Welcome!

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

About This Guide #2: Setting up Contracts and Services

This guide does NOT cover merging subservices, service sharing between providers, or other more advanced topics.

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

Guides in this series:

1. *Downloading and installing CAREWare*
2. *Setting up contracts and services*
3. *Entering Clients and their Service and Clinical Data*
4. *Customizing tabs and fields*
5. *Customizing clinical data*
6. *Working with CAREWare's prebuilt reports (including the RSR)*
7. *Creating basic custom reports*
8. *Creating more advanced reports*
9. *User and System administration*

For additional information:

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

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

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

Revision date: September 21, 2012

First Things First

What are contracts?

CAREWare has been set up to mirror the way services are handled in the real world: for instance, your agency may have a contract to perform Medical Transportation services, funded by Part B. Under that contract, you perform a variety of subservices – providing bus tokens, gas vouchers, taxi rides, etc. In CAREWare, you'll be setting up your data entry to reflect those subservices.

Remember:

- At least one contract must be set up in CAREWare before you can begin entering services!

- A client needs at least one CARE Act-funded service in the reporting year to get included in the RSR export. CAREWare looks at funding sources in contracts to determine this.

- Proper configuration of contracts in CAREWare is essential to ensure accurate client-level data collection and reporting throughout the year. Proper setup of contracts before you begin data entry helps avoid data inconsistencies in the future.

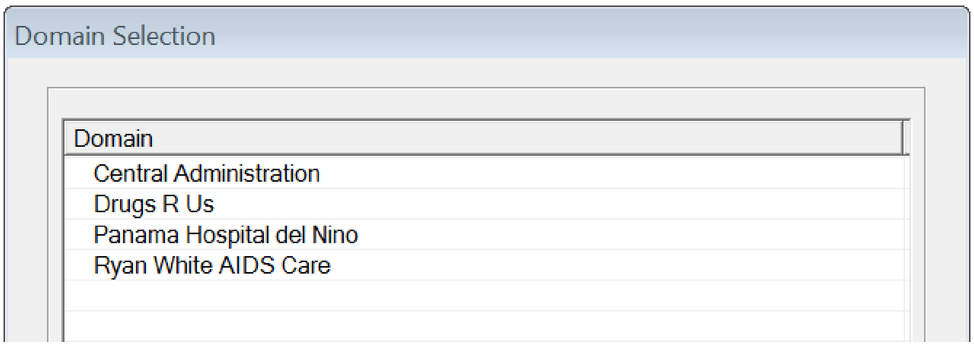
What do I need to get started?

- You will need to know which funding source is applicable to your contracts and designate them accordingly.

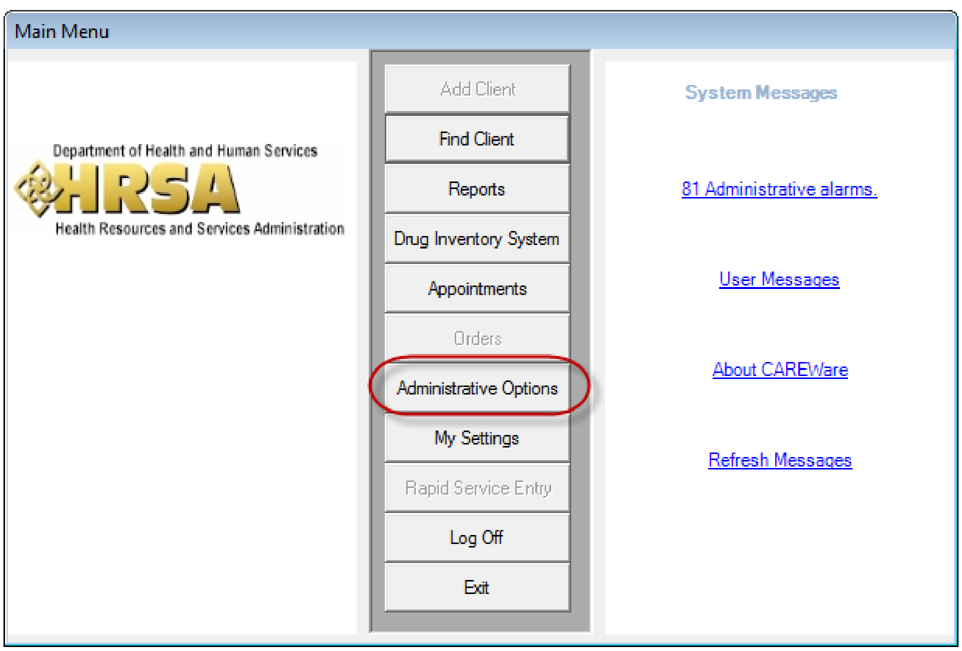
- If you are a multi-agency provider, you'll need to decide if your contracts are going to be created in the Central Administration domain (and therefore only editable by the user(s) with access to Central Administration) or within the Provider domain (editable by users at individual agencies, with the necessary permissions). This is a decision that you should make in line with your HIPAA Security policies before you begin. We recommend that contracts are administered through Central Administration.

