CAREWARE 6

TRAINING MANUAL

Louisiana HealthHub
STD/HIV/Hepatitis Program | www.lahhub.org

Prepared by: STD/HIV/Hepatitis Program

Last Updated: October 1, 2020

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:

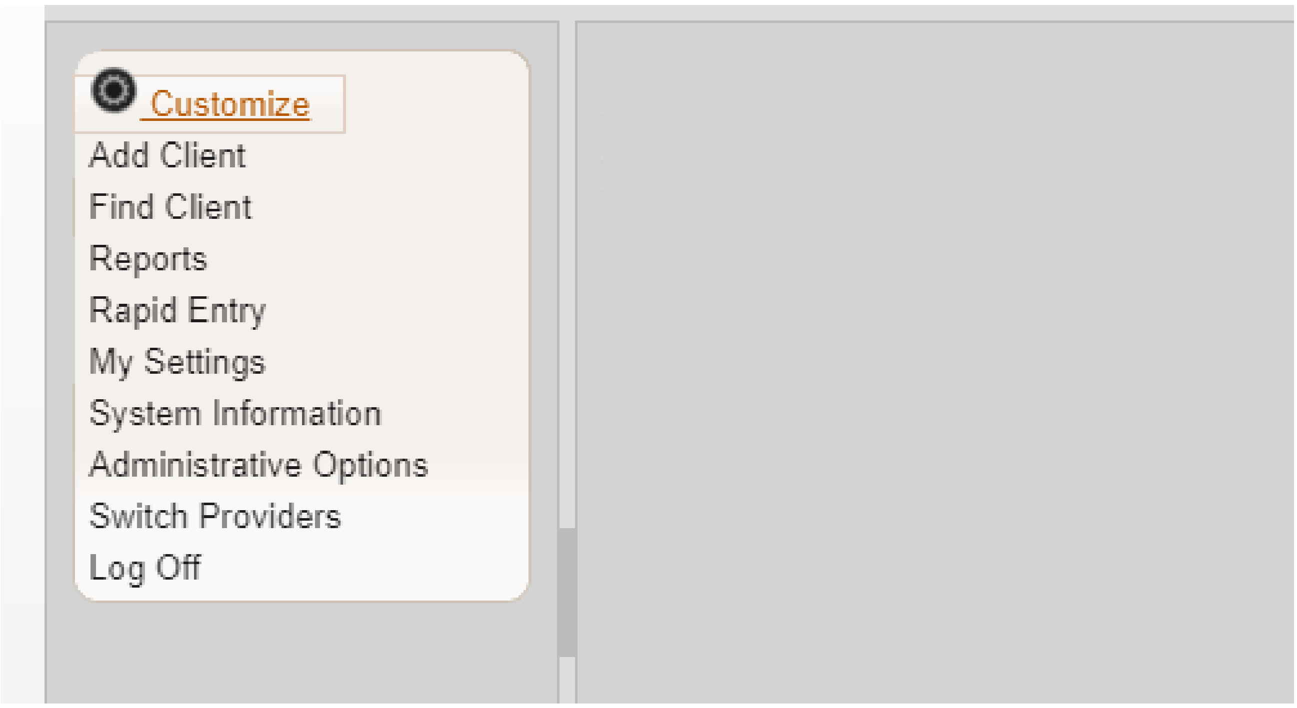
- Chrome
- Firefox
- Microsoft Edge
- Safari

Internet Explorer cannot be used to access CAREWare 6.

WHAT'S NEW IN CAREWARE 6

MENU OF LINKS

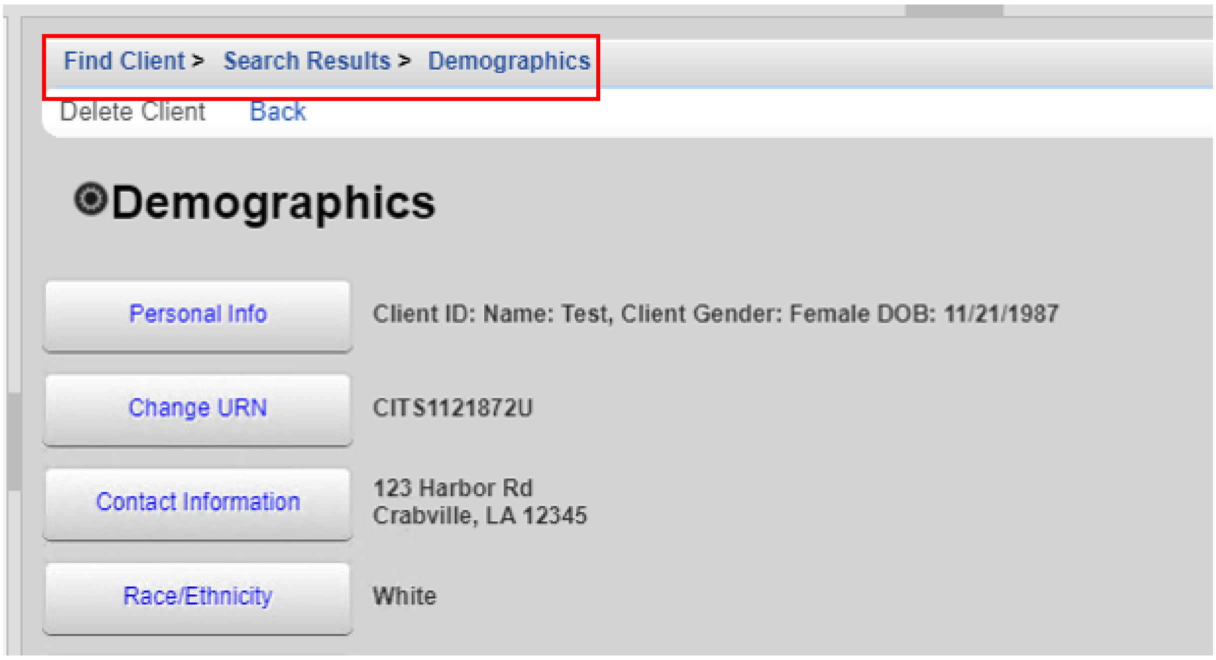
Upon logging in to CAREWare, you will find a Menu of Links on the left-hand side of the screen. Simply click on the item you wish to access.



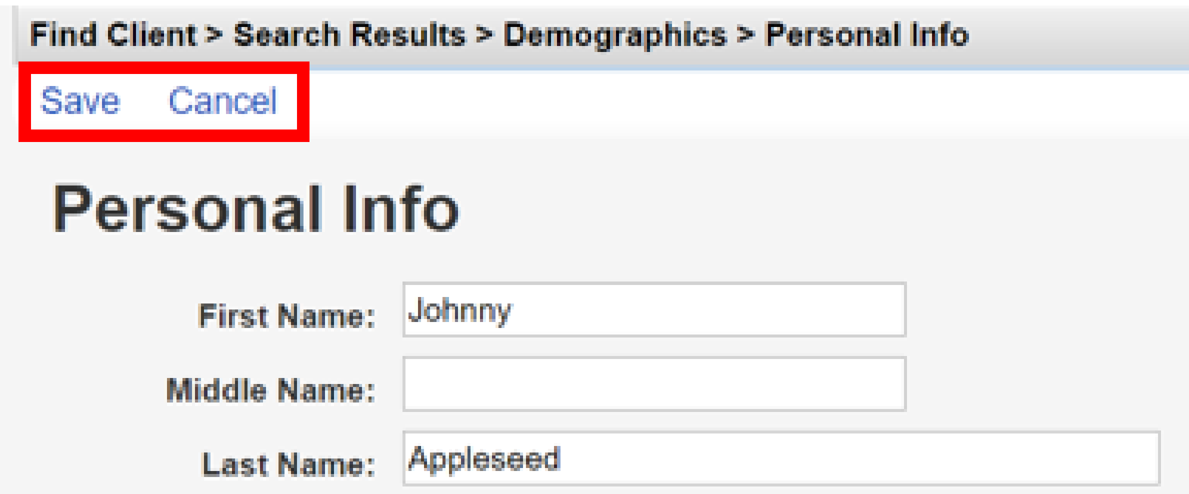
BREADCRUMBS

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

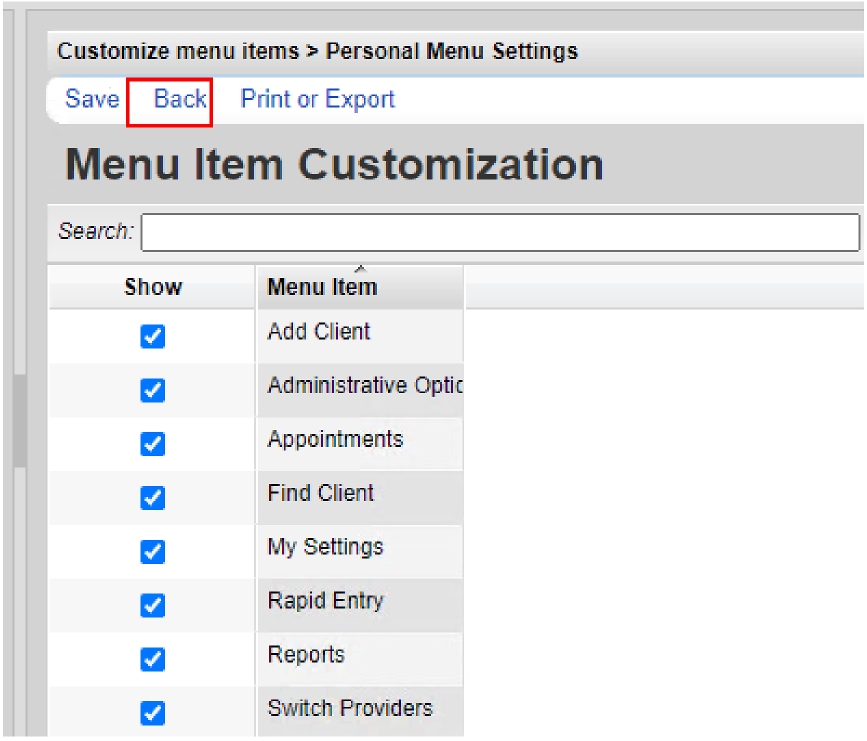


If the items in the Breadcrumb trail are blue (as in the example above), click on the item link to return to that section. If they are black, you must either click **Save** or **Cancel** to return to the previous section.



CUSTOMIZATION

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.

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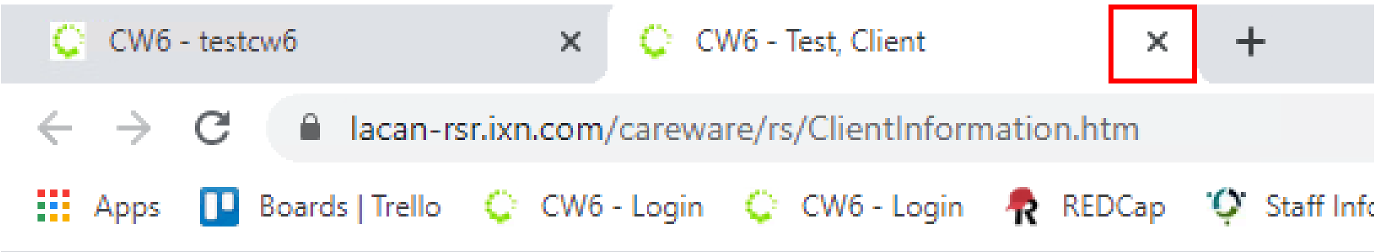
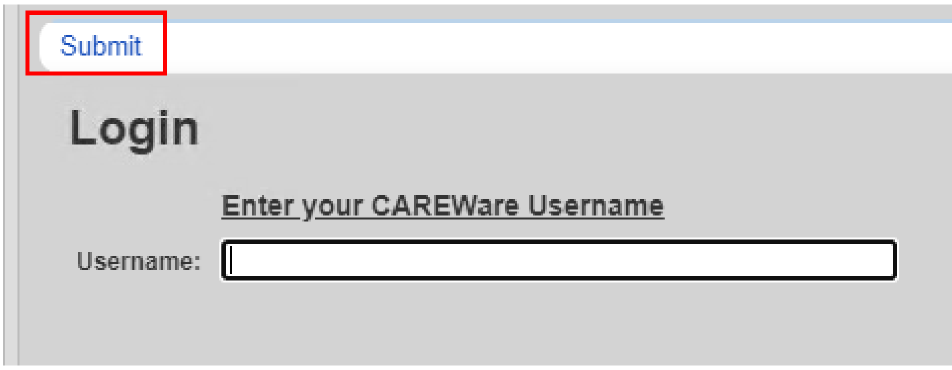


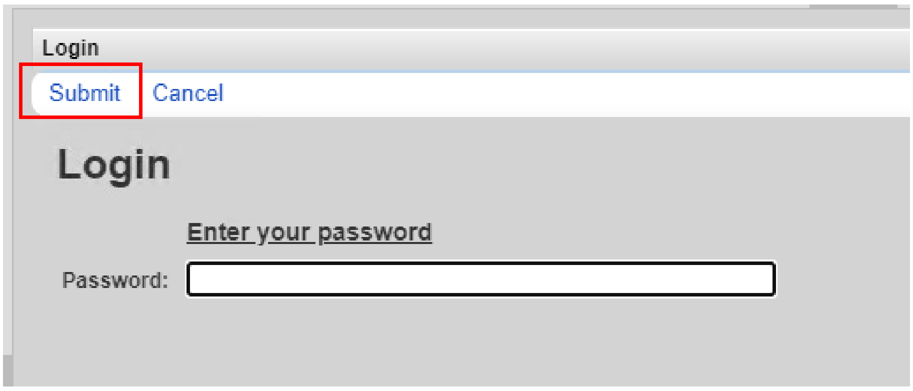
LOGGING INTO CAREWARE 6

01 Open your browser and go to lacan.ixn.com

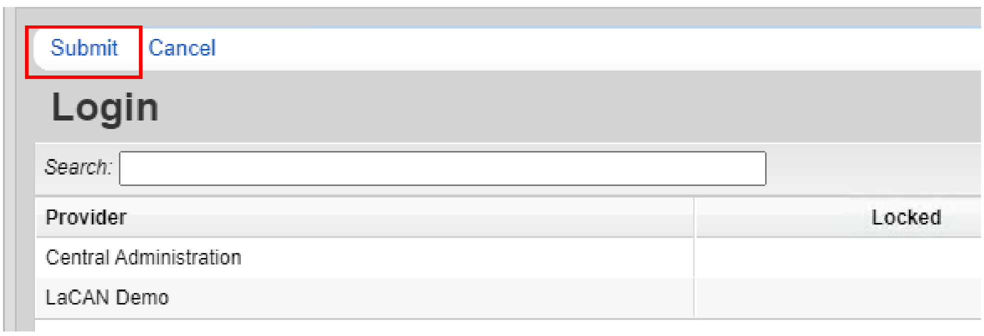
02 Enter your CAREWare username and click **Submit**.



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



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



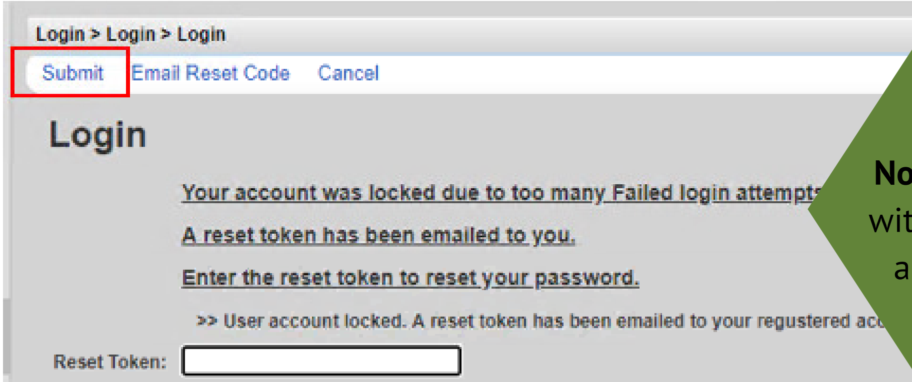
RESETTING PASSWORDS

After three failed login attempts your account will be locked.

01 Click **Email Reset Code**

02 Check your email for the Reset Token.

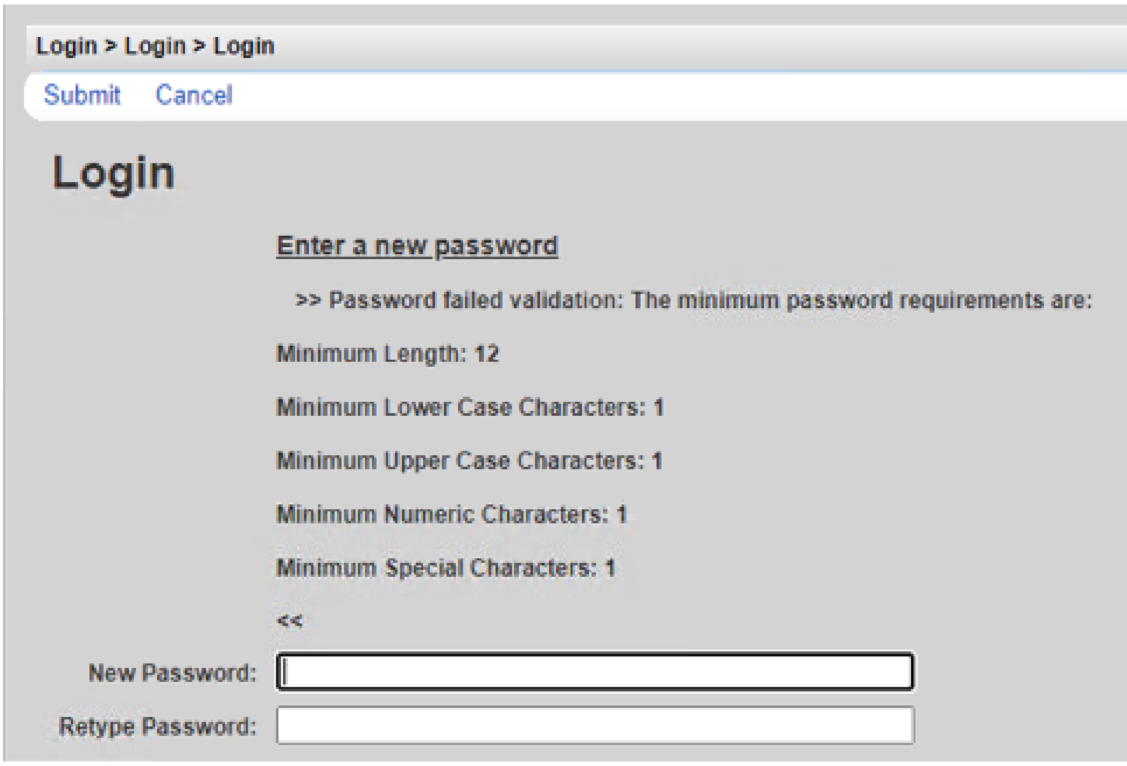
03 Enter the Reset token and click **Submit.**



Note: If you do not receive an email with the token, please contact SHHP and we can reset your password.

04 Enter your new password, then retype it and click **Submit**.

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



ACCESSING CAREWARE 6

TWO-FACTOR AUTHENTICATION IN CAREWARE

WHAT IS TWO-FACTOR AUTHENTICATION?

Two-factorauthentication (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

TWO-FACTOR AUTHENTICATION OPTIONS

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.

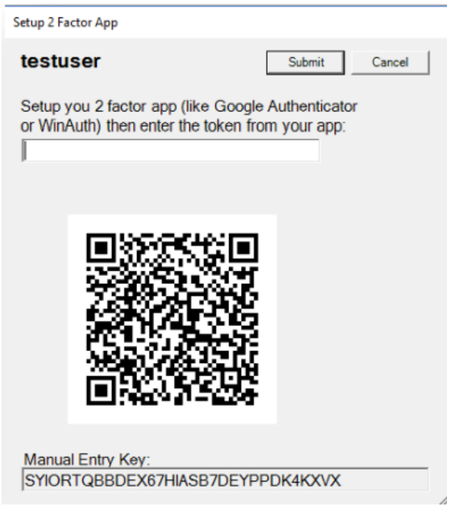
03 On your mobile device open the Google Authenticator app and select **Begin Setup.**

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.**



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.

