

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 #3: Entering Clients and their Service and Clinical Data



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

Guides in this series:

1. *Downloading and installing CAREWare*
2. *Creating contracts and services*
3. *Entering Clients and their Service and Clinical Data*
4. *Customizing tabs and fields*
5. *Customizing clinical data*
6. *Working with CAREWare's prebuilt reports (including the 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

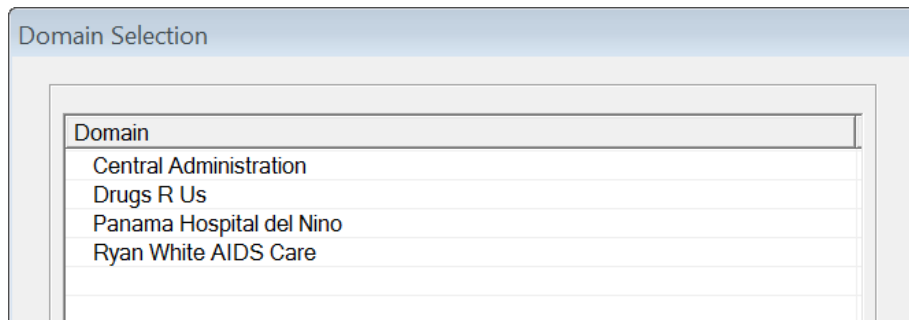
First Things First

What do I need to get started?

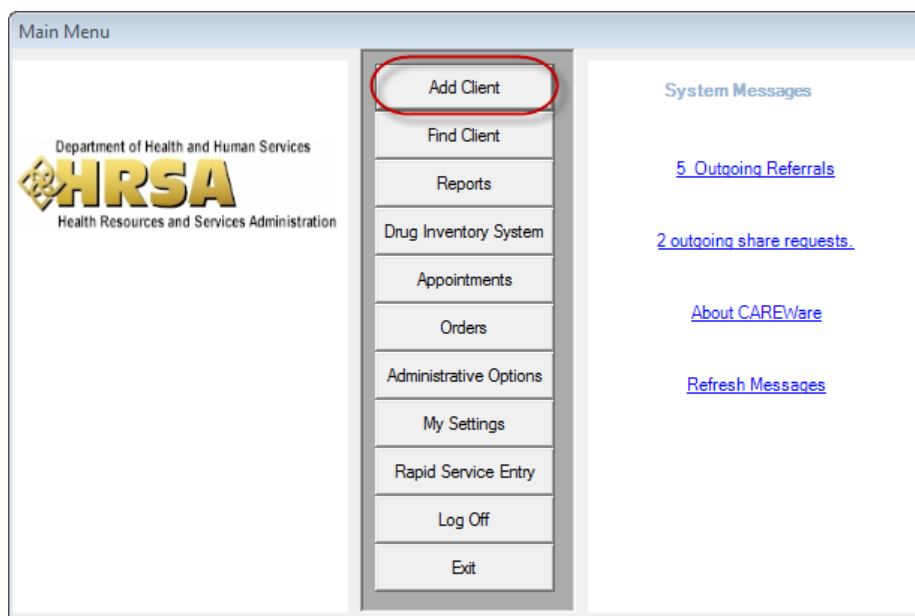
You can't enter services until you've set up your contracts. Please see the Quick Start guide, "Setting up Contracts and Subservices."

Entering Clients

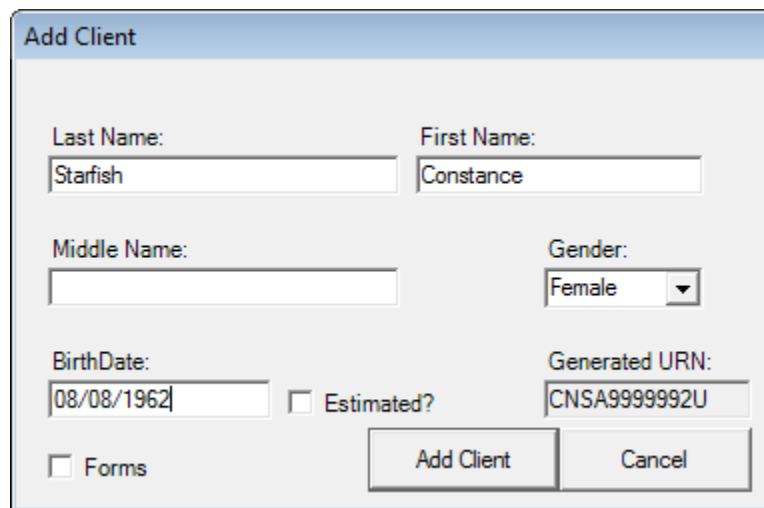
1. Log into CAREWare. If you have administrative privileges and are asked to choose between Central Administration and Provider ("Default" until you change the name), log in as a Provider.



2. Select **Add Client** from the main menu.



- The client information window appears.



The screenshot shows a dialog box titled "Add Client". It contains the following fields and controls:

- Last Name:** Text box containing "Starfish".
- First Name:** Text box containing "Constance".
- Middle Name:** Empty text box.
- Gender:** Dropdown menu showing "Female".
- BirthDate:** Text box containing "08/08/1962".
- Estimated?:** A checkbox that is currently unchecked.
- Generated URN:** Text box containing "CNSA999992U".
- Forms:** A checkbox that is currently unchecked.
- Buttons:** "Add Client" and "Cancel".

You'll need to enter **Last Name, First Name, Gender** and **Date of Birth**.

***NOTE:** This step is the number one source of duplicate clients and data entry errors in CAREWare. Please double check your entries here carefully before clicking the "Add Client" button!* Capitalize the first letters of the last and first name, and use the client's legal form of ID to confirm the Birth Date, Legal Name and Gender.

You can check **Estimated** if you don't know the client's exact birth date, but this should be avoided wherever possible as it dramatically increases the possibility of duplicate client records.

Check **Forms** to use a Form Designer template to enter client data. (You'll have to have already created a form; please see the complete user manual for instructions.)

- Click **Add Client**.

Duplicate Client Scenarios:

There are several scenarios where you may get a "duplicate client" message. The most common is when the client has already been entered into the system, but sometimes clients with common names may have the same birthday, so further research is needed before you proceed.

- In the event of a conflict, after you click **Add Client**, you'll see the **Possible Duplicate Client List** notice.