Setting Up Contracts

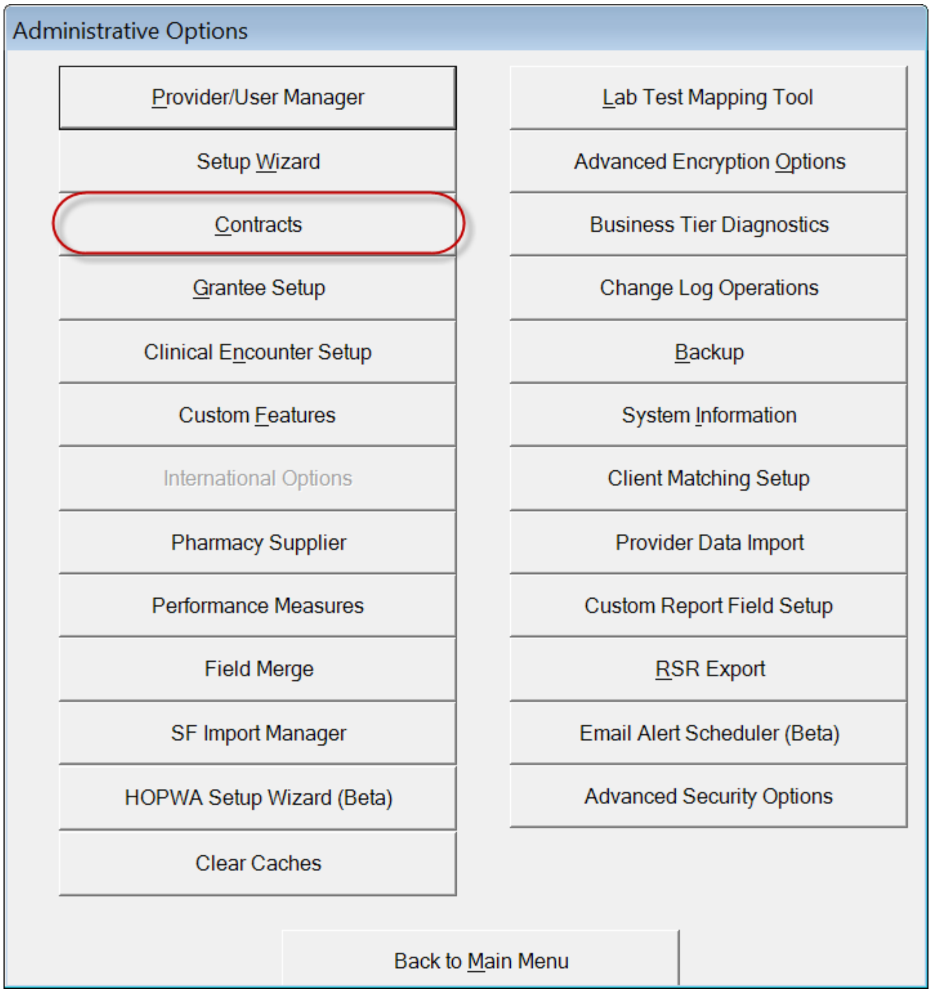
1. Log into CAREWare as a user with the proper permissions (See Quick Start #9 on user and permission administration) into either the Central Administration or Provider domain. For security and quality purposes, we recommend configuring all contracts under Central Admin.



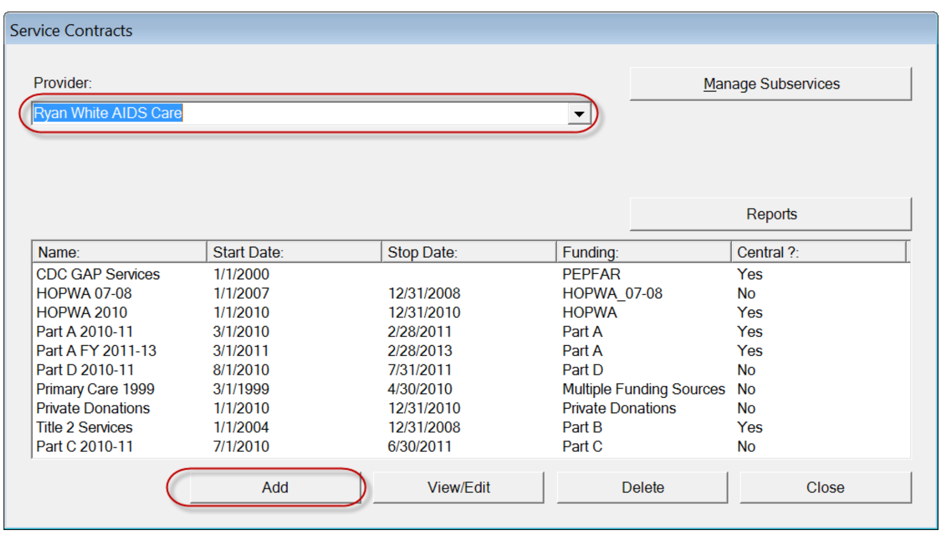
2. Select **Administrative Options** from the main menu.