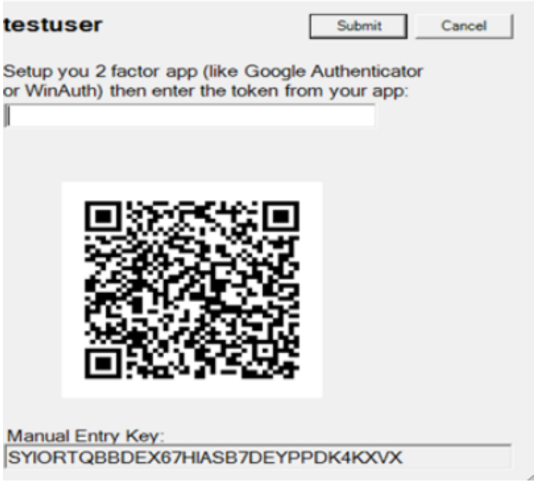
02 When prompted for the code, open your Google Authenticator app and wait for the current code to be replaced by a new code.

03 When the new code appears, enter the six-digit number into CAREWare and submit it. You should be logged in.

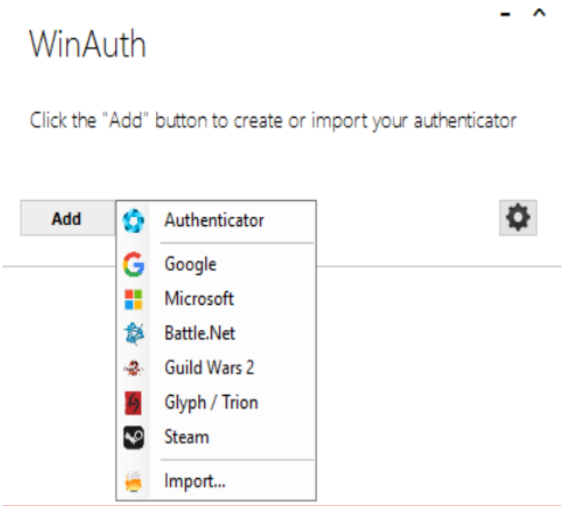
OPTION 2: WINAUTH AUTHENTICATOR APP ENROLLMENT

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

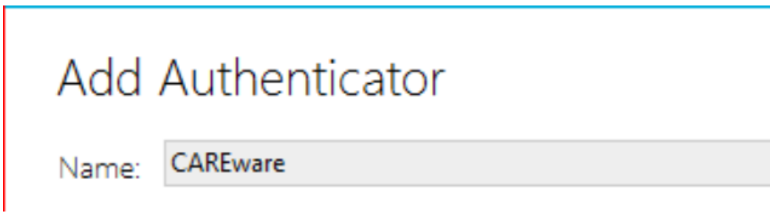
02 Sign in to CAREWare as usual. You will be asked to set up your 2 factor app, then enter the token to verify that you are the appropriate user of the account



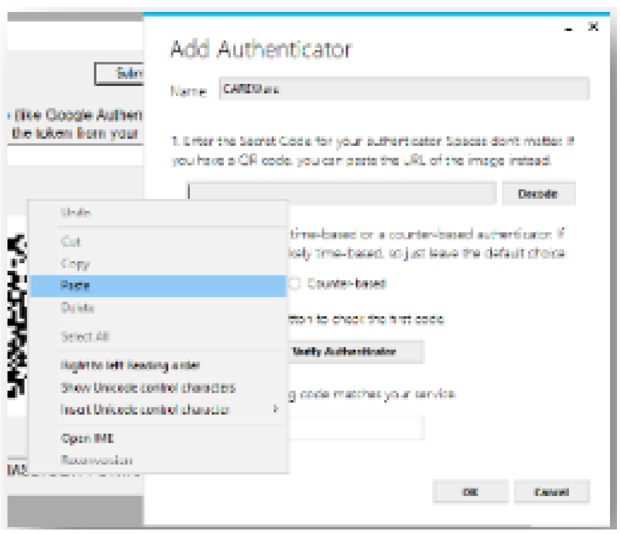
03 Launch WinAuth. Click **Add** to set up the CAREWare authenticator. Select the top option—Authenticator.



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



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**.

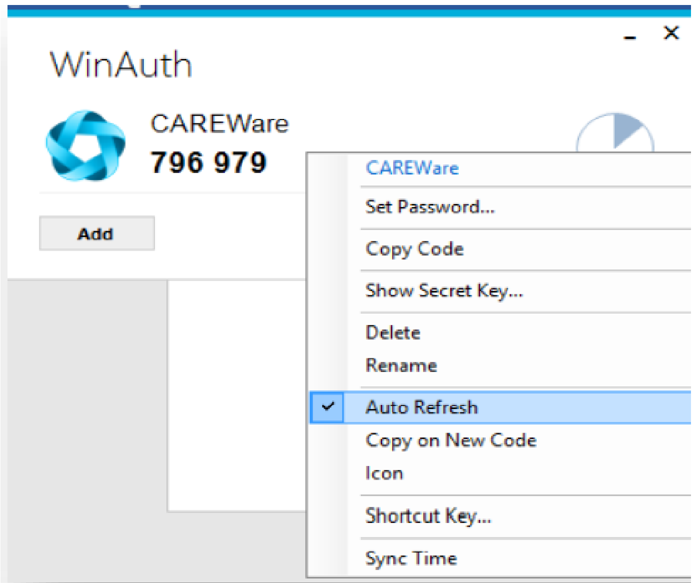
09 You should now be logged into CAREWare.

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.

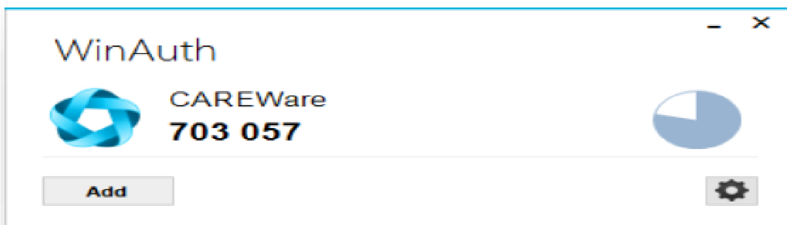
11 Do not select the "Encrypt to only be useable on this computer" nor "Lock with a YubiKey"

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.

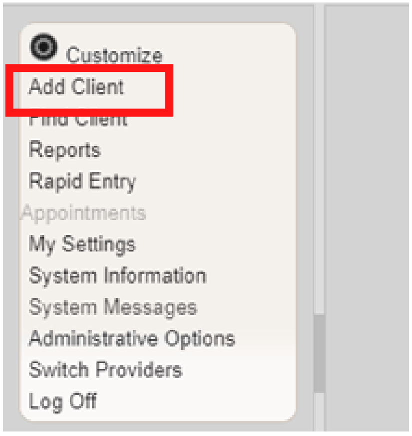
HOW TO GET ASSISTANCE WITH TWO-FACTOR AUTHENTICATION

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

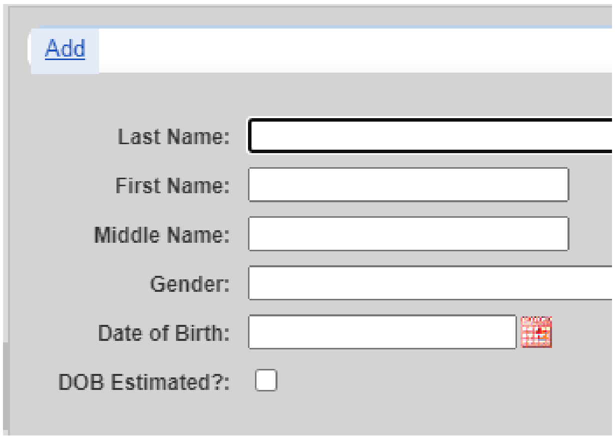
- Completing a help desk ticket at: https://louisianahealthhub.org/careware-submission-form/

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**.

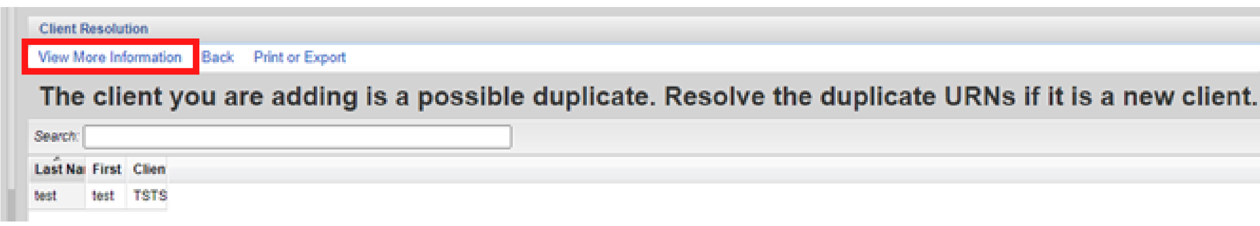


Note: Enter the **legal** last name, first name and Date of birth of the client from an identification card such as driver's license, birth certificate, social security card, passport or other official document.

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.



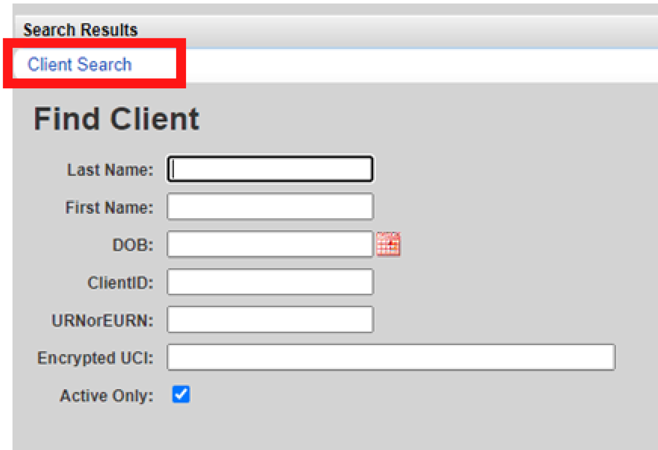
03 Compare client information to determine if this is the same client.

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.

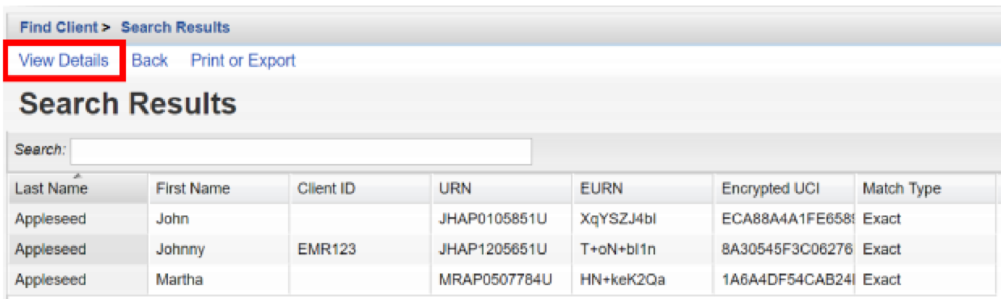
HOW TO FIND A CLIENT

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**.



03 A list of matches to your search appears. Select the correct name from the list and click **View Details**.



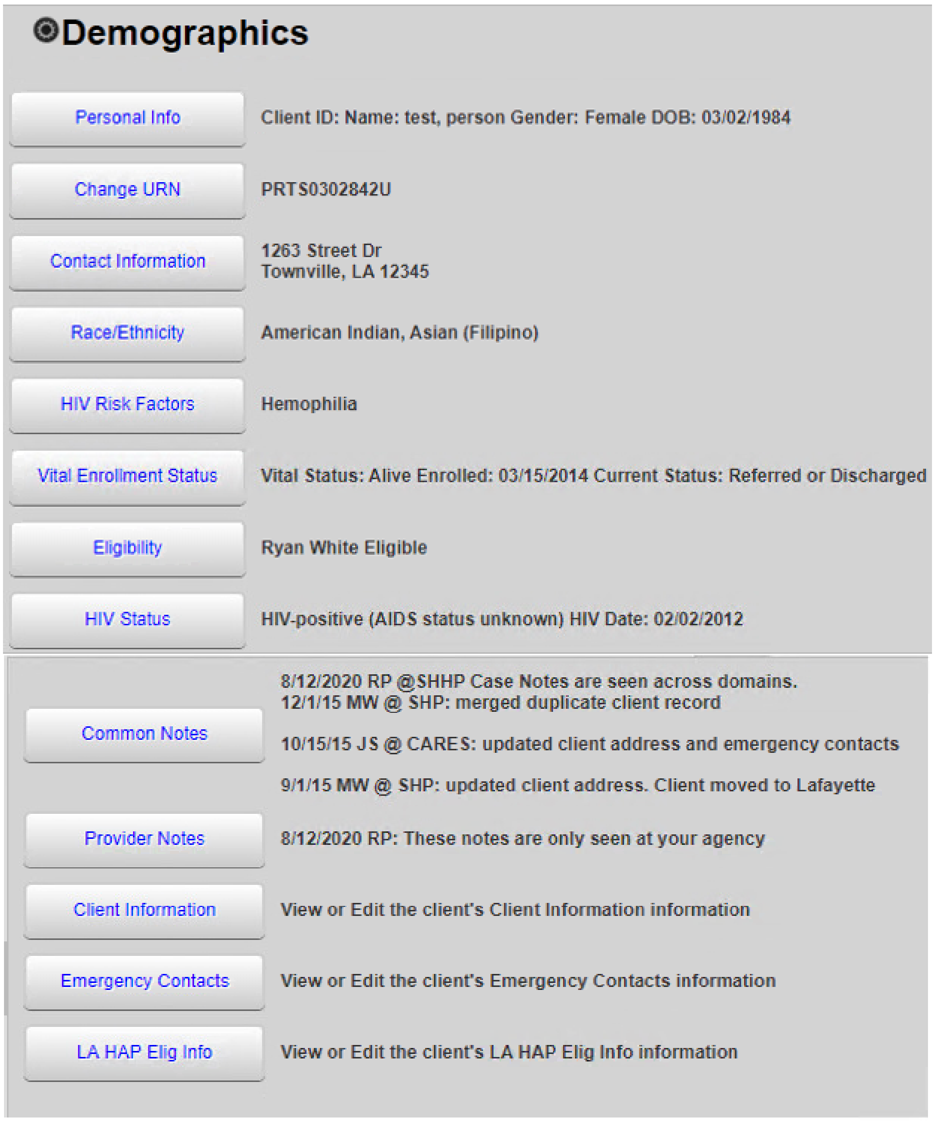
04 After clicking **View Details**, the Demographics screen will appear.

DEMOGRAPHICS

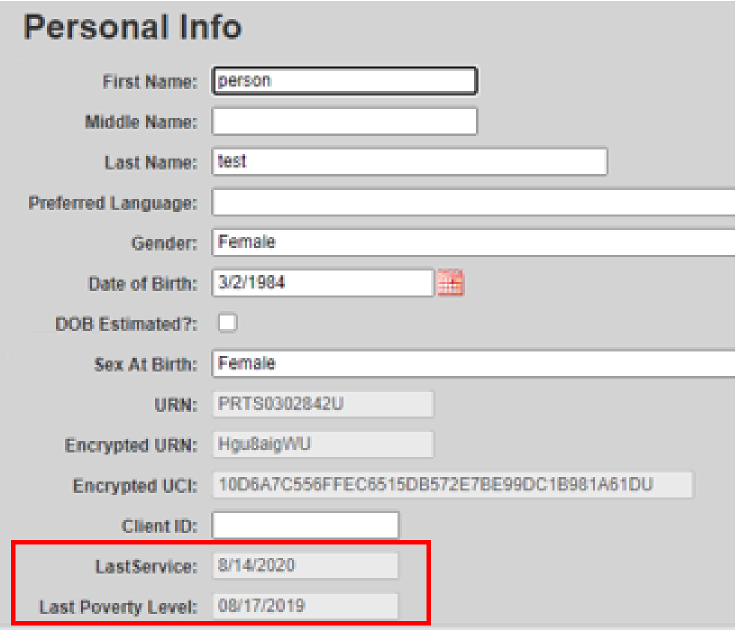
Like CAREWare 5, the demographic information is shared across domains with the exception of Eligibility, Enrollment Status, and Provider Notes.

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.

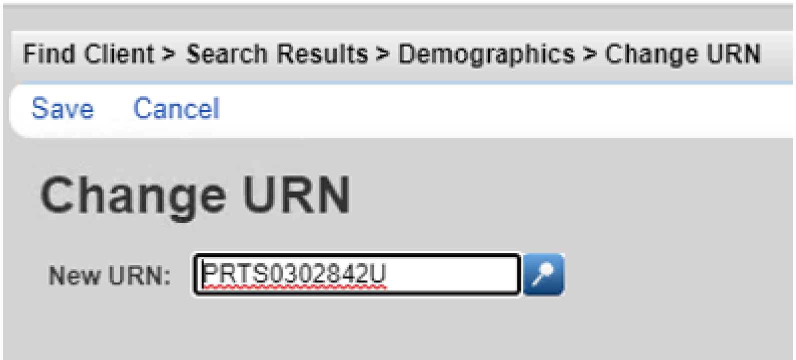


PERSONAL INFO



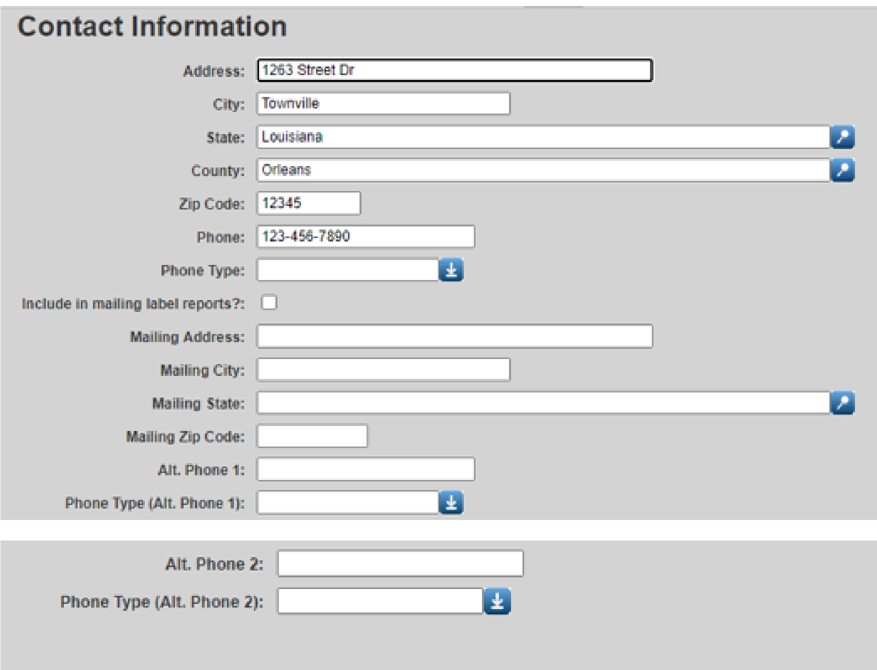
Note:
The Personal Info section includes the date of Last Service and Last Poverty Level.