Possible Duplicate Client List

The new client information you have entered generates a unique record number 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:
Appleseed	JOSEPH	JSAP1205451U

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

[Cancel the add client process.](#)

If you do not have all the information at hand you will need to confirm the information, click **Cancel the add client process**. This could be a different person, or it could be a client who’s been closed in the system for years, so it’s best to double check regardless. Otherwise, click **View more information about the selected client**.

- If the information you entered in the Add Client box is **similar**, you’ll see this screen:

Add New Client Confirmation

Please confirm that the data you entered is correct and review the list to make sure that you are not entering a duplicate client.

Client URN: JSAP1206451U First Name: Joseph Last Name: Appleseed

Middle Name: Gender: Male Birth Date: 12/06/1945

[F1-Add New Client](#)
[F2-Go To Client Screen](#)
[F3-Go To Client Forms](#)
[ESC-Cancel](#)

Possible Matches:

Score	Name	Gender	Birth Date	Client URN
79	Appleseed, JOSEPH	Male	12/05/1945	JSAP1205451U

Shown here is an instance where the person doing data entry miskeyed the client’s birth date as 12/6/1945. CAREWare warns the user that a client with similar information is already listed at this agency, but with a birth date of 12/5/1945.

The **Score** is the probability that this person is the same person you're attempting to add. Score ranges from 75-100, where 100 is an exact match.

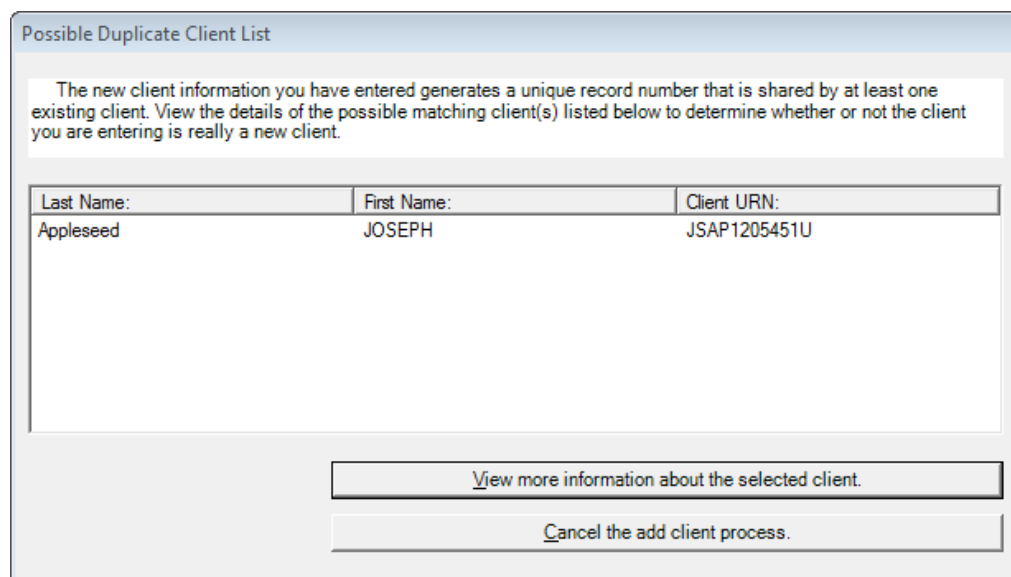
3. Select the client from the Possible Matches list and click **F2 - Go To Client Screen** to look at the client record and see if this is the same person.

If it is the same person:

- Click **Close** in the upper right hand corner of the client info window.
- Then **Cancel** in the Add window.
- Then use **Find Client** to look up the existing client and edit the record.

If it's a new client:

- Click **Close** in the upper right hand corner.
 - If you have confirmed this should be a new client record, with a similar Name and/or BirthDate as an existing record, click **F1 Add New Client**.
 - Then **F1 Add New Client** to confirm the addition.
4. If the information you entered is **exactly the same**, you'll see this screen. Click **View more information about the selected client**.



Last Name:	First Name:	Client URN:
Appleseed	JOSEPH	JSAP1205451U

5. Review the information on screen:

Possible Duplicate Client Information.

URN Fields:

First Name:	Middle Name:	Last Name:
JOSEPH		Appleseed
Date of Birth:	Gender:	Client URN:
12/5/1945	Male	JSAP1205451U

Address Fields:

Address:	City:		
1011 Jason Blvd	Queens		
State:	County:	Zip Code:	Phone Number:
New York	Queens	48911	

Ethnicity:

Hispanic Non-Hispanic Unknown

Race

<input checked="" type="checkbox"/> White	<input type="checkbox"/> American Indian or Alaska Native	<input type="checkbox"/> Other
<input type="checkbox"/> Black or African American	<input type="checkbox"/> Native Hawaiian or Other Pacific Islander	<input type="checkbox"/> Unknown
<input type="checkbox"/> 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.](#)

6. If it is the same person:

- Click **This is the client I was attempting to add. Continue to client screen** to go to the existing client record.

If it's a new client:

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

Entering Demographic Information

1. After you've created the client, the main demographic screen will appear.

The screenshot shows the 'Starfish, Constance' client record in the CAREWare system. The interface includes a top navigation bar with tabs for Appointments, Orders, Forms, Change Log, Client Report, Merge Client, Delete Client, Find List, New Search, and Close. Below this is a secondary navigation bar with tabs for Demographics, Drug Services, Service, Annual Review, Encounters, Referrals, HIV C&T, Pregnancy, Relations, Interesting Stuff, Hoi Polloi, and Attachments. The main content area is divided into several sections:

- Personal Information:** Fields for First Name (Constance), Middle Name, Last Name (Starfish), Date of Birth (11/14/1962), Gender (Female), Client URN (CNSA1114622U), Encrypted URN (QouLBI27), and Encrypted UCI (B3A97F9670955C8BD6B331C5826DA1FF69E8726BU).
- Ethnicity and Race:** Radio buttons for Ethnicity (Hispanic, Non-Hispanic, Unknown) and checkboxes for Race (White, Black or African American, Asian, American Indian or Alaska Native, Native Hawaiian or Other Pacific Islander, Other, Unknown).
- Address:** Fields for Client ID, Address, City, State, Zip Code, County, and Phone Number, with an 'Include on label report' checkbox.
- HIV Status:** A dropdown menu for HIV Status (Unknown), HIV+ Date, Est? checkbox, and AIDS Date, Est? checkbox.
- HIV Risk Factors:** Checkboxes for Male who has sex with male(s), Heterosexual contact, Receipt of transfusion of blood, blood components, or tissue, Injecting Drug Use, Perinatal Transmission, Other, specify, Hemophilia/coagulation disorder, and Undetermined/unknown, Risk not reported or identified.