3. Select **Contracts**.



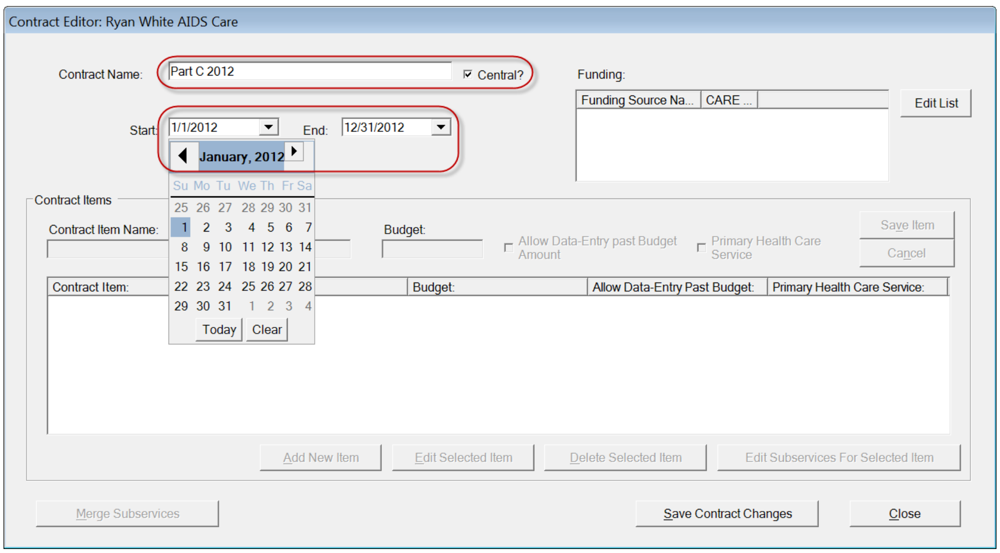
4. The **Service Contracts** menu will appear. Use the **Provider** drop down menu to select from multiple providers. Click **Add** to enter a new contract.



5. The Contract Editor appears. Enter the **Contract Name**. It's a good idea for basic RW grants to use the funding stream as the name of your contract.

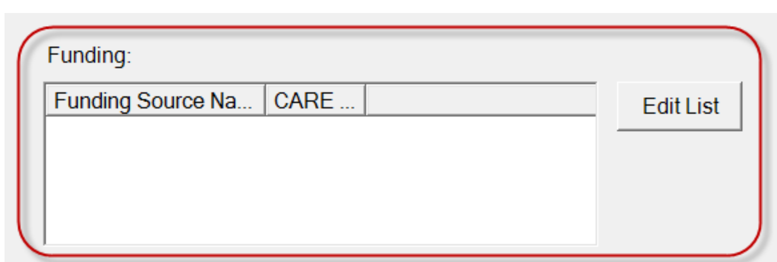
TIP: To keep your data organized, we recommend you keep your contracts "high level." I.E., create a contract for Part C, a contract item named after the HRSA service category, such as Medical Transportation, then create subservices for Bus Tokens, etc. It's best to maintain as few contracts as possible, mirroring your funded service categories.

6. Below this, enter the **Start Date** of your contract. You can use the drop-down calendar to pick your dates.



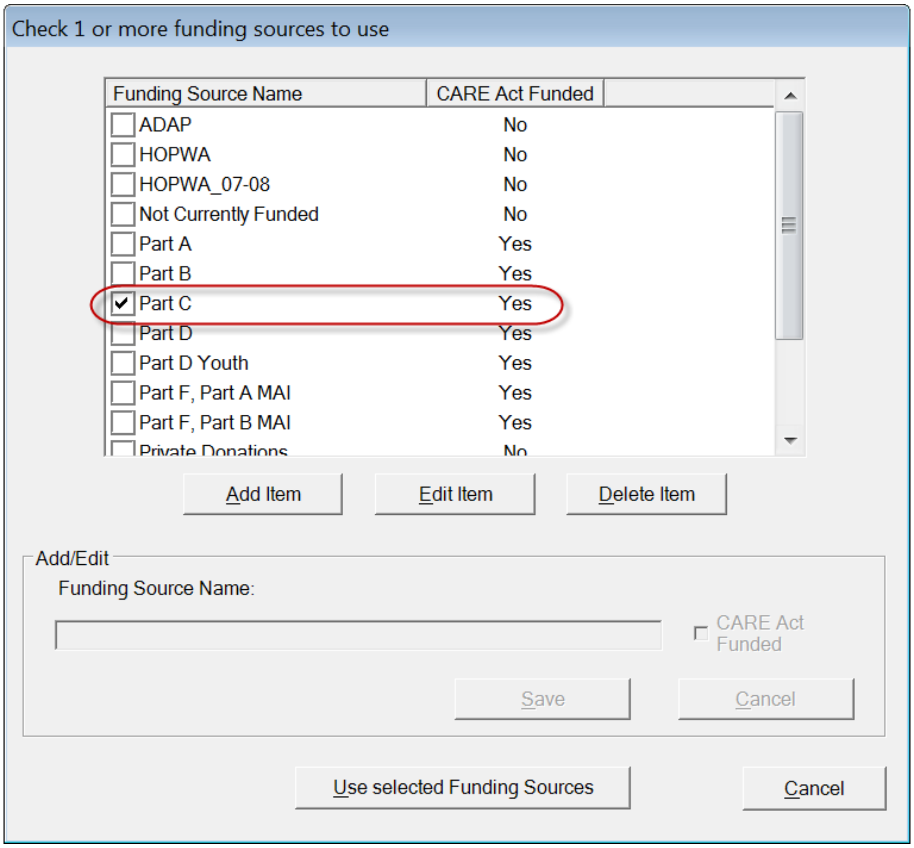
It's not necessary to enter a stop date. If you do, you won't be able to enter services provided past this stop date! However, if your funding does have a stop date, you may wish to enter an end date for data entry quality control.