CHANGE URN

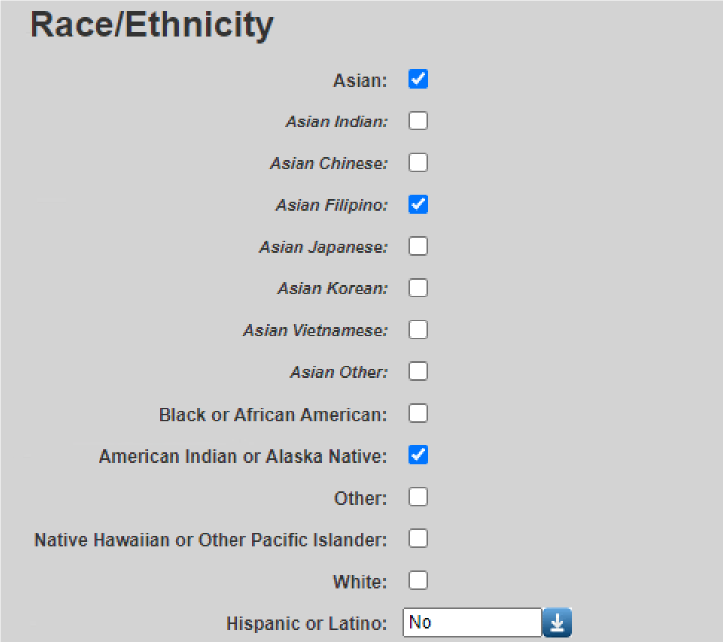


Note: The Change URN section allows the URN to be edited if needed

CONTACT INFORMATION

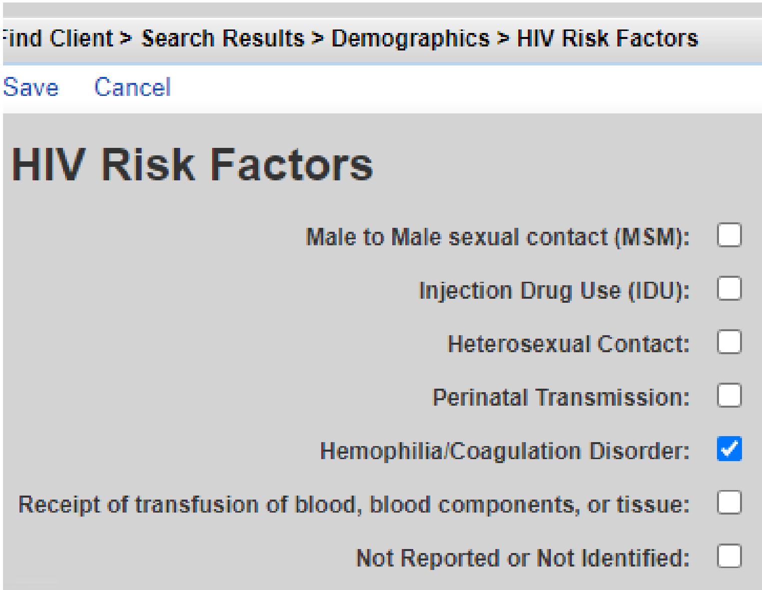


RACE/ETHNICITY



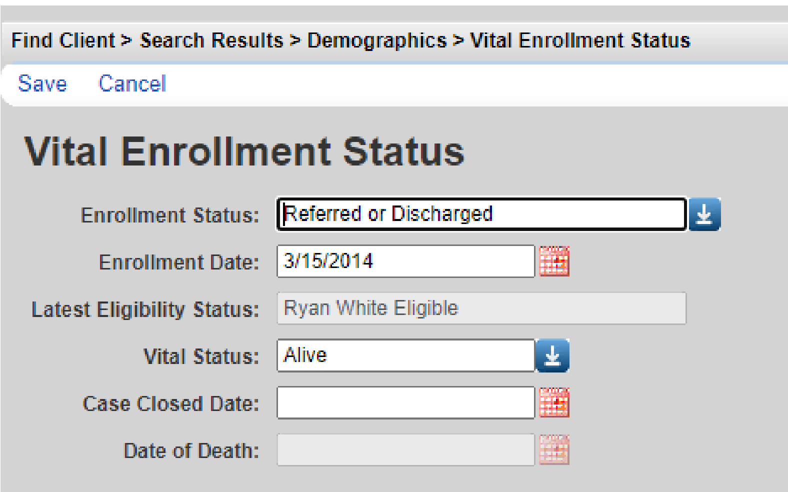
Select the race and ethnicity the client identifies as Multiple selections are allowed.
Any clients who identify as Asian, Native Hawaiian or Pacific Islander, or Hispanic, will need to be select a subgroup as well.

HIV RISK FACTORS



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

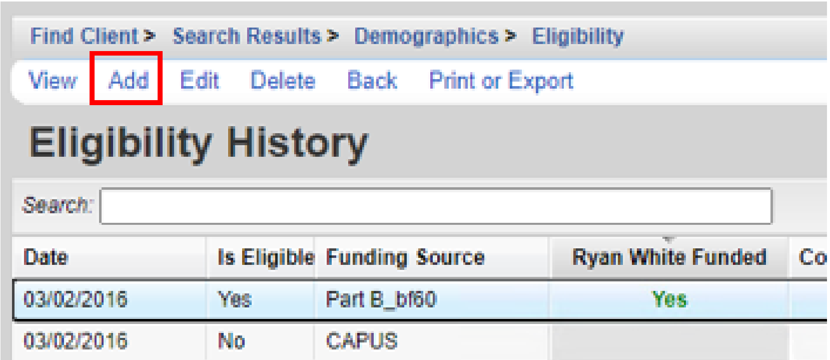


Select the appropriate Enrollment Status from the drop down menu. This field is agency-specific.

For example, a client may have an Enrollment Status of "Relocated" at Crescent Care but "Active" at Southwest Louisiana AIDS Council.

ELIGIBILITY

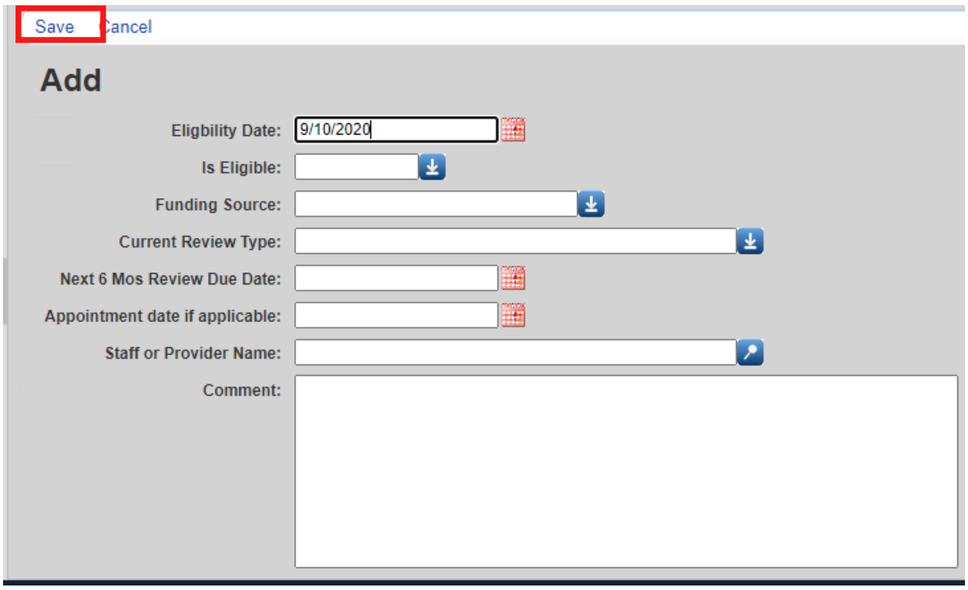
01 Click **Add**



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

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.

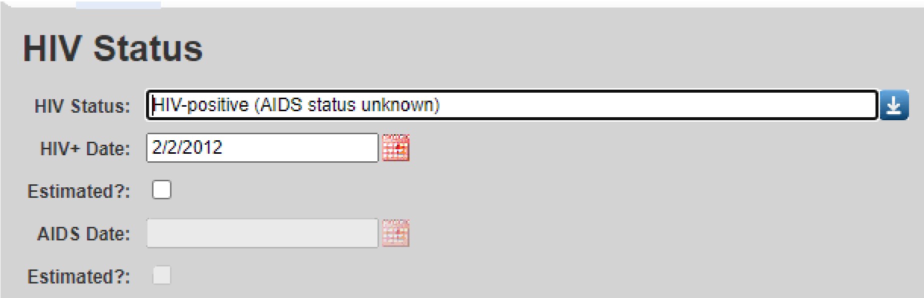


A new record needs to be added for each Funding Source the client is eligible for.

Eligibility Records should be added:

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

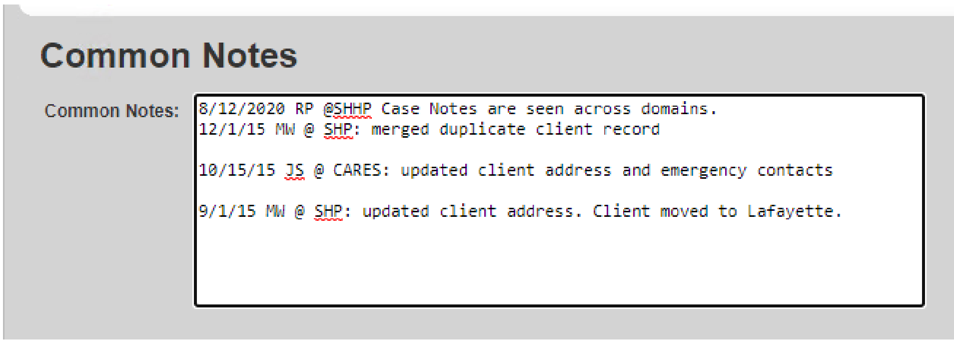
HIV STATUS



COMMON NOTES

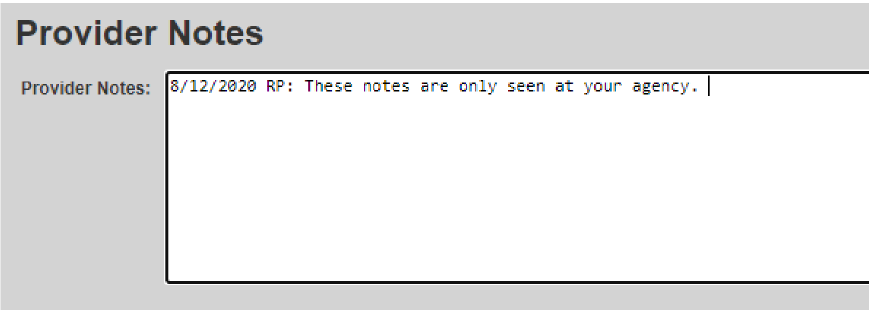
Common Notes are available to any agency that serves the client.

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"



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.



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:

Attachments: 0 Attachments (Access in view mode only)

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:

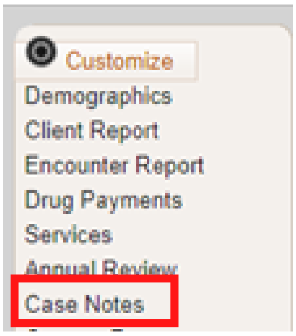
Most Recent LA HAP Medicare Status:

Most Recent LA HAP Application First Received Date:

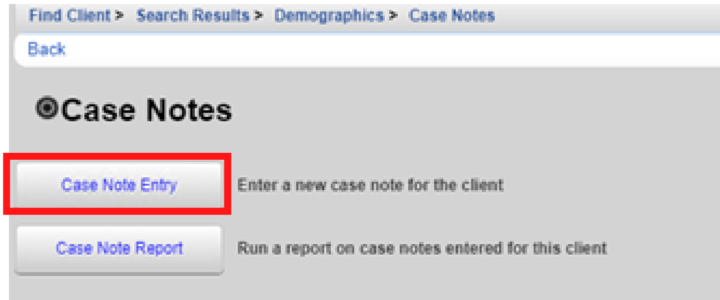
Most Recent LA HAP Application Completed Date:

CASE NOTES

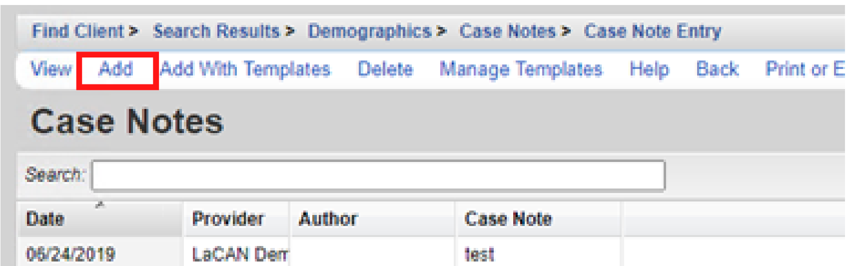
01 Select **Case Notes** from the main menu.



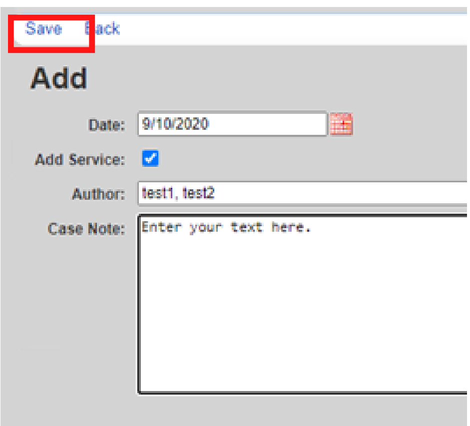
02 Select **Case Note Entry.**



03 Select **Add**.



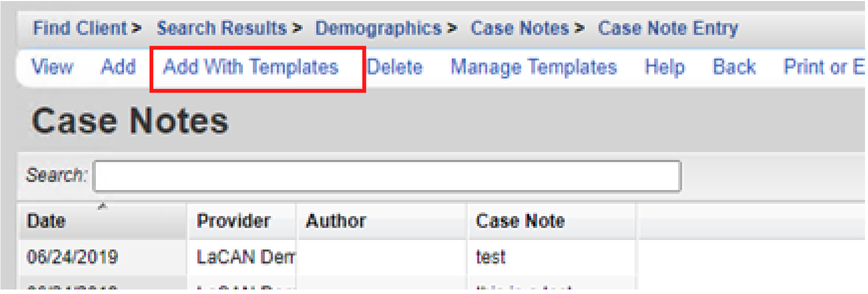
04 Enter the Case Note date, Author, and case note text and click **Save**.



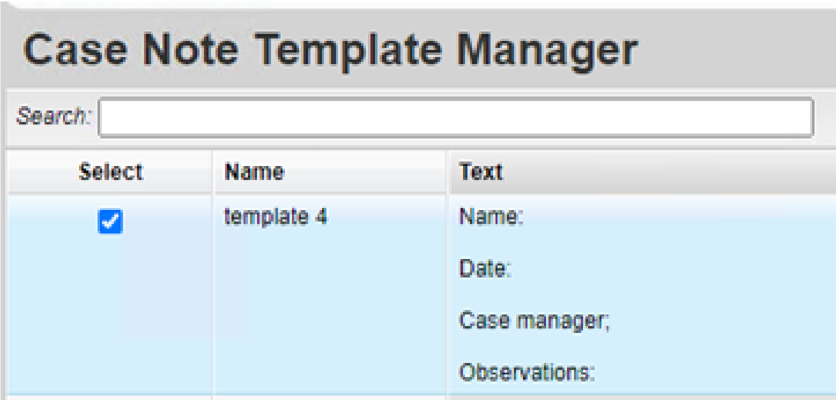
Note: If you want to add a service associated with the note, select **Add Service**.

CASE NOTES TEMPLATE

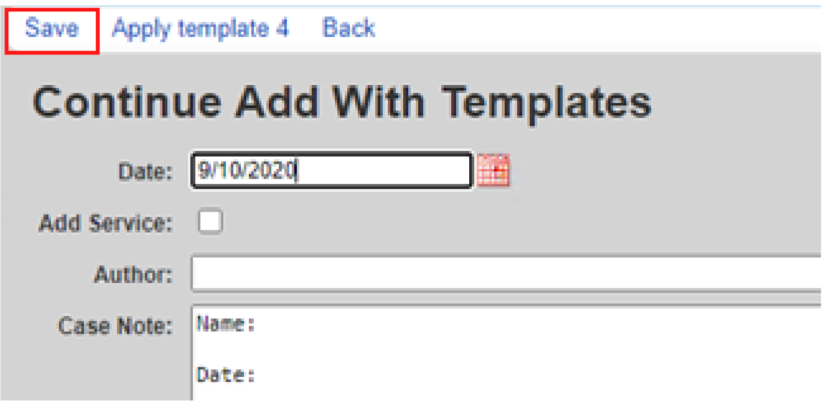
01 Click **Add With Templates.**



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

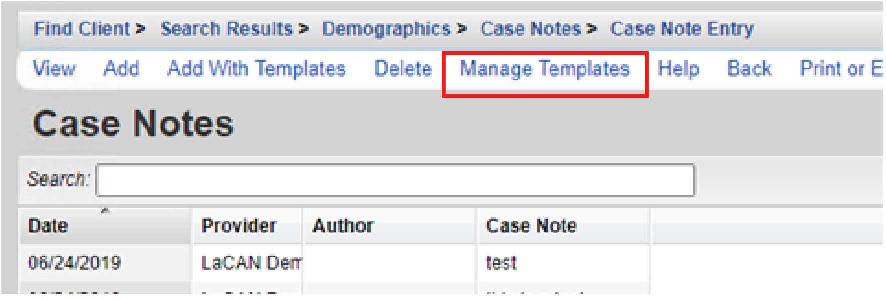


03 Enter the Date of the Service, Author, and complete the Case Note in the format you have selected and click **Save**.



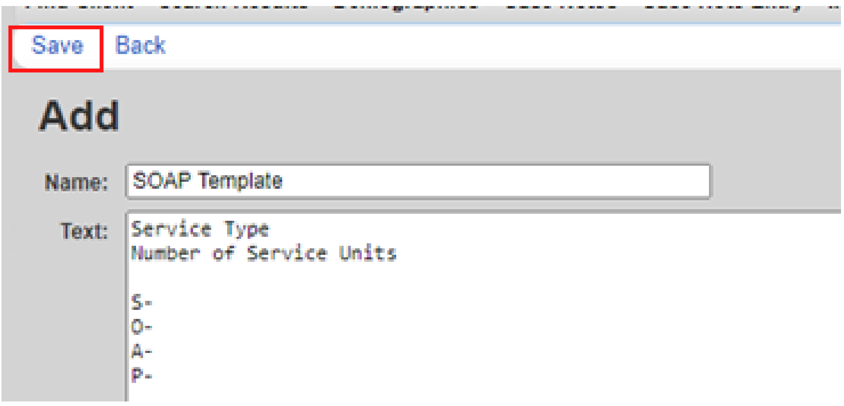
ADDING A NEW TEMPLATE

01 Click **Manage Templates**.



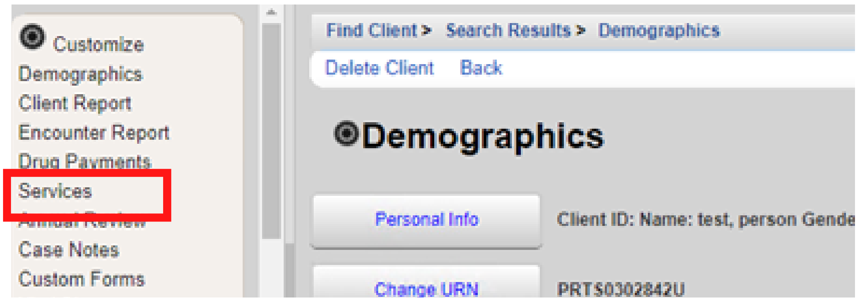
02 Click **Add**.

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

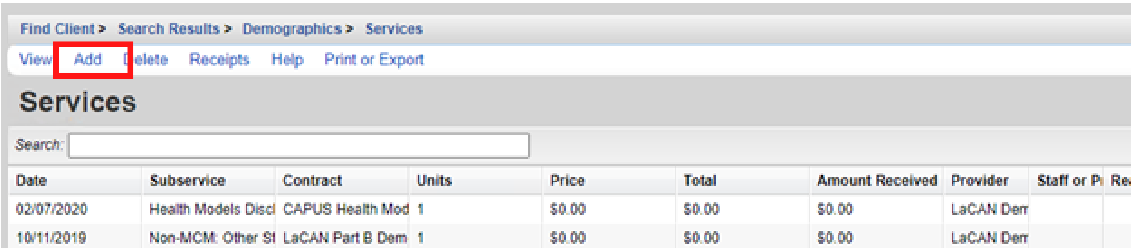


SERVICES

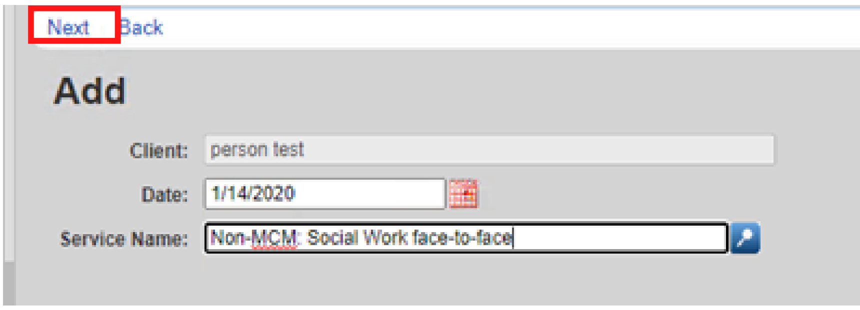
01 Click **Services** from the Menu of Links.



