

# CAREWare 6

## June 2019

### Quick Start Guide #1

Navigating CAREWare Version 6.0

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 need to get basic information in and out of CAREWare.

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

## Logging in to CAREWare

1. Open your browser and enter the secure webpage address to connect to your CAREWare system (contact your CAREWare administrator if not known). Enter your CAREWare username and click **Submit**.

A screenshot of the CAREWare login interface. At the top left, a 'Submit' button is highlighted with a red box. Below it, the word 'Login' is displayed in a large, bold font. Underneath, the text 'Enter your CAREWare user name' is centered. To the left of a white text input field is the label 'User Name:'. The input field is currently empty.

2. Enter your CAREWare password, click **Submit**.

A screenshot of the CAREWare login interface, showing the password input step. At the top left, a 'Submit' button is highlighted with a red box, and a 'Cancel' button is visible to its right. Below the buttons, the word 'Login' is displayed in a large, bold font. Underneath, the text 'Enter your password' is centered. To the left of a white text input field is the label 'Password:'. The input field is currently empty.

3. If you have administrative privileges, you may see a list of several domains. If choosing between Central Administration (“Read-only”) and Provider (“Default” until you change the name), log into a Provider domain.

Select a Provider domain, click **Submit** or double-click on **Domain** name.

The screenshot shows a 'Login' dialog box with a search field and a table of domains. The 'Submit' button is highlighted with a red box.

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

## Getting Started

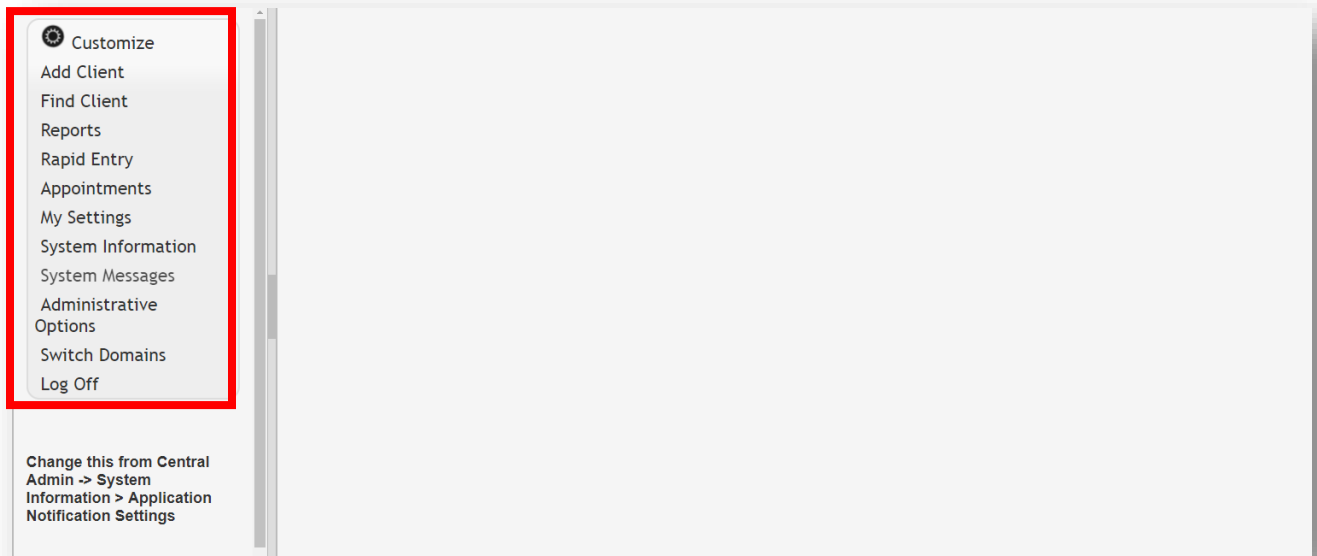
CAREWare Version 6.0 is a design change that performs more like a web application than previous versions of CAREWare. After logging into CAREWare, a **Menu of Links** will be displayed on the left.

Links will list common user tasks in CAREWare. Upon selecting a particular link, the **Link Summary** description will be displayed on the right.

Similar formats, link menus, and descriptions are the same throughout CAREWare Version 6.0!

### 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. Clicking **Add Client** or **Find Client** will open a new tab within your browser.



## Link Summary

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



## Breadcrumbs and Link Actions

**Breadcrumbs** or **breadcrumb trails** allow users to keep track and maintain awareness of their locations within CAREWare 6.

In this example: [Find Client](#) > [Search Results](#) > [Demographics](#) is considered the **Breadcrumb trail**.