7. Now you'll specify the funding source. Click **Edit List** to indicate available funding streams.



8. Select one or more funding streams. Shown here are those which come in CAREWare by default. We highly recommend that you set up contracts under a single funding stream, such as Part A or Part B or Non-Ryan White. (Multiple

Funding Source contracts will not allow for separation of individual funding streams when you enter services.)



In this case, we select **Part C**. This is preset to **CARE Act Funded.**

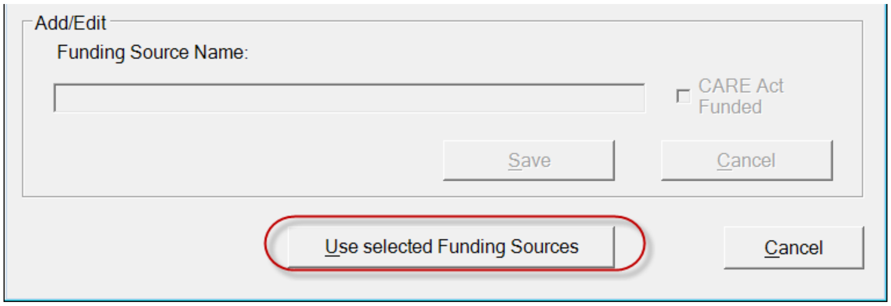
9. You can add funding streams as well (for instance, some agencies receive grants from Broadway Cares or other grantors).

   a. Click **Add Item**.

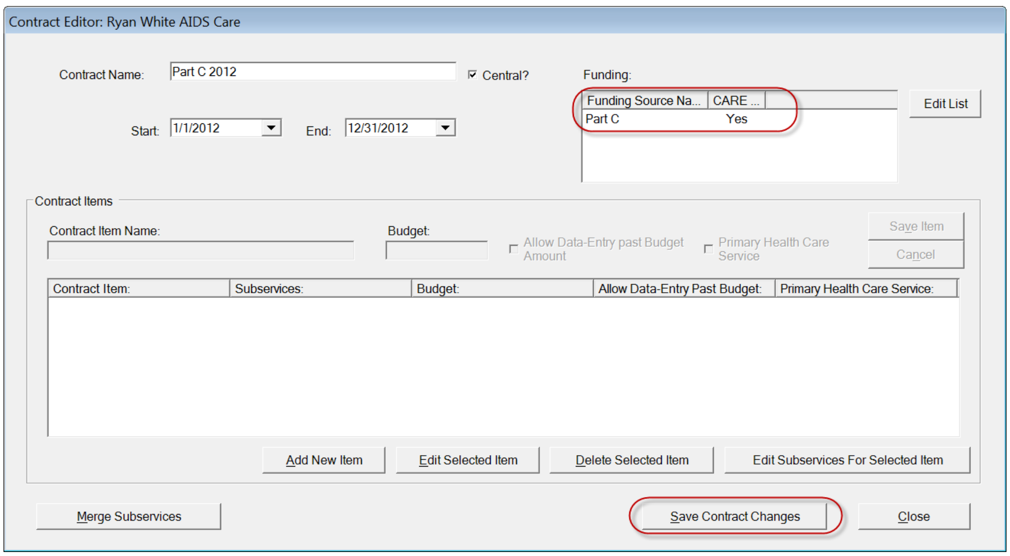
   b. Enter a **Funding Source Name.**

   c. Use the check box to indicate if the source is **CARE Act Funded** or not. (You cannot alter HRSA defined funding sources such as Part C.)