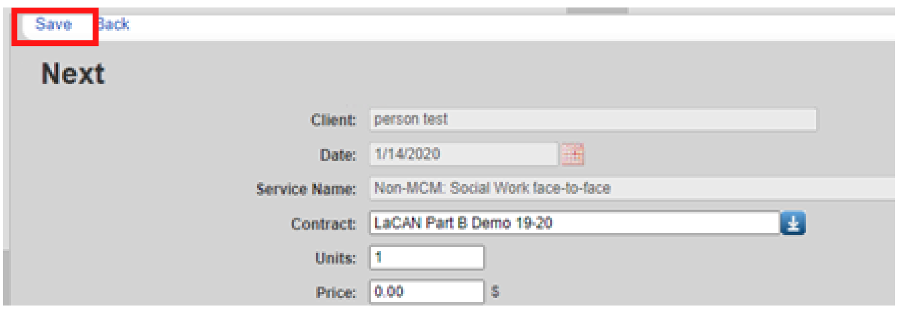
02 The Services screen will now be displayed. Click **Add**.



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**.

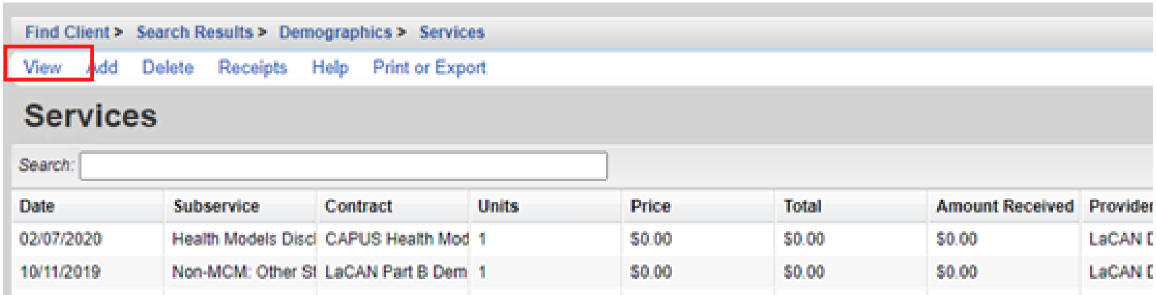


04 Enter the Contract for this service, and any other necessary information, such as Units, Price, total and any fields required for the service. Once complete, click **Save**.

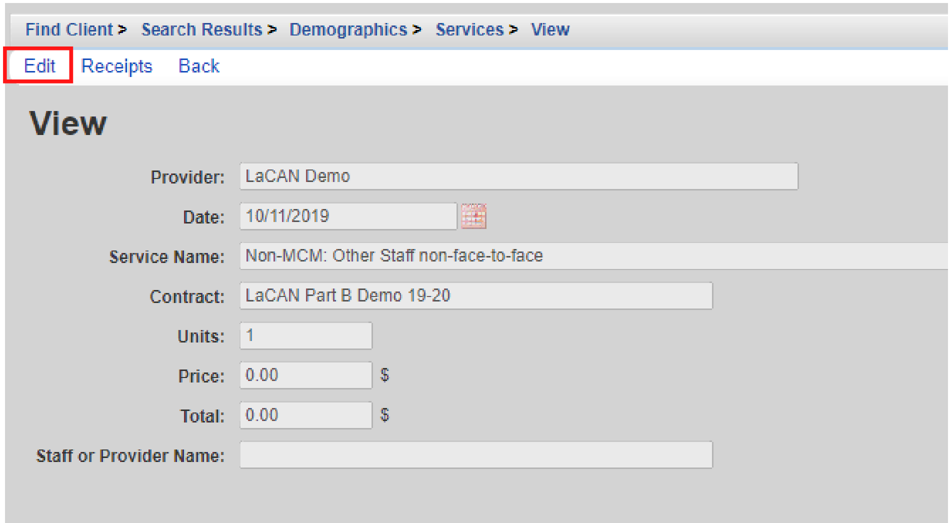


EDITING A SERVICE

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

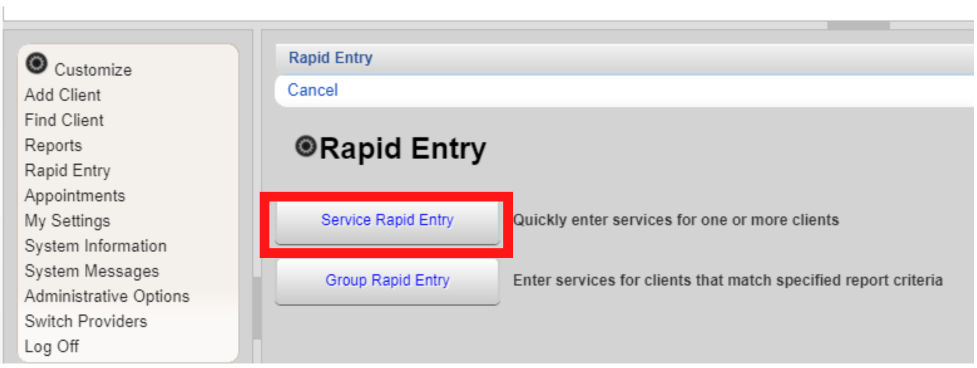


02 Click **Edit**, make any edits you need to, then click **Save**.



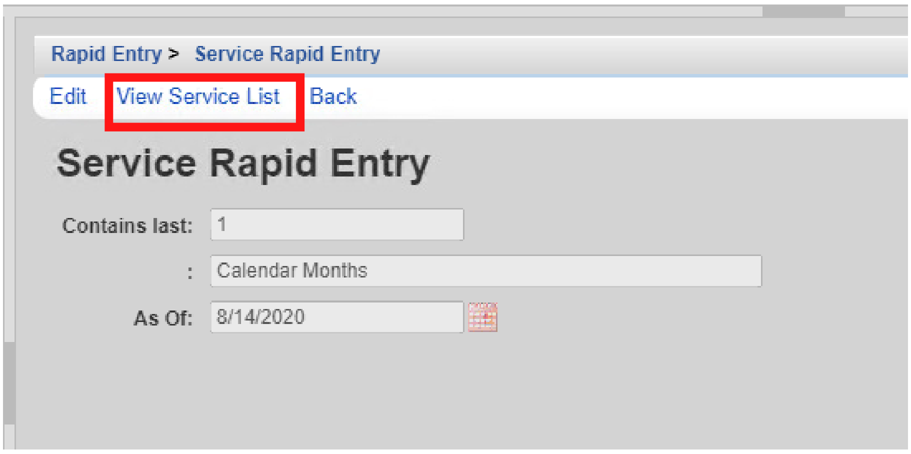
RAPID SERVICE ENTRY

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

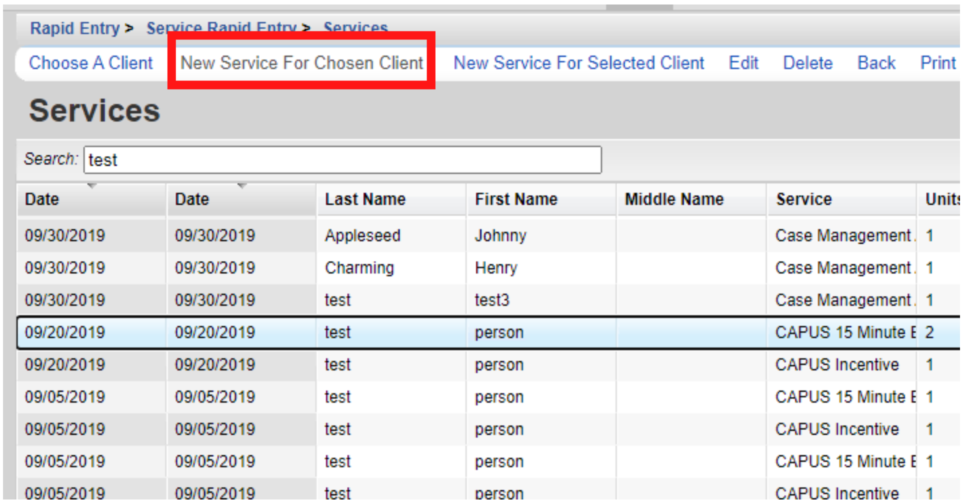


02 Select **Service Rapid Entry**

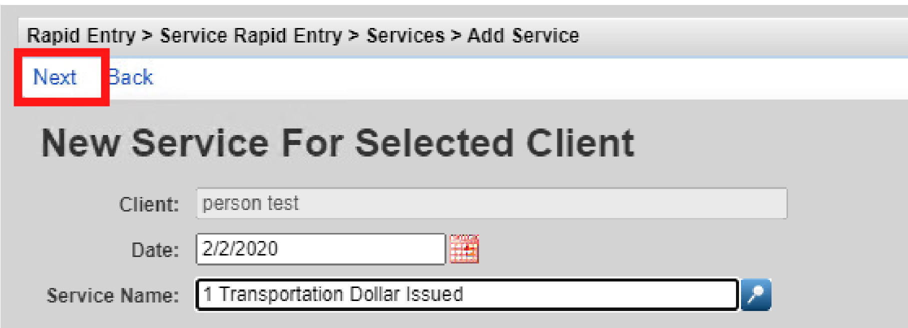
03 Click **View Service List**



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



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



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

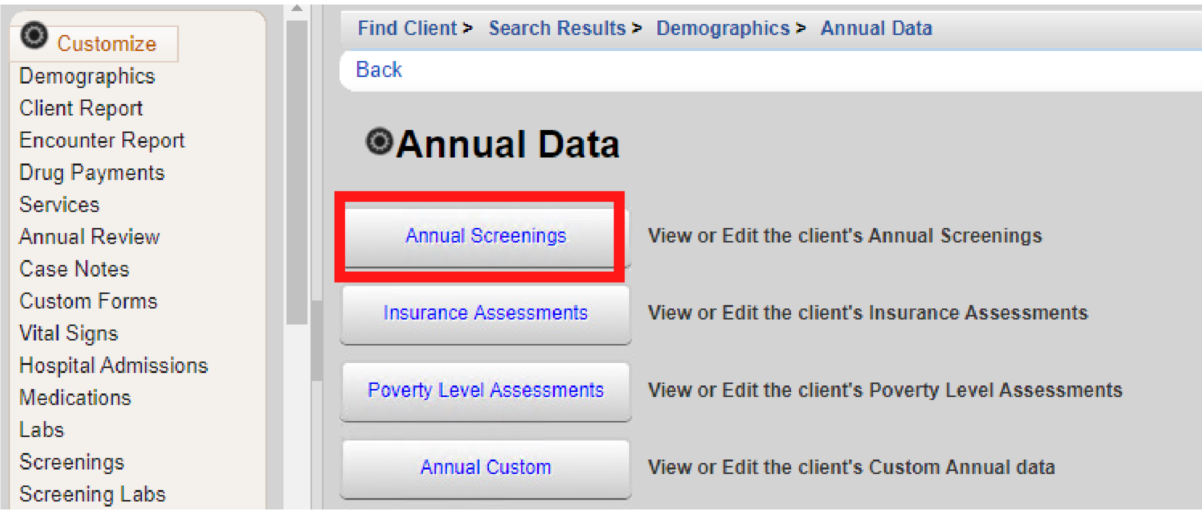
These three fields are RSR-required data elements for clients that received ANY service in the reporting year.

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

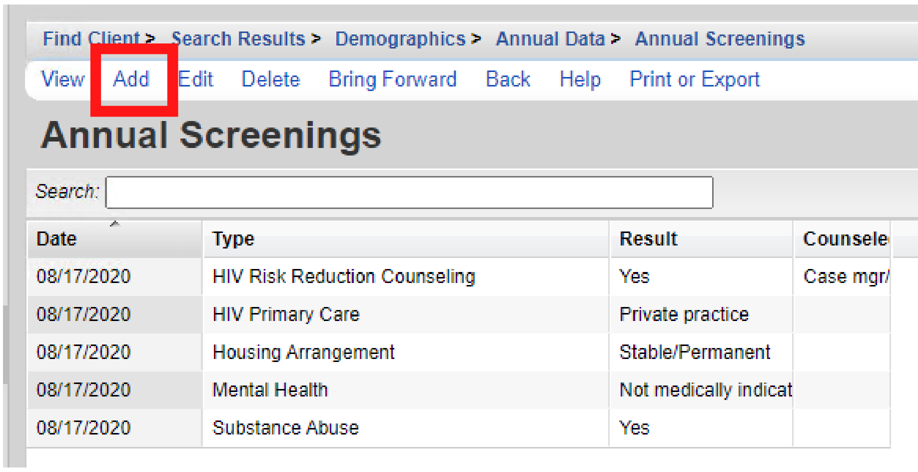
- HIV Risk Reduction Counseling
- Mental Health
- Substance Abuse

ANNUAL SCREENINGS

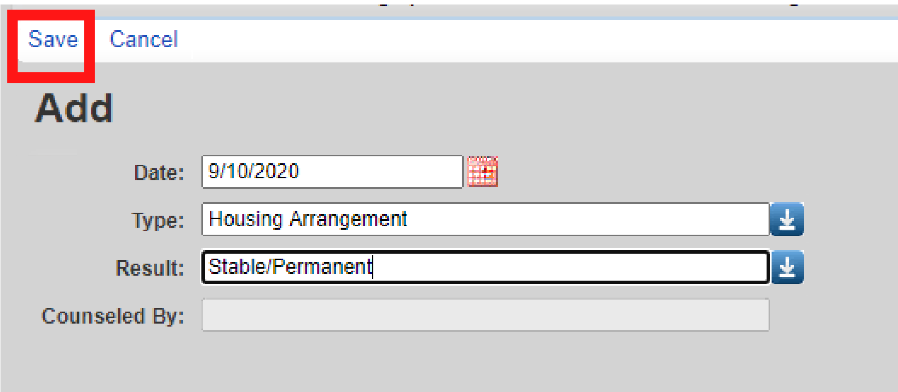
01 Select **Annual Review** from the menu on the left side of the screen. Then Select **Annual Screenings**.



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**.

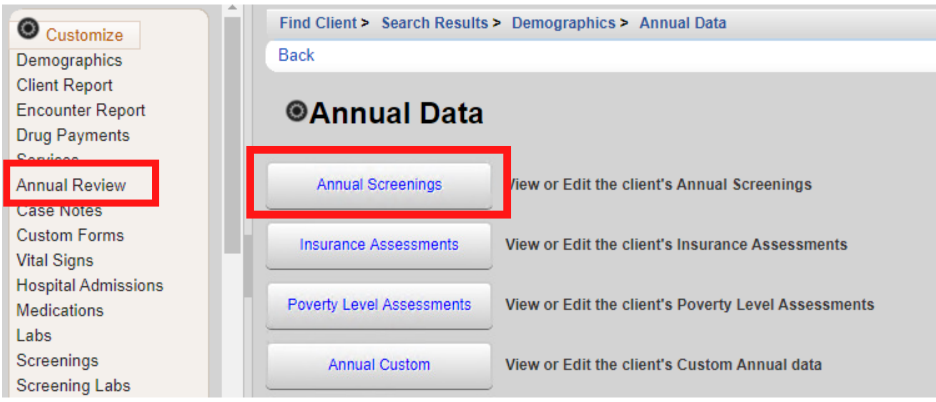


The following Types are available in the drop-down list. Refer to the guidance below regarding the Result field:

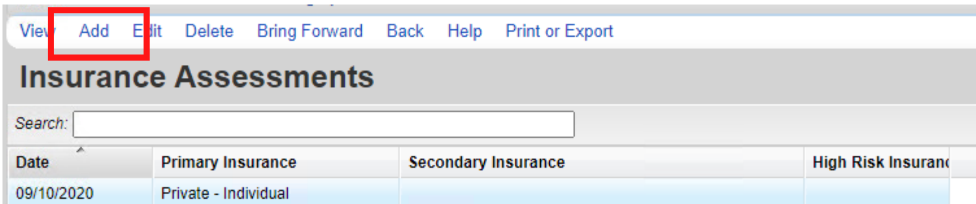
- HIV Risk Reduction Counseling– If the counseling has been provided, select the appropriate authorized counselor who performed it.
- Housing Arrangement - Please refer to HRSA guidelines to determine the difference between stable/permanent, temporary, and unstable.
- Mental Health – Select Yes, No, 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**.

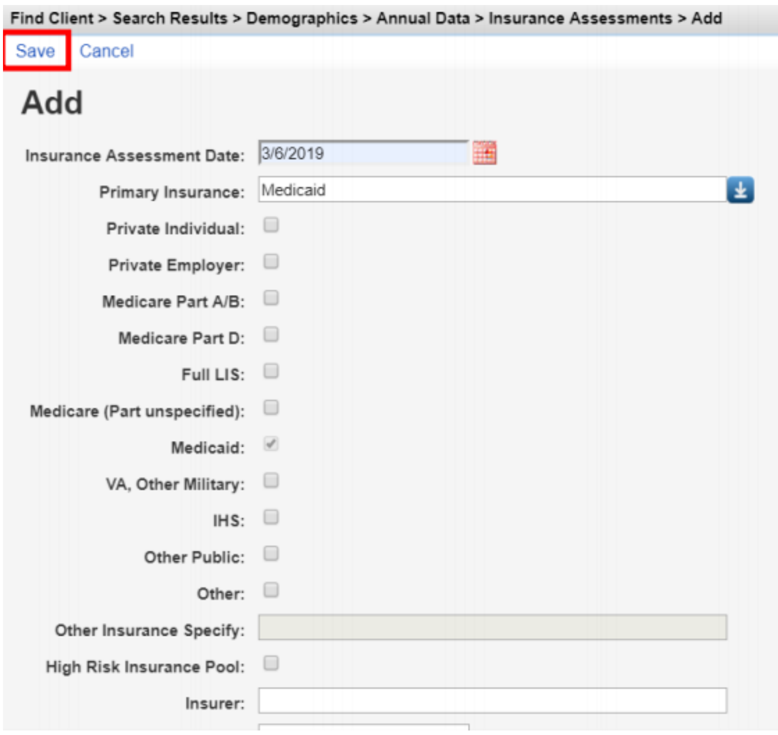


02 On the next page, click **Add.**



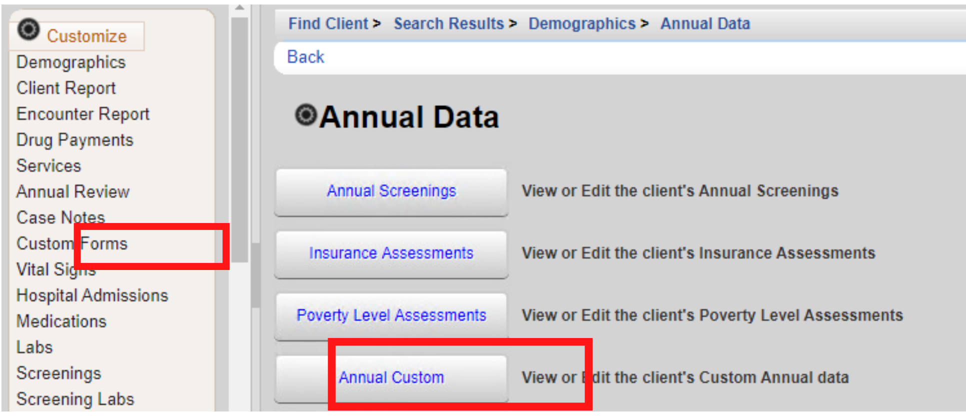
03 Enter Insurance Assessment Date, then select the client's Primary Insurance from the drop-down list. Once the value is selected from the drop-down list for primary insurance, the value will automatically be checked in the list below.

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

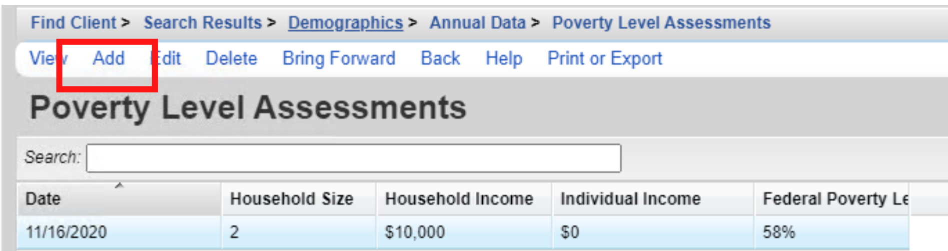


POVERTY LEVEL ASSESSMENTS

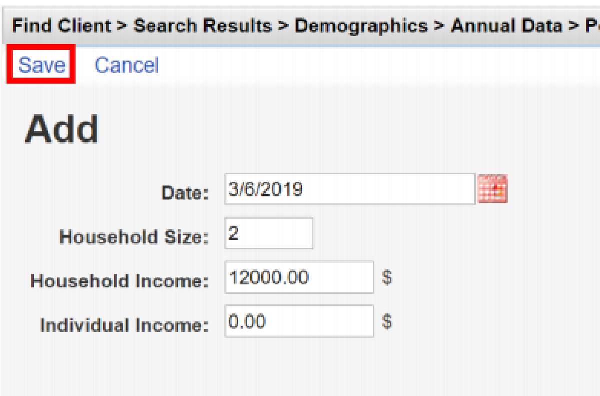
01 Select **Annual Review** from the menu on the left side of the screen. Then Select **Poverty Level Assessments**.