[Find Client](#) > [Search Results](#) > [Demographics](#)

[Delete Client](#) [Back](#)

### Demographics

<a href="#">Personal Info</a>	Name: Appleseed, Johnny, Gender: Male DOB: 12/05/1965
<a href="#">Change URN</a>	JHAP1205651U
<a href="#">Contact Information</a>	123 Main St Apt 2 Anytown, IN 46213
<a href="#">Race/Ethnicity</a>	Hispanic (Other), White
<a href="#">HIV Risk Factors</a>	MSM AND IDU

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, as seen below.

[Find Client](#) > [Search Results](#) > [Demographics](#) > [Personal Info](#)

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

### Personal Info

First Name:

Middle Name:

Last Name:

**Link Actions** are displayed below the Breadcrumb trail and are actions that can be taken on each screen.

CAREWare Reports > Custom Reports > Custom Reports

Manage / Run Add Delete Back Help Print or Export

## Custom Reports

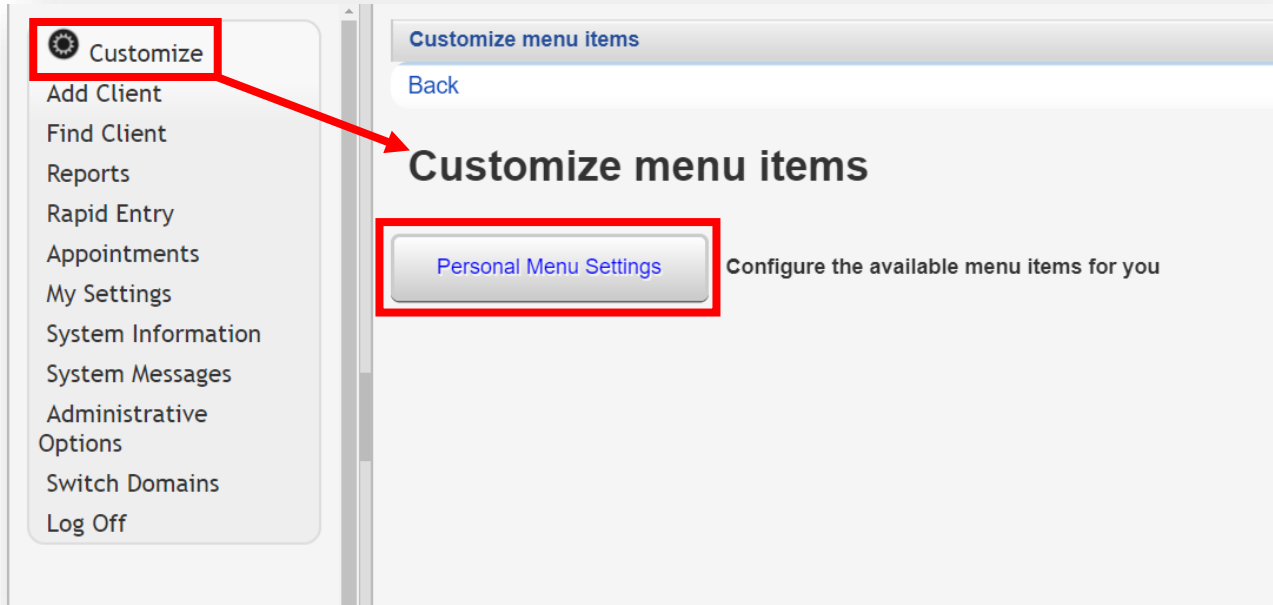


**TIP:** Using the **Help** option within the **Link Actions** will open a new tab within your browser with more information on the section you are currently in.

## Menu Customization

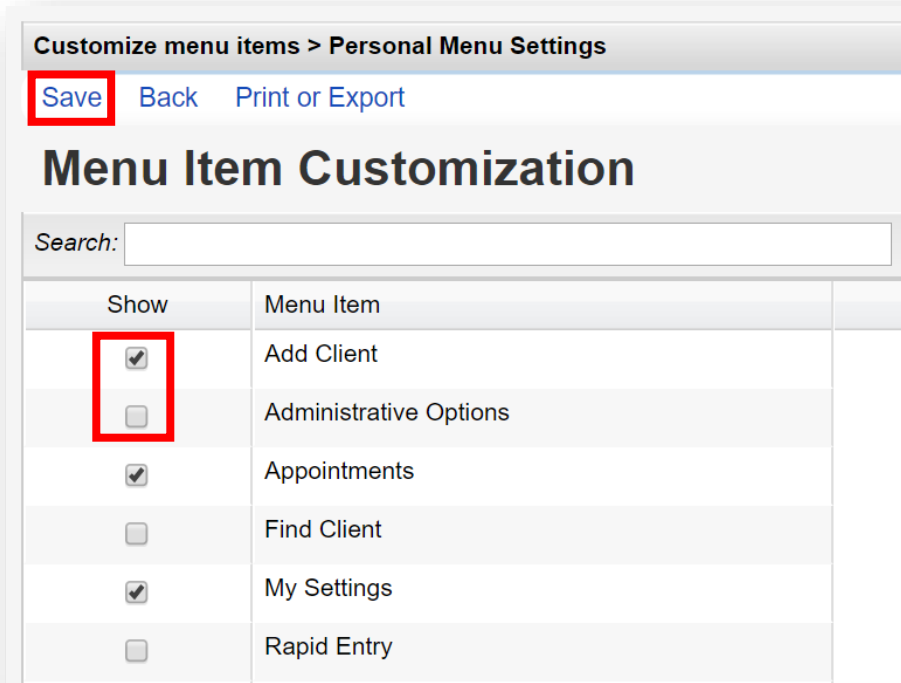
With adequate permissions, the user can personalize and customize the **Menu of Links**.

