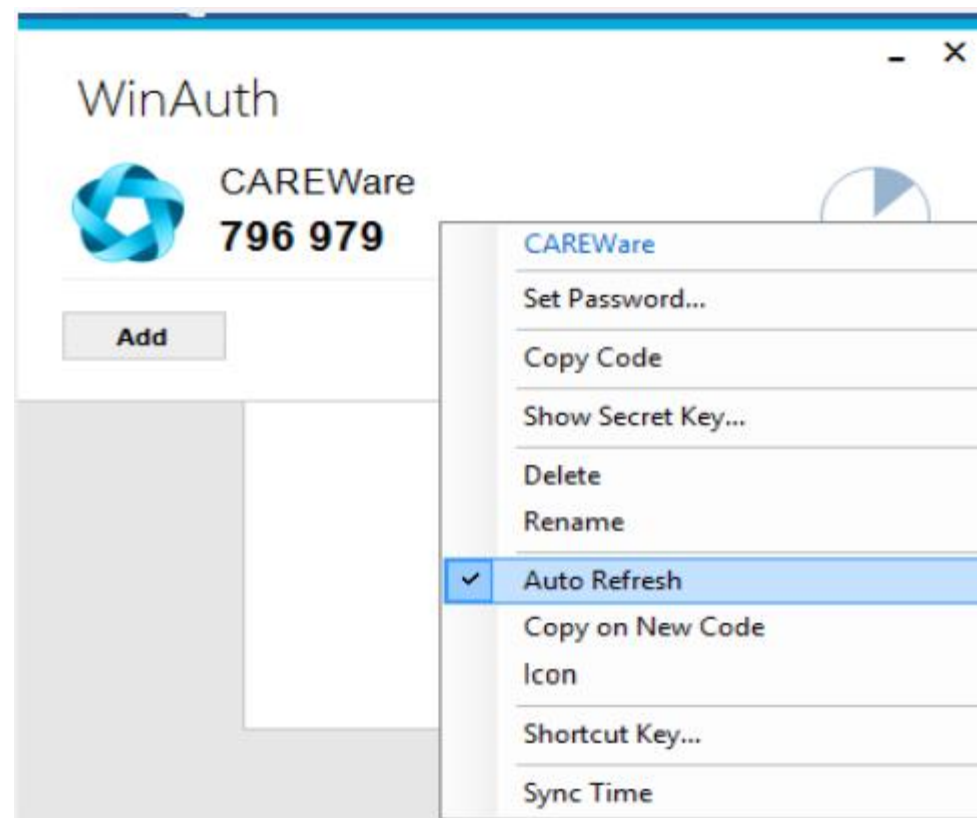
Name:

- 05 Select the Manual Entry Key from the Setup 2 Factor App screen in CAREWare, right click and copy it. Right click and select paste in the field to the left of the Decode button in WinAuth.

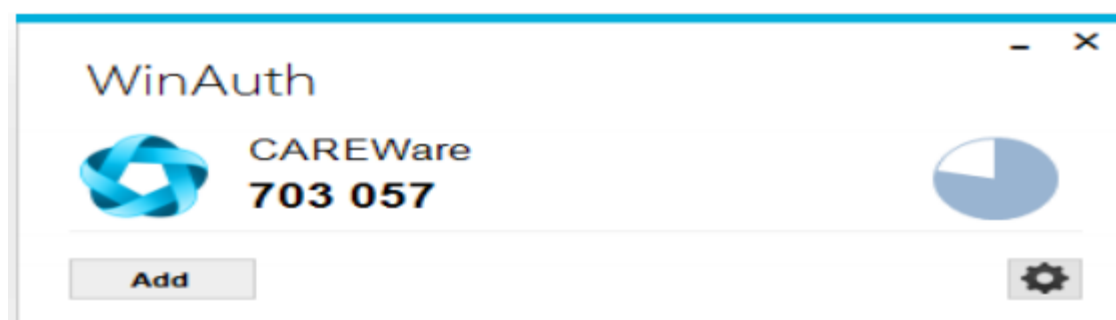


- 06 The Time-based option is the default and should not be configured differently that it is.
- 07 Press Verify Authenticator. A six-digit code should appear at the bottom of the screen with a green timer that shrinks as it expires.
- IMPORTANT: Wait until the countdown ends and a new number appears before proceeding to the next step.
- 08 Once the number regenerates, type the six-digit number into CAREWare and press **Submit**.
- 09 You should now be logged into CAREWare.

- 10 In WinAuth, press **OK**. This brings you to a “Protection” Screen where you can create a password to protect your code generator for CAREWare
- 11 Do not select the “Encrypt to only be useable on this computer” nor “Lock with a YubiKey”
- 12 Press **OK**.
- 13 On the code generation window, right click and make sure **Auto Refresh** is checked.



When you launch WinAuth, you will be prompted for the password you created in step 10 above and you will see this window containing your CAREWare 2FA code.



REGULAR LOGIN PROCESS WITH THE WINAUTH AUTHENTICATOR APP

Once you have enrolled with the WinAuth authenticator app, when you login to CAREWare, you will get a code from it every time you login and must enter this code in order to proceed.

IMPORTANT: Wait until the countdown ends and a new number appears before entering the six-digit code into CAREWare.

Login process: Username > Password > WinAuth Code

- 01 Start CAREWare as normal. Login with your usual username and password.
- 02 When prompted for the code, open your WinAuth authenticator app and wait for the current code to be replaced by a new code.
- 03 When the new code appears, enter the six-digit number into CAREWare and submit it. You should be logged in.

HOW TO GET ASSISTANCE WITH TWO-FACTOR AUTHENTICATION

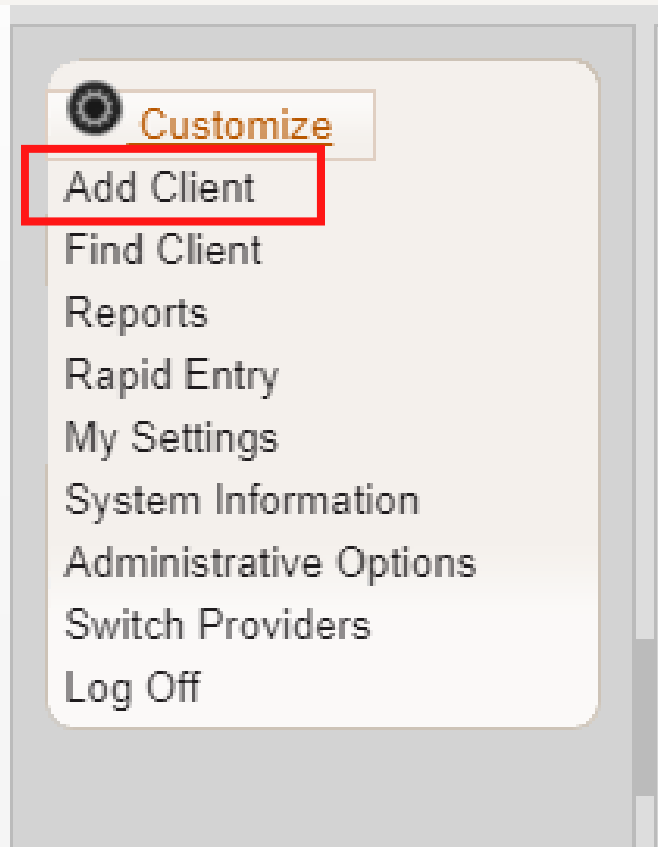
If you have specific questions regarding the CAREWare application, WinAuth application, or Google Authenticator, please contact the CAREWare Help Desk:

<https://louisianahealthhub.org/careware-submission-form/>

HOW TO ADD A CLIENT

01

Select [Add Client](#) from the main menu and a new tab will open in your browser.



02

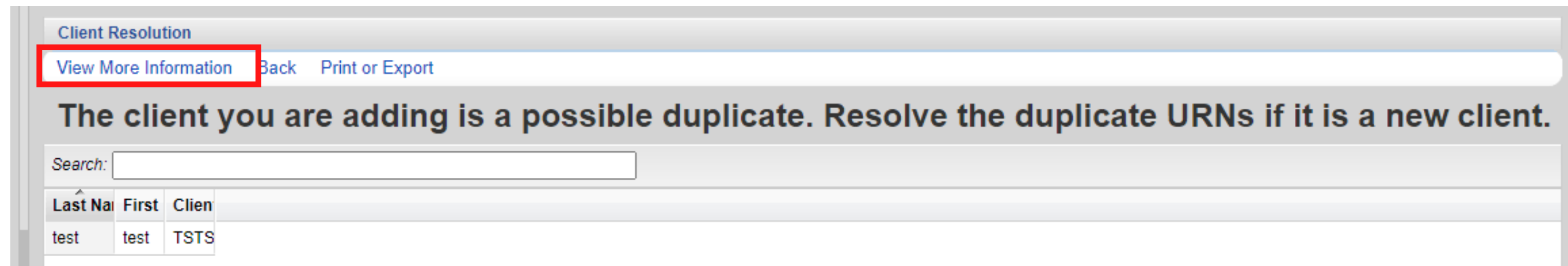
Enter the Last Name, First Name, Gender, and Date of Birth of the client. All fields are required, except Middle Name and the DOB Estimated checkbox . Click Add.

A screenshot of the 'Add Client' form. The form has a title bar with the word 'Add' in blue. Below the title bar are several input fields: 'Last Name:' with a long text box, 'First Name:' with a text box, 'Middle Name:' with a text box, 'Gender:' with a dropdown menu and a blue arrow icon, 'Date of Birth:' with a text box and a calendar icon, and 'DOB Estimated?:' with an unchecked checkbox.

Note: Enter the **legal** last name, first name and Date of birth of the client from an identification card such as driver's license, birth certificate, social security card, passport or other official document.

POSSIBLE DUPLICATE CLIENT

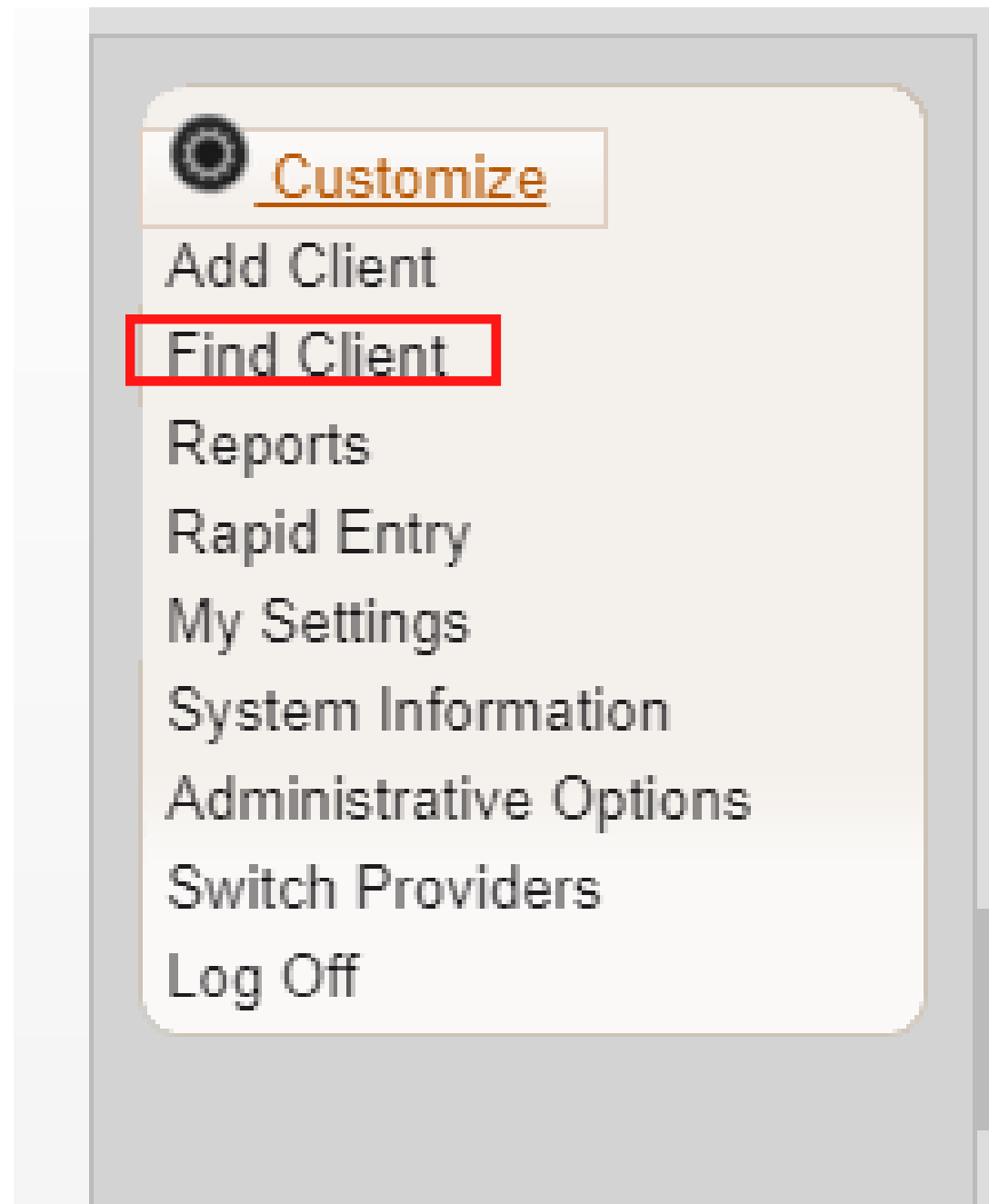
- 01 If a client's information is similar to an existing CAREWare record, you will see the message stating "The client you are adding is a possible duplicate."
- 02 Select the client from the list and select **View More Information** to review additional client information.



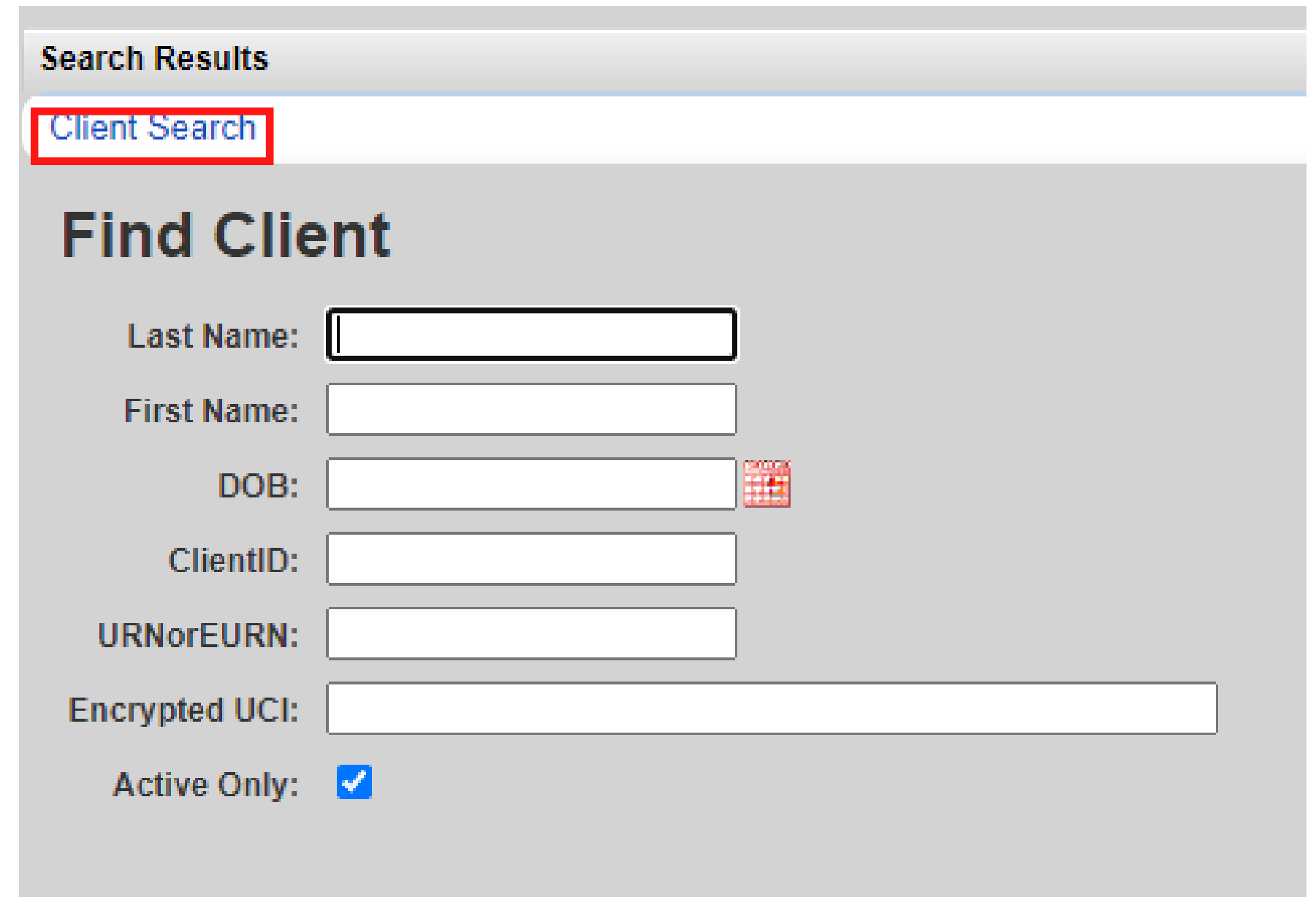
- 03 Compare client information to determine if this is the same client.
- 04 If it is the same person, click **This is the same client**. The existing client record will be displayed. If it's a new client, click **This is a new client**. Doing so will create a new client record. If the client matches multiple clients in the database, click **Back** and repeat step #2.

HOW TO FIND A CLIENT

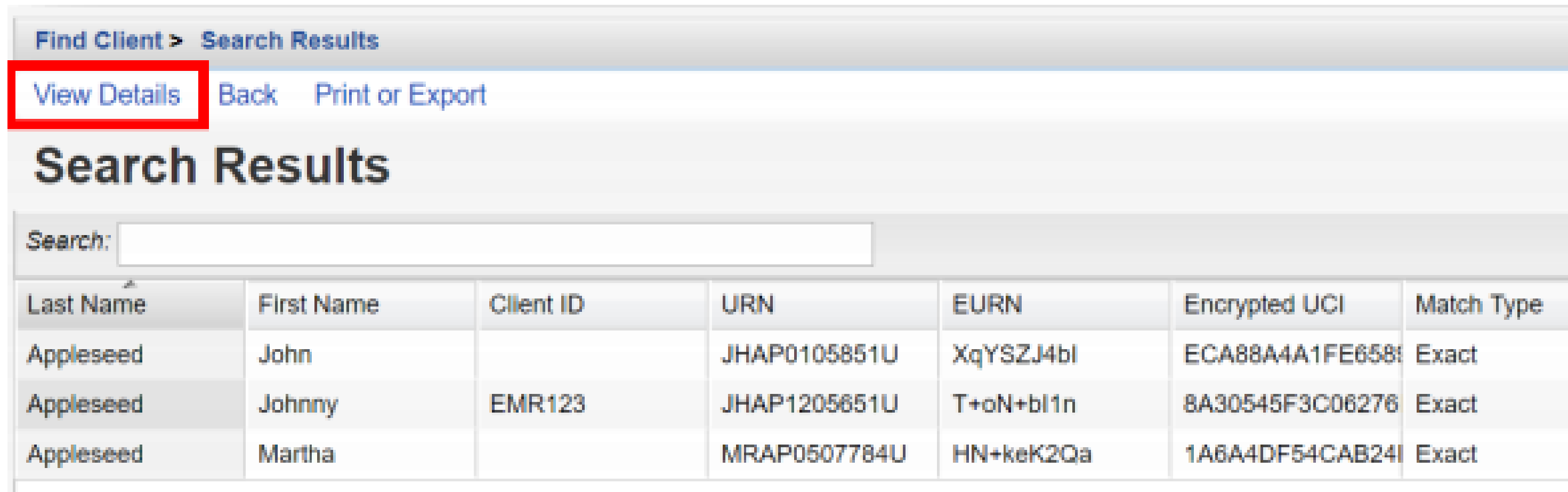
- 01** To search for a client, select **Find Client** from the main menu.



- 02** Enter search text into any of the fields and press **Client Search**.

A screenshot of the "Find Client" search form. The form is titled "Find Client" in large, bold, black text. Above the form, there is a "Search Results" header and a "Client Search" button highlighted with a red border. The form contains several input fields: "Last Name:" with a text box, "First Name:" with a text box, "DOB:" with a date picker icon, "ClientID:" with a text box, "URNorEURN:" with a text box, and "Encrypted UCI:" with a long text box. At the bottom, there is a checkbox labeled "Active Only:" which is checked with a blue checkmark.

03 A list of matches to your search appears. Select the correct name from the list and click [View Details](#).



The screenshot shows a web interface for search results. At the top, there is a breadcrumb trail: "Find Client > Search Results". Below this, there are three navigation links: "View Details" (highlighted with a red box), "Back", and "Print or Export". The main heading is "Search Results". Below the heading is a search input field with the label "Search:". Underneath the search field is a table with the following columns: Last Name, First Name, Client ID, URN, EURN, Encrypted UCI, and Match Type. The table contains three rows of data.