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



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

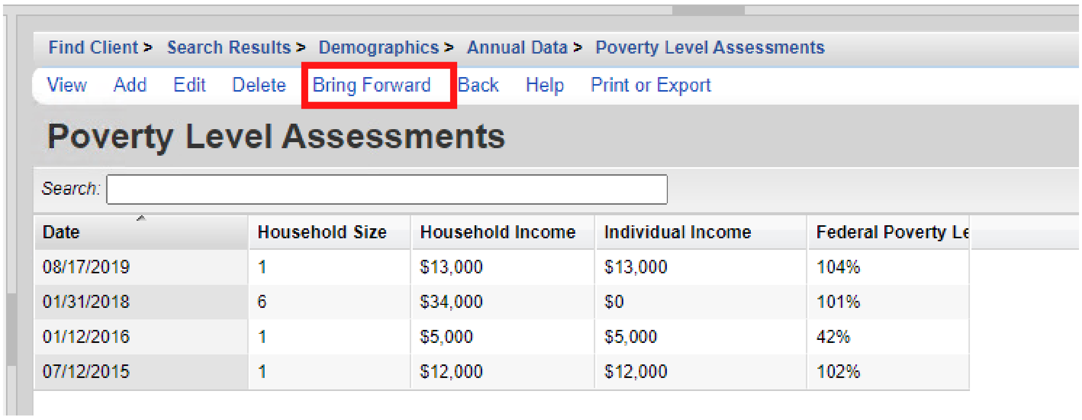


Note:
Entry of Individual Income is optional. It is used in the Cap on Charges feature.

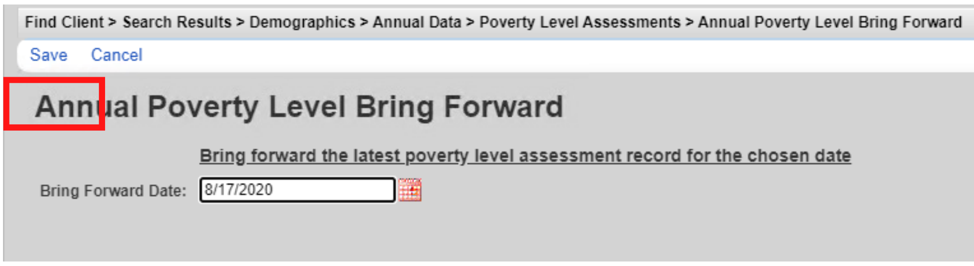
BRING FORWARD

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.

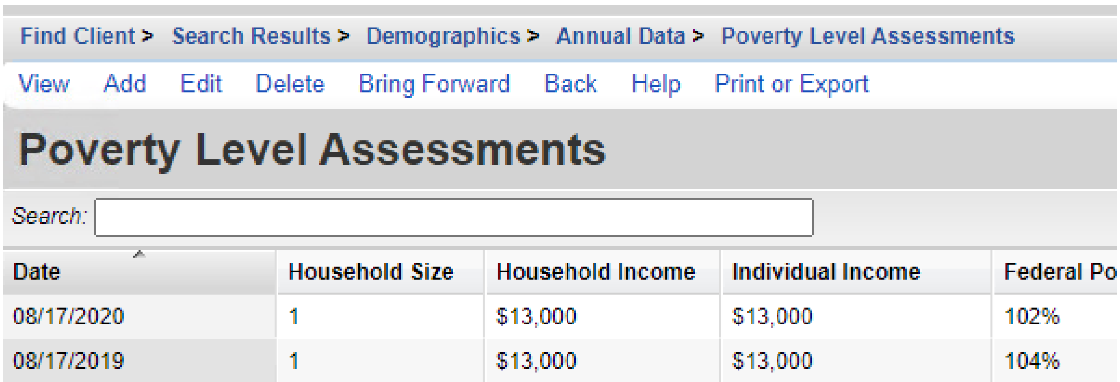
01 Select **Bring Forward**



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



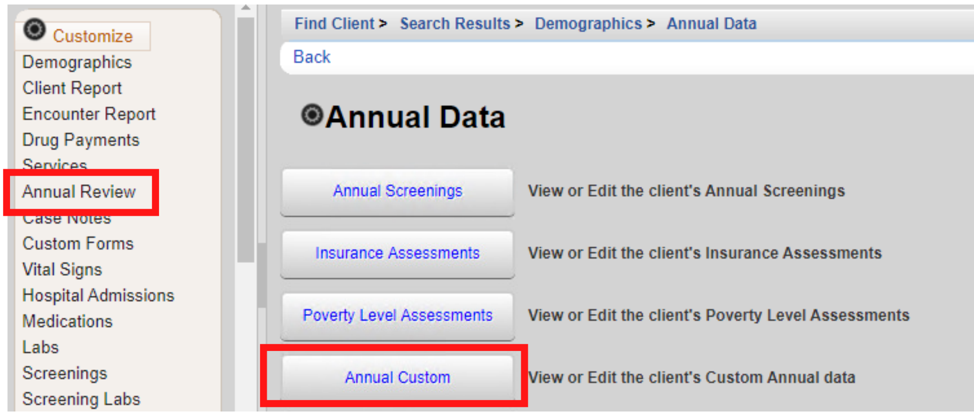
A new record with the Bring Forward date will be created.



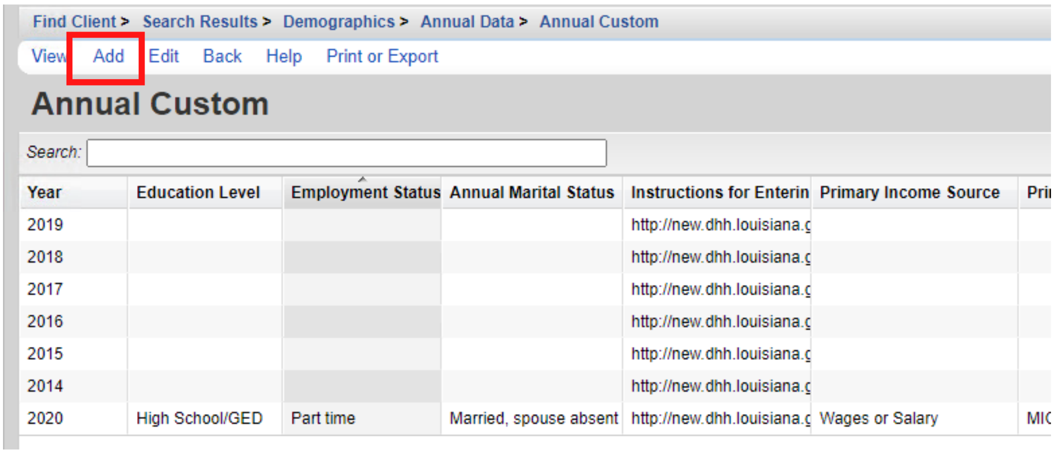
ANNUAL CUSTOM

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.

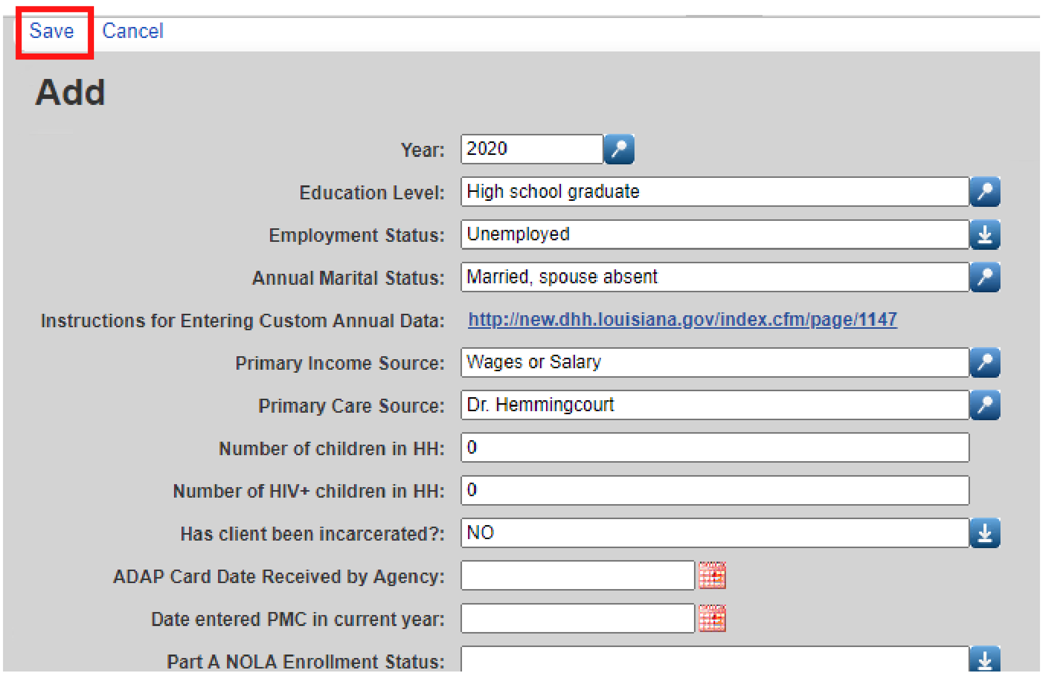
01 Select Annual Review from the menu on the left side of the screen. Then Select **Annual Custom**



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

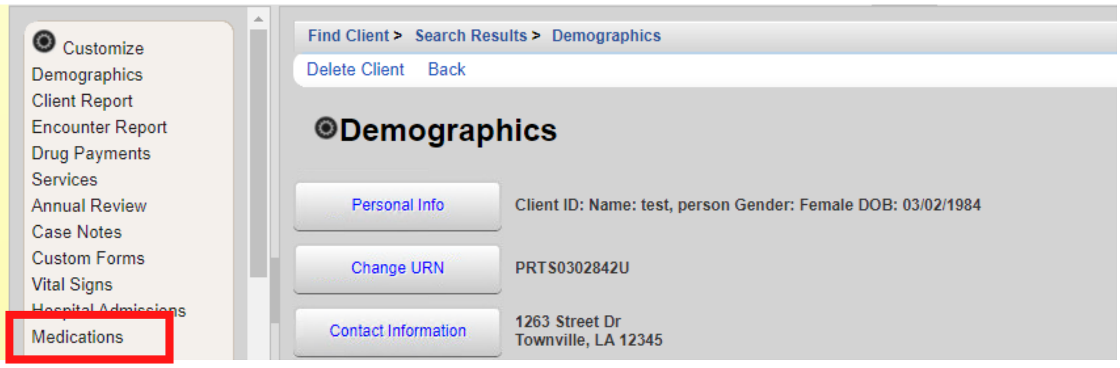


03 Complete the fields, then click **Save**.

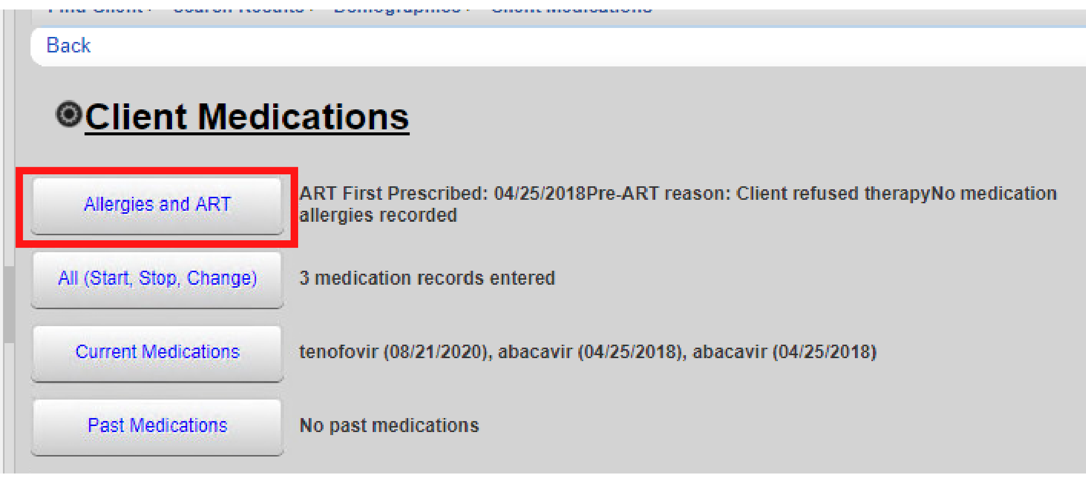


MEDICATION

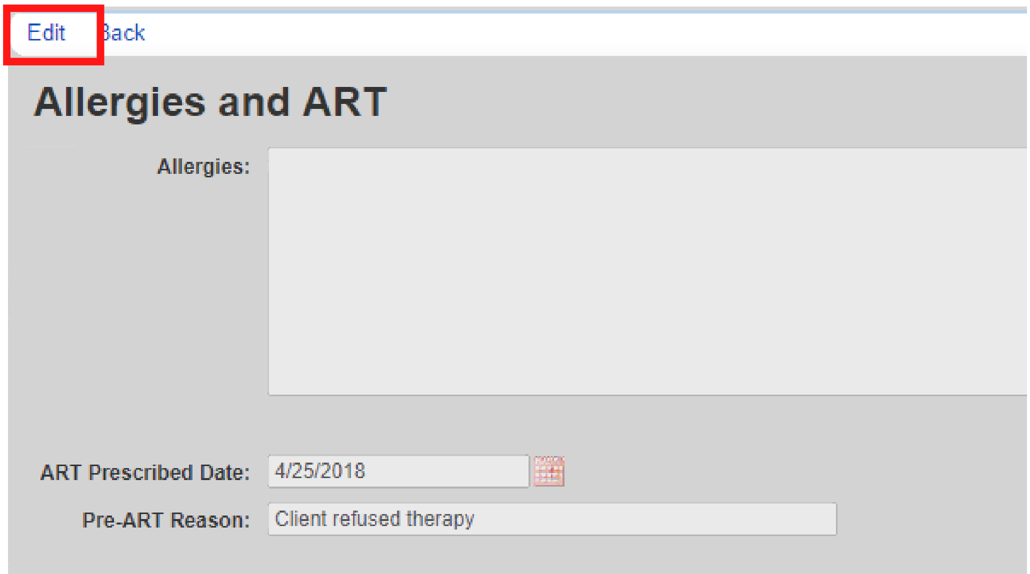
01 From the Demographics screen, select **Medications** from the Menu of Links.



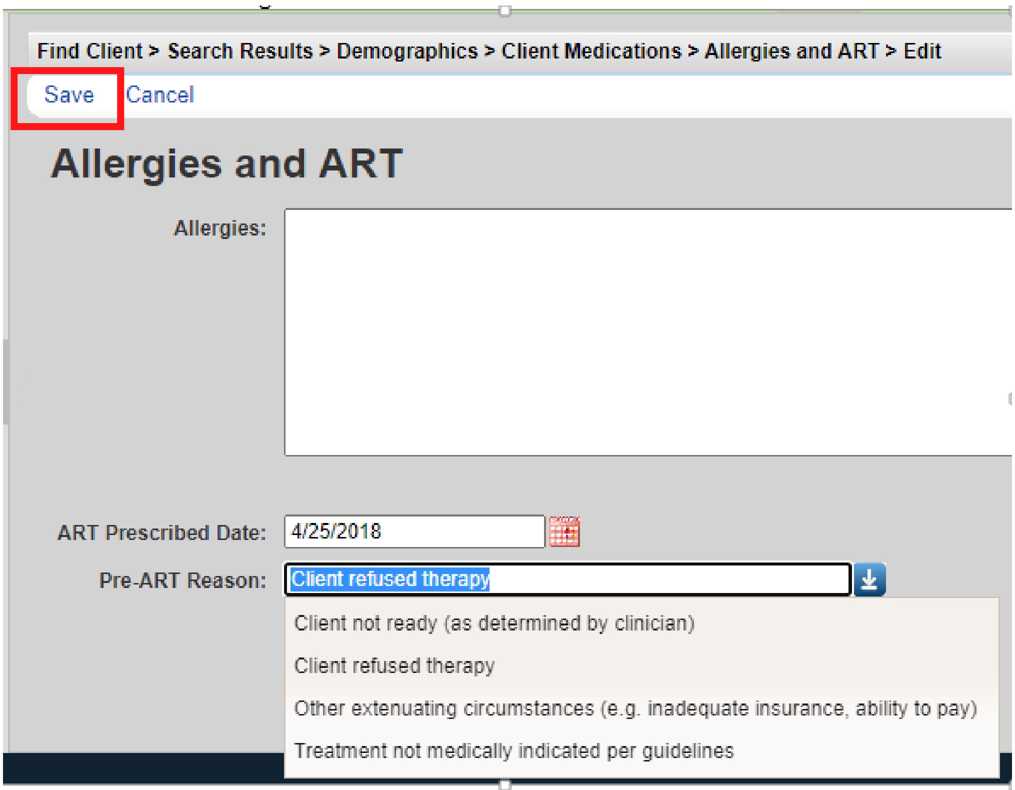
02 Select **Allergies and ART**.



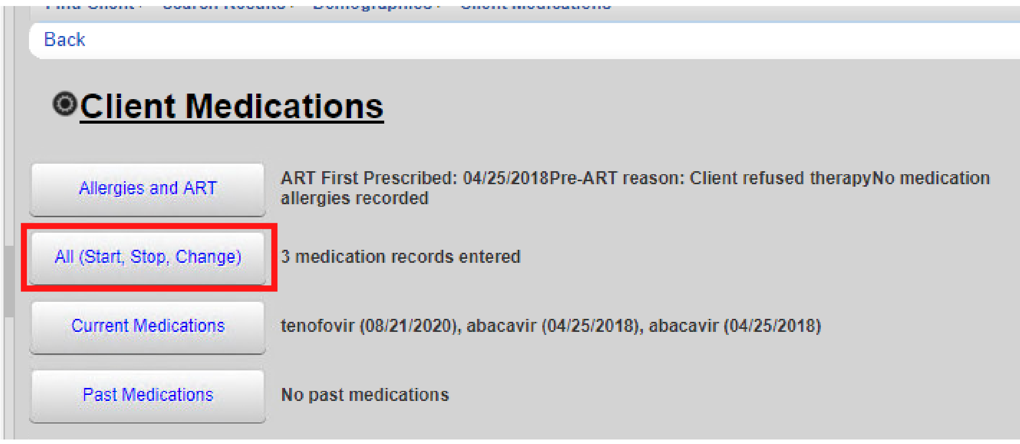
03 Select **Edit** to enter allergies and ART information



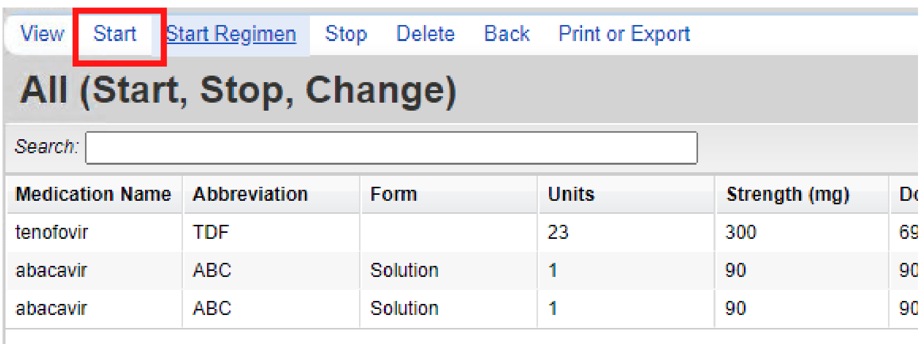
04 After making the desired edits, click **Save** and then **Back** (see previous screenshot) to return to the Client Medications screen.