You can go directly to the Services tab from here and begin entering services, but it's a best practice to enter all the main demographic data when you first create the client.

- Enter the client address (part of the zip code is required for the RSR). This will help other agencies on your network, if any, confirm this is the same client and reduce data entry.
 - Enter the client's Race/Ethnicity and HIV Status/Risk Factors
 - Enter the client's first service
 - Enter the remaining demographic information on the Annual Review tab
2. Enter the client's **Race/Ethnicity** by clicking the relevant Ethnicity button and checking the relevant boxes for Race. Multiple race categories can be checked.

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

- Enter the client’s **HIV status** from the drop-down menu. The default will be Unknown and only clients who are HIV+ are eligible for Ryan White services, so there should not be any clients with an HIV Status of Unknown.

Note: Unfortunately, any client with Ryan White services during the reporting year will be included on the RSR, even with an HIV Status=Unknown.

HIV Status: **Unknown**

- HIV-positive (not AIDS)
- HIV-positive (AIDS status unknown)
- CDC defined AIDS
- HIV-negative (affected)
- Unknown**
- HIV-indeterminate

HIV-indeterminate is only available for clients less than 2 years of age.

- Your selection of a status will trigger red alert flags for **HIV+ Date** for HIV positive clients, and **AIDS Date** for CDC-defined AIDS clients. Enter a date if known; if it’s a rough guess, enter a date and click the **Est?** (Estimated) box.

HIV Status: CDC defined AIDS HIV+ Date: Est? AIDS Date: Est?

- Enter the client’s **HIV Risk Factor(s)** by checking one or more risk factors as applicable. Note that MSM is disabled for female clients to prevent data entry errors.

HIV Risk Factors

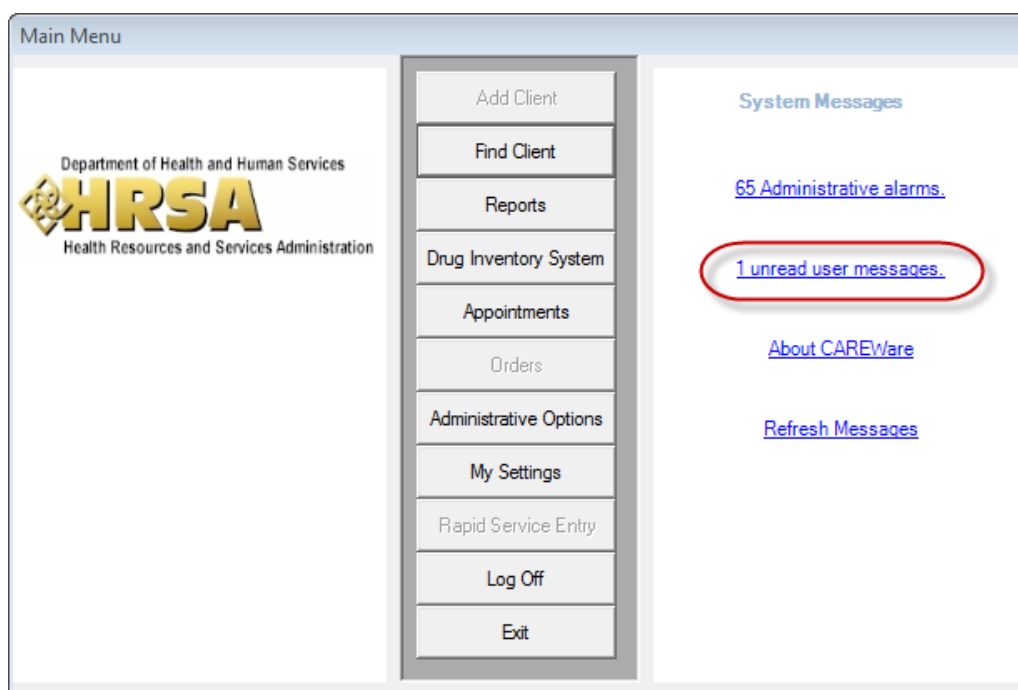
- Male who has sex with male(s)
- Heterosexual contact
- Receipt of transfusion of blood, blood components, or tissue
- Injecting Drug Use
- Perinatal Transmission
- Other, specify:
- Hemophilia/coagulation disorder
- Undetermined/unknown, Risk not reported or identified

- The remaining information is optional (Client ID if you have an internal chart numbering system, phone, etc.). **Include on label report** is an opt-in for clients to receive mail from your agency at this address.

Common Notes are for general comments for all system users, usually as flags for client interactions. Examples would include “Use phone discretion when leaving messages” or “Remind client to check in with case manager.”

Provider Notes function similarly but are specific to the provider, so they might include “Tell client prescription for Xixaxivax is ready” or other information a medical provider would not share with a social services provider.

User Notes allow users to send each other messages about this client, including messages from the Central Admin user to all users. These messages are flagged on the CAREWare “home page.”



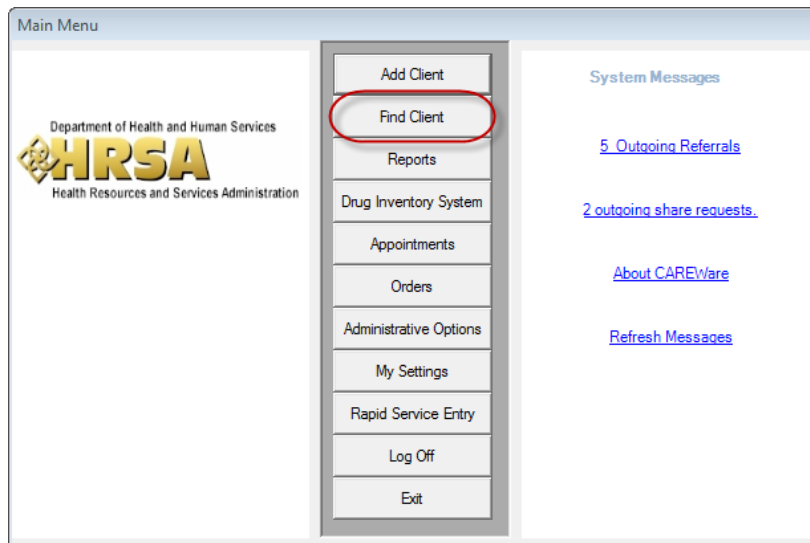
PLEASE NOTE: None of these notes are a substitute for case notes. They are meant as virtual “sticky notes.”

- You'll now need to go to the **Services** tab and enter a service, before going to the **Annual Review** tab to complete the client's entry into the system. **Remember that a client must have at least one RW-funded service in the reporting period to be included in the RSR.**

Entering Services

If you're entering a new client, you'll be in the client screen already; **skip to step 5**. If you're entering services for an existing client, perform the following actions.

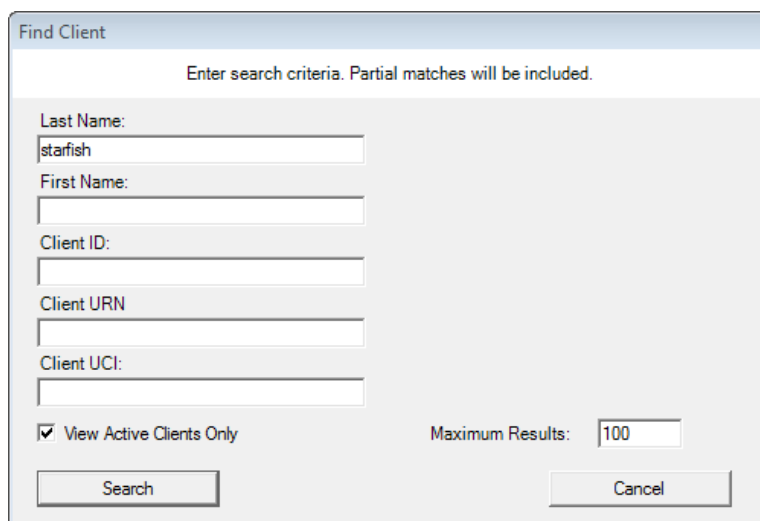
1. Log into CAREWare and select **Find Client** from the main menu.



2. Search by any of the available fields; in this case we'll use the last name.



PLEASE NOTE: The default is set to **View Active Clients Only**. Uncheck this box if you wish to search for **ALL clients**.



Find Client

Enter search criteria. Partial matches will be included.

Last Name:

First Name:

Client ID:

Client URN:

Client UCI:

View Active Clients Only

Maximum Results:

3. Click **Search**. A list of matches to your search appears.

Search Results
Search results for criteria: Last Name Like 'starfish', Active Clients Only.

Last Name	First Name	Client ID	Client URN	Client
Starfish	Constance		CNSA1114622U	Go...

Buttons: Forms, Details, Modify Search, New Search, Close

4. Select the correct name from the list and click **Details**. The client information window appears.
5. Click on the **Services** tab. Enter the client’s status information.

Starfish, Constance

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 | Interesting Stuff | Hoi Polloi | Attach

Year: 2012 | Vital Status: Alive | Deceased Date: | Enrl Status: Active | **Enrl Date:** | Case Closed: | HIP Enrl Status: Active | HIP Enrl Date: | HIP Closed:

Add/Edit Service Details

Date: | Service Name: | Contract: | Units: | Price: | Cost:

Buttons: Amount Received, Save, Cancel, Print

Date	Service Name	Contract	Units	Total	Received

Buttons: Service Sharing, Preview Services, **New Service**, Edit Service, Delete Service

- The defaults are a **Vital Status** of “Alive” and an **Enrollment Status** of “Active.” It’s possible for a client to be deceased and still be an active case, as you may still be doing case management, charting, etc. for a deceased client.
- The Enrollment Date should coincide with the first service for the agency. This is how the RSR determines new clients. *Note that the enrollment*


year is used by CAREWare for the Ryan White Services Report (RSR) to determine if this client is new in the current year or not.

- If a client leaves services (i.e. is Referred or Relocated), enter a Closed Date to remove them from the list of active clients. You'll need to reset them to back to **Active** status if they return to services.



PLEASE NOTE: Once entered, the Enrollment Date should not be changed.

6. After setting these, click **New Service**. The Add/Edit Service Details pane becomes active.

7. The default service date is today's date. Type in a different date if necessary or click the  arrow next to the date to use the calendar function.

NOTE: To enter services for a previous reporting year, select the Year dropdown box and the appropriate year.

8. Type in the first few letters of the service name or select one from the drop-down menu.

- Only services under active contracts will be listed; if you are looking for a service that you know is in the system but doesn't appear on your drop-down list, the contract may have reached its end date, or you may not

have added that subservice to this specific contract. See the Quick Start Guide, “Creating Contracts and Services.”

9. Enter the **Contract** for this service.
 - If this service is only funded under one contract, that contract will auto-fill under the Contract field. If the service is provided under multiple contracts (for instance, you may have case management services funded by both Part B and D), select the appropriate contract from the drop-down menu.
10. The default number of units and price will auto-fill based on how the service was set up. Enter any changes to the default, if required.
11. Seen here are two custom fields, “Wellness Level” and “Case Manager.” Custom fields can be tailored to your needs and are discussed in the Quick Start Guide, “Customizing Tabs and Fields.” They are not required entries.
12. Use the Amount Received button if you collect fees for services. (Please see the complete user manual for details.)
13. Click **Save** when done.
14. The service will appear in the service record portion of the screen (latest on top):

↓ Date	Service Name	Contract	Units	Total	Received
8/16/2012	Medical Case Management	Part A FY 2011-13	1	\$100.00	\$0.00
3/8/2012	Medical Case Management	Part A FY 2011-13	2	\$60.00	(\$179.76)
3/7/2012	Labs	Part A FY 2011-13	1	\$50.00	(\$179.76)
2/1/2012	PMCT	CDC GAP Services	1	\$50.00	\$0.00
1/1/2012	Medical Case Management	Part A FY 2011-13	2	\$100.00	(\$179.76)

15. You can **Edit** or **Delete** service records as needed.
16. Select **Preview Services** to create a report of services for this client.

NEXT STEPS:

If this is the client’s first service, click on the **Annual Review** tab to complete their entry. Otherwise, you can continue entering services or other client information.

Entering RSR-Required Annual Review Data

1. After entering and saving the client's first service, go to the **Annual Review** tab.

Starfish, Constance

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 | Interesting Stuff | Hoi Polloi | Attac

Annual | Annual RSR View | Annual Custom Fields | Quarterly

Summary Data as of 8/13/2012 Bring Forward

Insurance Add Edit Delete

0 / 0

↓ Date	Primary Insurance	Other Insurance
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Insurance
Primary Insurance:
Other Insurance:

Federal Poverty Level
Household Income: **\$0.00**
Household Size: **0** Poverty Level: **0%**

Annual Screening

HIV Primary Care

Housing Arrangement

HIV Transmission Counseling

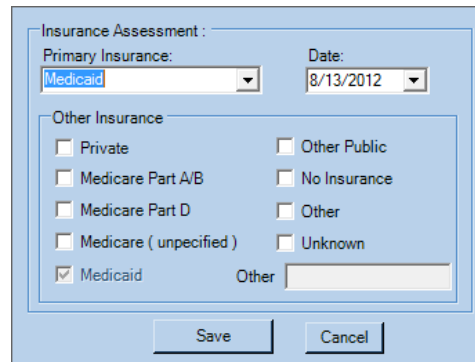
Mental Health

Substance Abuse

2. As you roll over each area on the left, the window on the right will change to allow data entry for that section. Click **Add** to create a new entry.

The following information is required for the RSR (HIV Transmission Counseling, Mental Health and Substance Abuse Screenings are required for medical care providers):

- **Insurance Assessment.** Enter the primary source of insurance and any other secondary sources if applicable. Use the drop down menu to select the **Primary** source, then one of the check boxes if the client has any **Other** or supplemental source.



Insurance Assessment :

Primary Insurance: Date:

Other Insurance

Private Other Public

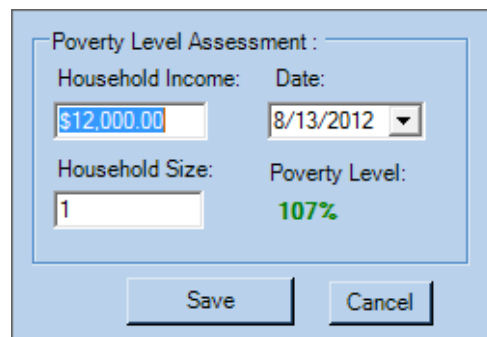
Medicare Part A/B No Insurance

Medicare Part D Other

Medicare (unspecified) Unknown

Medicaid

- **Poverty Level Assessment** – enter the Household Income and Household Size (number of people). The level will not calculate until after you **Save** the entry. This will automatically calculate the Federal poverty level for that calendar year. Providers/grantees in Hawaii and Alaska, which have different cost of living calculations, must indicate the appropriate state in the Grantee setup wizard in Central Administration.



Poverty Level Assessment :

Household Income: Date:

Household Size: Poverty Level: **107%**



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

- **Annual Screening fields** are accessible through the Annual Screening area by rolling over any of these on the left hand side. Click Add then select the Type from the drop down menu.

The screenshot shows the 'Annual Screening' window with a table containing columns for Date, Screening, Result, and Action. A modal dialog is open for adding a new screening entry. The dialog has the following fields:

- Type: A dropdown menu with options: HIV Primary Care, Housing Arrangement, HIV Transmission Counseling, Mental Health, Substance Abuse.
- Result: A dropdown menu.
- Date: A date picker showing 8/13/2012.

Buttons for 'Save' and 'Cancel' are at the bottom of the dialog.

- **HIV Primary Care** – enter the location where the client receives their primary HIV medical care.

This close-up shows the 'Annual Screening' dialog with 'Type' set to 'HIV Primary Care'. The 'Result' dropdown menu is open, displaying the following location options:

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

- **Housing Arrangement.** Please refer to HRSA guidelines to determine the difference between stable/permanently and non-permanently housed.

This close-up shows the 'Annual Screening' dialog with 'Type' set to 'Housing Arrangement'. The 'Result' dropdown menu is open, displaying the following housing status options:

- Institution
- Non-permanently Housed
- Other
- Stable/Permanent
- Unknown / Unreported
- Unstable

Buttons for 'Save' and 'Cancel' are at the bottom of the dialog.

- **HIV Transmission Counseling.** If the counseling has been provided, select the appropriate authorized counselor who performed it.

- Enter any mental health or substance abuse screening performed, if applicable



Data entry hint: Much of the information on the Annual Review tab may stay the same from year to year. CAREWare contains a feature that will “roll-over” these data from one year to the next.

To use this feature, click the **Bring Forward** button at the top of the tab. The date will appear in RED if the data is more than a year old. Though shown here as “1/1/2010,” in a forthcoming build, the legacy data will be set to 12/31 of the year in which it is reported.

Summary Data as of 8/13/2012 **Bring Forward**

↓ Date	Household Inco...	Household Size	Poverty Level
1/1/2010	\$45,000.000	2	309.00%
1/1/2010	\$45,000.000	2	309.00%
1/1/2008	\$45,000.000	2	321.00%
1/1/2008	\$45,000.000	2	321.00%
1/1/2007	\$4,500.000	1	44.00%
1/1/2007	\$4,500.000	1	44.00%
1/1/2006	\$4,500.000	1	46.00%
1/1/2006	\$4,500.000	1	46.00%
1/1/2005	\$4,500.000	1	47.00%
1/1/2005	\$4,500.000	1	47.00%
1/1/2000	\$4,500.000	1	54.00%
1/1/2000	\$4,500.000	1	54.00%

Annual Screening

HIV Primary Care	*1/1/2010
Hospital outpatient center	
Housing Arrangement	*1/1/2010
Stable/Permanent	
HIV Transmission Counseling	*1/1/2010
No	
Mental Health	*1/1/2007
No	
Substance Abuse	

You'll be given the option to check boxes next to the prior information to carry it forward if there are no changes.

Assessment Date: 8/13/2012

Bring Forward Values

<input checked="" type="checkbox"/>	Insurance Primary Insurance: No Insurance Other Insurance:	8/10/2012
<input checked="" type="checkbox"/>	Federal Poverty Level Household Income: \$11,170.00 Household Size: 1 Poverty Level: 100%	1/1/2012
<input type="checkbox"/>	HIV Primary Care Private practice	1/1/2012
<input type="checkbox"/>	Housing Arrangement Stable/Permanent	1/1/2012

Save Cancel

Entering Clinical Encounter Data

NOTE: For most of the sub-tabs under **Encounters**, you can also create Reports and Charts. See the Reporting user guides for more information.

1. Open the client's record, then click on the **Encounters** tab.

ALLEN, LAWRENCE

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 | Relations | Food Bank | Hoi Polloi | Attachments | Subform

Encounter Date: 08/09/2012 | Ryan White | 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

	Prior Value:	Date Taken:	Current Value:	Current Value Provider:
Height(inches)	72.0	8/8/2012		Ryan White AIDS Care
Weight(lbs)	190.0	8/8/2012		
Pulse (bpm)	90.0	8/8/2012		
Temperature(F)	98.7	8/8/2012		
B.P. Sys/Dia:	120.0/80.0	8/8/2012		

Pregnant? Last visit Currently

There are two ways to enter clinical data.

You can choose **Create Encounter**, which allows you to enter all the data associated with an encounter date (i.e. a clinic visit), or


You can choose **Rapid Entry**, which allows you to enter just one subset of data (e.g. labs or screenings) on any date, on or off a formal clinical encounter. For details on Rapid Entry, please see the complete User Manual. *It is only in Rapid Entry that you can print **graphs** of lab tests and vital signs over time.*

2. Click **Create Encounter** to create an encounter.

Create Encounter

Encounter Date: 8/9/2012

Create Encounter Cancel

You will be prompted to enter the encounter date. The system defaults to today's date. You can type in a different date or use the  arrow to bring up the drop-down calendar. Click **Create Encounter** after entering the date.

- The color of the subtab titles goes from gray to red. Select any subtab to enter data.

Vital Signs:

Choose **English** or **Metric** values. You only need to enter **Height** once for adults; this will roll over to future encounters. This is not RSR-reported data so it is optional.

Hospital/ER Admissions

Enter any data you wish to record – this is not RSR-reported data so it is optional. Click **Save** when done.

Medications

The **Date ART 1st Prescribed** field will auto-populate with the start date of the first ART drug entered. The **HIV+ Date** comes from information entered in the Demographics tab. If the client is not yet on ART, you can enter a **Pre-ART Reason** from the drop down menu.

Current Medications:

HIV + Date: Date ART 1st Prescribed: 4/26/2002 Pre-ART Reason:

Allergies:

Medication:	Abbreviation:	Class:	Units:	Strength:	Dose:	Frequency:	Daily Dose:	Indication:	OI:
Eпивir (Unsp...	3TC	NRTI	1	125	125	bid	250	ART	
Combivir (a...	AZT+3TC	NRTI	1	125	125	tid	375	ART	
Reyataz (Ca...	ATV	PI	1	300	300	qd	300	ART	

Buttons: Start, Stop, Correct Data Error, Change Dose

1. Click **Start** to enter a new medication.

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: 8/8/2012

Regimen:

Start	Regimen Name
<input type="checkbox"/>	ART 1
<input type="checkbox"/>	Atripla
<input type="checkbox"/>	Comb/Sust
<input type="checkbox"/>	Nevirapine Pediatric Regimen: 5...
<input type="checkbox"/>	New Protease Inh Regimen

Regimen Setup

Medication(s): Filter:

Start	Medication Name
<input type="checkbox"/>	Agenerase
<input type="checkbox"/>	albendazole
<input type="checkbox"/>	amoxicillin (as trihydrate)
<input type="checkbox"/>	Antihypertensive X
<input type="checkbox"/>	Aptivus (tipranavir)
<input type="checkbox"/>	aripiprazole
<input type="checkbox"/>	Atenolol Plus
<input type="checkbox"/>	Atripla
<input type="checkbox"/>	Bactrim

Buttons: Cancel, Next>>

The start date is grayed out since by default the encounter date = start date. Scroll through the list of medications and select the check box next to the med or meds to start. You can also create a **Regimen** or group of antiretrovirals (or perhaps TB drugs) that will ease data entry by starting all the medications in the regimen at once.

You can use the Filter to do a quick find. Type several of the letters in the medication’s name to automatically reduce the length of the list. For example, typing “rey” will bring up Reyataz.

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: 8/13/2012

Regimen:

Start	Regimen Name
<input type="checkbox"/>	ART1
<input type="checkbox"/>	Atripla
<input type="checkbox"/>	Comb/Sust
<input type="checkbox"/>	Nevirapine Pediatric Regimen: 5...
<input type="checkbox"/>	New Protease Inh Regimen

Regimen Setup

Medication(s): Filter: rey

Start	Medication Name
<input type="checkbox"/>	Reyataz

Cancel Next>>

2. Click **Next** to enter strength, frequency, etc. Indicate whether the medication is ART, Opportunistic Infection (OI) treatment, OI prophylaxis or other. If this is an OI med, the OI drop down box will activate so you can choose the OI being treated.



PLEASE NOTE: For accurate reporting on the RSR and HAB Performance Measures, clinical data-entry of meds is crucial for medical providers. CAREWare looks to these fields – Indication and OI – to determine how many antiretroviral medications the client is on (if any) and if a client has been or is currently being treated for PCP Prophylaxis or other Opportunistic Infection diseases.

Start Medication

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

Medication:	Units:	Form:	Strength:	Frequency:	Dose:	Indication:	OI:	Comment:	Instructions:
Norvir	1	Tablets	100	qd	100	ART			
Reyataz	1	Capsules	300	qd	300	ART			
Truvada	1	Tablets	500	qd	500	ART			

<<Back Finish



PLEASE NOTE: Remember that if you select an Indication of OI Treatment or OI Prophylaxis, the OI needs to be specified for performance measures to report properly:

Indication:	OI:	Comment:	Instructions:
OI Prophylaxis	<div style="border: 1px solid black; padding: 2px;"> Pneumocystis carinii pneumonia (PCP) M. avium complex (Mac) M. tuberculosis (Mtb) Candida Cytomegalovirus (CMV) Toxoplasma gondii Varicella zoster virus (VZV) Other </div>		

3. Click **Finish** when done.
4. To stop a medication, click on **Stop**.

Stop Medication

1. Enter the last date that client took the medication(s) and the reason for discontinuing the medication(s):

Stop Date: Reason for Discontinuing:

2. Check the medication(s) to be stopped.

Stop	Medication Name	Reason for Discontinuing
<input type="checkbox"/>	Norvir (Tablets)	Virologic Failure
<input type="checkbox"/>	Reyataz (Capsules)	Toxicity
<input type="checkbox"/>	Truvada (Tablets)	Intolerance
		Lost to followup
		Dose Change
		Other
		Unknown
		Therapy completed

5. Select the reason for discontinuing from the drop down menu, check the medication to be stopped. Click **Close** if you are done with meds, or click **Go to Start New Med(s) Form** to start the client on a new med.
6. To make changes, click on a med to highlight it and click **Correct Data Error**. If a medication is already in the system as “prescribed,” you’ll need to stop this prescription and recreate it.