1. From the **Menu of Links**, select **Customize**. Then, click **Personal Menu Settings**.

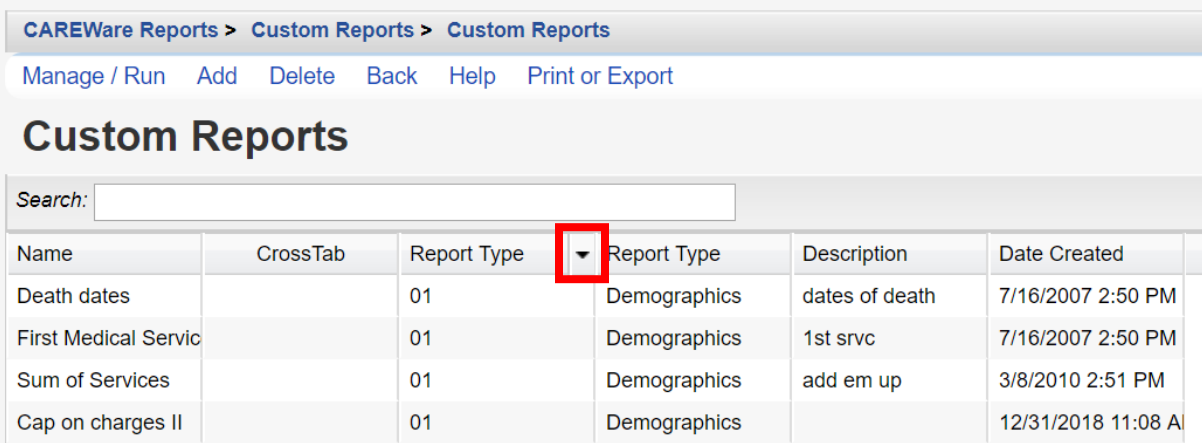




2. Show or hide items in the CAREWare Menu of Links by checking or un-checking the box next to the relevant Menu Item. Once complete, click **Save**.



3. Click on the down arrow at the top of any column to **Hide/Show Columns**.



4. Click-and-drag the column header to reposition it within the table.

## Menu Navigation

1. From the **Menu of Links**, select **Reports** and the CAREWare Reports screen will appear. For this example, click **Financial Report**.



2. You will now be on the Financial Report Settings screen.
  - Enter **Begin Date**
  - Enter **End Date**
  - Click **Run** to open the report in a new tab. Click **PDF** to open the report as a PDF.

CAREWare Reports > Financial Report Settings

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

### Financial Report Settings

Begin Date: 1/1/2018

End Date: 12/31/2018

Funding Sources: No Funding Source Filter Applied.


Include Subservice Detail?:

Include Provider Information?:

Pull Amount Received from receipts in the date span?:

Apply Filter:

Filter Description: Viral Load suppression = In Numerator



**TIP:** You may also filter the report by selecting either **Funding Source Filter** or **Edit Filter**.


- Once you click **Run**, a report confirmation message will open in the upper right corner of the screen. Select **View Financial Report**. Your report will be displayed in a new tab.






- Some screens will have editable fields:

- Fields with a Magnifying-Glass icon  indicate longer lists which are searchable.

County:	cl	
Zip Code:	Clark	
	Clay	
Phone:	Clinton	

- Fields with a Down-Arrow icon  will display the complete list for ten (10) or fewer choices.

Preferred Language:	<input type="text"/>	
Gender:	Male	
Date of Birth:	Female	
DOB Estimated?:	Male	
	Refused to Report	
Sex At Birth:	Transgender FtM	
URN:	Transgender MtF	
Encrypted URN:	Transgender Other	
	Unknown	