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

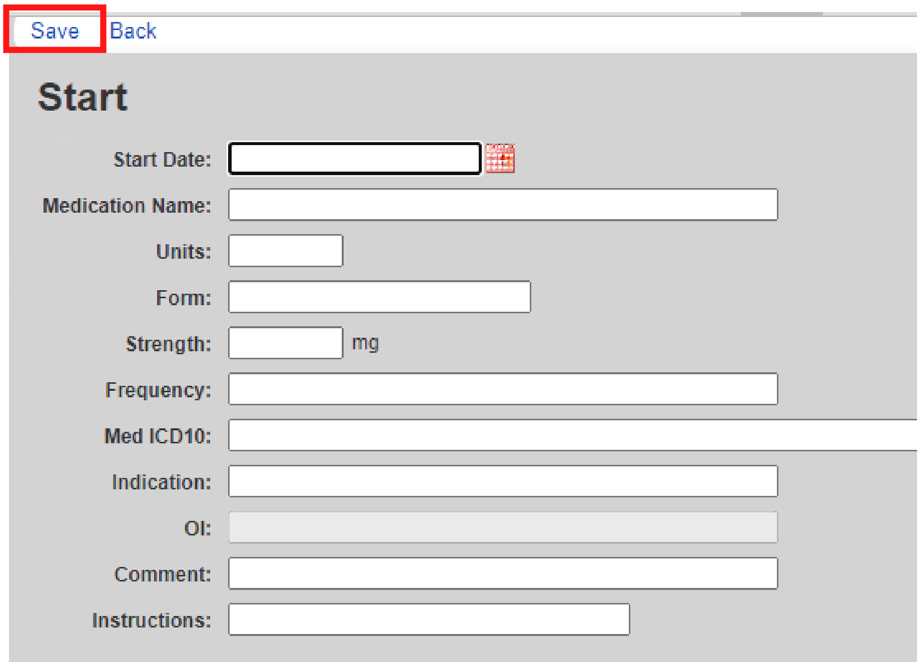


06 Select **Start** to enter a new client medication.



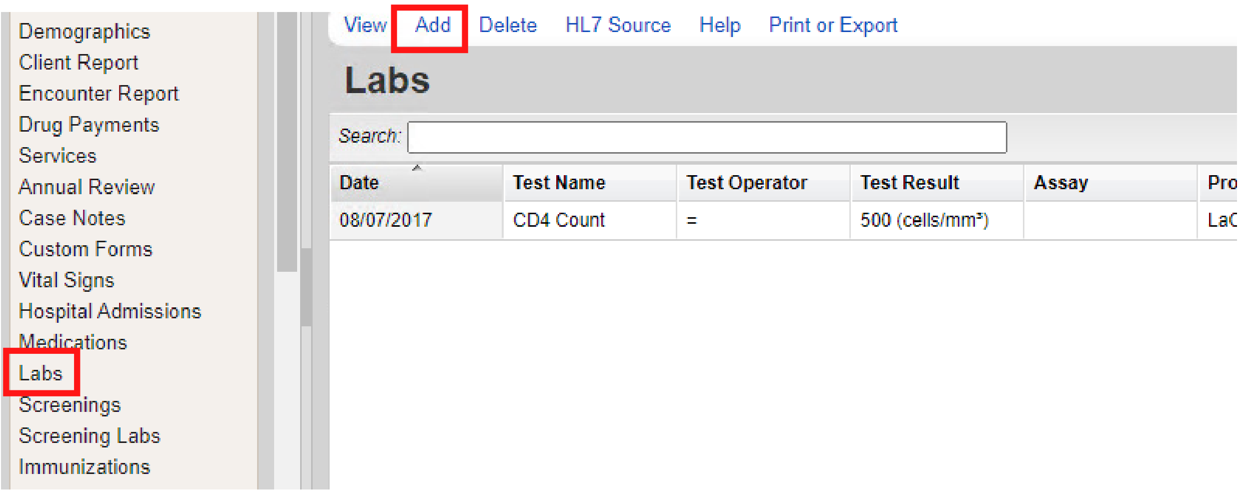
07 Enter the following information (as applicable):

- 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



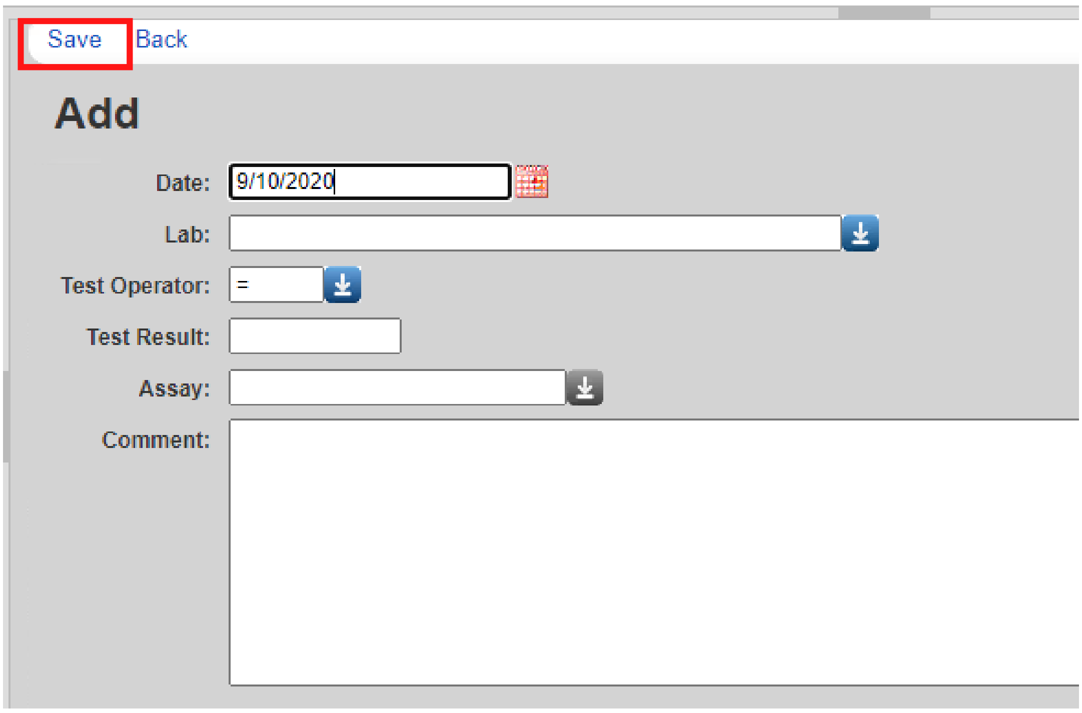
LABS

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



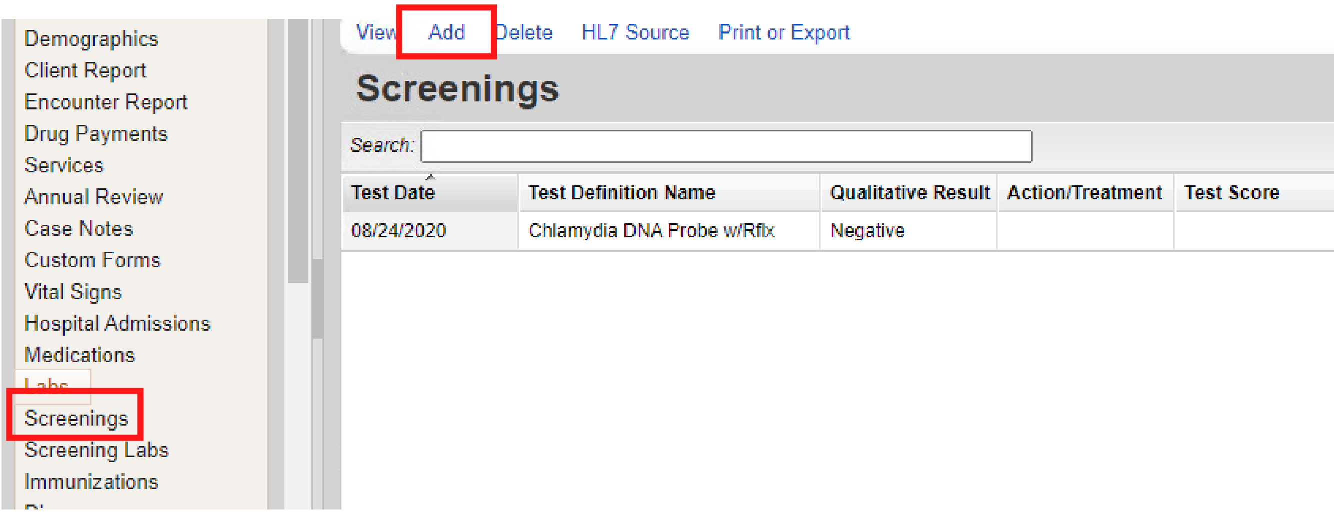
02 Enter the following information (as applicable) and then click **Save**.

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



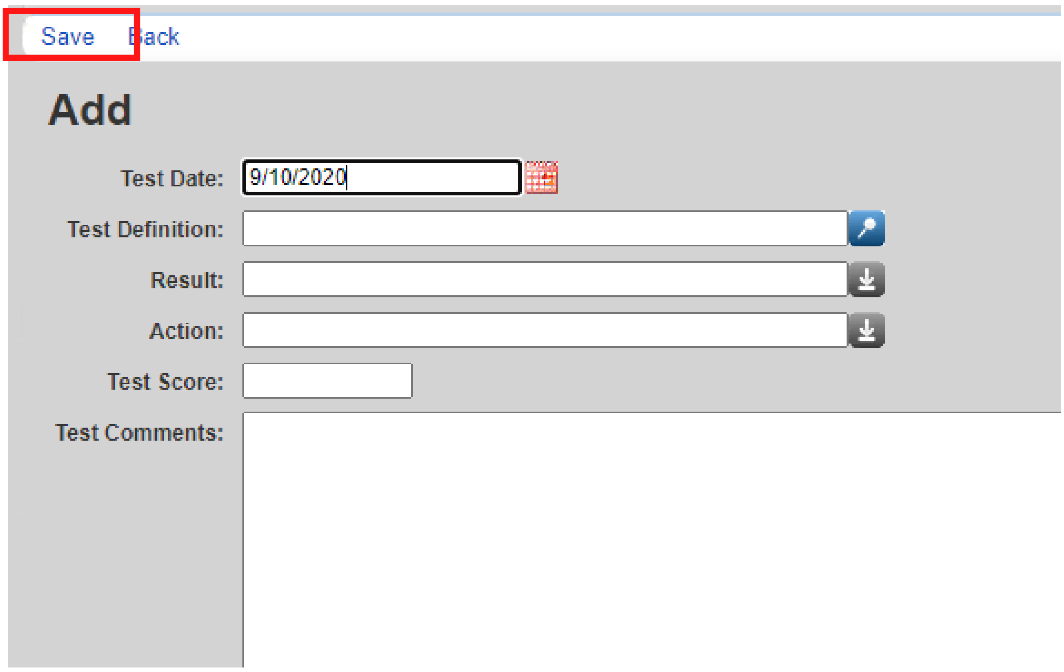
SCREENINGS

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



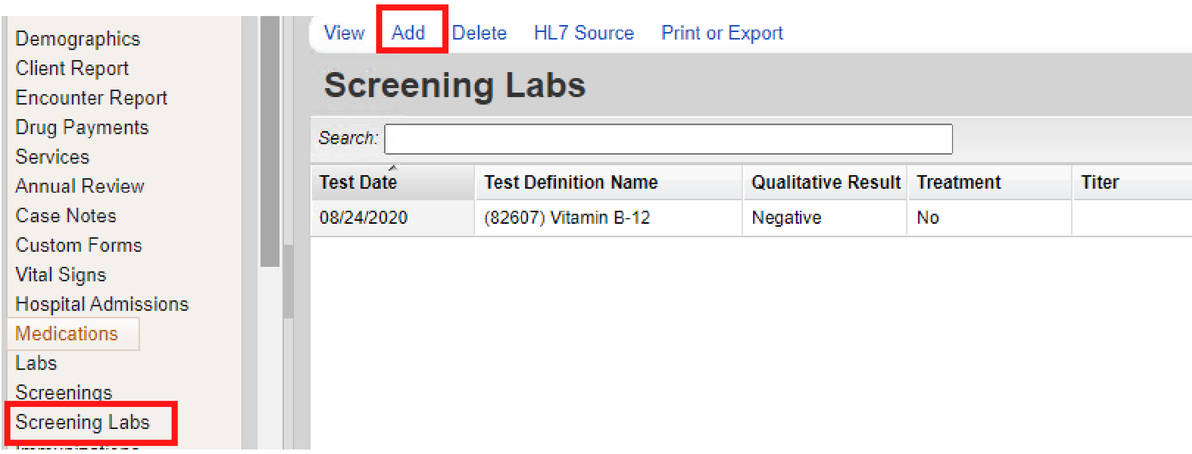
02 Enter the following information (as applicable) and then click **Save**.

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



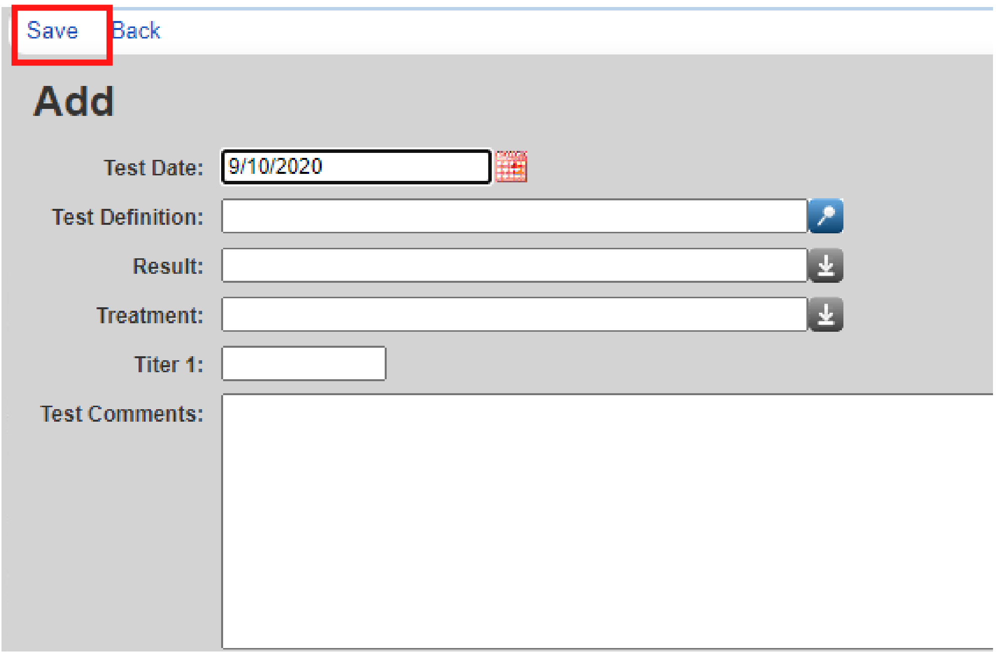
SCREENING LABS

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



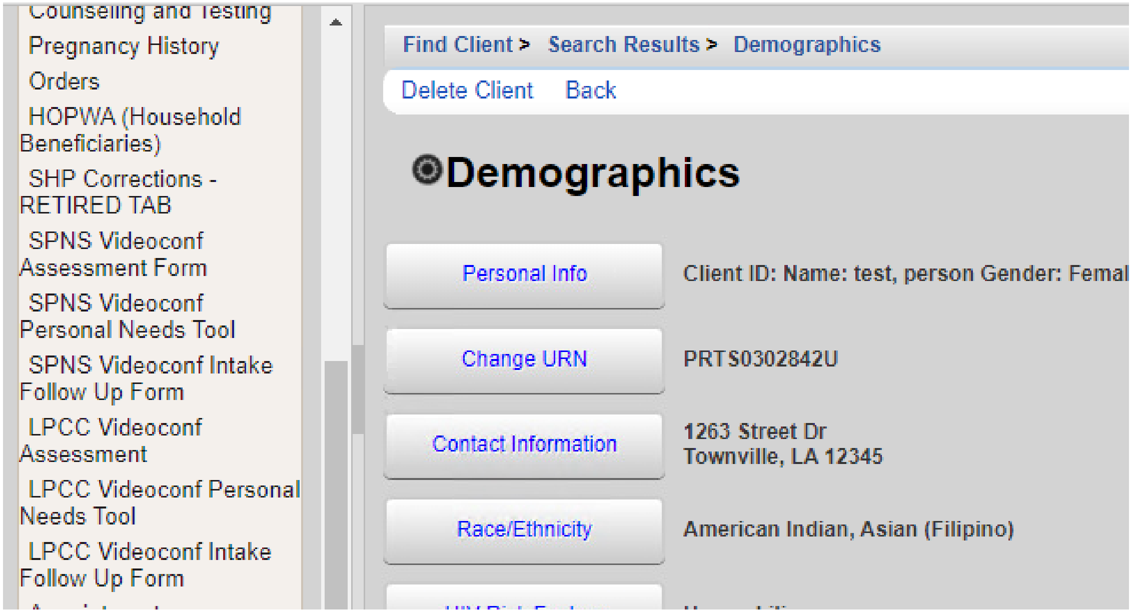
02 Enter the following information (as applicable) and then click **Save**.

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



CUSTOM SUBFORMS

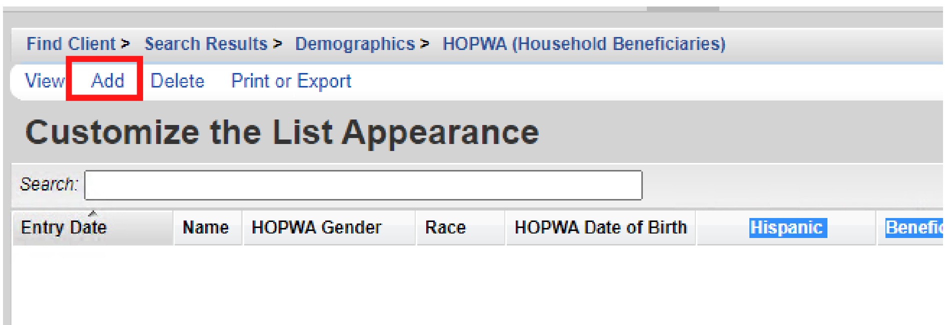
Any Custom Subforms that were in used in CAREWare 5 will be in CAREWare The process of adding or editing a record on a Custom Subform will be the same regardless of which Custom Subform you are using.