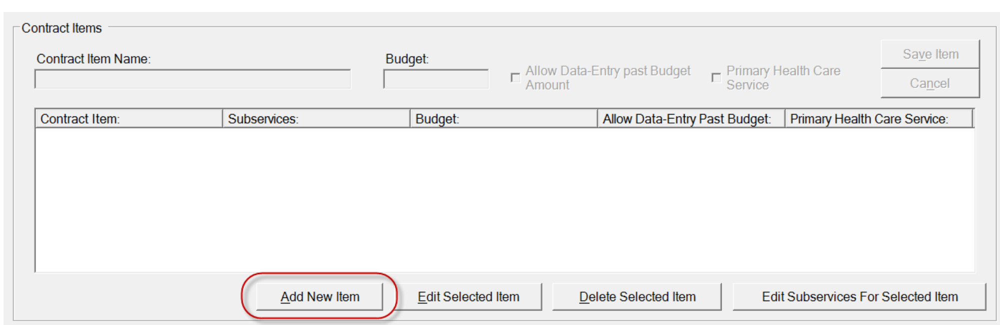
10. Click **Use selected Funding Sources** when done.



11. The funding source you designated will be populated on screen. Click **Save Contract Changes** to continue.



12. Now you can begin creating contract items. Click **Add New Item** to enter a contract item name.

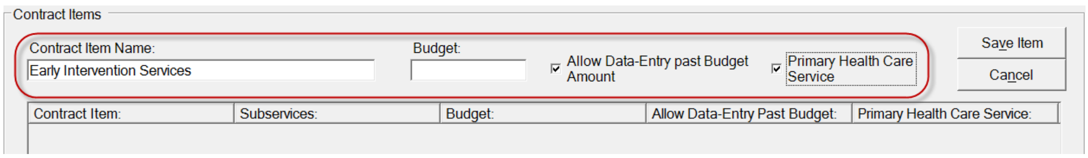


13. Enter the contract details:

    a. The broad general **Contract Item Name**. Contract Item names should mirror HRSA Funding Categories, such as Medical Case Management; Outpatient/Ambulatory Medical Care, Medical Transportation, etc. In this case, as it's a Part C funded contract, we've called this item Early Intervention Services.

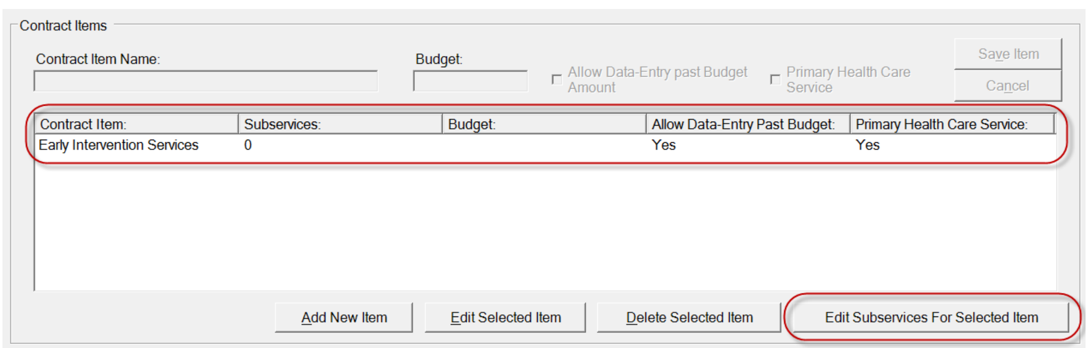
b. The **Budget** is not required, but can be useful if you enter per-unit costs for subservices and want to use CAREWare to track overall expenditure.

c. Whether or not to **Allow Data-Entry past Budget Amount**. If you uncheck this box, and assign per-unit costs, data entry will be blocked once the budget is expended. We don't recommend this as data entry can lag behind services, and this could pose problems in your record keeping. Use of this feature depends on how strict your agency would like to be in limiting data entry on costed subservices.



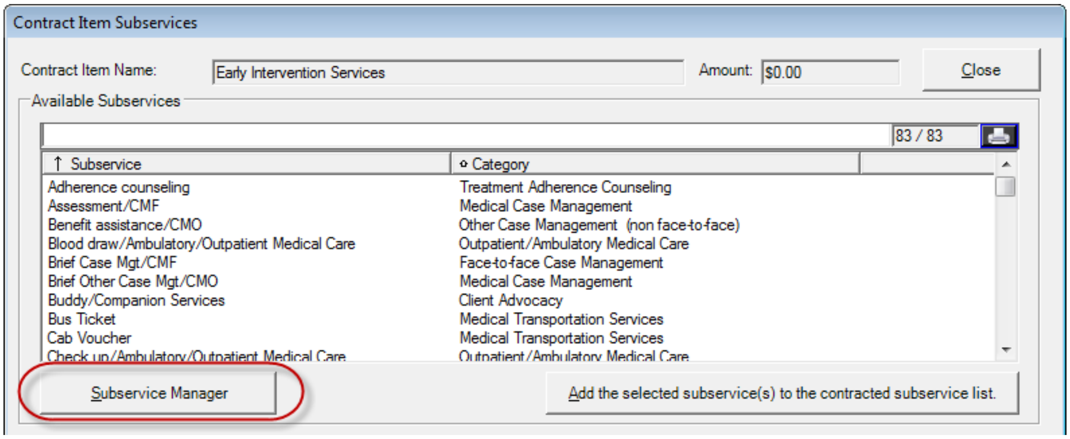
14. Click **Save Item** to continue. The contract item will appear in the lower part of the window.