Medication:	Abbreviation:	Class:	Units:	Strength:	Dose:	Frequency:	Daily Dose:	Indication:
Norvir (Tablets)	RTV	PI	1	100	100	qd	100	ART
Reyataz (Capsules)	ATV	PI	1	300	300	qd	300	ART
Truvada (Tablets)	TDF+FTC	NRTI	1	500	500	qd	500	ART

Start Stop **Correct Data Error** Change Dose

7. You can add or remove a medication from the database of available meds through the **Setup** feature on this tab. Please see the Clinical Encounter Setup Quick Start guide for details. It’s important to download the most current medication list available from HRSA before you add medications to your active list. *If you don’t see a specific drug on the list, it may be that you need to download a more recent medication file.*

Labs

1. Click on any test or select one from the **Current Test** drop down menu.

Labs Rapid Entry Setup

Add/Edit

Current Test: CD4 Count (cells/mm³) = 200 Save Delete

Test:	Date of Prior Test:	Prior Result:	Current Result (08/1...	Provider:	Comment:
CD4 Count (cells/mm ³)	02/01/2008	198			
CD4 Percent					
HDL (mg/dL)					
LDL (mg/dL)					
Platelets (cells/mm ³)	11/01/2007	345666			
Total Cholesterol (mg/...					
Triglycerides (mg/dL)					
Viral Load (Copies/mL)	11/29/2007	1000			
WBC (x 10 ⁹ /mm ³)					

2. Select whether the result is =, <= or >=.
3. Enter the value in the Result box and click **Save**.
4. For viral load, you have the option of selecting “Assay” from the drop down menu.

Screening Labs

Screening labs are any tests with a Qualitative result—Negative, Positive, Indeterminate, etc.

Test:	Date of Prior T...	Prior Result:	Current Result ...	Titer:	Treatment:	Provider:	Comment:
Hepatitis B surf...							
Hepatitis C anti...							
HIV							
HPV							
Human Papillom...							
IGRA							
MMR							
Non-Specific Ur...							
Panel Test							
SARS							
Syphilis	06/01/2007	Positive					
Toxoplasma Ig...							
Varicella (Chick...							

1. Click on any test or select one from the **Current Test** drop down menu.
2. Select the **Result** from the drop down menu. (NMI or Not Medically Indicated is often selected for hepatitis tests to indicate that the client has already been exposed; this prevents your reports from counting these clients as not having been tested for hepatitis.)
3. The **Titer** field will activate for tests where titer is indicated (e.g. syphilis). **Viral titer** is the lowest concentration of a virus that still infects cells.
4. Select a **Treatment** from the drop down menu.
5. Click **Save**.

Screenings

Screenings Rapid Entry Setup

Add/Edit

Current Test: Current Result: Current Action: Current Score: Save Delete

Test:	Date of Pri...	Prior Result:	Prior Action:	Pri...
Anal Pap				
Appetite				
Bowels				
Geno/Pheno				
History of se...				
Mental Health	01/01/2007	No		
Mouth				
PSA				
Rectal Pap ...				
Substance ...				
TB Chest R...	02/06/2006	Negative		
TST	09/03/2007	Negative (...)	Prophylaxis...	

Client did not return for reading
 Negative (<5mm)
 Not documented in medical record/unknown
 Not medically indicated
 Positive (>=5 mm)
 Refused

1. Click on any test or select one from the **Current Test** drop down menu.
2. Select the **Current Result** from the drop down menu. Data in the drop down is test dependent, i.e. if you select TST you'll see Negative <5mm, Positive >5mm, Client did not return for reading, etc.
3. Select a **Current Action** if applicable.
4. Click **Save**.

Immunizations

Vaccine:	Prior:	Prior Date:	Received:	Immunity:
Gardisil				
Hep A/Hep B (Twinrix)(1)				
Hep A/Hep B (Twinrix)(2)				
Hep A/Hep B (Twinrix)(3)				
Hepatitis A (1)				
Hepatitis A (2)				
Hepatitis B (1)				
Hepatitis B (2)				
Hepatitis B (3)				
Influenza				
MMR				
Pneumovax (Pneumococca...	NMI	03/12/2007		
Tetanus Toxoid				

1. Click on any test or select one from the **Vaccine** drop down menu.
2. Select the appropriate value from **Received**.
3. Select the appropriate value from **Immunity**.

There are often cases where a client has either been vaccinated prior to entering your care (hepatitis, pneumovax) or has already been exposed and requires no vaccination. In these cases you would select “NMI” under **Received** and “History of immunization” or “History of vaccination” under **Immunity**.

4. Click **Save**.

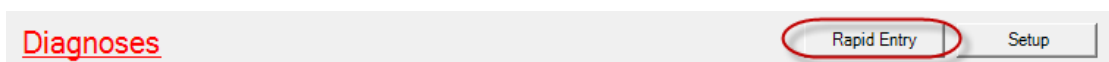
Diagnoses

1. Click on any condition or select one from the drop down menu.
2. Select diagnosis from the drop down menu.
3. Enter any comments.
4. Click **Save**.



TIP: If you have a large number of activated diagnoses, you can use the Rapid Entry screen to filter them by diagnosis name.

1. Click **Rapid Entry** at the top of the Diagnoses panel.



2. Click **Add**, then the button next to the **Condition** drop down.

3. Type in the first few letters of the condition name to filter the results. Shown here are all the tuberculosis diagnoses codes that come up when you type “tuber.”

4. Select the condition, click OK and enter the remaining information (date, definitive/presumptive/unknown diagnosis, comments).

NOTE: CMS will be phasing in ICD-10 codes in the near future. CAREWare will make this file available. Using CMS files, we will map ICD9 onto ICD10, which may result in certain codes remaining unmapped.

Here’s the link to the CMS website: <https://www.cms.gov/ICD10/>

Case Notes

NOTE: This can be accessed from here or from the Demographic tab, both link to the same information.

Case Note (for the selected encounter date):

Rapid Entry Setup

Edit/Append

Save Add Append Paste Template Spell Check Thesaurus Delete

Provider: Note: Author:

1. Type a case note in the **Edit/Append** box and click **Save Add** when done.
2. Note the Spell Check, Thesaurus and Template features.
3. Templates allow you to create a standard format for a case note. Click **Setup** in the upper right hand corner to begin.

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

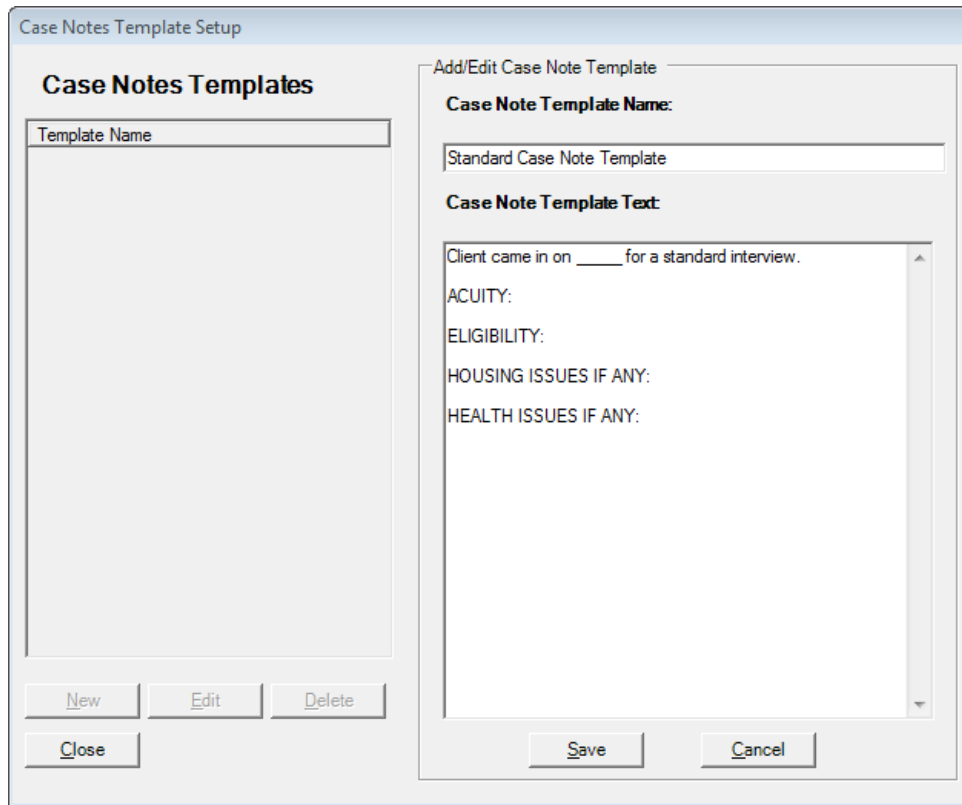
Case Note (for the selected encounter date):

Rapid Entry Setup

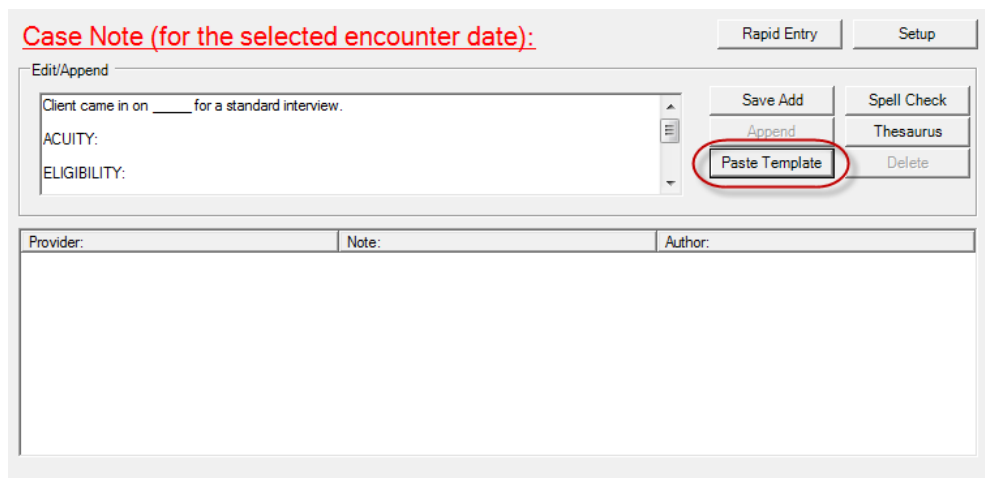
Edit/Append

Save Add Append Paste Template Spell Check Thesaurus Delete

4. Click **New** to create a template. Enter a name and fill in the information each case note of this type will require.

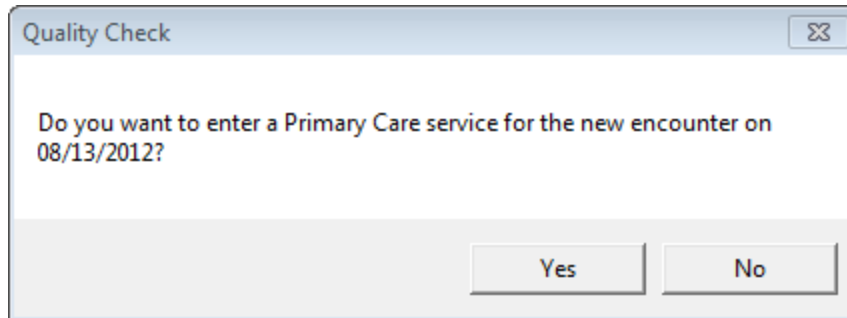


5. Click **Save** when done, then **Close**.
6. Click **Paste Template** from the Case Notes window, and select the template. The template will pre-populate the new case note.



Adding a Related Service

When you complete your Encounter entries and navigate away from this screen, you'll be asked if you want to add a Primary Care service for this encounter date:



You'll be redirected to the Services tab where you can enter a medical service as applicable.

Where do I go from here?

To customize service data entry fields, please see the Quick Start guide, "Customizing Tabs and Fields." To add or modify clinical encounter data (add/edit test data, etc.), please see the Quick Start guide, "Customizing Clinical Data."