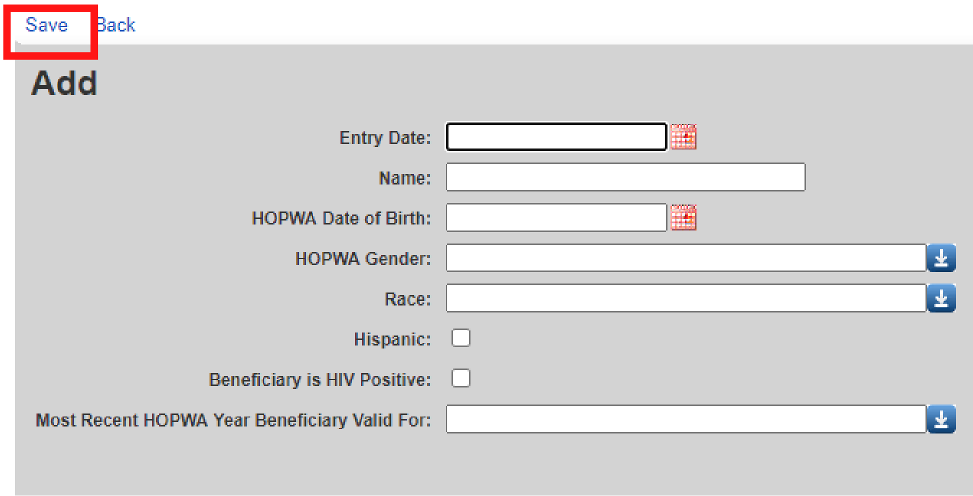
ADDING A SUBFORM

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

02 Click **Add.**



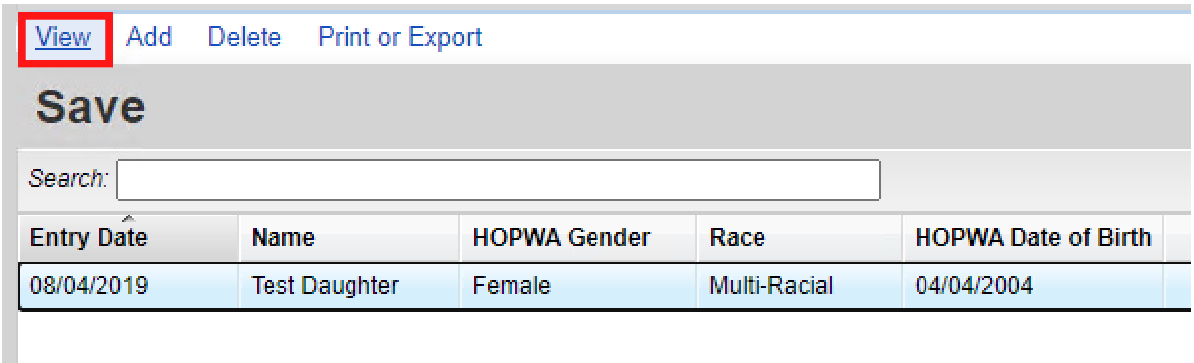
03 Complete the fields for the subform and click **Save.**



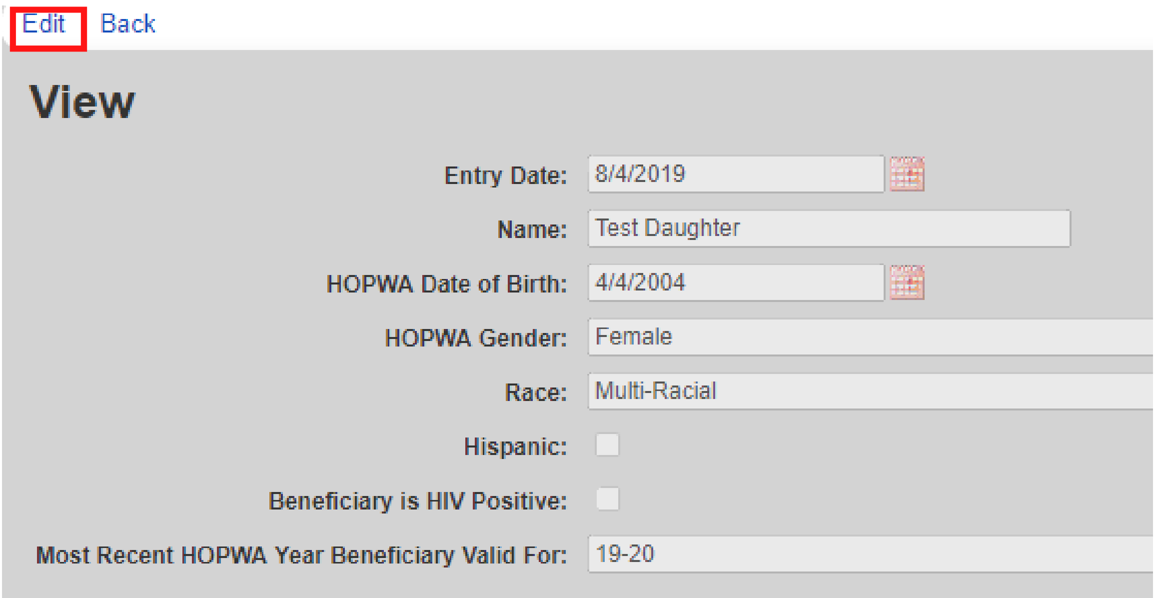
EDITING A SUBFORM

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

02 Click to highlight the subform record you would like to edit and Click **View**.



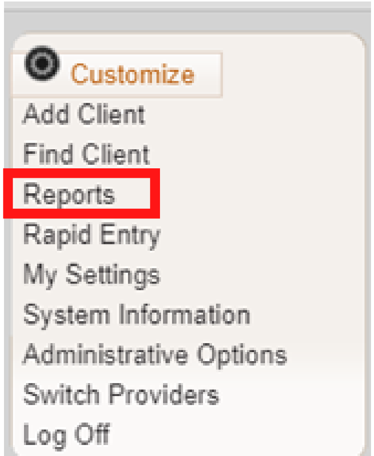
03 Make any changes you wish to make and click **Edit**.



REPORTS

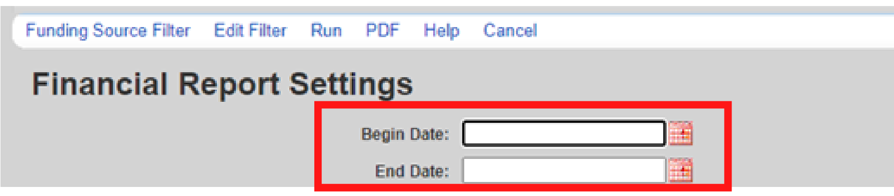
FINANCIAL REPORT

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

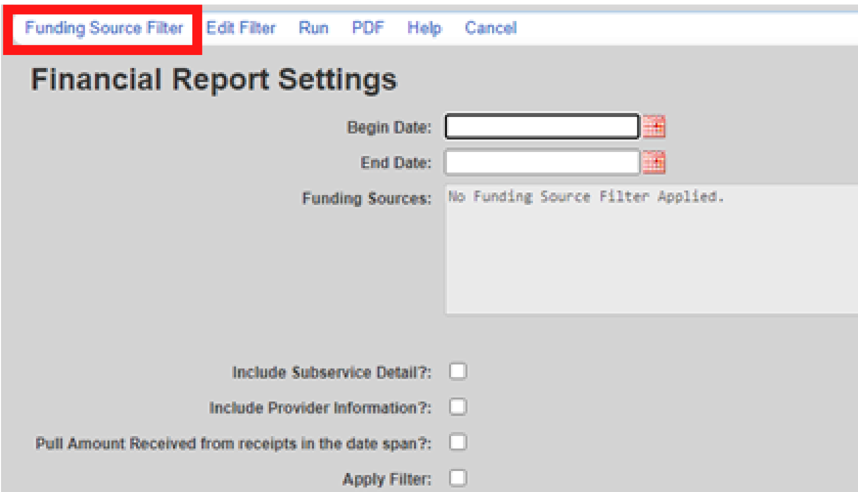


02 Select **Financial Report** from the Reports Menu.

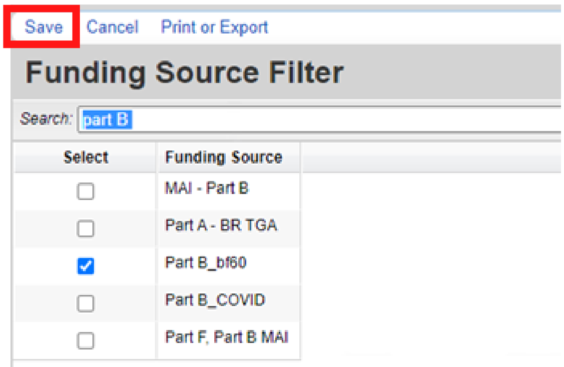
03 Select your Date Span.



04 Click **Funding Source Filter.**



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

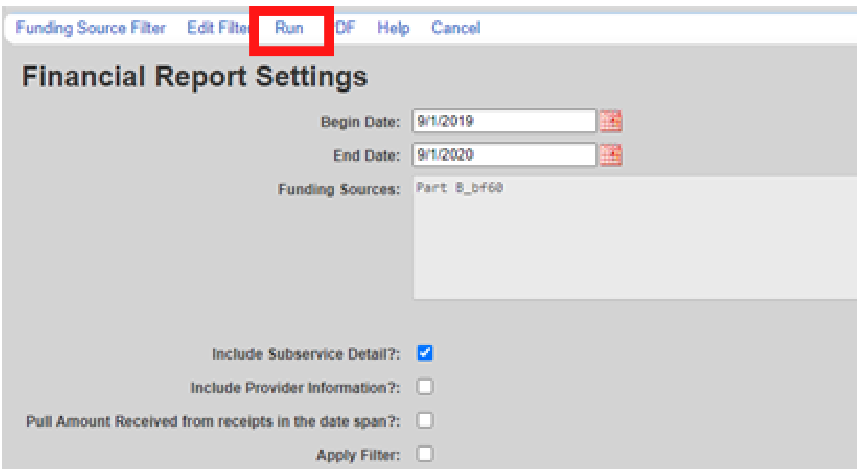


Note: The Funding Source list will only display up to 20 funding sources per page. If you do not see the source you are looking for, try using the search box to find the funding source.

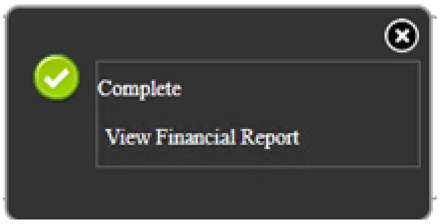
06 Check any boxes that apply;

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

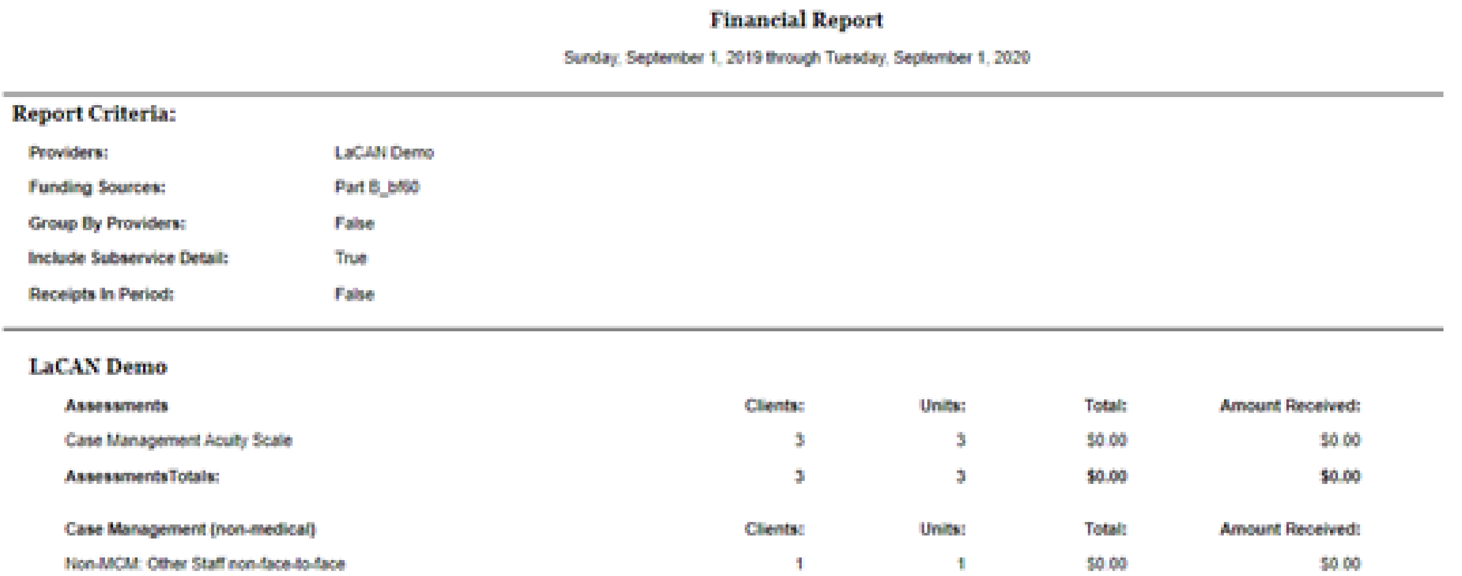
07 Click **Run.**



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:

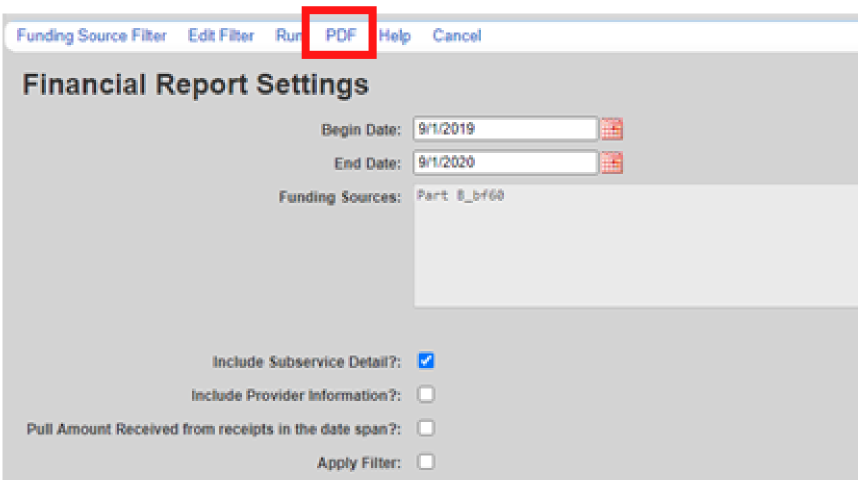
Providers:	LaCAN Demo
Funding Sources:	Part B_bf60
Group By Providers:	False
Include Subservice Detail:	True
Receipts In Period:	False

LaCAN Demo

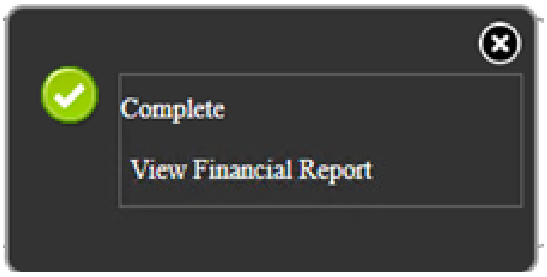
Assessments	Clients:	Units:	Total:	Amount Received:
Case Management Acuity Scale	3	3	$0.00	$0.00
AssessmentsTotals:	**3**	**3**	**$0.00**	**$0.00**

Case Management (non-medical)	Clients:	Units:	Total:	Amount Received:
Non-MCM: Other Staff non-face-to-face	1	1	$0.00	$0.00

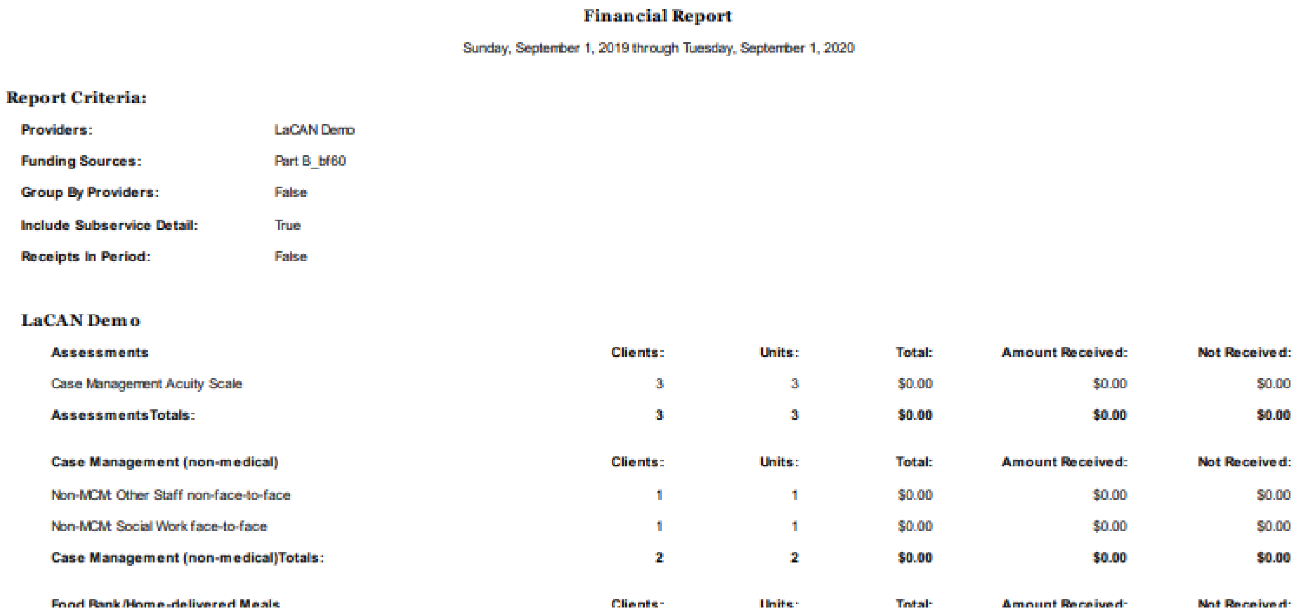
09 To view as PDF: Click **PDF.**



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_bf60
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
AssessmentsTotals:	**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:**

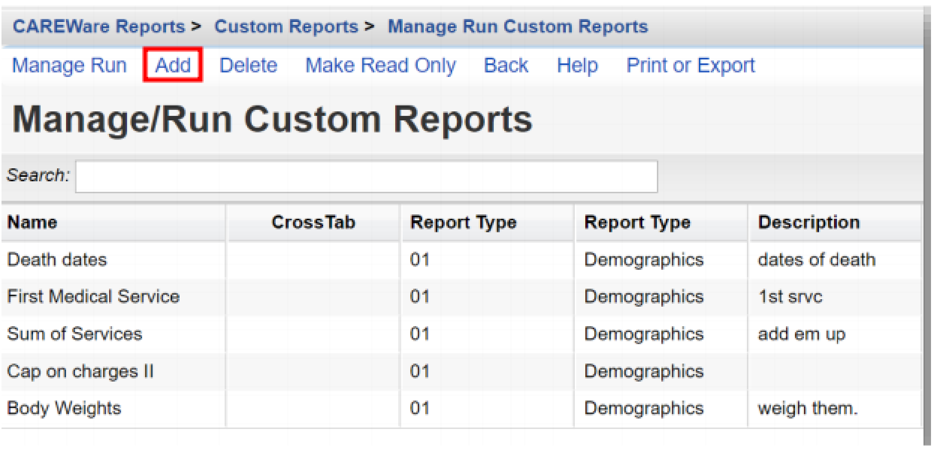
CREATING CUSTOM REPORTS

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

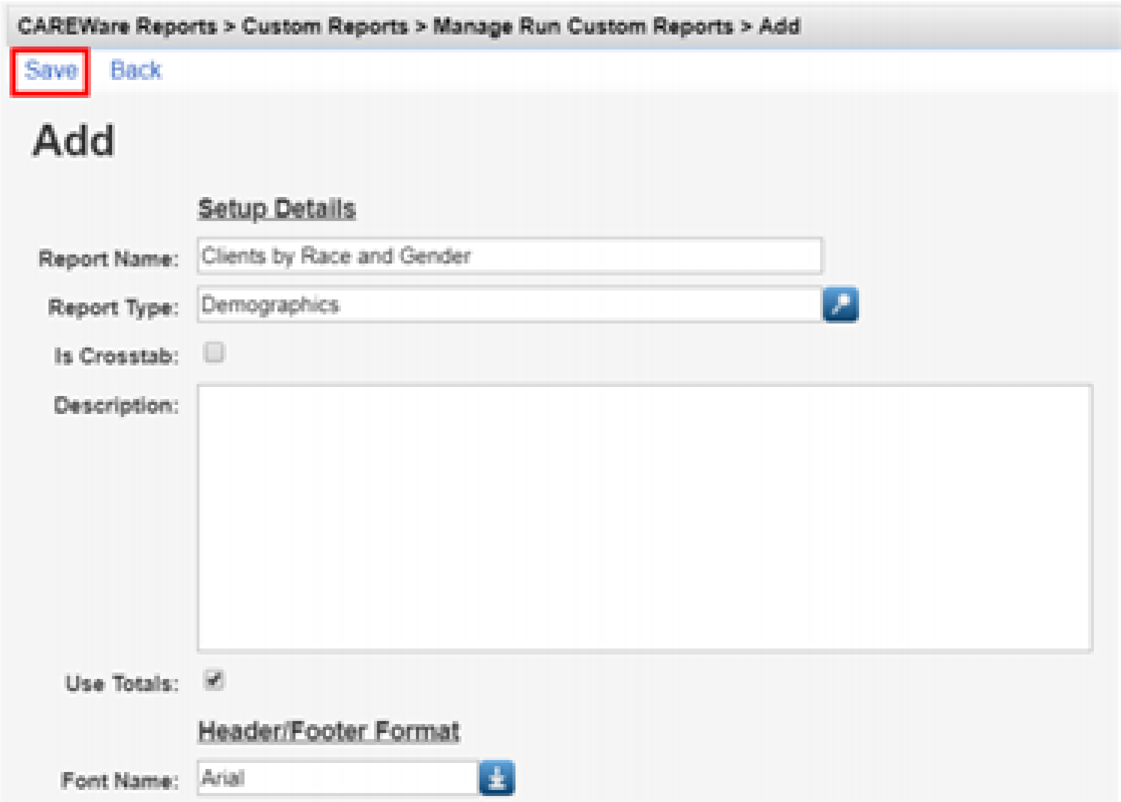
02 Select **Custom Reports** from the link menu.

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

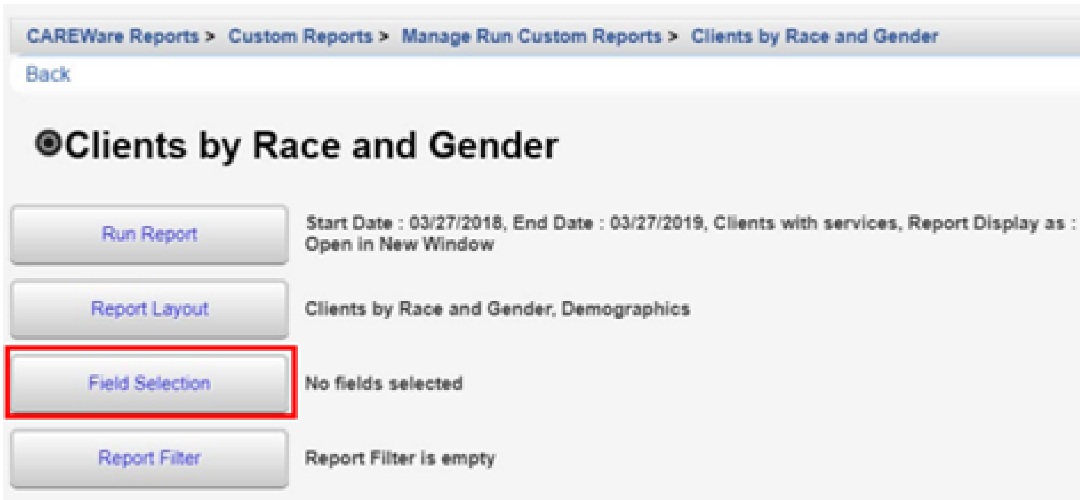
04 Select **Add**.



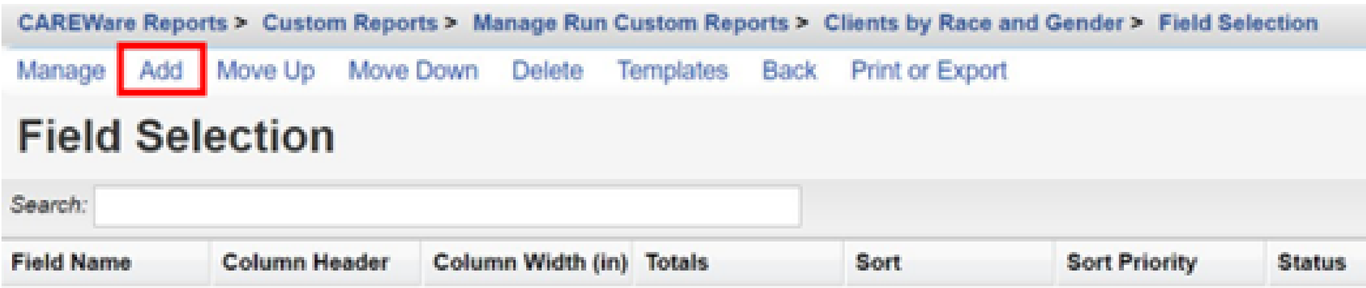
05 Enter in the following information (as applicable) and click **Save**.
- Report Name
- Report Type
- Is Crosstab (checkbox)
- Description (optional)
- Use Totals (checkbox – will automatically sum total fields in the report)
- Header/Footer Format (optional)



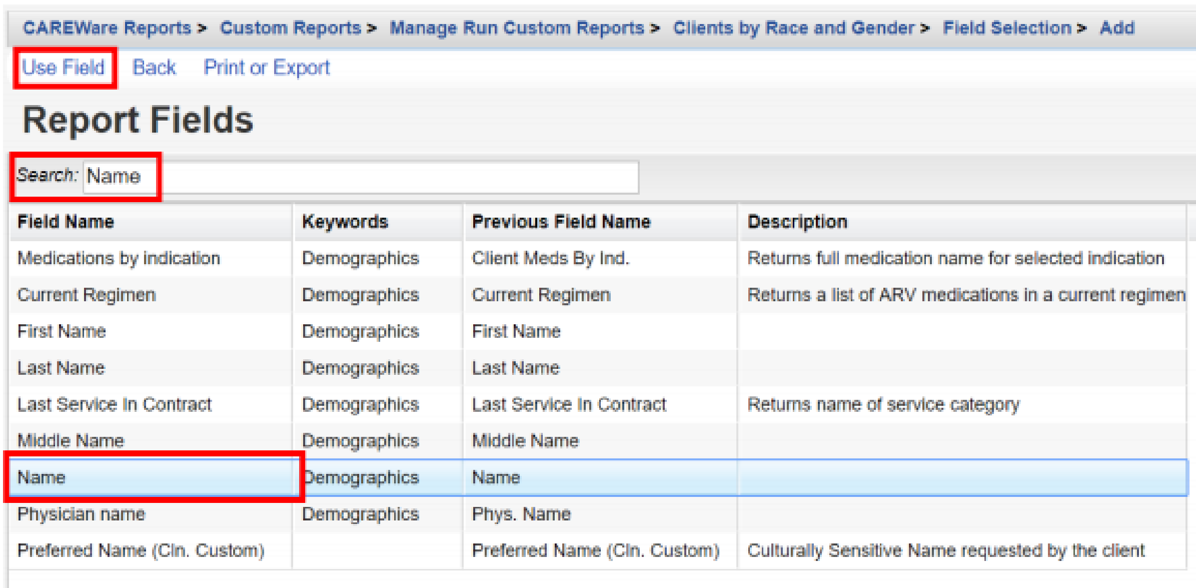
06 After clicking save, you will be on the custom report's menu. Select **Field Selection**.



07 Select **Add**.

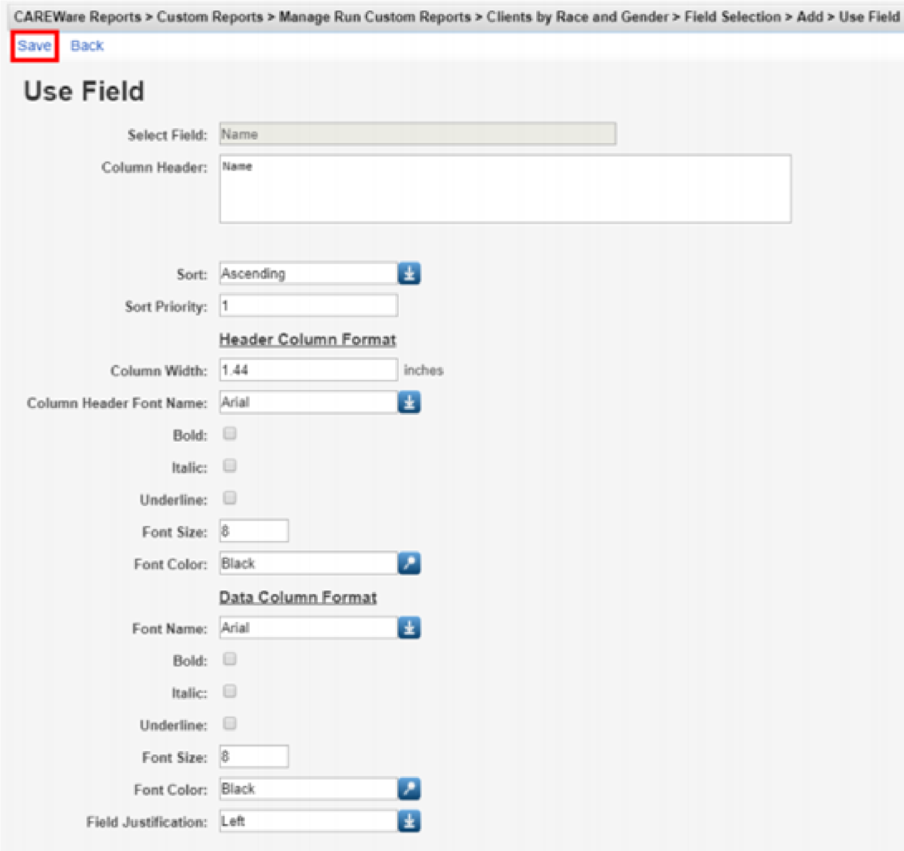


08 Use the Search box to find the fields to display in the report. In this example, “Name” was entered. Since the complete client name is desired for the report, the Name field has been selected. Click **Use Field.**

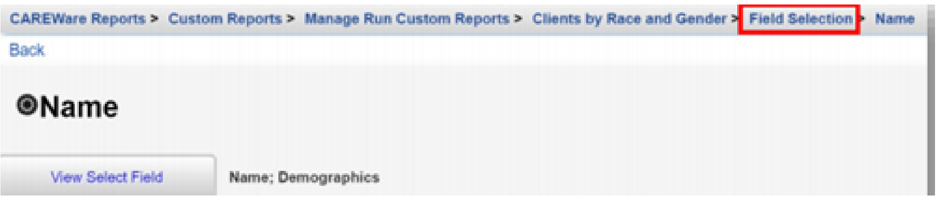


09 You will now be on the Use Field menu. Enter in the following information (as applicable) and click Save.

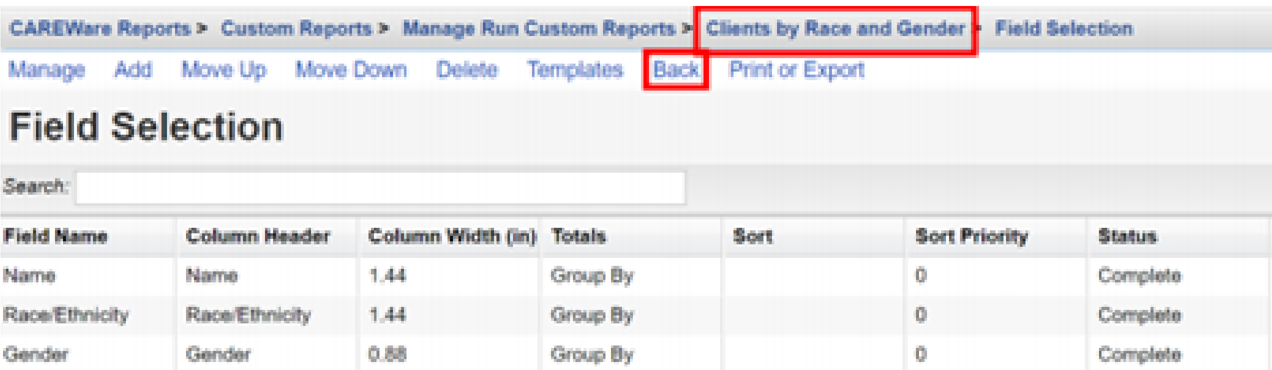
- Column Header
- Sort
- Sort Priority
- Header Column Format
- Data Column Format



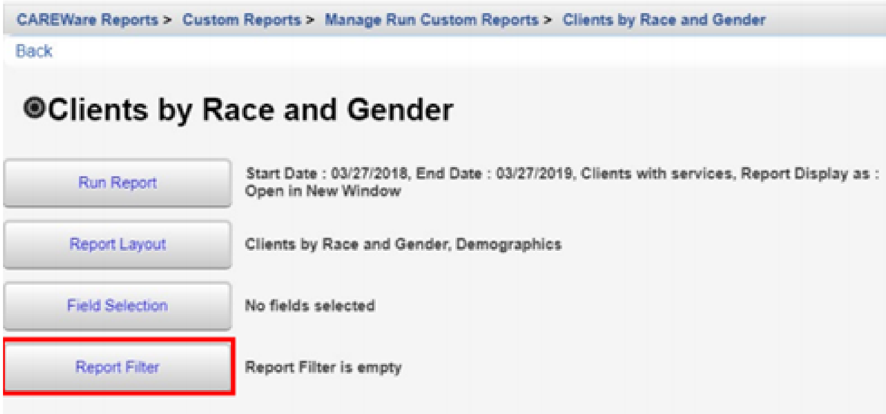
10 After clicking save, you will be on the selected field's menu. Return to the Field Selection menu by clicking **Field Selection** within the breadcrumb trail. Repeat steps 8 through 10 to add additional Report Field selections (such as Race/Ethnicity and Gender).



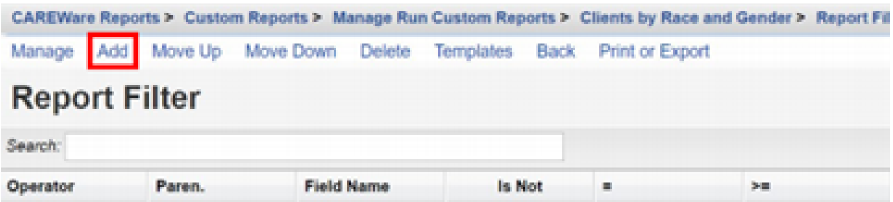
To Return to the custom report's menu, click the name of the custom report in the breadcrumb trail (in this example, "Clients by Race and Gender") or click **Back** from the Field Selection menu.



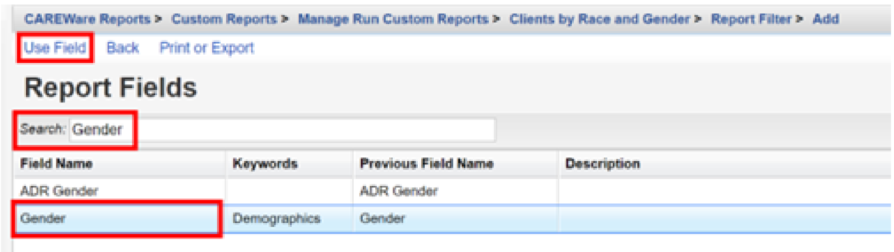
11 Click **Report Filter**.



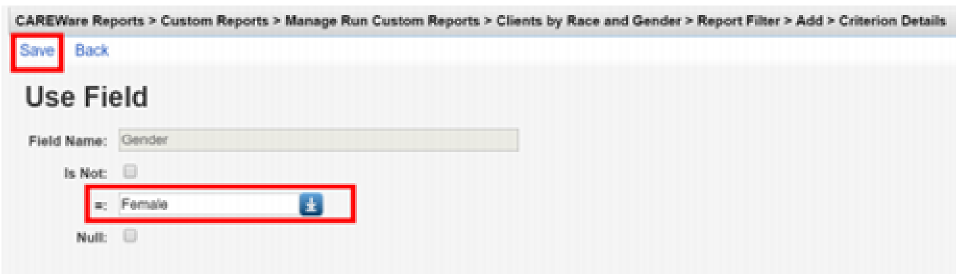
12 Click **Add**.



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



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

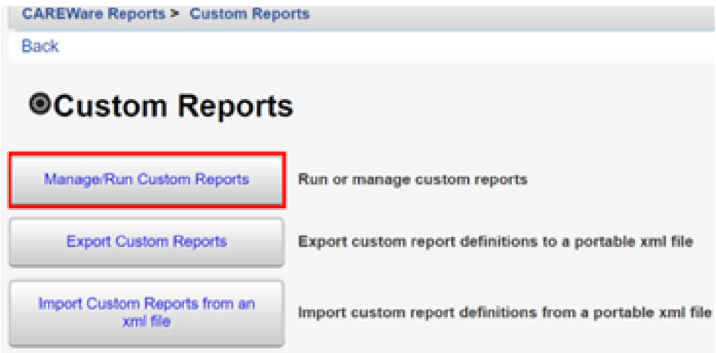


RUNNING A CUSTOM REPORT

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

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

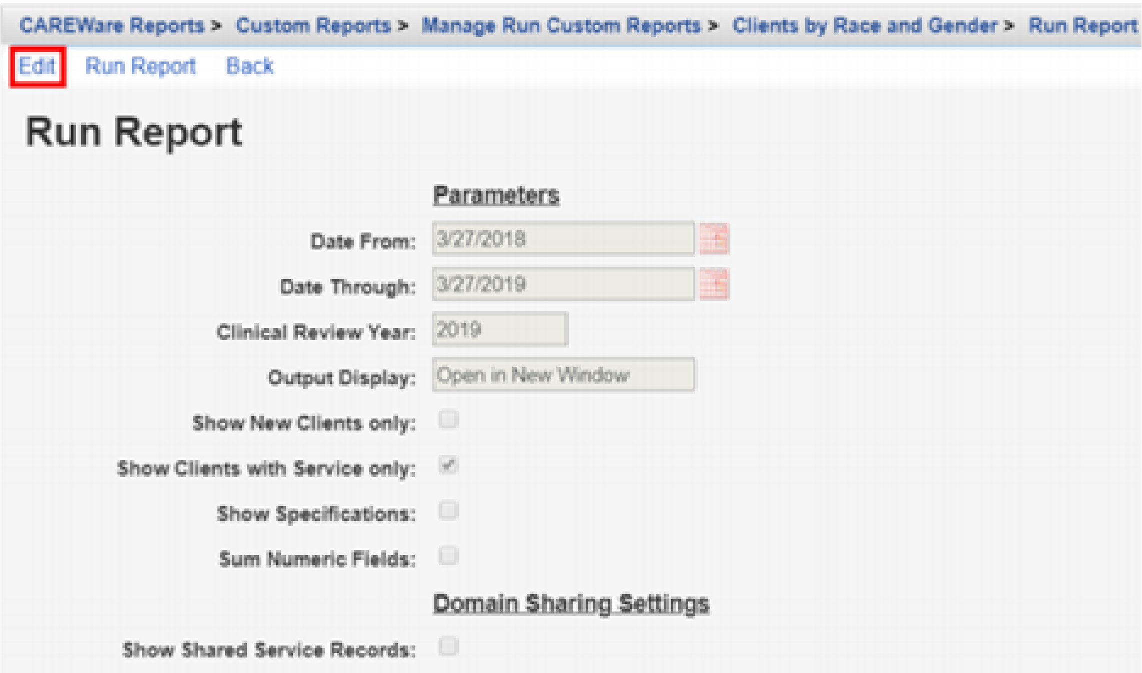
03 Select **Manage/Run Custom Reports** from the link menu.



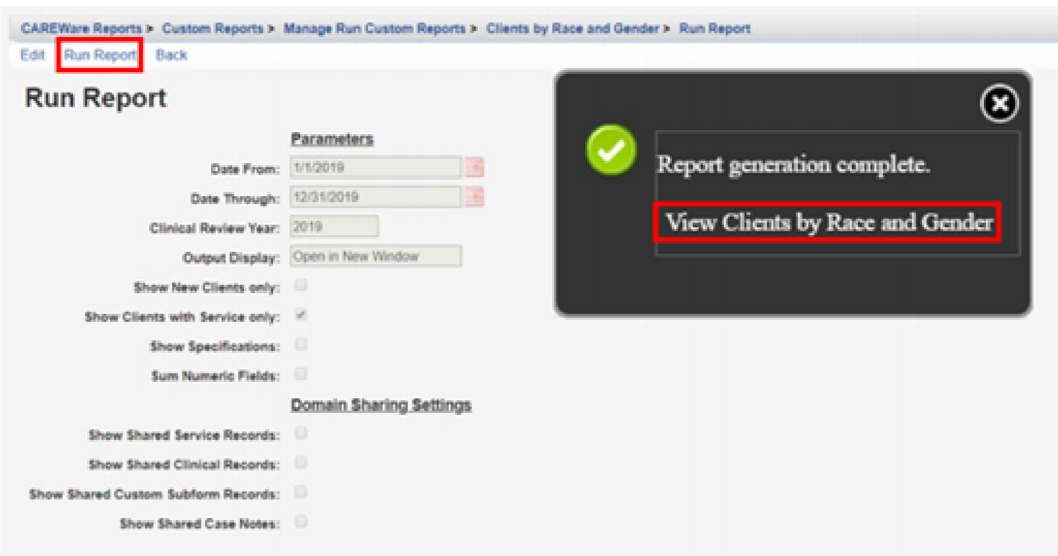
04 Select **Run Report**.

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)



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**

Name:	Race/Ethnicity:	Gender:
Adap, Sigourney	Hispanic	Female
Appleseed, Johnny	Hispanic	Male
Appleseed, Martha	Not Specified	Transgender MtF
Badge, Jane	Hispanic	Female
Badland, Abbey	Hispanic	Female
Baker, Clam	Pacific Islander	Male
Brown, Buster	Hispanic	Transgender MtF

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

ANNUAL REVIEW

- Poverty Level
- Housing Status
- Insurance

FOR AGENCIES PROVIDING OUTPATIENT AMBULATORY HEALTH SERVICES

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

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.