15. Highlight the contract item, and click **Edit Subservices for Selected Item in the bottom right**.

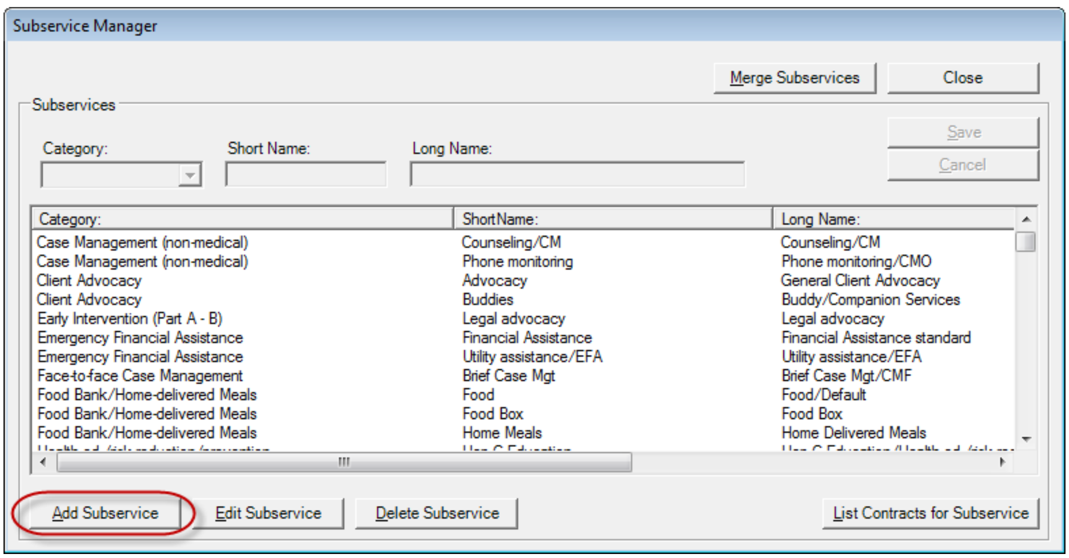


A subservice is the most detailed breakdown of a funded service. For instance, you have a **Contract** for Part C funding. One of the **Items** fundable under Part C is Early Intervention Services. And EIS covers Intakes, medical care visits, Labs, Medical Case Management, Medical Transportation, etc. Those are the **subservices** you may provide under this contract.

16. In a new CAREWare installation, there are no subservices. To create new subservices, or make changes to the available subservices, click on **Subservice Manager**.