Last Name	First Name	Client ID	URN	EURN	Encrypted UCI	Match Type
Appleseed	John		JHAP0105851U	XqYSZJ4bl	ECA88A4A1FE6588	Exact
Appleseed	Johnny	EMR123	JHAP1205651U	T+oN+bl1n	8A30545F3C06278	Exact
Appleseed	Martha		MRAP0507784U	HN+keK2Qa	1A6A4DF54CAB24I	Exact

04 After clicking [View Details](#), the Demographics screen will appear.

DEMOGRAPHICS

Like CAREWare 5, the demographic information is shared across domains with the exception of Eligibility, Enrollment Status, and Provider Notes.

A Link Summary is displayed to the right of each link item. In the example below, once Demographics is selected from the Menu of Links, a new screen appears with additional link items. To the right of each is a Link Summary.

The demographics screen in CAREWare 6 has the demographic information broken down into sections.

Demographics

Personal Info	Client ID: Name: test, person Gender: Female DOB: 03/02/1984
Change URN	PRTS0302842U
Contact Information	1263 Street Dr Townville, LA 12345
Race/Ethnicity	American Indian, Asian (Filipino)
HIV Risk Factors	Hemophilia
Vital Enrollment Status	Vital Status: Alive Enrolled: 03/15/2014 Current Status: Referred or Discharged
Eligibility	Ryan White Eligible
HIV Status	HIV-positive (AIDS status unknown) HIV Date: 02/02/2012
Common Notes	8/12/2020 RP @SHHP Case Notes are seen across domains. 12/1/15 MW @ SHP: merged duplicate client record 10/15/15 JS @ CARES: updated client address and emergency contacts 9/1/15 MW @ SHP: updated client address. Client moved to Lafayette
Provider Notes	8/12/2020 RP: These notes are only seen at your agency
Client Information	View or Edit the client's Client Information information
Emergency Contacts	View or Edit the client's Emergency Contacts information
LA HAP Elig Info	View or Edit the client's LA HAP Elig Info information

PERSONAL INFO

Personal Info

First Name:

Middle Name:

Last Name:

Preferred Language:

Gender:

Date of Birth:

DOB Estimated?:

Sex At Birth:

URN:

Encrypted URN:

Encrypted UCI:

Client ID:

Last Service:

Last Poverty Level:

Note: The Personal Info section includes the date of Last Service and Last Poverty Level.

CHANGE URN

Find Client > Search Results > Demographics > Change URN

Save Cancel

Change URN

New URN:

PRTS0302842U



Note: The Change URN section allows the URN to be edited if needed

CONTACT INFORMATION

Contact Information

Address:

City:

State: 

County: 

Zip Code:

Phone:

Phone Type: 

Include in mailing label reports?:

Mailing Address:

Mailing City:

Mailing State: 

Mailing Zip Code:

Alt. Phone 1:

Phone Type (Alt. Phone 1): 

Alt. Phone 2:

Phone Type (Alt. Phone 2): 

RACE/ETHNICITY

Race/Ethnicity

Asian:

Asian Indian:

Asian Chinese:

Asian Filipino:

Asian Japanese:

Asian Korean:

Asian Vietnamese:

Asian Other:


Black or African American:

American Indian or Alaska Native:

Other:

Native Hawaiian or Other Pacific Islander:

White:

Hispanic or Latino: 

Select the race and ethnicity the client identifies as.

Multiple selections are allowed.

Any clients who identify as Asian, Native Hawaiian or Pacific Islander, or Hispanic, will need to be select a subgroup as well.

HIV RISK FACTORS

Find Client > Search Results > Demographics > HIV Risk Factors

Save Cancel

HIV Risk Factors

Male to Male sexual contact (MSM):

Injection Drug Use (IDU):

Heterosexual Contact:

Perinatal Transmission:

Hemophilia/Coagulation Disorder:

Receipt of transfusion of blood, blood components, or tissue:

Not Reported or Not Identified:


Check all the boxes that apply for HIV Risk Factors (modes of HIV transmission to the client.) These entries may be based on client self-report and/or the case manager's professional assessment.


VITAL ENROLLMENT STATUS

Find Client > Search Results > Demographics > Vital Enrollment Status


Save Cancel


Vital Enrollment Status


Enrollment Status: 

Enrollment Date: 

Latest Eligibility Status:

Vital Status: 

Case Closed Date: 

Date of Death: 

Select the appropriate Enrollment Status from the drop down menu.

This field is agency-specific.

For example, a client may have an Enrollment Status of

“Relocated”

at Crescent Care but “Active” at Southwest Louisiana AIDS Council.

ELIGIBILITY

01 Click **Add**

Find Client > Search Results > Demographics > Eligibility

View **Add** Edit Delete Back Print or Export

Eligibility History

Search:

Date	Is Eligible	Funding Source	Ryan White Funded	Co
03/02/2016	Yes	Part B_bf60	Yes	

A new record needs to be added for each Funding Source the client is eligible for.

Eligibility Records should be added:

- At the time of Enrollment
- At the time of Disenrollment
- Every 6 months when a client is actively enrolled

02 Complete the fields below and click **SAVE**

- Eligibility Date
- Is Eligible?
- Funding Source
- Current Review Type
- Next 6 Mos Review Due Date
- Appointment Date if Applicable
- Staff or Provider Name
- Comment

Save Cancel

Add

Eligibility Date:

Is Eligible:

Funding Source:

Current Review Type:

Next 6 Mos Review Due Date:

Appointment date if applicable:

Staff or Provider Name:

Comment:

Note: Current Review Type, Next 6 Mos Review Due Date, Appointment Date if Applicable and Staff or Provider Name are new fields and should be completed for each eligibility record.

HIV STATUS

HIV Status

HIV Status:



HIV+ Date:



Estimated?:

AIDS Date:



Estimated?:

COMMON NOTES

Common Notes are available to any agency that serves the client.

When you change information in one of the client's shared fields (e.g. address), put a notification in this box. Example: "12/1/2011 OT @ Agency: Updated address"

Common Notes

Common Notes:

```
8/12/2020 RP @SHHP Case Notes are seen across domains.  
12/1/15 MW @ SHP: merged duplicate client record  
  
10/15/15 JS @ CARES: updated client address and emergency contacts  
  
9/1/15 MW @ SHP: updated client address. Client moved to Lafayette.
```

PROVIDER NOTES

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.

Provider Notes

Provider Notes: 8/12/2020 RP: These notes are only seen at your agency. |

CLIENT INFORMATION

Client Information

Other Case Management Program:

Case Management Program:

Case Manager Assigned: Part A:

Case Manager Assigned: Part C:

Case Manager Assigned: Part B:

Case Manager Assigned: Part D:

Case Manager Assigned: Housing:

SSN:

Primary Language:

Secondary Language:

Non-logo mailing only:

Veteran:

Client Consent to Share:

EMERGENCY CONTACTS

Emergency Contacts

EmergContact1 Name:

EmergContact1 Relationship:

EmergContact1 Address1:

EmergContact1 Address2:

EmergContact1 City:

EmergContact1 State:

EmergContact1 Zip Code:

EmergContact1 Phone:

EmergContact1 Cell:


EmergContact1 Email:

EmergContact1 Comments:

LAHAP ELIG INFO

LA HAP Elig Info

Date Ramsell Data Generated:




Member ID_Ramsell:

Most Recent LA HAP Enrollment Status:


Most Recent LA HAP Group:

Most Recent LA HAP Plan:


Most Recent LA HAP Eligibility Start Date:




Most Recent LA HAP Eligibility End Date:



Most Recent LA HAP Plan Start Date:



Most Recent LA HAP Plan End Date:




Most Recent LA HAP Priv Ins Status:


Most Recent LA HAP Priv Ins Type:

Most Recent LA HAP Medicare Status:

Most Recent LA HAP Application First Received Date:

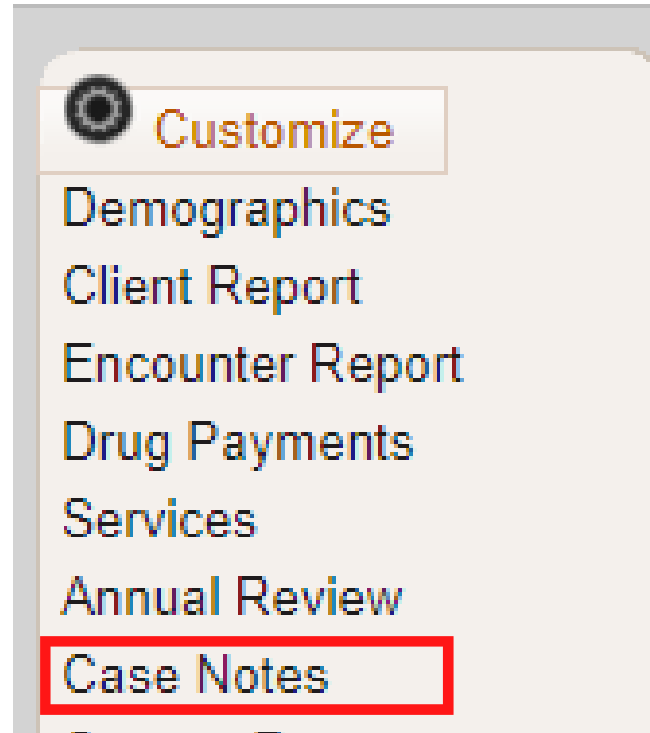


Most Recent LA HAP Application Completed Date:

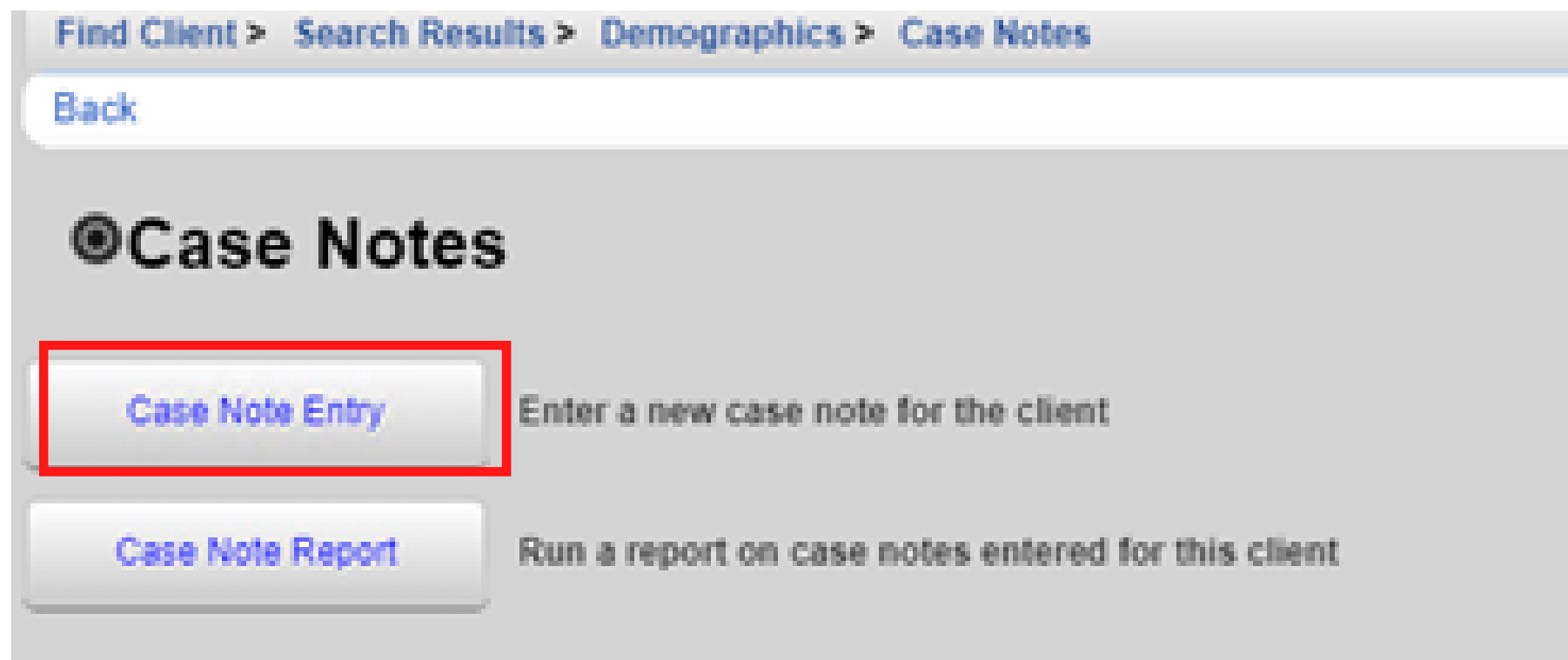


CASE NOTES

01 Select **Case Notes** from the main menu.



02 Select **Case Note Entry**.



03 Select **Add**.

Find Client > Search Results > Demographics > Case Notes > Case Note Entry

View **Add** Add With Templates Delete Manage Templates Help Back Print or E

Case Notes


Search:

Date	Provider	Author	Case Note
06/24/2019	LaCAN Derr		test

04 Enter the Case Note date, Author, and case note text and click **Save**.

Save Back

Add

Date: 

Add Service:

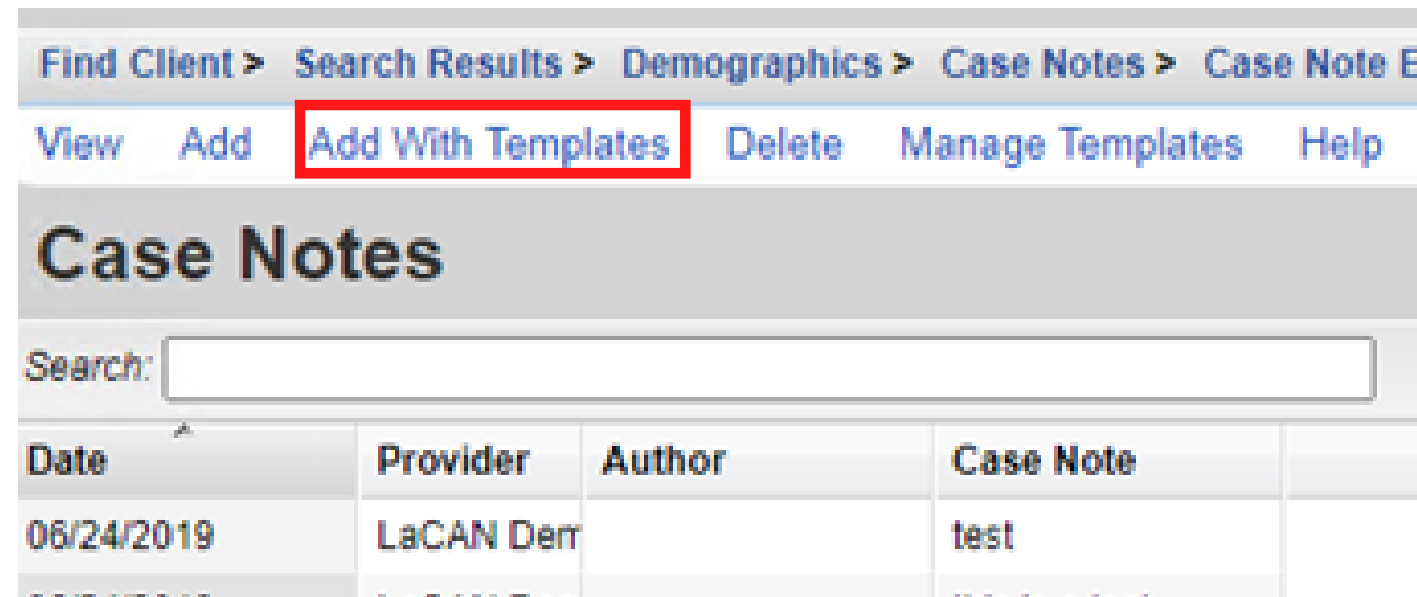
Author:

Case Note:

Note: If you want to add a service associated with the note, select **Add Service**.

CASE NOTES TEMPLATE

01 Click **Add With Templates**.



Find Client > Search Results > Demographics > Case Notes > Case Note E

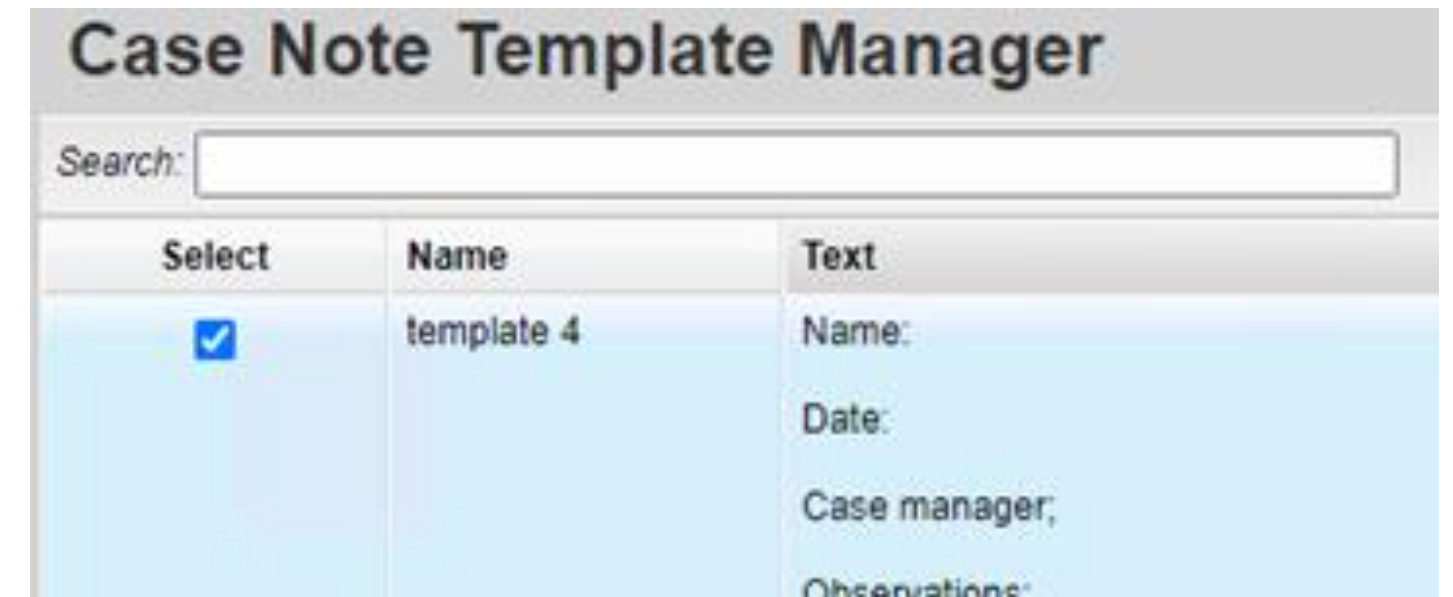
View Add **Add With Templates** Delete Manage Templates Help

Case Notes

Search:

Date	Provider	Author	Case Note
06/24/2019	LaCAN Derr		test

02 Check the box next to the template you would like to use and click **Continue Add With Templates**.

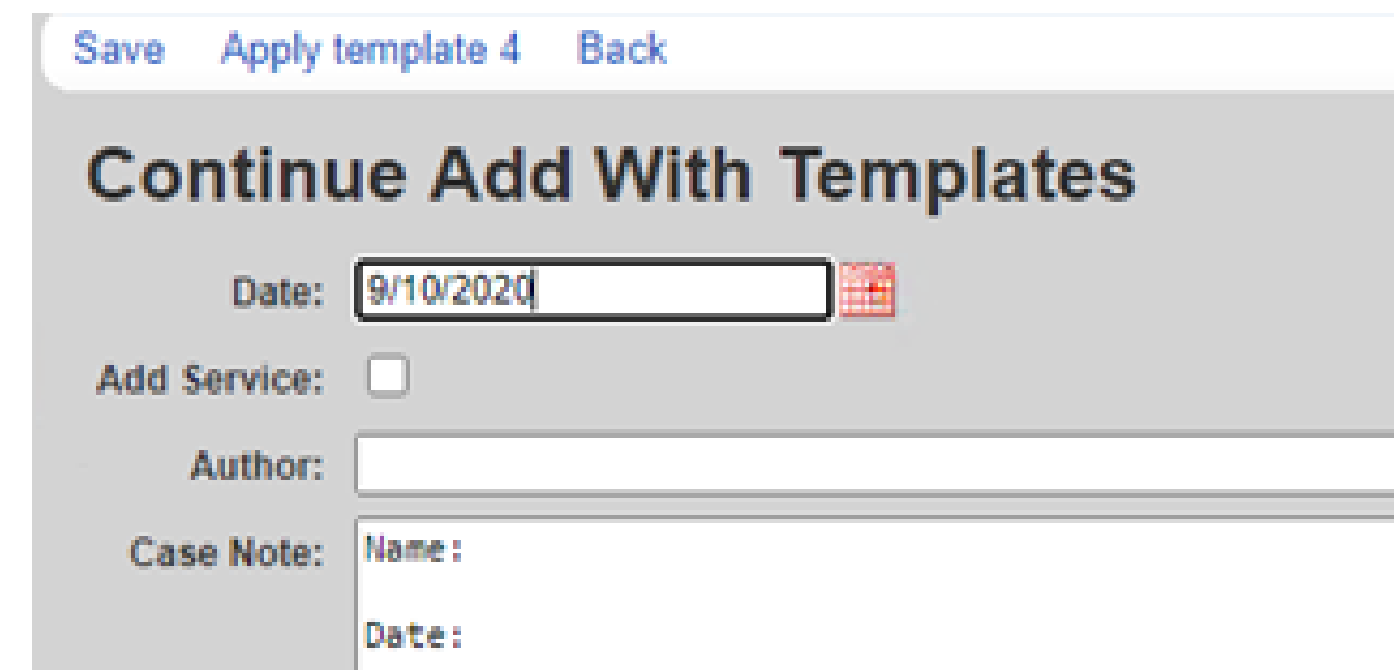


Case Note Template Manager

Search:


Select	Name	Text
<input checked="" type="checkbox"/>	template 4	Name: Date: Case manager; Observations:

03 Enter the Date of the Service, Author, and complete the Case Note in the format you have selected and click **Save**.



Save Apply template 4 Back

Continue Add With Templates

Date: 

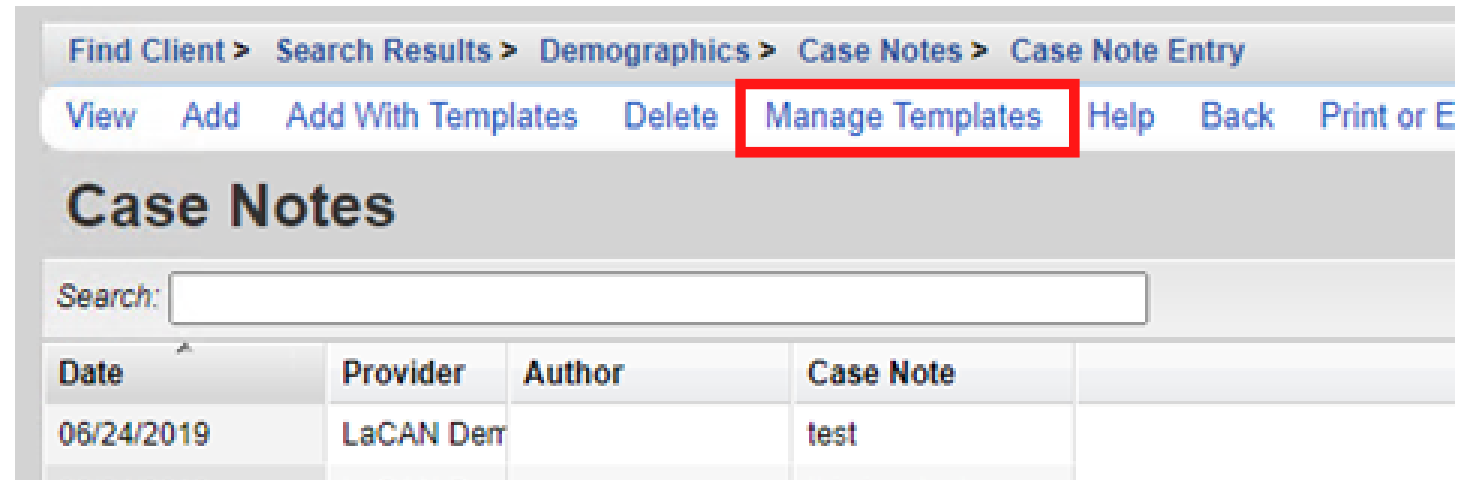
Add Service:

Author:

Case Note: Name:
Date:

ADDING A NEW TEMPLATE

01 Click **Manage Templates**.



Find Client > Search Results > Demographics > Case Notes > Case Note Entry

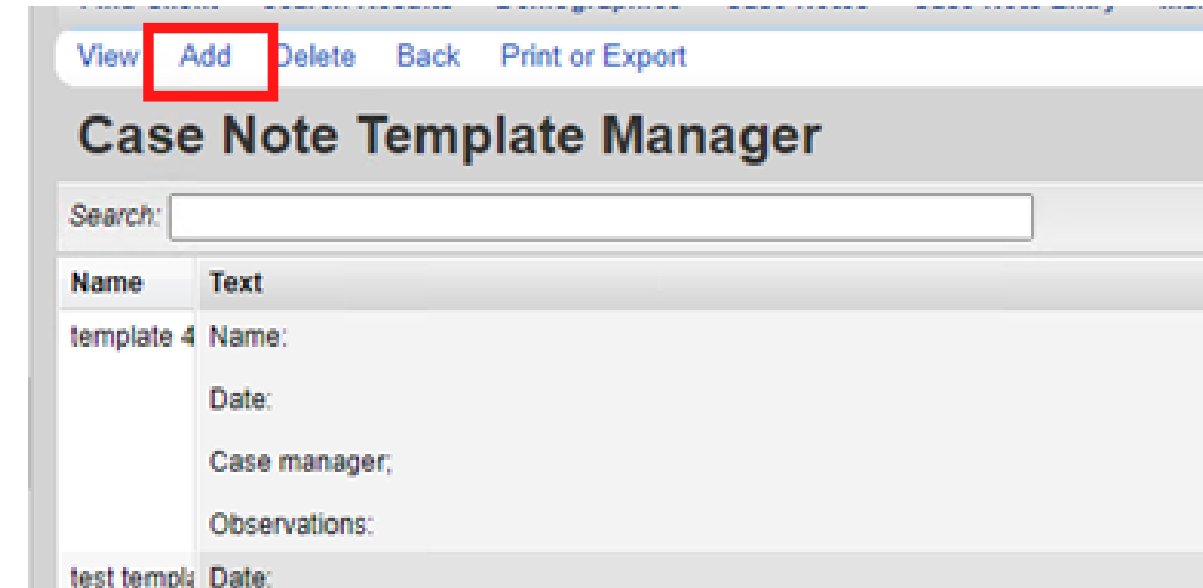
View Add Add With Templates Delete **Manage Templates** Help Back Print or E

Case Notes

Search:

Date	Provider	Author	Case Note
06/24/2019	LaCAN Derr		test

02 Click **Add**.



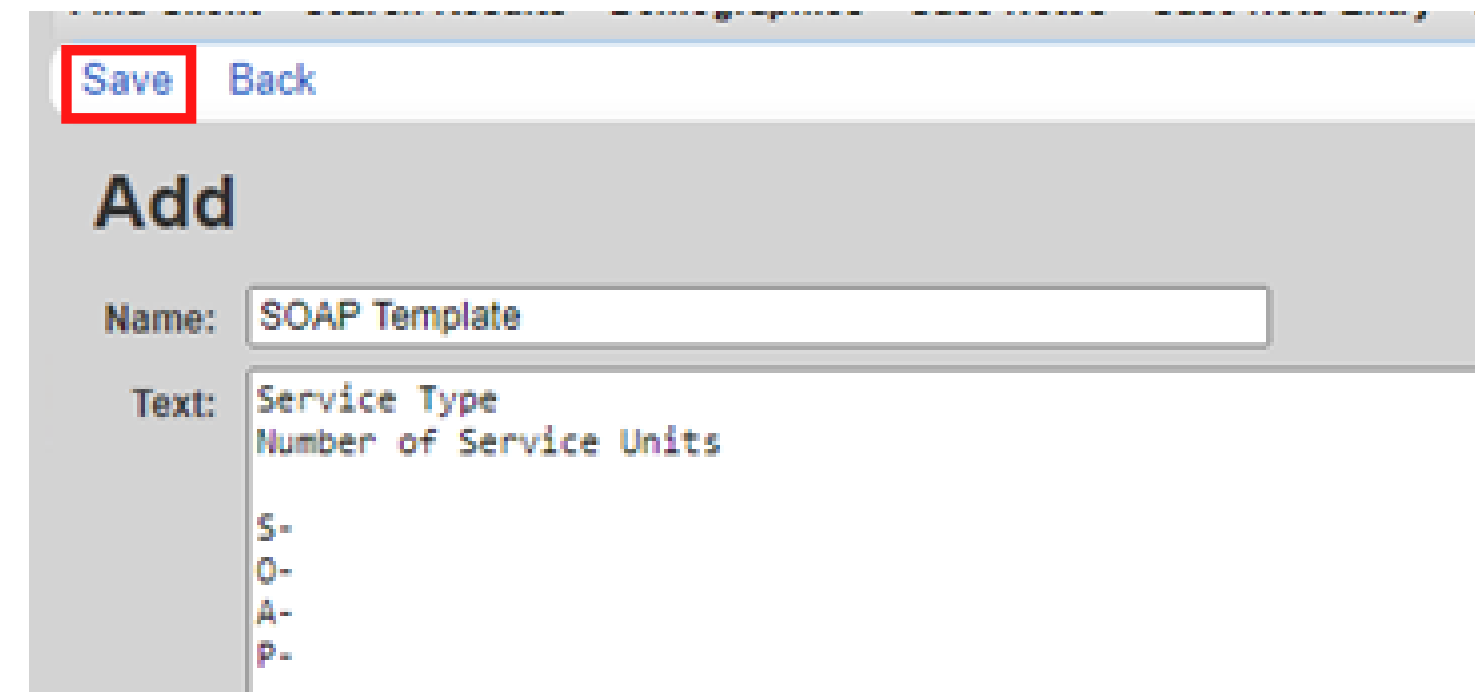
View **Add** Delete Back Print or Export

Case Note Template Manager

Search:

Name	Text
template 4	Name: Date: Case manager; Observations:
test templ	Date:

03 Create a name for your Template, type out template format you would like to use and click **Save**.



Save Back

Add

Name:

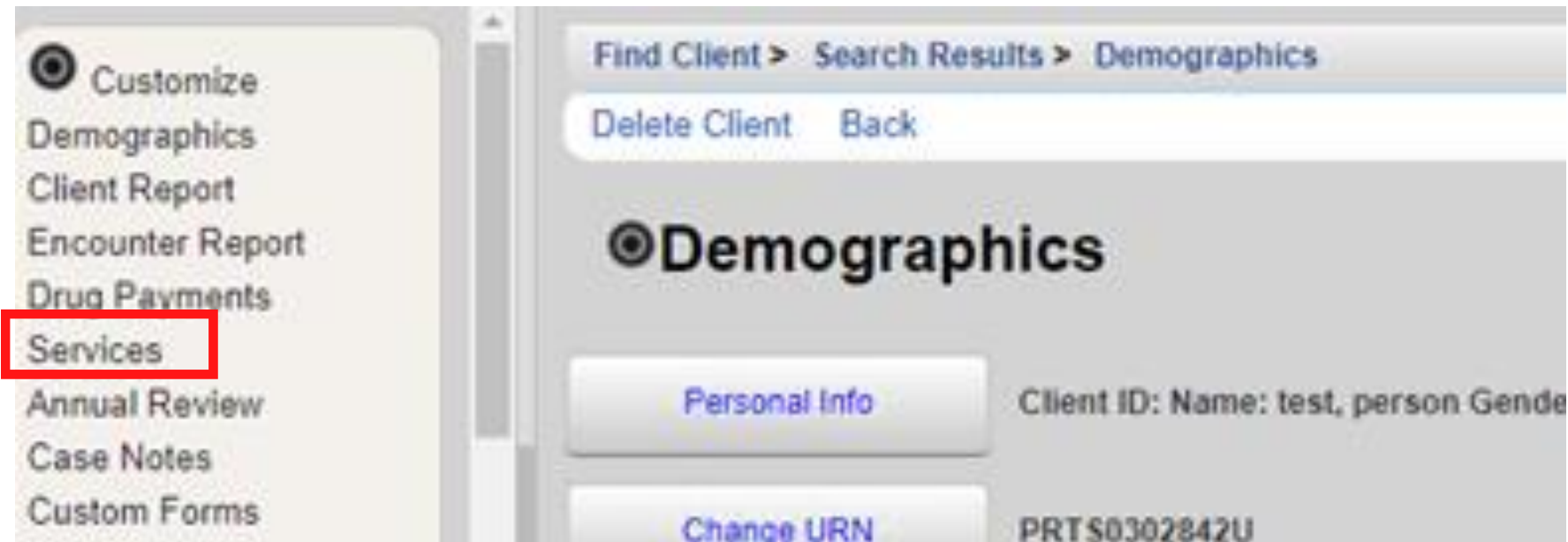
Text:

```
Service Type
Number of Service Units

S-
O-
A-
P-
```

SERVICES

01 Click **Services** from the Menu of Links.



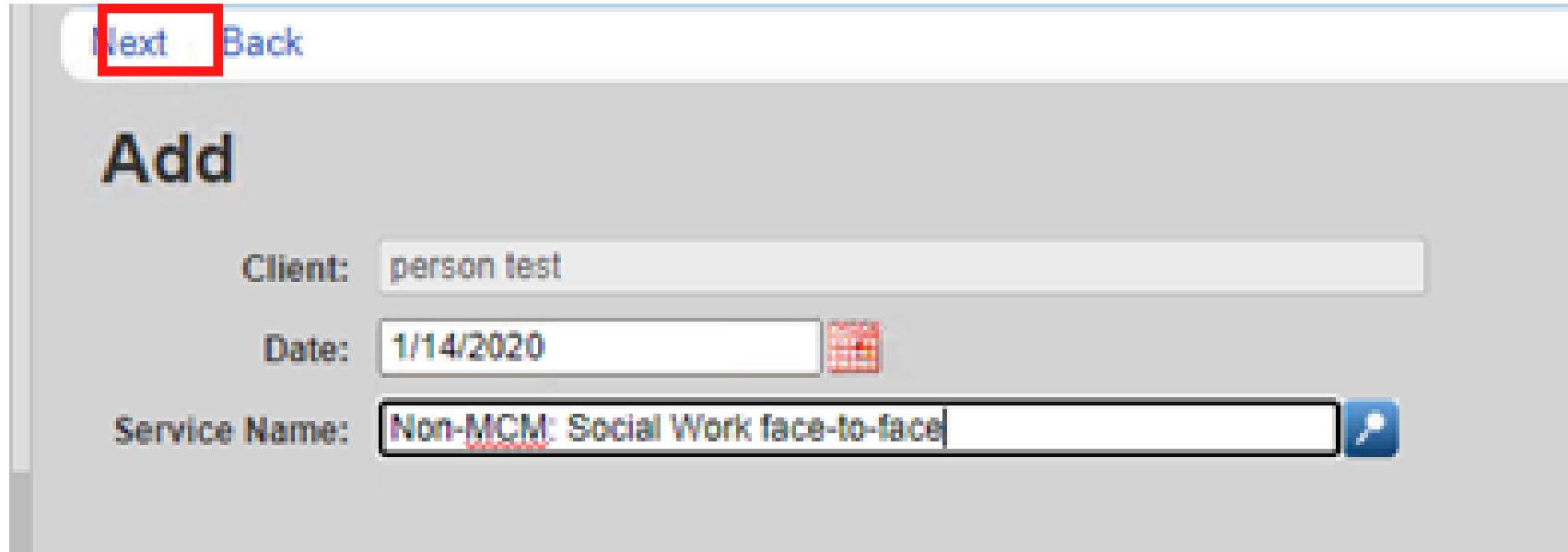
02 The Services screen will now be displayed. Click **Add**.

The screenshot shows the 'Services' screen. At the top, there is a breadcrumb trail: 'Find Client > Search Results > Demographics > Services'. Below this is a navigation bar with buttons: View, Add (highlighted with a red box), Delete, Receipts, Help, and Print or Export. Below the navigation bar is a search field labeled 'Search:'. Below the search field is a table with the following data:

Date	Subservice	Contract	Units	Price	Total	Amount Received	Provider	Staff or P	Re
02/07/2020	Health Models Discl	CAPUS Health Mod	1	\$0.00	\$0.00	\$0.00	LaCAN Derr		
10/11/2019	Non-MCM: Other St	LaCAN Part B Dem	1	\$0.00	\$0.00	\$0.00	LaCAN Derr		

03

Select Service Name from the Subservice drop-down list, previously setup in CAREWare for each funded provider. Select the desired service and click **Next**.



Next Back

Add

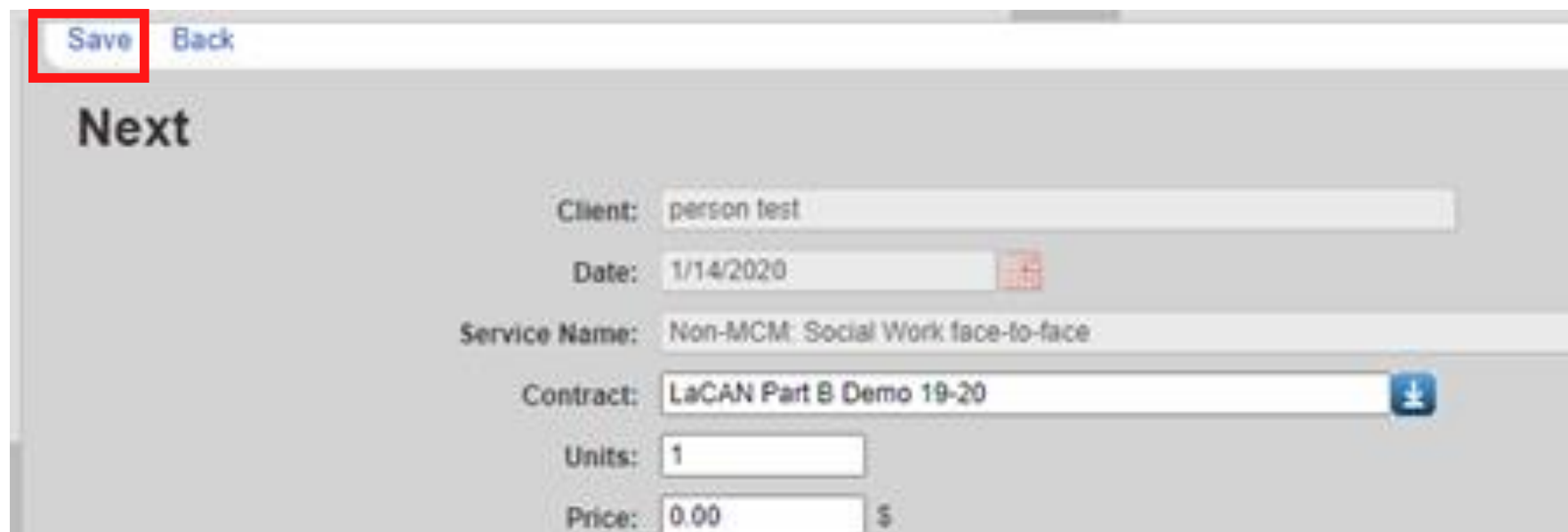
Client: person test

Date: 1/14/2020

Service Name: Non-MCM: Social Work face-to-face

04

Enter the Contract for this service, and any other necessary information, such as Units, Price, total and any fields required for the service. Once complete, click **Save**.



Save Back

Next

Client: person test

Date: 1/14/2020

Service Name: Non-MCM: Social Work face-to-face

Contract: LaCAN Part B Demo 19-20

Units: 1

Price: 0.00 \$

EDITING A SERVICE

01 To edit a previously entered service, click on the service you would like to edit and click **View**.

Date	Subservice	Contract	Units	Price	Total	Amount Received	Provider
02/07/2020	Health Models Disc	CAPUS Health Mod	1	\$0.00	\$0.00	\$0.00	LaCAN C
10/11/2019	Non-MCM: Other St	LaCAN Part B Dem	1	\$0.00	\$0.00	\$0.00	LaCAN C

02 Click **Edit**, make any edits you need to, then click **Save**.

Provider: LaCAN Demo

Date: 10/11/2019

Service Name: Non-MCM: Other Staff non-face-to-face

Contract: LaCAN Part B Demo 19-20

Units: 1

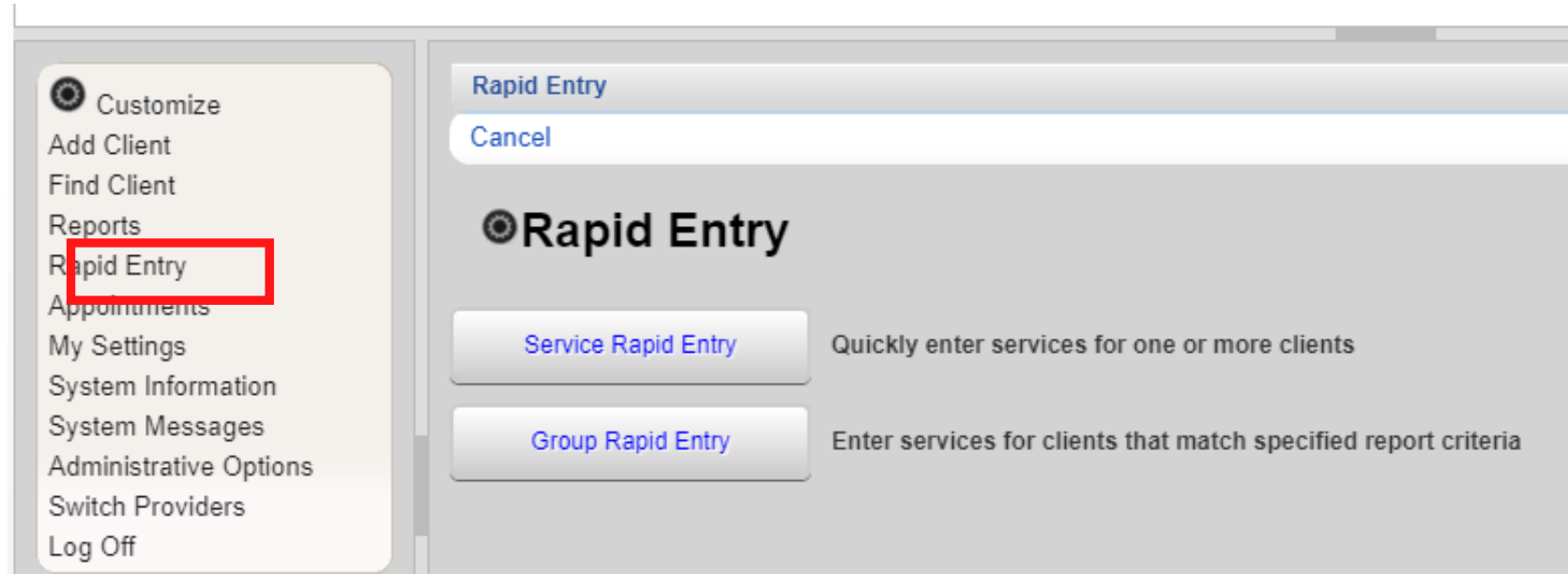
Price: 0.00 \$

Total: 0.00 \$

Staff or Provider Name:

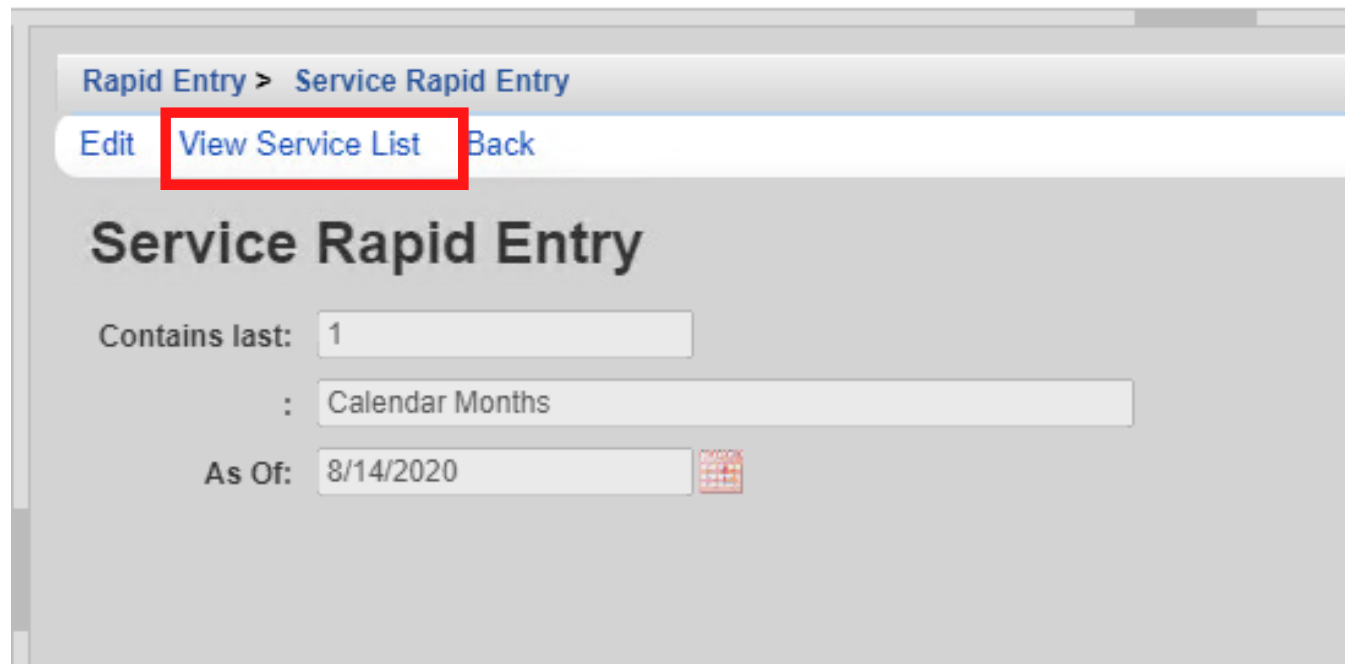
RAPID SERVICE ENTRY

01 Select **Rapid Entry** from the Main Menu

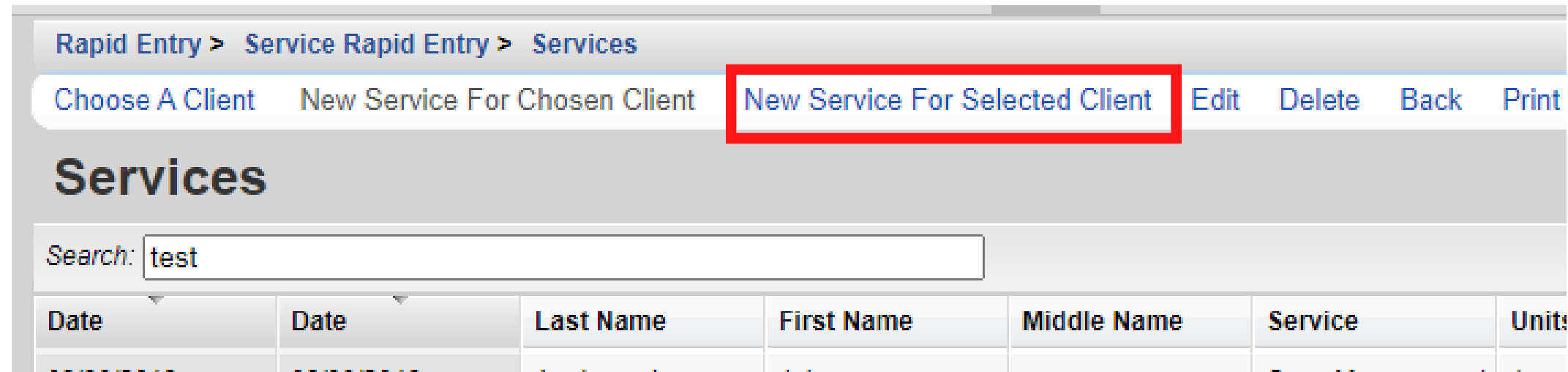


02 Select **Service Rapid Entry**

03 Click **View Service List**



04 Search for the client you are entering the service for and click **New Service for Selected Client**



Rapid Entry > Service Rapid Entry > Services

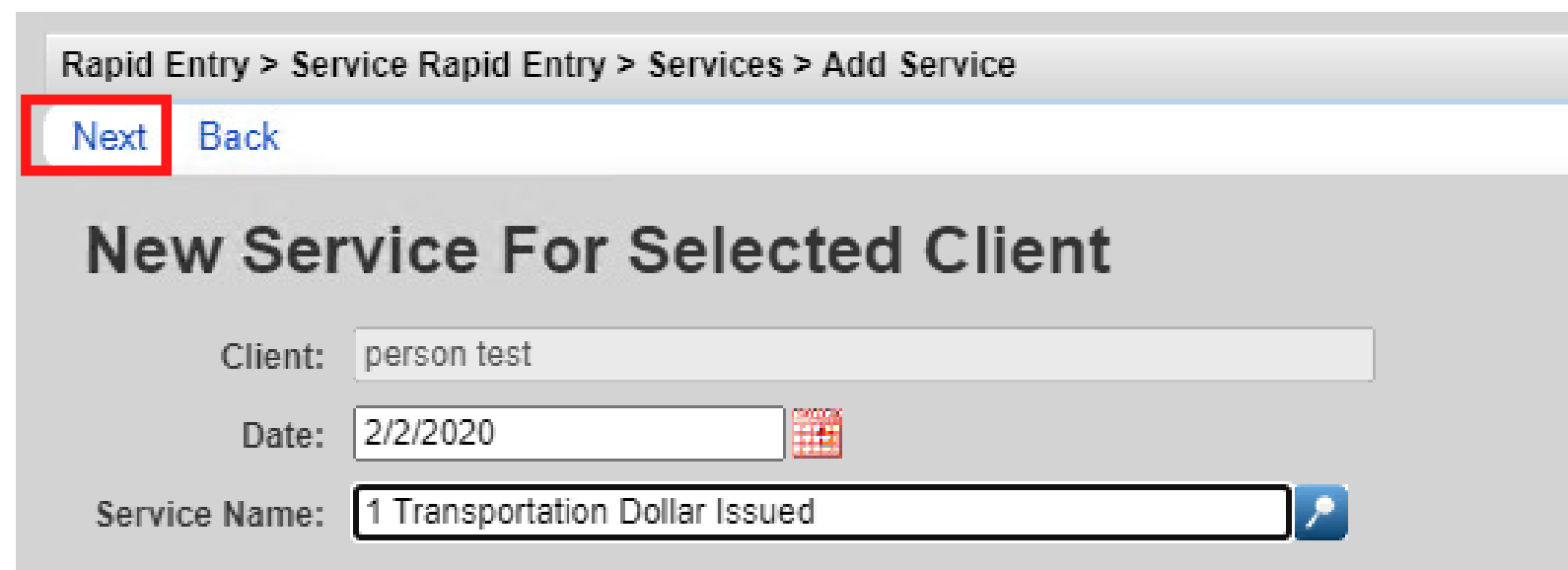
Choose A Client New Service For Chosen Client **New Service For Selected Client** Edit Delete Back Print

Services

Search: test

Date	Date	Last Name	First Name	Middle Name	Service	Units

05 Enter the Date of service and the Service Name then click **Next**.



Rapid Entry > Service Rapid Entry > Services > Add Service

Next Back

New Service For Selected Client

Client: person test

Date: 2/2/2020

Service Name: 1 Transportation Dollar Issued

06 Enter the Contract for this service, and any other necessary information, such as Units, Price, Total and any fields required for the service. Once complete, click **Save**.

ANNUAL REVIEW

Annually, CAREWare users are required to review and update two annual review fields and one screening for all RWHAP eligible clients. These fields are:

- Housing Arrangement (found within the Annual Screenings tab)
- Insurance Assessments
- Poverty Level Assessments

These three fields are RSR-required data elements for clients that received ANY service in the reporting year.

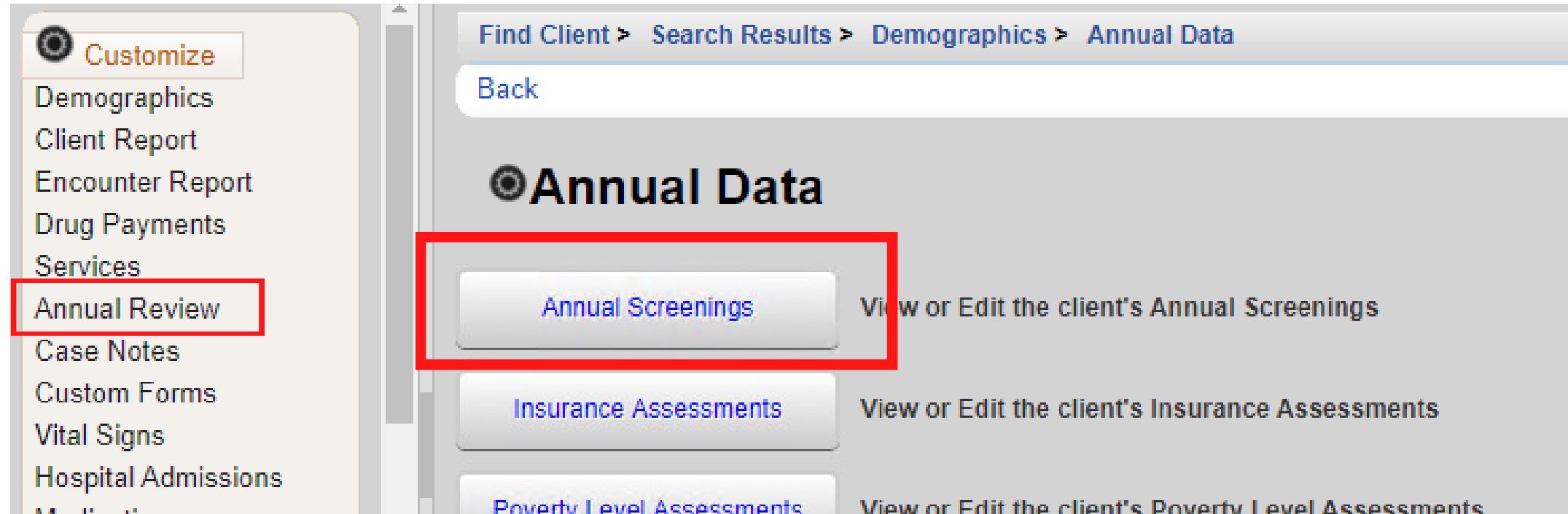
There are also three additional annual screenings (as of the 2019 RSR, these screenings are no longer RSR-required data elements):

- HIV Risk Reduction Counseling
- Mental Health
- Substance Abuse

ANNUAL SCREENINGS

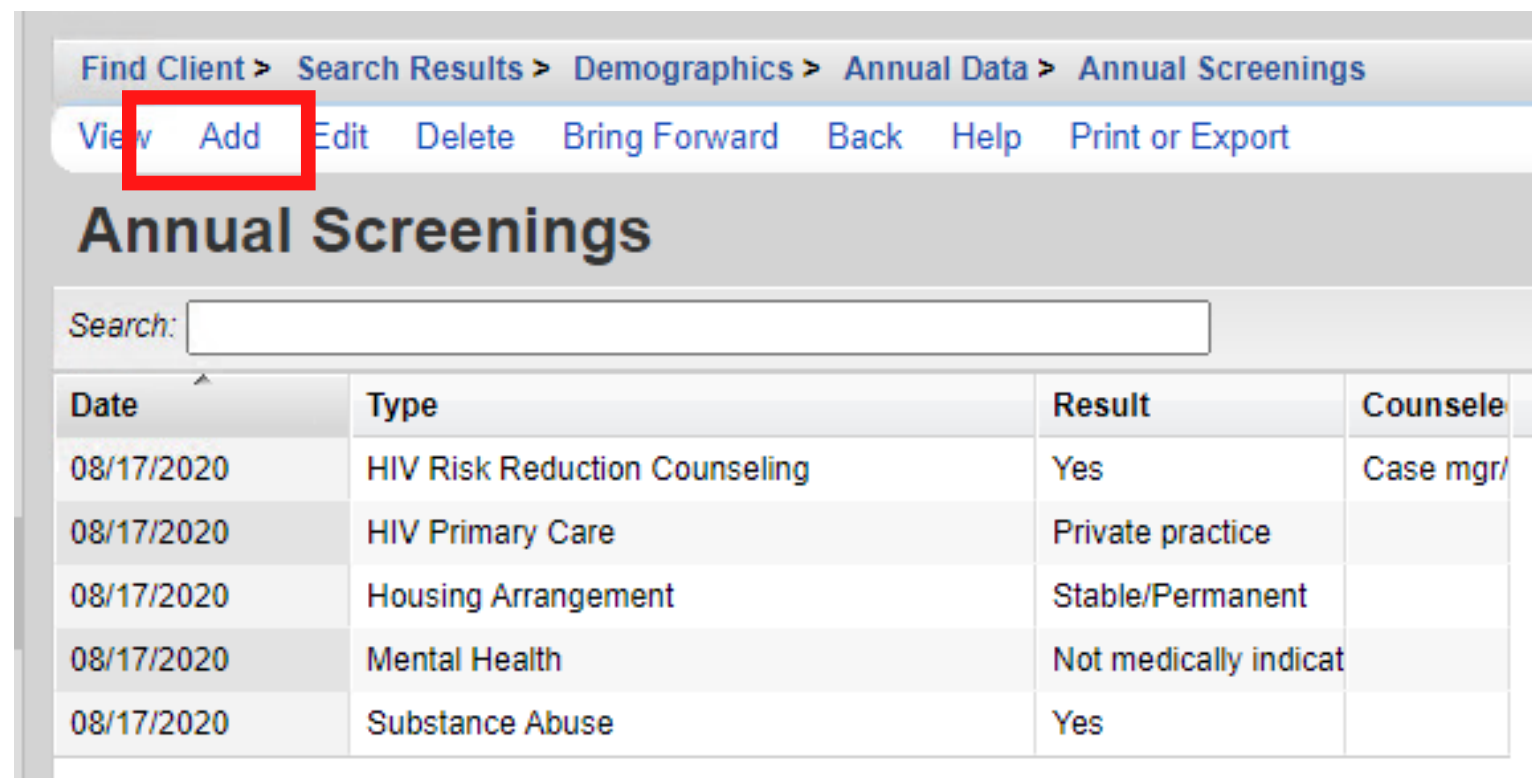
01

Select **Annual Review** from the menu on the left side of the screen. Then Select **Annual Screenings**.



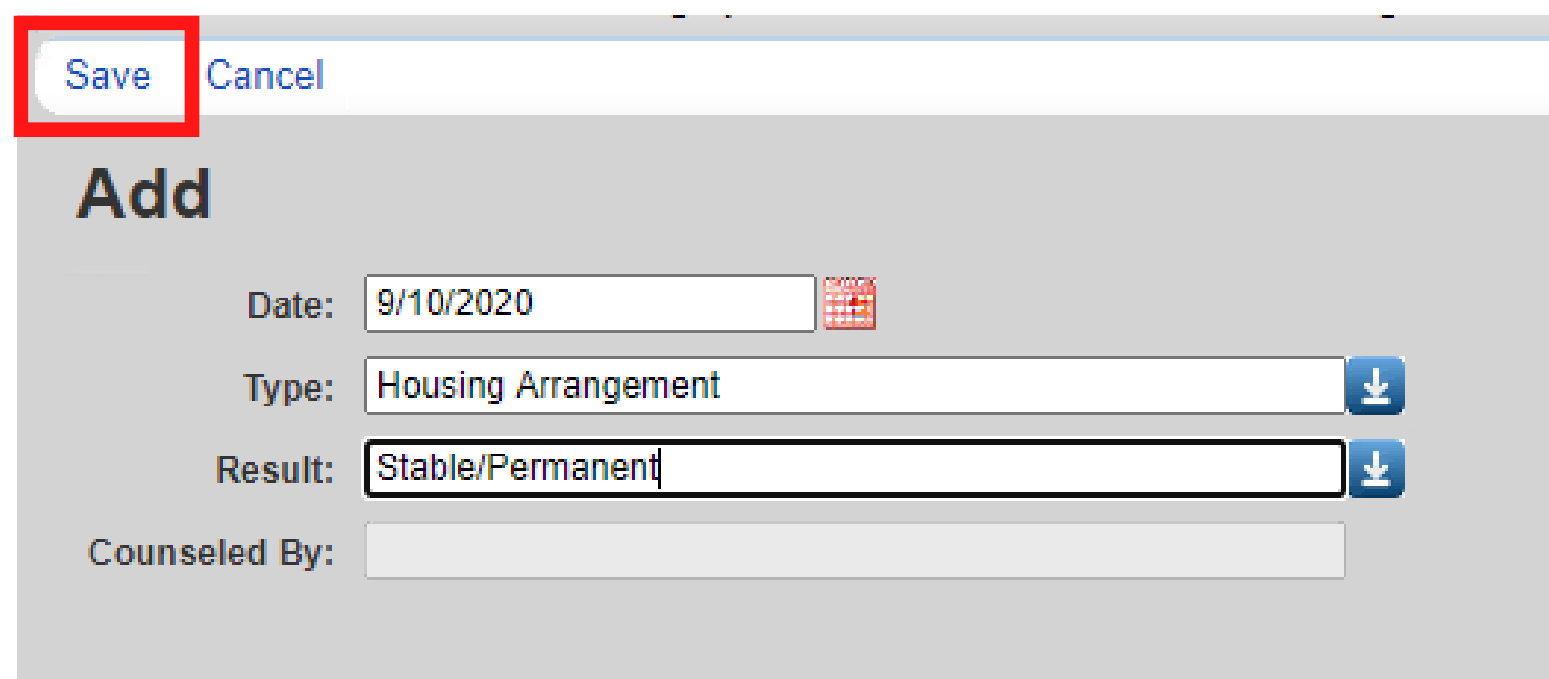
02

On the next page, click **Add**.



03

Enter Date and select Type, Result, and Counseled By (if applicable) from the drop-down lists. Once all information is entered, click **Save**.



The screenshot shows a web form titled "Add" with the following fields and controls:

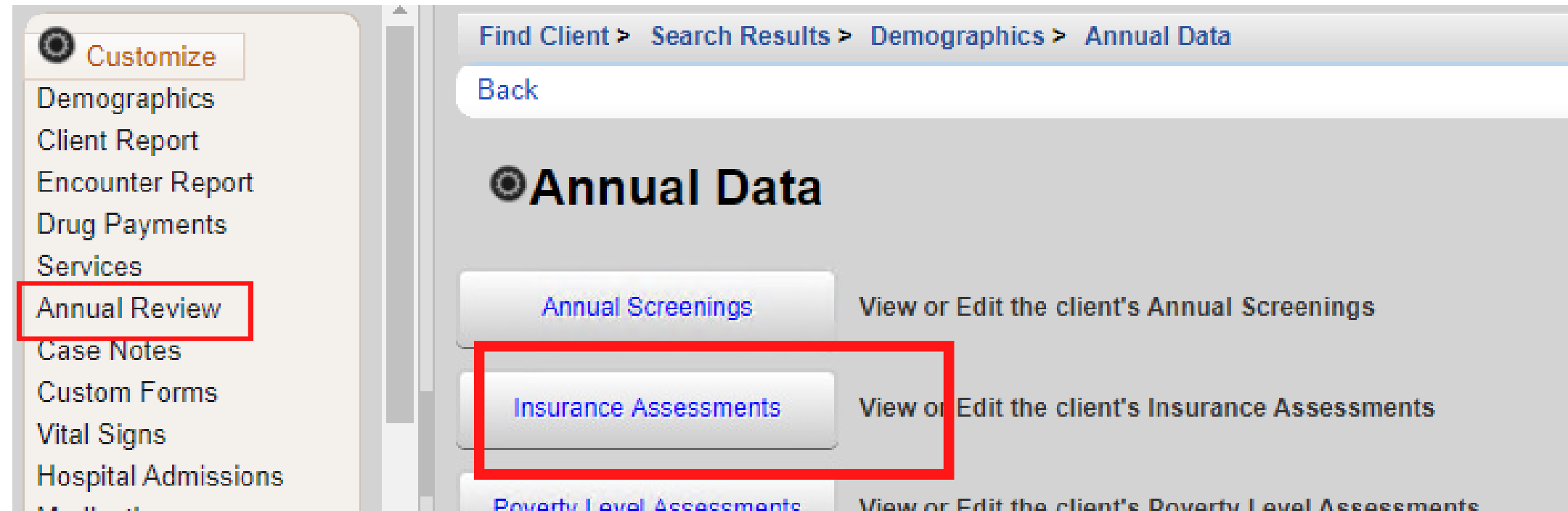
- Save** button: Highlighted with a red rectangular box.
- Cancel** button: Located to the right of the Save button.
- Date:** A text input field containing "9/10/2020" with a calendar icon to its right.
- Type:** A drop-down menu with "Housing Arrangement" selected and a downward arrow icon to its right.
- Result:** A drop-down menu with "Stable/Permanent" selected and a downward arrow icon to its right.
- Counseled By:** An empty text input field.

The following Types are available in the drop-down list. Refer to the guidance below regarding the Result field:

- HIV Risk Reduction Counseling– If the counseling has been provided, select the appropriate authorized counselor who performed it.
- Housing Arrangement - Please refer to HRSA guidelines to determine the difference between stable/permanent, temporary, and unstable.
- Mental Health – Select Yes, No, or Not Medically Indicated, if applicable.
- Substance Abuse – Select Yes, No, or Not Medically Indicated, if applicable.
- HIV Primary Care – Enter the location where the client receives their primary HIV medical care.

INSURANCE ASSESSMENTS

01 Select **Annual Review** from the menu on the left side of the screen. Then Select **Insurance Assessments**.



02 On the next page, click **Add**.

The screenshot shows the 'Insurance Assessments' table. At the top, there is a toolbar with buttons: 'View', 'Add' (highlighted with a red box), 'Edit', 'Delete', 'Bring Forward', 'Back', 'Help', and 'Print or Export'. Below the toolbar is a search bar labeled 'Search:'. The table has four columns: 'Date', 'Primary Insurance', 'Secondary Insurance', and 'High Risk Insurance'. The first row of data shows the date '09/10/2020' and 'Private - Individual' under the 'Primary Insurance' column.

Date	Primary Insurance	Secondary Insurance	High Risk Insurance
09/10/2020	Private - Individual		


03 Enter Insurance Assessment Date, then select the client's Primary Insurance from the drop-down list. Once the value is selected from the drop-down list for primary insurance, the value will automatically be checked in the list below..


04 Select secondary insurance/other insurance using the checkboxes, as applicable. Click **Save**.

Find Client > Search Results > Demographics > Annual Data > Insurance Assessments > Add

Save Cancel

Add

Insurance Assessment Date: 3/6/2019 

Primary Insurance: Medicaid 

Private Individual:

Private Employer:

Medicare Part A/B:

Medicare Part D:

Full LIS:

Medicare (Part unspecified):

Medicaid:

VA, Other Military:

IHS:

Other Public:

Other:

Other Insurance Specify:

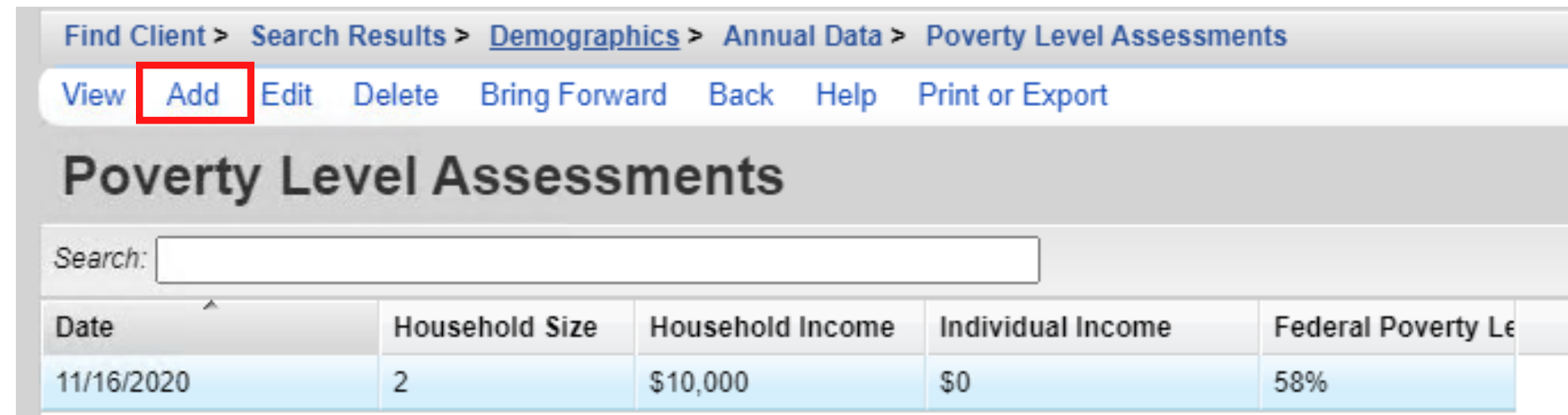
High Risk Insurance Pool:

Insurer:

POVERTY LEVEL ASSESSMENTS

01 Select **Annual Review** from the menu on the left side of the screen. Then Select **Poverty Level Assessments**.

02 On the next page, click **Add**.



Find Client > Search Results > Demographics > Annual Data > Poverty Level Assessments

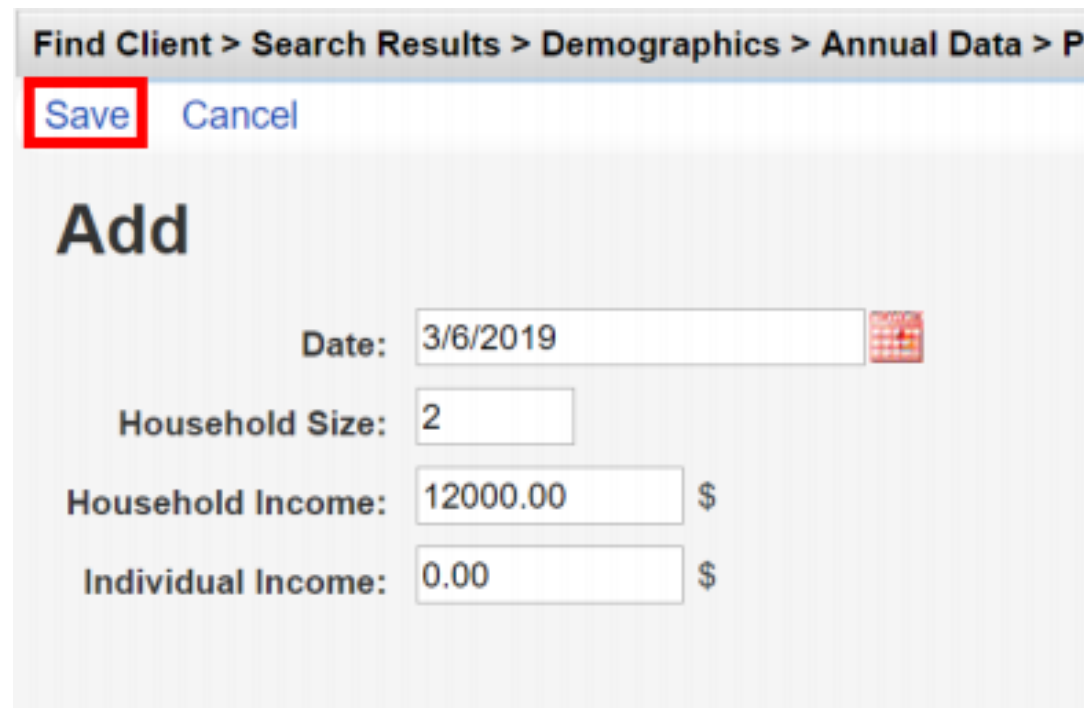
View **Add** Edit Delete Bring Forward Back Help Print or Export

Poverty Level Assessments

Search:

Date	Household Size	Household Income	Individual Income	Federal Poverty Le
11/16/2020	2	\$10,000	\$0	58%


03 Enter Date, Household Size, and Household Income. Click **Save**.



Find Client > Search Results > Demographics > Annual Data > P

Save Cancel

Add

Date: 

Household Size:

Household Income: \$

Individual Income: \$

Note:
Entry of Individual Income is optional. It is used in the Cap on Charges feature.

BRING FORWARD

01 Select **Bring Forward**



Find Client > Search Results > Demographics > Annual Data > Poverty Level Assessments

View Add Edit Delete **Bring Forward** Back Help Print or Export

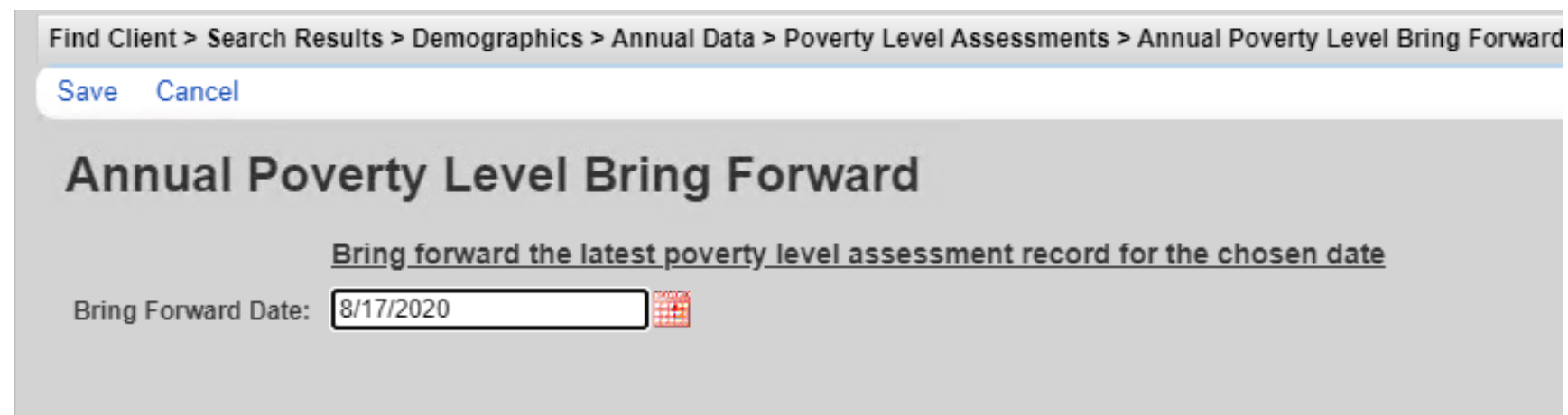
Poverty Level Assessments

Search:

Date	Household Size	Household Income	Individual Income	Federal Po
08/17/2019	1	\$13,000	\$13,000	104%

If the Household income and size are staying the same at the time of your recertification, you can bring that information forward in a new record.

02 Select the date you are recertifying and click **Save**.




Find Client > Search Results > Demographics > Annual Data > Poverty Level Assessments > Annual Poverty Level Bring Forward

Save Cancel

Annual Poverty Level Bring Forward

Bring forward the latest poverty level assessment record for the chosen date

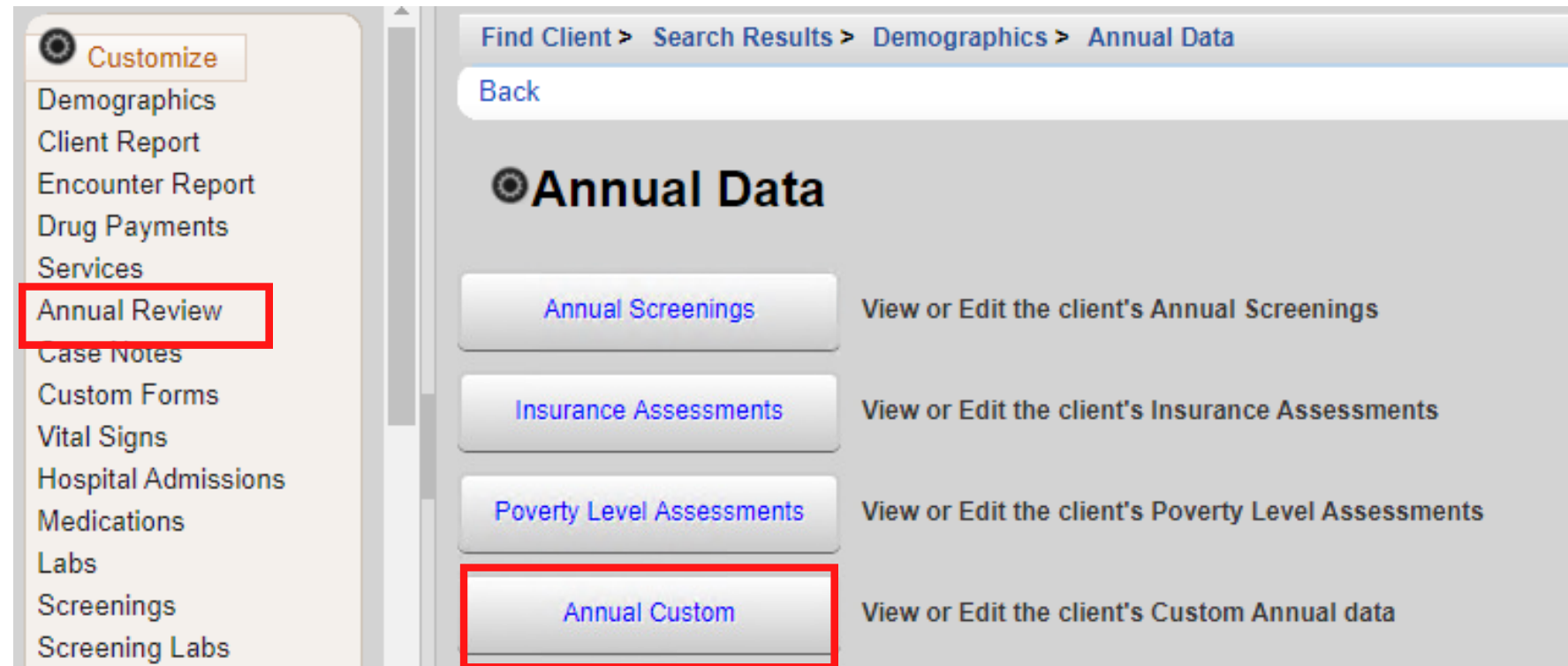
Bring Forward Date: 

A new record with the Bring Forward date will be created.

ANNUAL CUSTOM

These fields should be completed at the same time as those on the Annual screen. Fields with “NOLA” in them are not required for agencies not funded by New Orleans Part A.

01 Select Annual Review from the menu on the left side of the screen. Then Select **Annual Custom**



02 Enter Date, Household Size, and Household Income. Click **Save**.


The screenshot shows the 'Annual Custom' data entry screen. At the top is a breadcrumb trail: 'Find Client > Search Results > Demographics > Annual Data > Annual Custom'. Below the breadcrumb are several action buttons: 'View', 'Add' (highlighted with a red box), 'Edit', 'Back', 'Help', and 'Print or Export'. The main heading is 'Annual Custom'. Below the heading is a search box labeled 'Search:'. Below the search box is a table with the following columns: Year, Education Level, Employment Status, Annual Marital Status, Instructions for Enterin, Primary Income Source, and Prii. The table contains four rows of data for the years 2019, 2018, 2017, and 2016. The 'Instructions for Enterin' column contains the URL 'http://new.dhh.louisiana.g' for each row.


Year	Education Level	Employment Status	Annual Marital Status	Instructions for Enterin	Primary Income Source	Prii
2019				http://new.dhh.louisiana.g		
2018				http://new.dhh.louisiana.g		
2017				http://new.dhh.louisiana.g		
2016				http://new.dhh.louisiana.g		


03 Complete the fields, then click **Save**.


Save Cancel

Add


Year: 


Education Level: 

Employment Status: 

Annual Marital Status: 


Instructions for Entering Custom Annual Data: <http://new.dhh.louisiana.gov/index.cfm/page/1147>


Primary Income Source: 


Primary Care Source: 


Number of children in HH:

Number of HIV+ children in HH:

Has client been incarcerated?: 

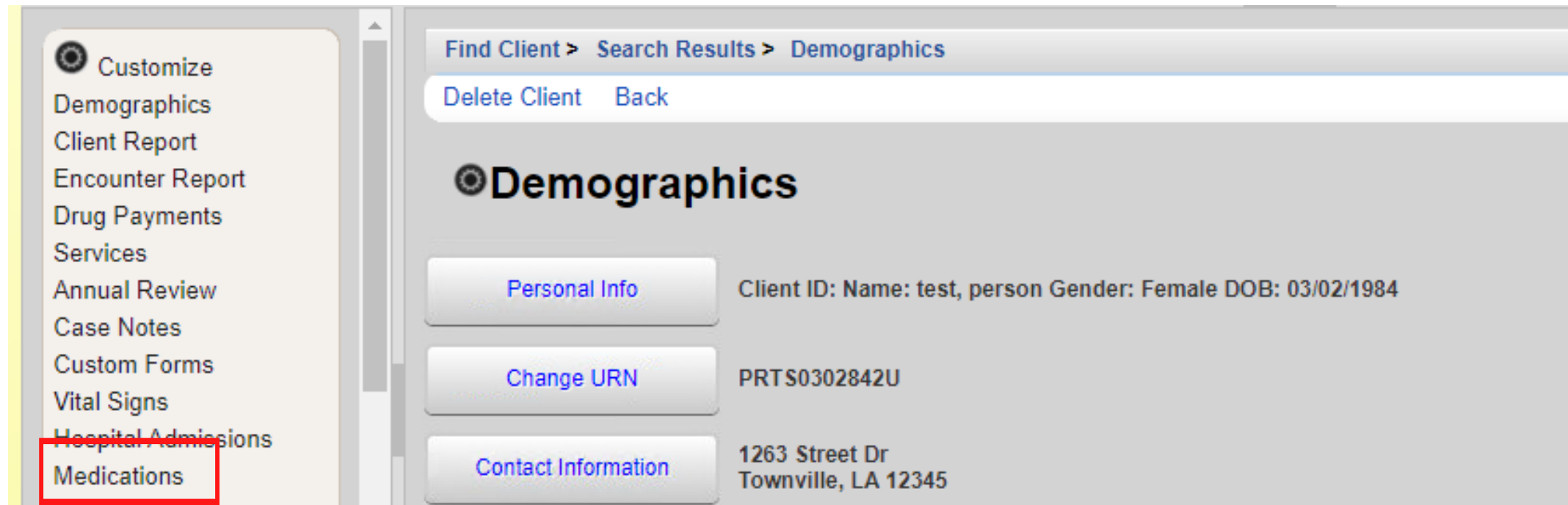
ADAP Card Date Received by Agency: 

Date entered PMC in current year: 

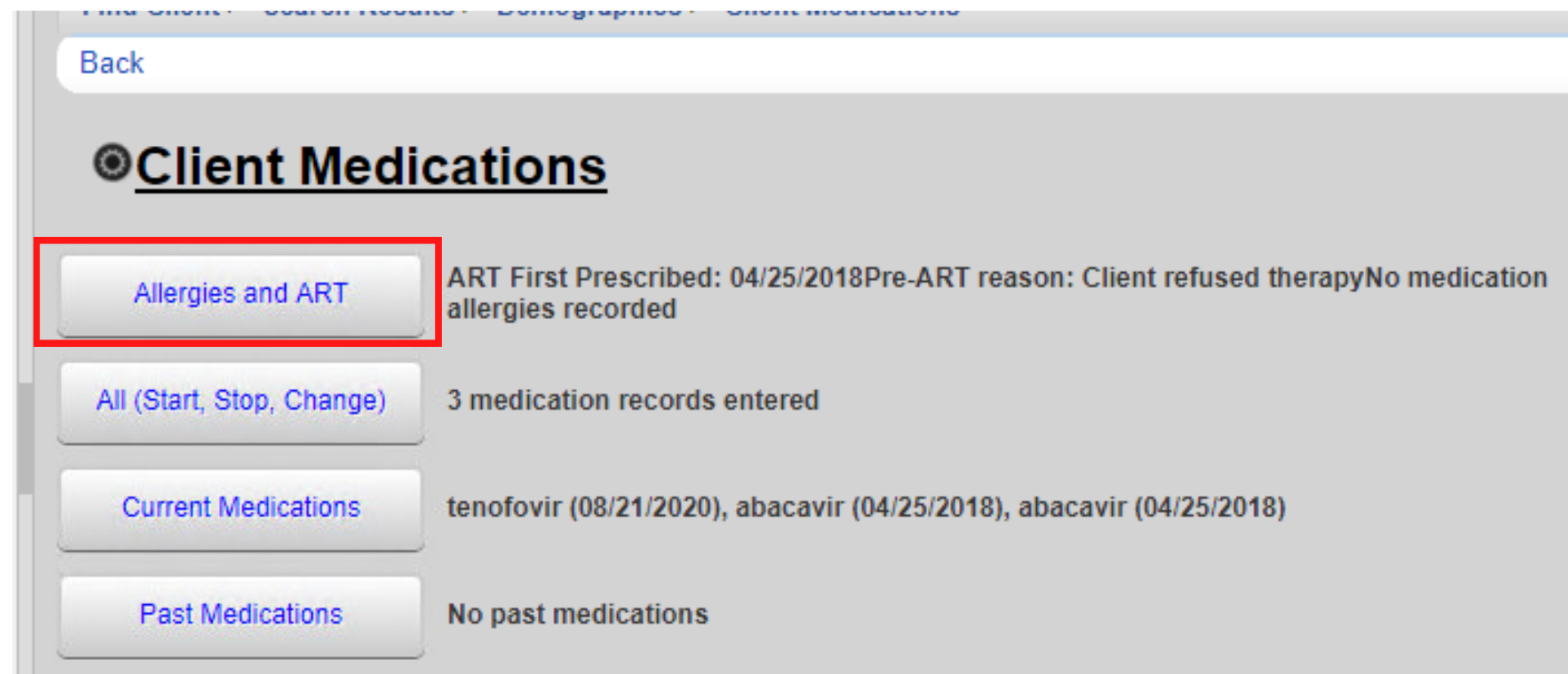
Part A NOLA Enrollment Status: 

MEDICATION

01 From the Demographics screen, select **Medications** from the Menu of Links.



02 Select **Allergies and ART**.



03 Select **Edit** to enter allergies and ART information

The screenshot shows the 'Allergies and ART' form. At the top left, there are two buttons: 'Edit' (highlighted with a red box) and 'Back'. Below the title, there is a large text area labeled 'Allergies:'. At the bottom, there are two input fields: 'ART Prescribed Date: 4/25/2018' with a calendar icon, and 'Pre-ART Reason: Client refused therapy'.

04 After making the desired edits, click **Save** and then **Back** (see previous screenshot) to return to the Client Medications screen.

The screenshot shows the 'Allergies and ART' form with a breadcrumb trail at the top: 'Find Client > Search Results > Demographics > Client Medications > Allergies and ART > Edit'. Below the breadcrumb, there are 'Save' and 'Cancel' buttons. The 'Allergies and ART' title is centered. Below it, there is a large text area labeled 'Allergies:'. At the bottom, there are two input fields: 'ART Prescribed Date: 4/25/2018' with a calendar icon, and 'Pre-ART Reason: Client refused therapy' with a dropdown arrow. The dropdown menu is open, showing the following options: 'Client refused therapy' (highlighted), 'Client not ready (as determined by clinician)', 'Other extenuating circumstances (e.g. inadequate insurance, ability to pay)', and 'Treatment not medically indicated per guidelines'.

05 From the Client Medications screen, select All (**Start Stop, Change**).

The screenshot shows the 'Client Medications' interface. At the top, there is a 'Back' button. Below it, the title 'Client Medications' is displayed. A red box highlights the 'Allergies and ART' button. To its right, text reads: 'ART First Prescribed: 04/25/2018 Pre-ART reason: Client refused therapy No medication allergies recorded'. Below this, there are four buttons: 'All (Start, Stop, Change)', 'Current Medications', and 'Past Medications'. The text next to 'All (Start, Stop, Change)' says '3 medication records entered'. The text next to 'Current Medications' lists 'tenofovir (08/21/2020), abacavir (04/25/2018), abacavir (04/25/2018)'. The text next to 'Past Medications' says 'No past medications'.

06 Select **Start** to enter a new client medication.

The screenshot shows the 'All (Start, Stop, Change)' medication list. At the top, there is a navigation bar with buttons: 'View', 'Start', 'Start Regimen', 'Stop', 'Delete', 'Back', and 'Print or Export'. The 'Start' button is highlighted with a red box. Below the navigation bar, the title 'All (Start, Stop, Change)' is displayed. Underneath is a search bar labeled 'Search:'. Below the search bar is a table with the following columns: 'Medication Name', 'Abbreviation', 'Form', 'Units', 'Strength (mg)', and 'Do'. The table contains three rows of data:

Medication Name	Abbreviation	Form	Units	Strength (mg)	Do
tenofovir	TDF		23	300	69
abacavir	ABC	Solution	1	90	90
abacavir	ABC	Solution	1	90	90


07

Enter the following information (as applicable):

- Start Date
- Medication Name – enter the first few letters of the medication to filter results
- Units – number of days of the prescription, (30-day or 90-day)
- Form – type, capsule, tablet, etc. (optional)
- Strength – in milligrams •
- Frequency – once a day, twice a day, etc.
- Indication – reason the medication is prescribed. The default indication is ART (Anti-retroviral Therapy)
- OI – opportunistic infection (as applicable)
- Comment – optional
- Instructions – optional

Save Back

Start

Start Date: 

Medication Name:

Units:

Form:

Strength: mg

Frequency:

Med ICD10:

Indication:

OI:

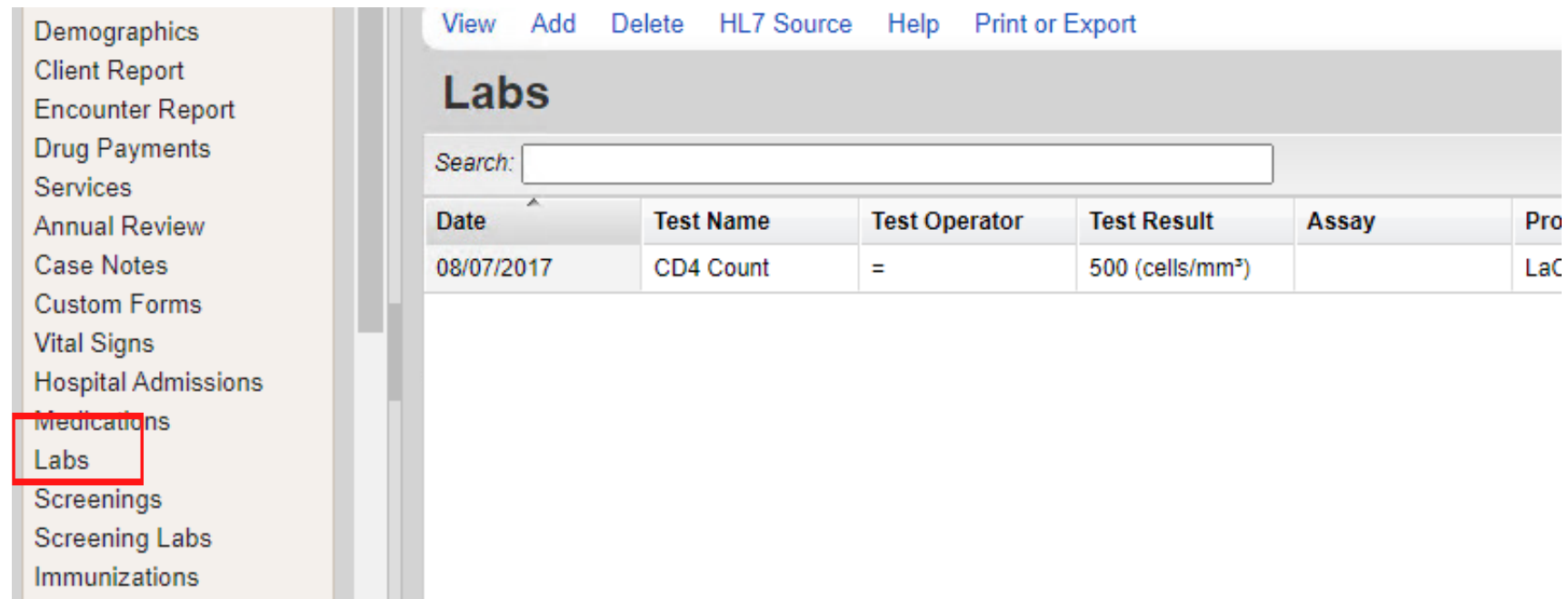
Comment:

Instructions:

LABS



01 From the Demographics screen, select **Labs** from the Menu of Links. On the Labs screen, click **Add**.

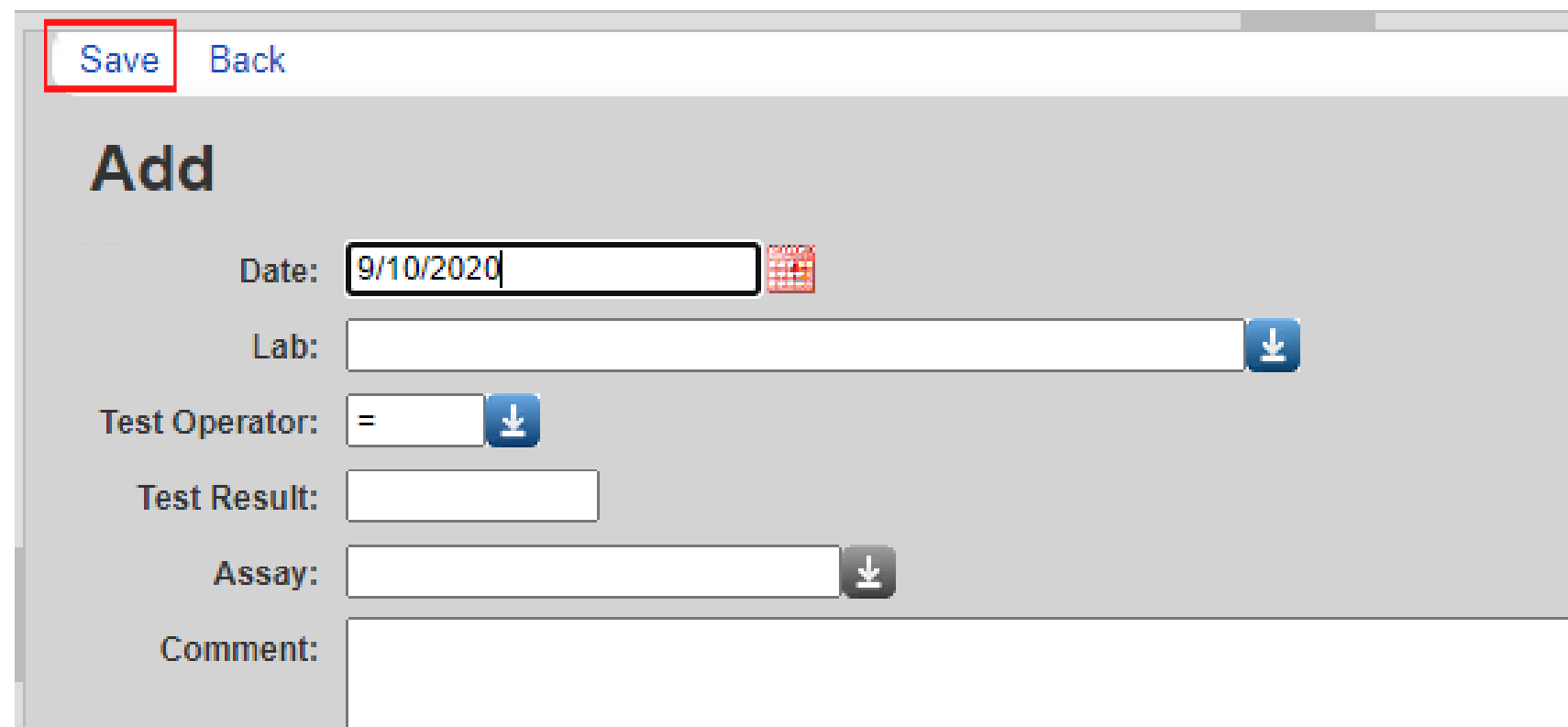


The screenshot shows a sidebar menu on the left with the following items: Demographics, Client Report, Encounter Report, Drug Payments, Services, Annual Review, Case Notes, Custom Forms, Vital Signs, Hospital Admissions, Medications, Labs (highlighted with a red box), Screenings, Screening Labs, and Immunizations. The main content area is titled 'Labs' and contains a search bar and a table with the following data:

Date	Test Name	Test Operator	Test Result	Assay	Pro
08/07/2017	CD4 Count	=	500 (cells/mm ³)		LaC

02 Enter the following information (as applicable) and then click **Save**.

- Date
- Lab
- Test Operator
- Test Result
- Assay
- Comment

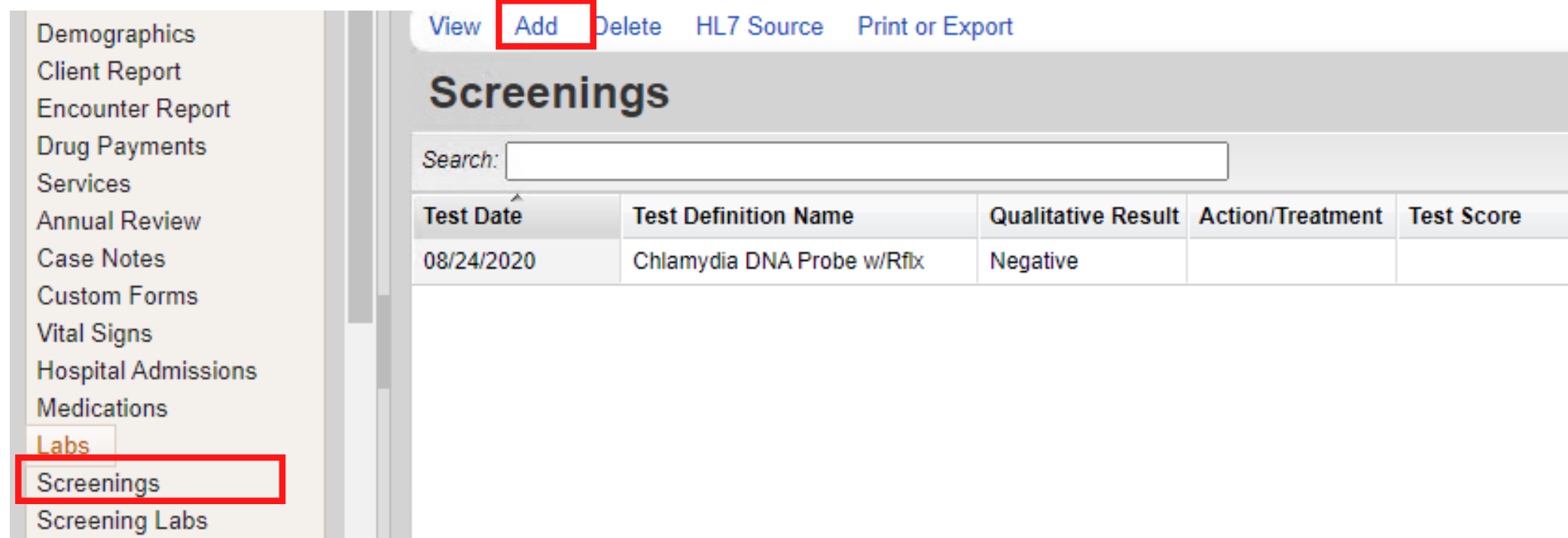


The screenshot shows the 'Add' form for the Labs screen. The 'Save' button is highlighted with a red box. The form contains the following fields:

- Date: 9/10/2020
- Lab: [Dropdown menu]
- Test Operator: = [Dropdown menu]
- Test Result: [Text input]
- Assay: [Dropdown menu]
- Comment: [Text input]

SCREENINGS

01 From the Demographics screen, select **Screenings** from the Menu of Links. On the Screenings screen, click **Add**.



02 Enter the following information (as applicable) and then click **Save**.

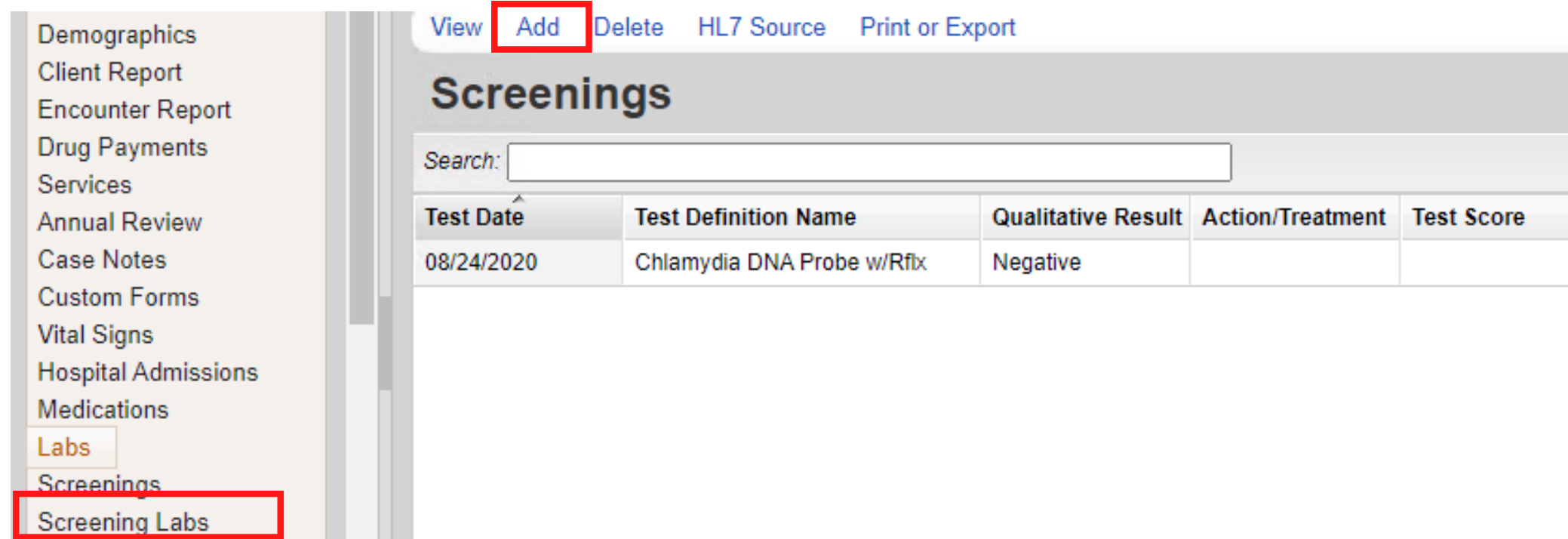
- Test Date
- Test Definition, (TST - TB skin test)
- Result
- Action
- Test Score
- Test Comments

The screenshot shows the 'Add' form for a screening test. At the top, there are 'Save' (highlighted with a red box) and 'Back' buttons. The form fields are:

- Test Date: 9/10/2020 (with a calendar icon)
- Test Definition: [Empty text field with a search icon]
- Result: [Empty dropdown menu with a down arrow icon]
- Action: [Empty dropdown menu with a down arrow icon]
- Test Score: [Empty text field]
- Test Comments: [Empty text area]

SCREENING LABS

01 From the Demographics screen, select **Screening Labs** from the Menu of Links. On the Screening Labs screen, click **Add**.



02 Enter the following information (as applicable) and then click **Save**.

- Test Date
- Test Definition
- Result
- Treatment
- Titer 1
- Test Comments

The screenshot shows the 'Add' form for a screening lab entry. At the top, there are 'Save' and 'Back' buttons. The form fields are:

- Test Date: 9/10/2020 (with a calendar icon)
- Test Definition: [empty text field with a search icon]
- Result: [empty dropdown menu with a down arrow]
- Treatment: [empty dropdown menu with a down arrow]
- Titer 1: [empty text field]
- Test Comments: [empty text area]

CUSTOM SUBFORMS

Any Custom Subforms that were in used in CAREWare 5 will be in CAREWare. The process of adding or editing a record on a Custom Subform will be the same regardless of which Custom Subform you are using.

The screenshot displays the CAREWare interface for a client's Demographics page. On the left, a sidebar menu lists various subforms, with the top item, "Counseling and testing", highlighted by a red border. The main content area features a breadcrumb trail: "Find Client > Search Results > Demographics". Below this, there are links for "Delete Client" and "Back". The page title is "Demographics". A vertical column of buttons is on the left side of the main content area, including "Personal Info", "Change URN", "Contact Information", and "Race/Ethnicity". To the right of these buttons, client information is displayed: "Client ID: Name: test, person Gender: Female", "PRTS0302842U", "1263 Street Dr Townville, LA 12345", and "American Indian, Asian (Filipino)".

Counseling and testing
Pregnancy History
Orders
HOPWA (Household Beneficiaries)
SHP Corrections - RETIRED TAB
SPNS Videoconf Assessment Form
SPNS Videoconf Personal Needs Tool
SPNS Videoconf Intake Follow Up Form
LPCC Videoconf Assessment
LPCC Videoconf Personal Needs Tool
LPCC Videoconf Intake Follow Up Form

Find Client > Search Results > Demographics
Delete Client Back

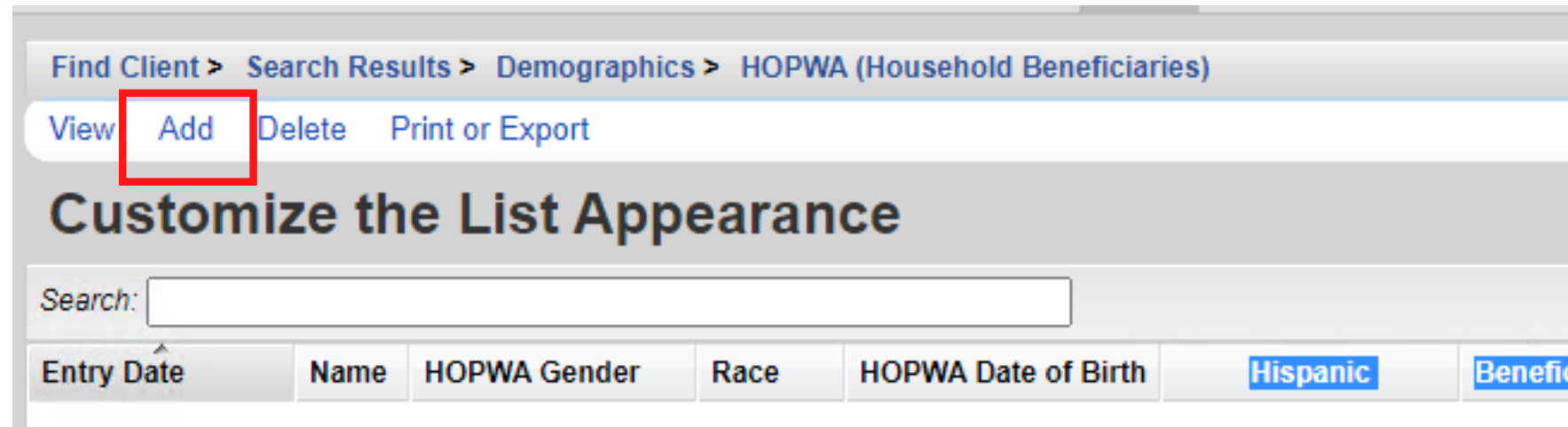
Demographics

Personal Info Client ID: Name: test, person Gender: Female
Change URN PRTS0302842U
Contact Information 1263 Street Dr
Townville, LA 12345
Race/Ethnicity American Indian, Asian (Filipino)

ADDING A SUBFORM

01 From the Demographics screen, select the subform you would like to use from the Menu of Links.

02 Click **Add**.



Find Client > Search Results > Demographics > HOPWA (Household Beneficiaries)

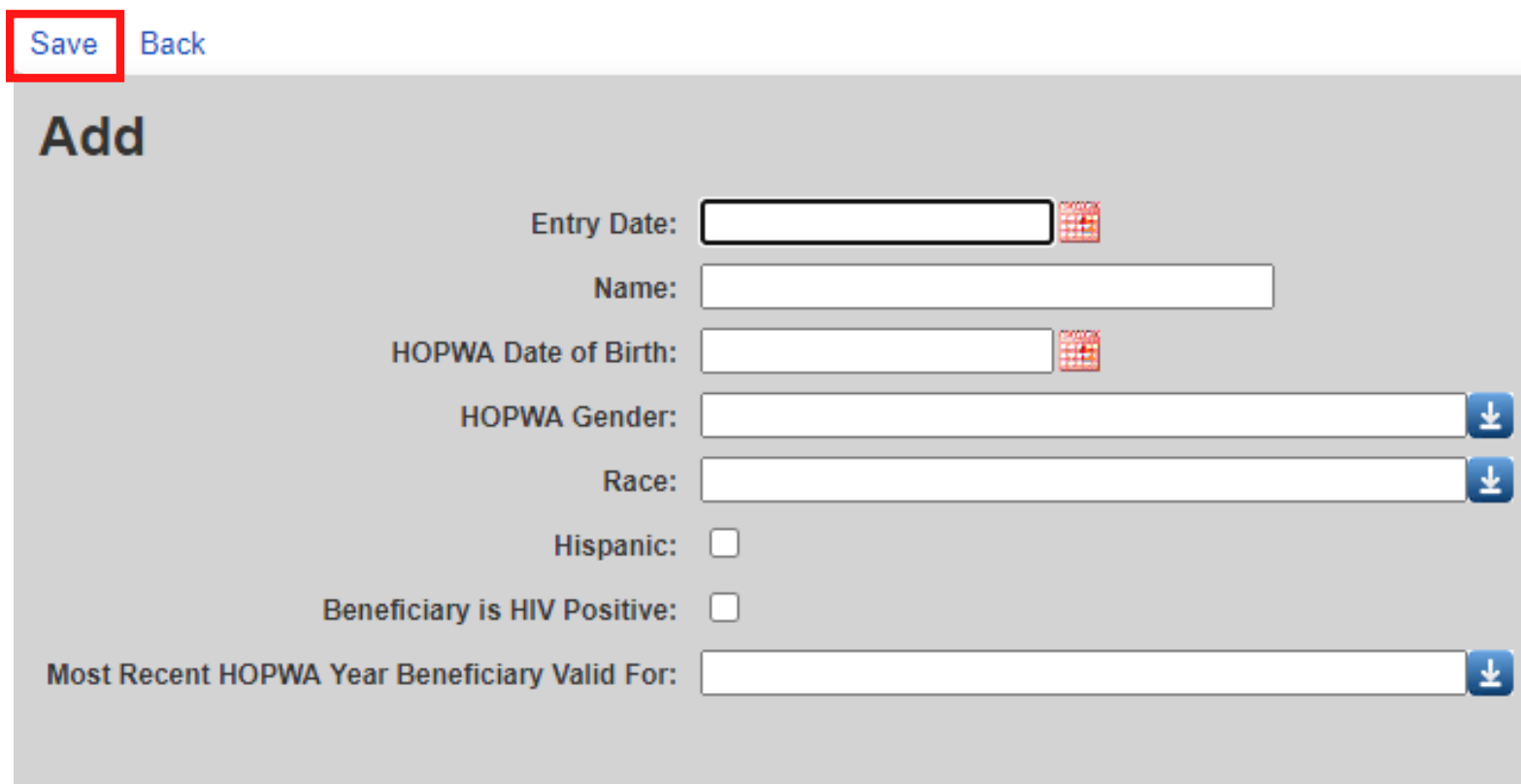
View **Add** Delete Print or Export

Customize the List Appearance

Search:


Entry Date	Name	HOPWA Gender	Race	HOPWA Date of Birth	Hispanic	Benefic
------------	------	--------------	------	---------------------	----------	---------

03 Complete the fields for the subform and click **Save**.





Save Back


Add

Entry Date: 

Name:


HOPWA Date of Birth: 

HOPWA Gender: 

Race: 

Hispanic:

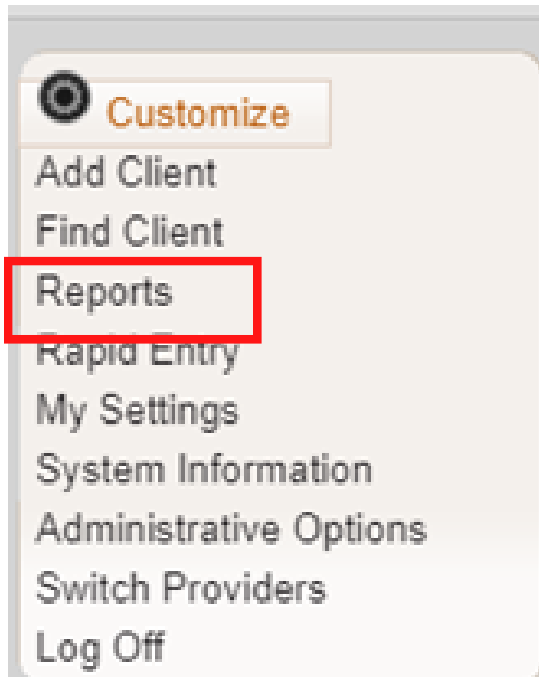
Beneficiary is HIV Positive:

Most Recent HOPWA Year Beneficiary Valid For: 

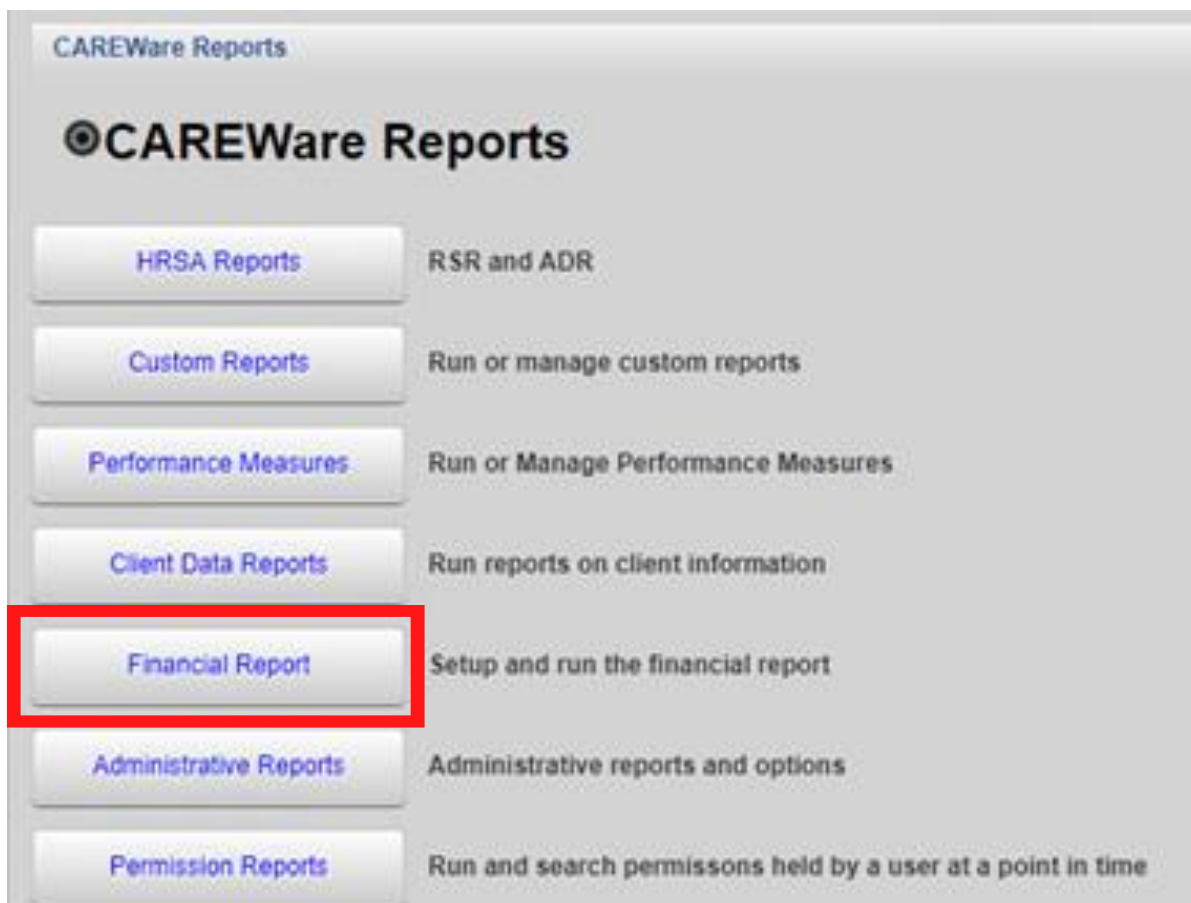
REPORTS

FINANCIAL REPORT

01 Select **Reports** from the main menu.




02 Select **Financial Report** from the Reports Menu.




03 Select your Date Span.

Funding Source Filter Edit Filter Run PDF Help Cancel

Financial Report Settings


Begin Date: 


End Date: 

04 Click **Funding Source Filter**.

Funding Source Filter Edit Filter Run PDF Help Cancel

Financial Report Settings

Begin Date: 

End Date: 

Funding Sources: No Funding Source Filter Applied.

Include Subservice Detail?:

Include Provider Information?:

Pull Amount Received from receipts in the date span?:

Apply Filter:

05 Select your funding source(s) and click **Save**.

Save Cancel Print or Export

Funding Source Filter

Search:

Select	Funding Source
<input type="checkbox"/>	MAI - Part B
<input type="checkbox"/>	Part A - BR TGA
<input checked="" type="checkbox"/>	Part B_bf60
<input type="checkbox"/>	Part B_COVID
<input type="checkbox"/>	Part F, Part B MAI

Note: The Funding Source list will only display up to 20 funding sources per page. If you do not see the source you are looking for, try using the search box to find the funding source.

06 Check any boxes that apply;

- Include Subservice Detail?
- Include Provider Information?
- Pull amount Received from receipts in the Date Span?
- Apply Filter

07 Click **Run**.

Funding Source Filter Edit Filter Run PDF Help Cancel

Financial Report Settings

Begin Date:

End Date:

Funding Sources:

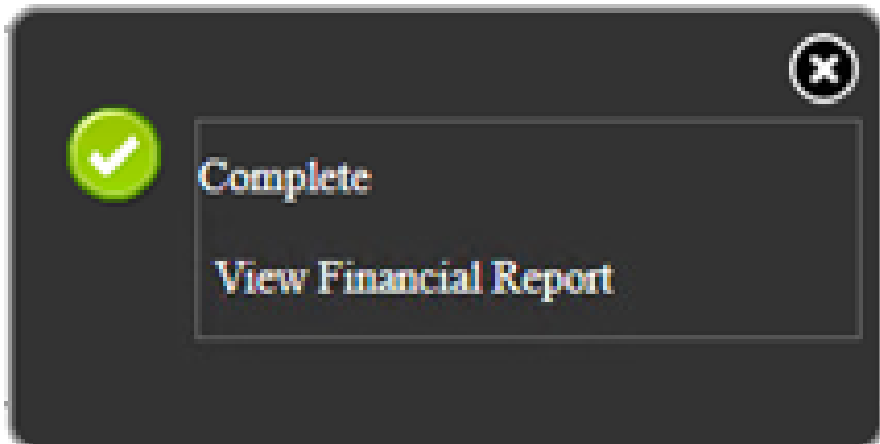
Include Subservice Detail?:

Include Provider Information?:

Pull Amount Received from receipts in the date span?:

Apply Filter:

08 When the report is complete click [View Financial Report](#).



Your financial report will display like this:

Financial Report				
Sunday, September 1, 2019 through Tuesday, September 1, 2020				
Report Criteria:				
Providers:	LaCAN Demo			
Funding Sources:	Part B_b60			
Group By Providers:	False			
Include Subservice Detail:	True			
Receipts In Period:	False			
<hr/>				
LaCAN Demo				
Assessments	Clients:	Units:	Total:	Amount Received:
Case Management Acuity Scale	3	3	\$0.00	\$0.00
Assessments Totals:	3	3	\$0.00	\$0.00
<hr/>				
Case Management (non-medical)	Clients:	Units:	Total:	Amount Received:
Non-MCM: Other Staff non-face-to-face	1	1	\$0.00	\$0.00

09

To view as PDF: Click [PDF](#).

Funding Source Filter Edit Filter Run **PDF** Help Cancel

Financial Report Settings

Begin Date: 9/1/2019

End Date: 9/1/2020

Funding Sources: Part B_bf60

Include Subservice Detail?:

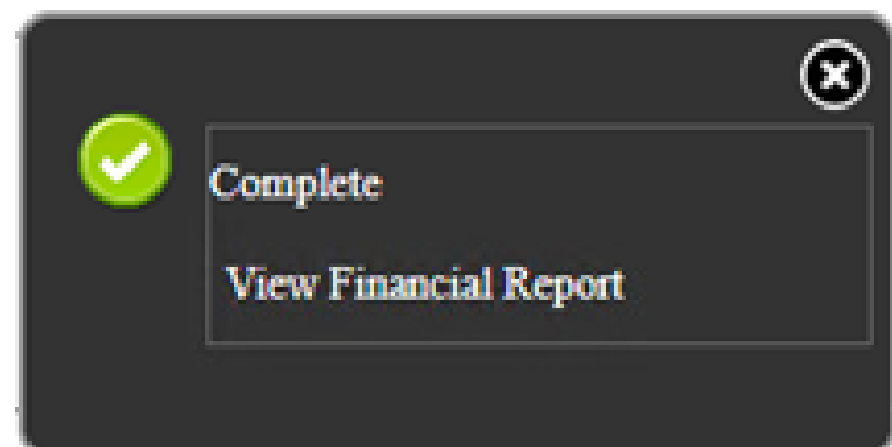
Include Provider Information?:

Pull Amount Received from receipts in the date span?:

Apply Filter:

10

When the report is complete click [View Financial Report](#)



The report will then display as a PDF file

Financial Report

Sunday, September 1, 2019 through Tuesday, September 1, 2020

Report Criteria:

Providers: LaCAN Demo
Funding Sources: Part B_bf80
Group By Providers: False
Include Subservice Detail: True
Receipts In Period: False

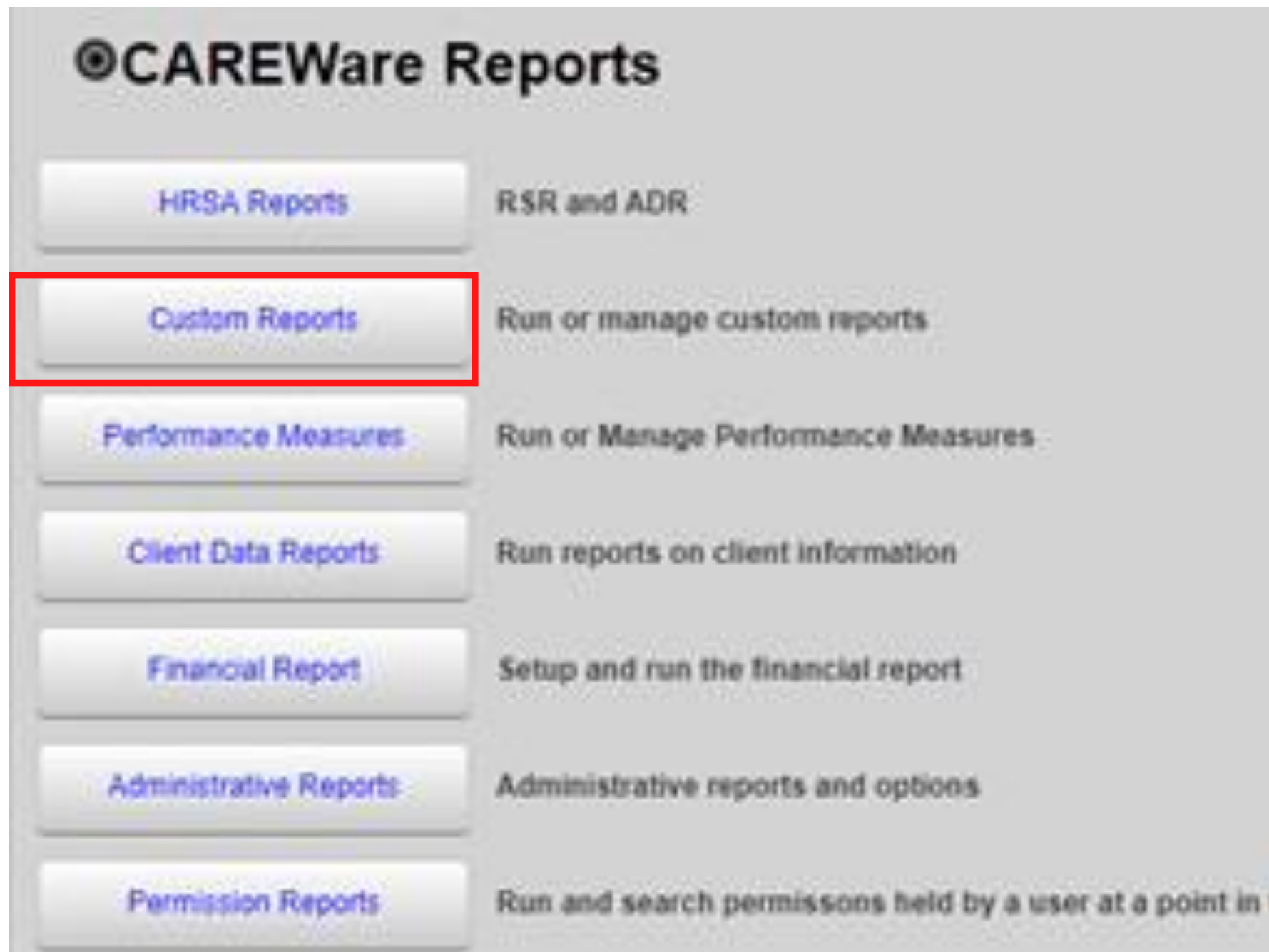
LaCAN Demo

Assessments	Clients:	Units:	Total:	Amount Received:	Not Received:
Case Management Acuity Scale	3	3	\$0.00	\$0.00	\$0.00
Assessments Totals:	3	3	\$0.00	\$0.00	\$0.00
Case Management (non-medical)	Clients:	Units:	Total:	Amount Received:	Not Received:
Non-MCM: Other Staff non-face-to-face	1	1	\$0.00	\$0.00	\$0.00
Non-MCM: Social Work face-to-face	1	1	\$0.00	\$0.00	\$0.00
Case Management (non-medical) Totals:	2	2	\$0.00	\$0.00	\$0.00
Food Bank/Home-delivered Meals	Clients:	Units:	Total:	Amount Received:	Not Received:

CREATING CUSTOM REPORTS

01 Select **Reports** from the Main Menu.

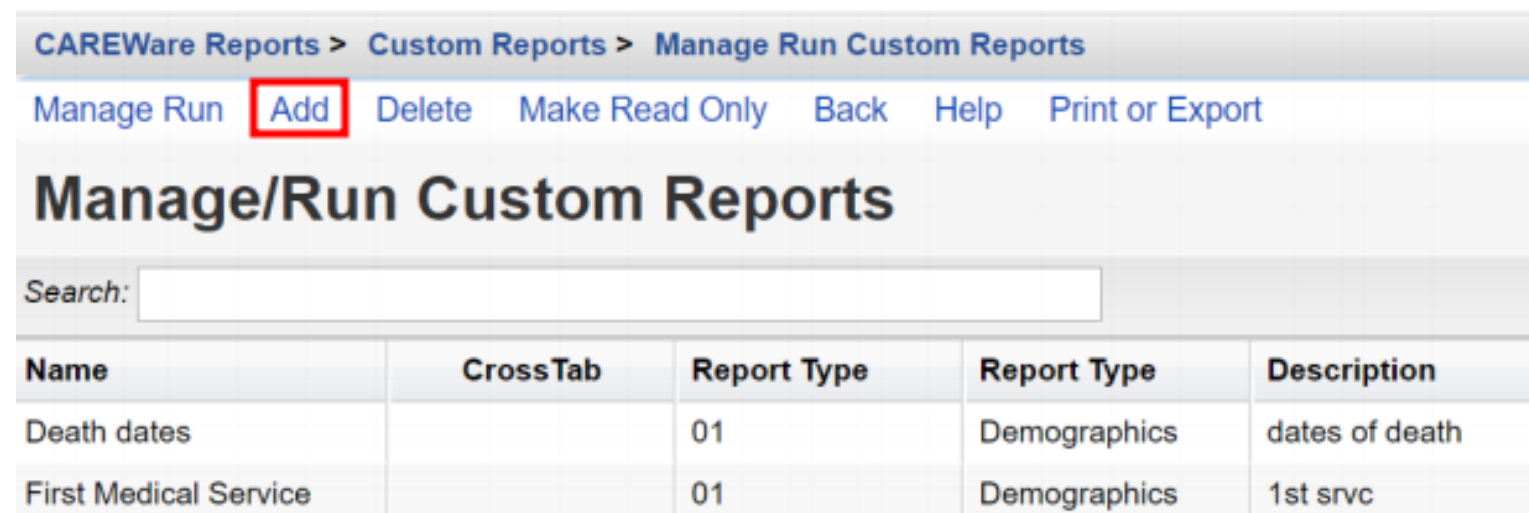
02 Select **Custom Reports** from the link menu.



03 Select **Manage/Run Custom Reports** from the link menu.



04 Select **Add**.



05

Enter in the following information (as applicable) and click **Save**.

- Report Name
- Report Type
- Is Crosstab (checkbox)
- Description (optional)
- Use Totals (checkbox – will automatically sum total fields in the report)
- Header/Footer Format (optional)


CAREWare Reports > Custom Reports > Manage Run Custom Reports > Add

Save Back

Add

Setup Details

Report Name:


Report Type: 

Is Crosstab:

Description:

Use Totals:

Header/Footer Format

Font Name: 

06 After clicking save, you will be on the custom report's menu. Select **Field Selection**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender

[Back](#)

☉Clients by Race and Gender

[Run Report](#) Start Date : 03/27/2018, End Date : 03/27/2019, Clients with services, Report Display as : Open in New Window

[Report Layout](#) Clients by Race and Gender, Demographics

[Field Selection](#) No fields selected

[Report Filter](#) Report Filter is empty

07 Select **Add**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Field Selection

Manage [Add](#) [Move Up](#) [Move Down](#) [Delete](#) [Templates](#) [Back](#) [Print or Export](#)

Field Selection

Search:

Field Name	Column Header	Column Width (in)	Totals	Sort	Sort Priority	Status
------------	---------------	-------------------	--------	------	---------------	--------

08

Use the Search box to find the fields to display in the report. In this example, “Name” was entered. Since the complete client name is desired for the report, the Name field has been selected. Click **Use Field**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Field Selection > Add

Use Field Back Print or Export

Report Fields

Search:

Field Name	Keywords	Previous Field Name	Description
Medications by indication	Demographics	Client Meds By Ind.	Returns full medication name for selected indication
Current Regimen	Demographics	Current Regimen	Returns a list of ARV medications in a current regimen
First Name	Demographics	First Name	
Last Name	Demographics	Last Name	
Last Service In Contract	Demographics	Last Service In Contract	Returns name of service category
Middle Name	Demographics	Middle Name	
Name	Demographics	Name	
Physician name	Demographics	Phys. Name	
Preferred Name (Cln. Custom)		Preferred Name (Cln. Custom)	Culturally Sensitive Name requested by the client

09 You will now be on the Use Field menu. Enter in the following information (as applicable) and click Save.

- Column Header
- Sort
- Sort Priority
- Header Column Format
- Data Column Format


CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Field Selection > Add > Use Field

Save [Back](#)

Use Field

Select Field:


Column Header:

Sort: 

Sort Priority:

Header Column Format

Column Width: inches


Column Header Font Name: 

Bold:


Italic:

Underline:

Font Size:

Font Color: 

Data Column Format


Font Name: 


Bold:

Italic:

Underline:

Font Size:

Font Color: 

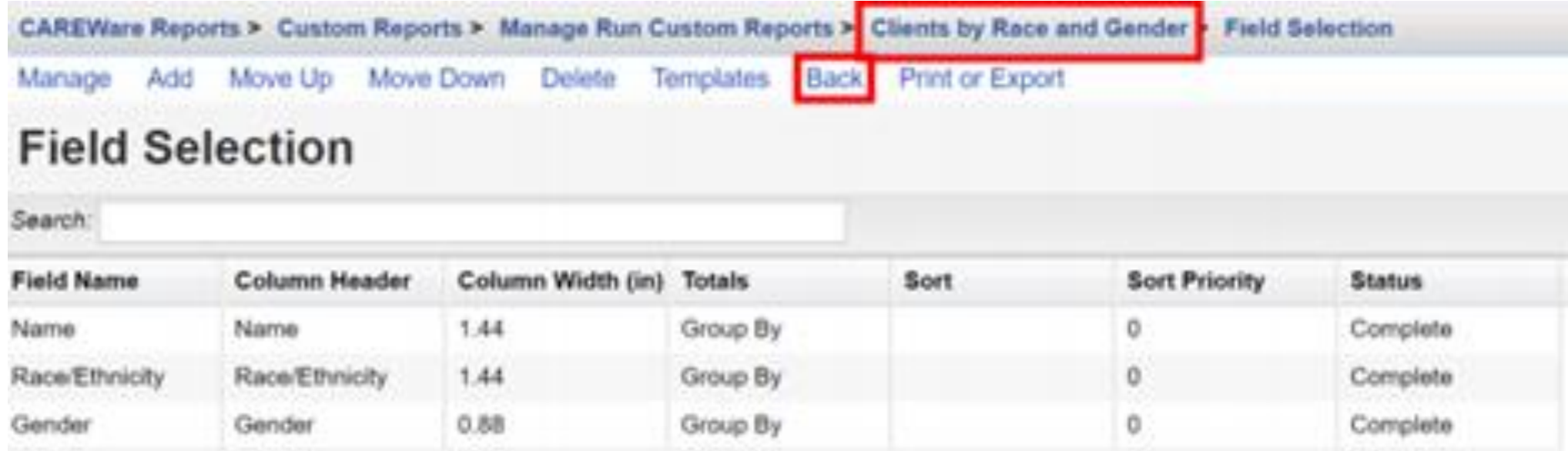
Field Justification: 

10

After clicking save, you will be on the selected field’s menu. Return to the **Field Selection** menu by clicking Field Selection within the breadcrumb trail. Repeat steps 8 through 10 to add additional Report Field selections (such as Race/Ethnicity and Gender).



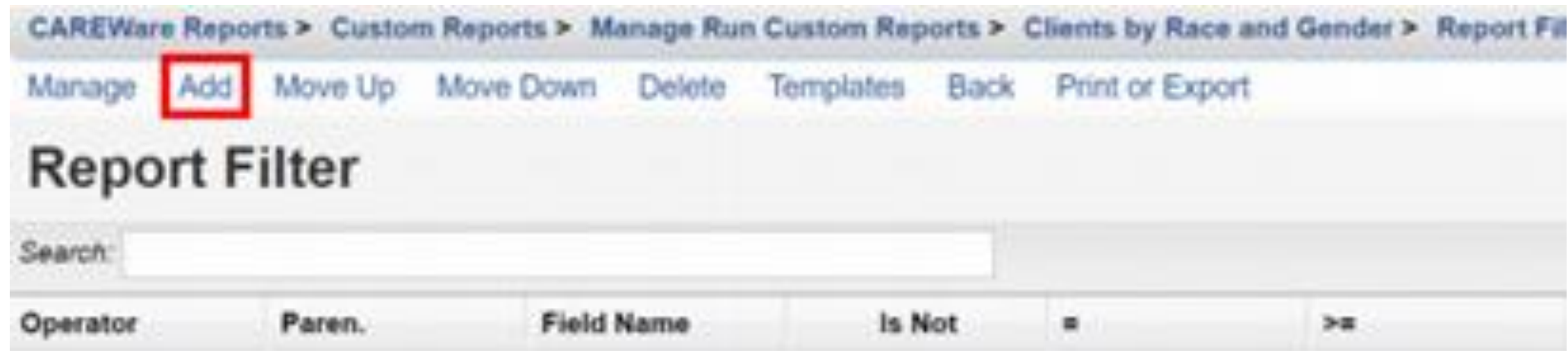
To Return to the custom report’s menu, click the name of the custom report in the breadcrumb trail (in this example, “Clients by Race and Gender”) or click **Back** from the Field Selection menu.



11 Click **Report Filter**.



12 Click **Add**.



- 13 Enter “Gender” in the Search box to limit available Field Names. Chose the appropriate Field Name and select **Use Field**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Report Filter > Add

Use Field Back Print or Export

Report Fields

Search: Gender

Field Name	Keywords	Previous Field Name	Description
ADR Gender		ADR Gender	
Gender	Demographics	Gender	

- 14 Select Female from drop-down box. Click **Save**.


CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Report Filter > Add > Criterion Details

Save Back

Use Field

Field Name: Gender

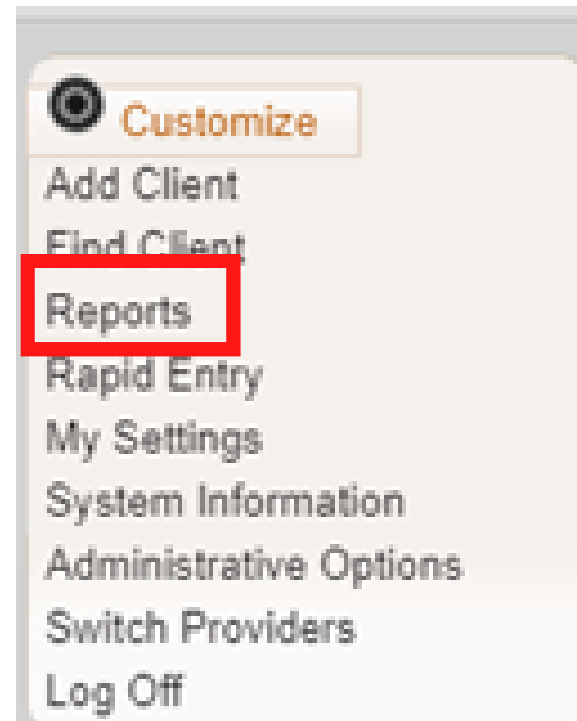
Is Not:

=: Female 

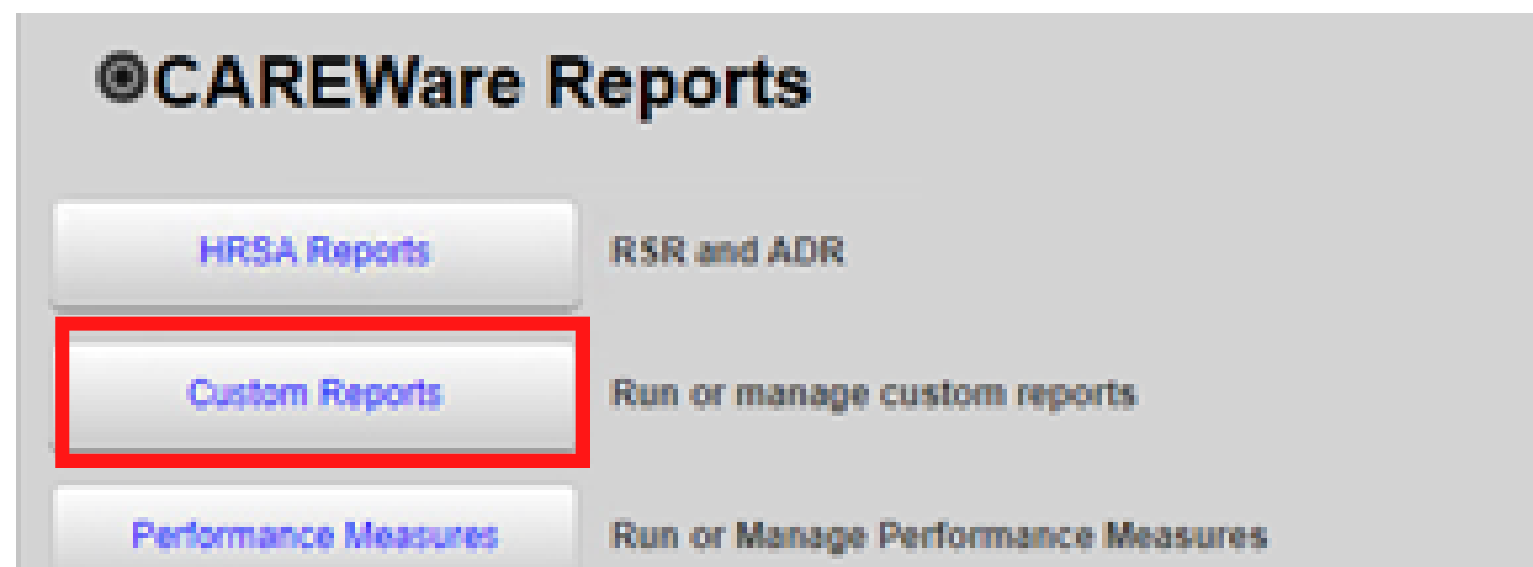
Null:

RUNNING CUSTOM REPORTS

01 Select **Reports** from the Main Menu



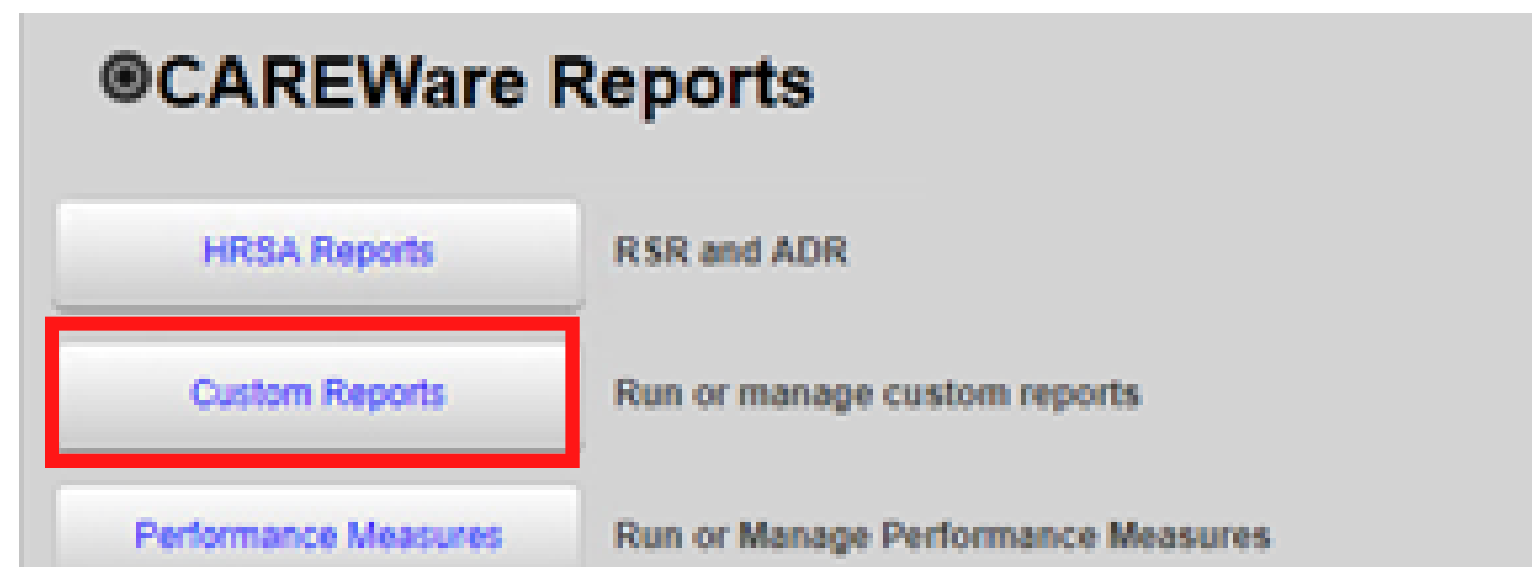
02 Select **Custom Reports** from the link menu.



01 Select **Manage/Run Custom Reports** from the link menu.



02 Select **Custom Reports** from the link menu.



03 Select [Manage/Run Custom Reports](#) from the link menu.



04 Select [Run Report](#).

05

Click **Edit**. Select the following report parameters and click **Save** (will be visible after clicking Edit).


- Date From
- Date Through
- Clinical Review Year (optional – typically matches the reporting year)
- Output Display – Download as CSV – Open in New Window – Open as PDF
- Show New Client only (check box)
- Show Clients with Service only (check box – will only list clients with services within date span)
- Show Specifications (check box – to list report criteria)
- Sum Numeric Fields (check box)
- Domain Sharing Settings (default value)


CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Run Report

Edit Run Report Back

Run Report

Parameters

Date From: 3/27/2018 

Date Through: 3/27/2019 

Clinical Review Year: 2019

Output Display: Open in New Window

Show New Clients only:

Show Clients with Service only:

Show Specifications:

Sum Numeric Fields:

Domain Sharing Settings

Show Shared Service Records:

Show Shared Clinical Records:

Show Shared Custom Subform Records:

Show Shared Case Notes:

06

Click **Run Report** and then click **View** [name of report] (in this example, View Clients by Race and Gender).



The report will appear in a new tab within your browser.

Clients by Race and Gender		
Data Scope:	Ryan White AIDS Care and Treatment Clinic	
Report Start Date:	01/01/2019	
Report End Date:	12/31/2019	
<u>Name:</u>	<u>Race/Ethnicity:</u>	<u>Gender:</u>
Adap, Sigourney	Hispanic	Female
Appleseed, Johnny	Hispanic	Male
Appleseed, Martha	Not Specified	Transgender MtF
Badge, Jane	Hispanic	Female

RYAN WHITE SERVICES (RSR) REPORT REQUIRED FIELDS

DEMOGRAPHICS

- Vital Status
- Date of Birth
- Race
- Asian Subgroup
- Native Hawaiian or Pacific Islander Subgroup
- Ethnicity
- Hispanic Subgroup
- Sex at Birth
- Gender
- HIV Status
- HIV Risk Factor
- HIV Diagnosis Year

FOR AGENCIES PROVIDING OUTPATIENT AMBULATORY HEALTH SERVICES

- First Ambulatory Care Date
- Last CD4 Test Results
- Last
- Viral Load Results
- Prescribed ART?
- Screened Syphilis
- Pregnant?

ANNUAL REVIEW

- Poverty Level
- Housing Status
- Insurance

NEED CAREWARE HELP

LACAN WEBSITE

For more information about CAREWare 6 or to access Trainings and Resources, visit the LaCAN Website

<https://louisianahealthhub.org/careware/>

HELP DESK

If you are experiencing issues with CAREWare or need to ask a question please create a ticket with the LaCAN Helpdesk

[Create a Helpdesk Ticket](#)

When creating a ticket please be sure to include

- Your Name
- CAREWare User Name
- Agency
- Phone
- Email
- Web Browser
- Issue Type
- If reporting error, paste the text of the error from CW
- Description of issue or error. Do not include any client PHI or user passwords.

**FOR MORE INFORMATION OR QUESTIONS ABOUT
CAREWARE VISIT:**

<https://louisianahealthhub.org/careware/>