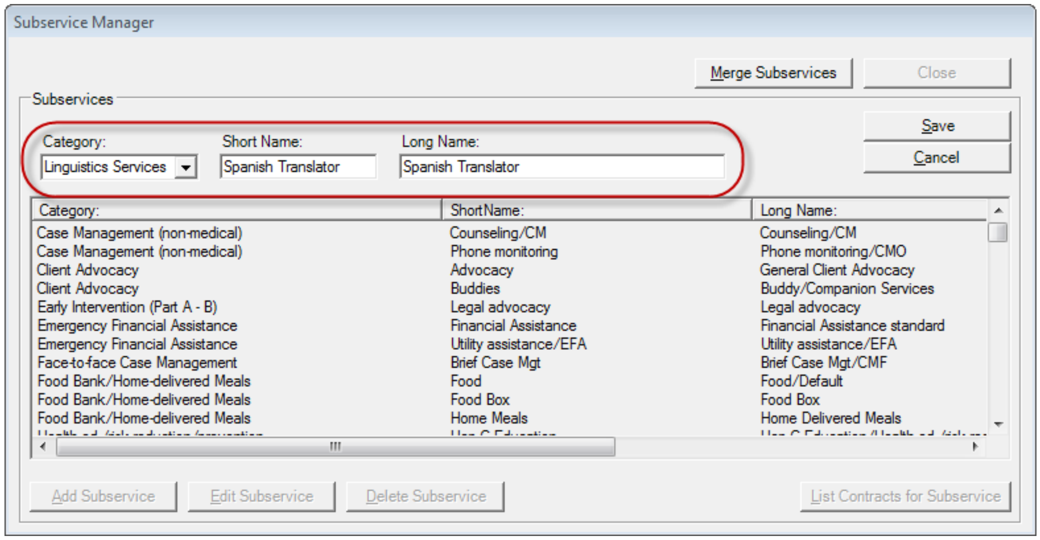


17. Click **Add Subservice.**

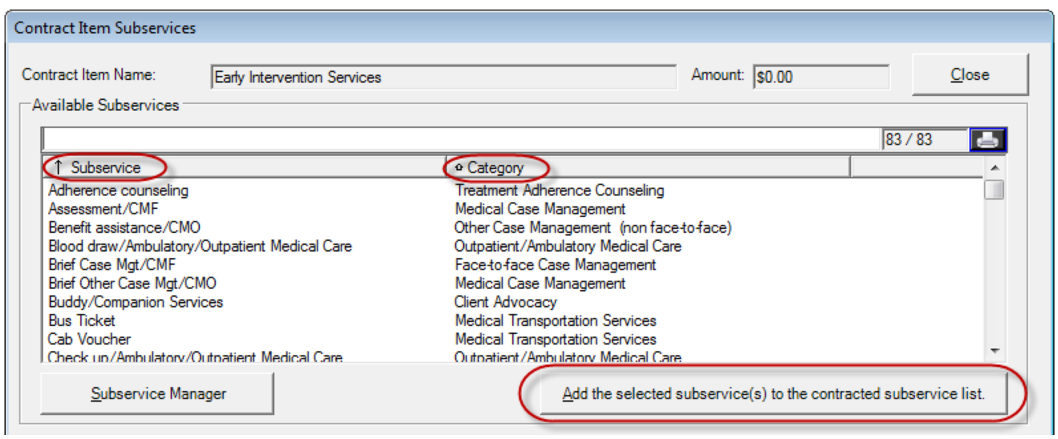


18. To add a subservice, you'll need to specify the **Category** (also known as the type of service). The Category is the HRSA-defined service category (as seen on your RSR). Then you'll create a **Short Name –** this is the name displayed in the drop-down menu when you perform data entry.

    Use the drop down menu to select the category. Next, enter a short name. We recommend using clear, easy names. You can edit the long name if you wish, but it's not necessary.

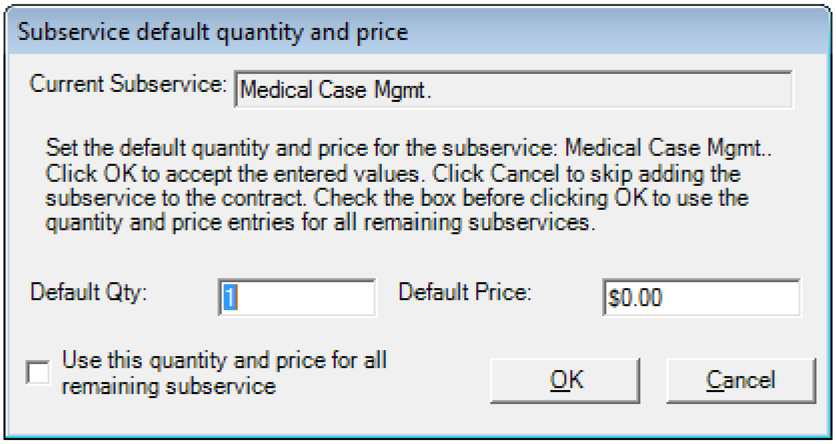


19. Click **Save** when you've finished. The subservice appears on the list and is ready to be attached to a contract. You can select it and click **Add the selected subservice(s) to the contracted subservice list**.

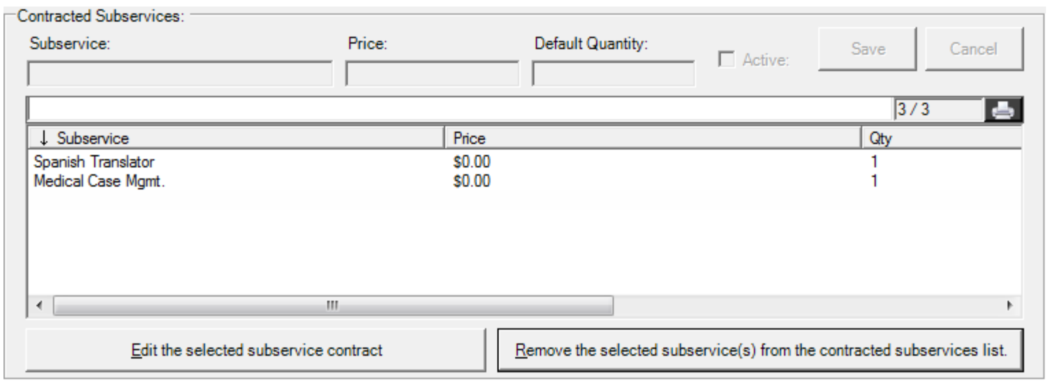


You can sort these A-Z or Z-A by clicking on either the **Subservice** or **Category** title. Select a subservice by clicking on it, then click the **Add the selected subservice(s) to the contracted subservice list** button.

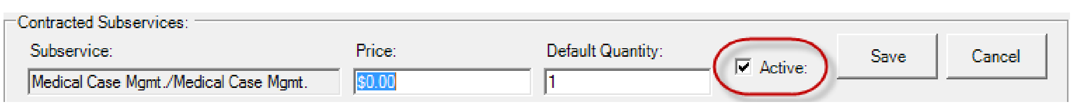
20. You'll be prompted to enter default units of service and cost of service. The default quantity is 1, and the default price is 0. You should enter a unit cost of service only if you plan on tracking your budgetary expenditure – this is not required so you can leave it at 0. If you check the box marked **Use this quantity and price for all remaining subservice**, you won't be prompted to do this when adding multiple subservices at the same time.

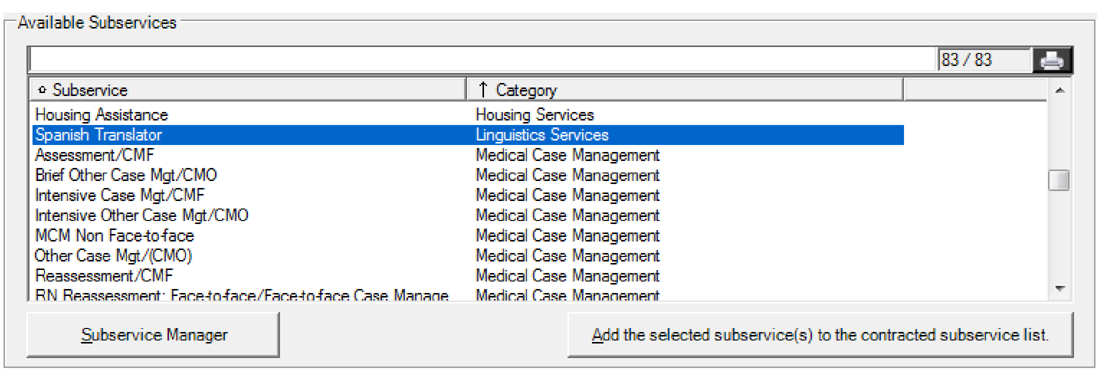


21. The subservice now appears in the bottom half of the window, under **Contracted Subservices**. You can now do data entry using this subservice.

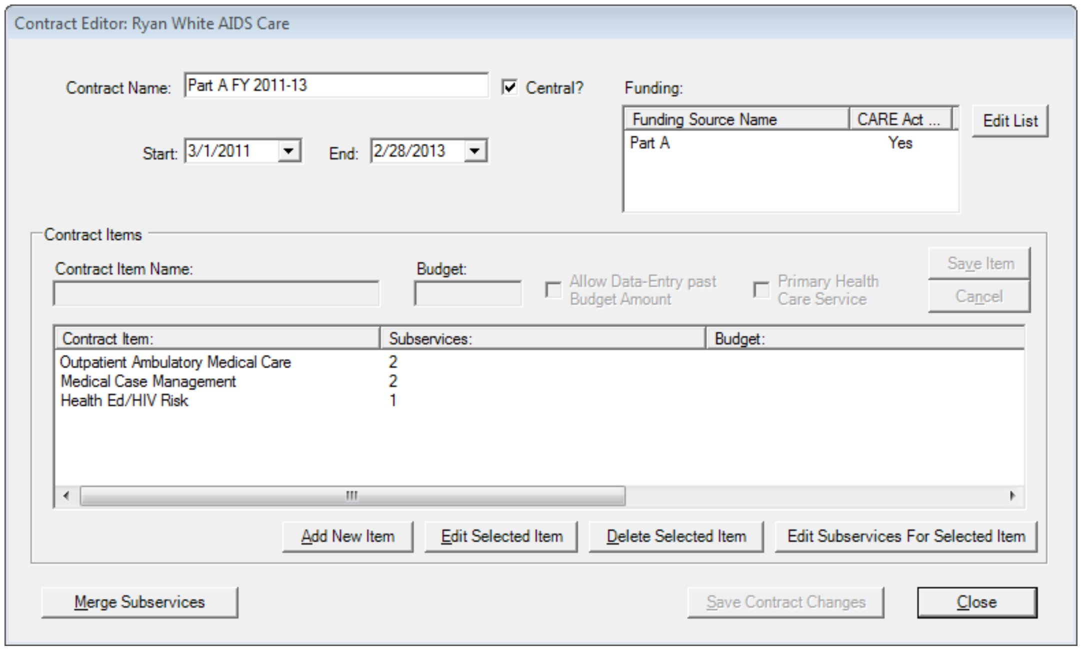


22. You can **Edit the selected subservice contract** if you want to change the price or default quantity later. Most likely, the only change you may need to make is to the **Active** check box. If you no longer provide a service, you can uncheck this box and prevent any further data entry for it.





23. Repeat these steps as necessary for all contracts and subservices. Here is a sample basic Part A contract:



And these are the subservices created for each contract item: