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.
First Things First

Getting Started

- You must have the appropriate user privileges to run reports.
- You should have at least one client entered in the system so you can see how your clinical data will look.

Clinical Setup

CAREWare comes prepackaged with the RSR-required, HIV-related tests, screenings, immunizations, and medications. However, it is easy to create additional custom clinical tests and screenings.

1. Log into CAREWare. For more details on how to do so, please refer to the Navigating CAREWare Version 6.0 Guide. If you are part of a CAREWare network, with multiple providers connected to one, central database, it is recommended that you manage Clinical Setup from the Central Administration domain. This will help ensure greater consistency in custom field coding and naming conventions.
2. Select Administrative Options from the Menu of Links and then Clinical Setup from the administrative options.

3. From the Clinical Setup screen, select a Provider and then select Manage Selected Provider.
**Lab Setup**

1. From the Manage Selected Provider screen, select **Lab Setup**.

   ![Lab Setup Screen](image)
2. HRSA Defined labs are clearly listed with an X under the HRSA column. In this example, ten (10) lab tests are listed.

3. A system warning will appear upon any attempt to Edit a HRSA Defined lab, screening lab, screening, or immunization record in CAREWare.
4. To add a custom lab test, begin by clicking Add from the Lab Setup screen.
5. Enter in the following information (as applicable) and click **Save.** Only the test name is required, but the other items should help to improve data quality.

- **Test Name**
- **Units (mm/s)**
- **Low Value**
- **High Value**
- **Decimal Places**
- **Test Name For HRSA Reporting**

Currently the only two lab tests that are reported in the RSR are the CD4 count and the viral load.

**NOTE:** A custom Lab test can also be linked to an existing HRSA Defined Lab using the **Test Name For HRSA Reporting** field box.
Screening Lab Setup

1. From the Manage Selected Provider screen, select Screening Lab Setup.
2. HRSA Defined Screening Labs are clearly listed with an X under the HRSA column. In this example, ten (10) screening lab tests are listed.

<table>
<thead>
<tr>
<th>Active</th>
<th>HRSA Defined</th>
<th>Test</th>
<th>Titer</th>
<th>Treatment</th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
<td>X</td>
<td>IGRA</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>X</td>
<td>X</td>
<td>Hepatitis A Ab-Total</td>
<td></td>
<td></td>
</tr>
<tr>
<td>X</td>
<td>X</td>
<td>Hepatitis B surface-antigen (HBsAg)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>X</td>
<td>X</td>
<td>Hepatitis B surface-antibody (HBsAb)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>X</td>
<td>X</td>
<td>Hepatitis C antibody</td>
<td></td>
<td></td>
</tr>
<tr>
<td>X</td>
<td>X</td>
<td>Cytomegalovirus (CMV)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>X</td>
<td>X</td>
<td>Syphilis</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>X</td>
<td>X</td>
<td>Toxoplasma IgG antibody</td>
<td></td>
<td></td>
</tr>
<tr>
<td>X</td>
<td>X</td>
<td>Chlamydia</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>X</td>
<td>X</td>
<td>Genital Herpes</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

3. To add a custom screening lab test, begin by clicking Add from the Screening Lab Setup screen (see previous screenshot).

4. Enter the Test Name of the custom screening lab and use the check boxes to indicate whether a Titer needs to be entered, and whether to activate a Treatment (Yes/No option). Click Save.

![Add Custom Lab Test](image)

NOTE: A custom Lab test can also be linked to an existing HRSA Defined Screening Lab using the Test Name For HRSA Reporting field box.
Screening Setup

1. From the Manage Selected Provider screen, select Screening Setup.

![Screening Setup]

- **Lab Setup**: 31 / 33 Labs Activated
- **Screening Lab Setup**: 28 / 39 Screening Labs Activated
- **Screening Setup**: 34 / 49 Screenings Activated
- **Immunization Setup**: 13 / 21 Immunizations activated
- **Medication Setup**: 76 / 498 medications activated
- **Medication Definitions File**: Update the medications file or import new medications from the current file
- **Diagnosis Setup**: 43028 / 43028 Diagnosis definitions activated
2. HRSA Defined Screenings are clearly listed with an X under the HRSA Defined column. The phrase *pap* was entered into the Search box to filter the screening results. In this example, five (5) screenings that include the phrase “pap” are listed.

3. To add a custom screening lab test, begin by clicking **Add** from the **Screening Setup** screen (see previous screenshot).

4. In this example, a custom screening test will be created for *Tobacco Use*.

   **NOTE:** A custom Lab test can also be linked to an existing HRSA Defined Screening using the **Test Name For HRSA Reporting** field box.
5. Enter in the following information (as applicable) and click Save (see previous screenshot).
   • Test Name
   • Result Class
   • Action Class
   • Excluded Gender
   • Min Score
   • Max Score
   • Score Decimal Place (0-2)
   • Test Name For HRSA Reporting

A **Result Class** allows you to create a drop-down list of possible results for a screening, and an **Action Class** allows you to create a drop-down list of possible actions taken due to a specific result. For the Tobacco Use screening, we’ll create a new **Result Class** for *Method of intake* and a new **Action Class** for *Nicotine Patch*.

6. From the **Manage Selected Provider** screen, select **Screening Result Class setup**. If this option is not available, you may need to configure the Personal Menu Settings by clicking the gear icon next to the selected provider’s name.
7. On the Screening Result Class Setup menu, select Add.

8. Enter the Name for the Screening Result Class. Click Save.
9. To add a Result for *Method of intake*, type “method” into the Search field on the **Screening Result Class Setup** menu. Once found, select it, and click **Edit Results**.

10. On the *Method of intake Results* screen, select **Add**.

11. Enter in the **Name** and **Code** (optional). For this example, we will create a result called *Cigarette (CIG)*. Click **Save**.
12. The new result now appears on the Method of intake Results screen. To return to the Manage Selected Provider screen, click the name of the provider in the breadcrumb trail or click Back.

13. To add a new Screening Action Class, from the Manage Selected Provider screen, select Screening Action Class setup. If this option is not available, you may need to configure the Personal Menu Settings by clicking the gear icon next to the selected provider’s name.

15. Enter the Name for the Screening Action Class. Click Save.
16. The newly created custom Screening test is now setup and ready for use.

<table>
<thead>
<tr>
<th>Find Client &gt; Search Results &gt; Demographics &gt; Screenings &gt; Add</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Add</strong></td>
</tr>
<tr>
<td><strong>Test Date:</strong> 4/9/2019</td>
</tr>
<tr>
<td><strong>Test Definition:</strong> Tobacco Use</td>
</tr>
<tr>
<td><strong>Result:</strong> Cigarette</td>
</tr>
<tr>
<td><strong>Action:</strong> Nicotine Patch</td>
</tr>
<tr>
<td><strong>Test Score:</strong></td>
</tr>
</tbody>
</table>
Immunization Setup

1. From the Manage Selected Provider screen, select Immunization Setup.
2. HRSA Defined Immunizations are clearly listed with an X under the HRSA column. In this example, four (4) immunizations are listed.

![Immunization Setup Table]

3. Enter the **Name** for the **Immunization**. Click **Save**.

![Add Immunization Form]
Diagnosis Setup

1. From the Manage Selected Provider screen, select Diagnosis Setup.
2. ICD-10 Diagnosis Codes and Descriptions are clearly listed with an X under the Active column. The phrase *human immuno* was entered into the Search box to filter the ICD-10 diagnosis results. In this example, five (5) diagnosis codes are listed.

3. The current codes can be found on the HRSA CAREWare website: [https://hab.hrsa.gov/program-grants-management/careware](https://hab.hrsa.gov/program-grants-management/careware). On the website, find the ICD-10 Diagnosis Codes XML download link and right click on it. Select Save target as… or Save link as… and save the XML file somewhere on your local computer (a “CAREWare” user folder is recommended).
4. On the ICD 10 Setup screen, click Update Definitions.

5. Click Choose File from the Update Definitions screen and browse to the saved location of the carewareicd10.xml file. Once you receive the Upload Completed Successfully message, click Save.

Diagnoses must be designated as active to be used. When “Deactivate all ICD 10s that are not contained in the file” is checked, any diagnosis that are not in the Updated Definitions file will automatically be deactivated. They will not be deleted but would need to be manually activated to be used.
Medication Setup

1. From the Manage Selected Provider screen, select Medication Setup.

2. Medications are clearly listed with an X under the Active column. In this example, five (5) medications are listed. Medications are listed by ingredient or generic name(s).
3. To add a Custom or Brand name to an active Medication name, click **Edit** (see previous screenshot).

4. Enter a Custom Name. In this example we entered *Ziagen*. Select **Save**.

![Edit Medication Name]

**NOTE:** It is recommended to include the medication name (ingredient or generic) after the custom name.
Medication Definitions File

1. From the Manage Selected Provider screen, select Medication Definitions File.

2. Current Medications should be imported into CAREWare on a regular basis. The current medications can be found on the HRSA CAREWare website: [https://hab.hrsa.gov/program-grants-management/careware](https://hab.hrsa.gov/program-grants-management/careware)
3. On the website, find the Medications Import XML download link and right click on it. Select Save target as… or Save link as… and save the XML file somewhere on your local computer (a “CAREWare” user folder is recommended).

5. Click **Choose File** and browse to the saved location of the `medications-(year-month-day).xml` file. Once you receive the Upload Completed Successfully message, click **Save**.

![Upload New Medication File Image]

**Entering Clinical Data**

After setup of the Clinical Module is completed, clinical data entry can begin.

1. Select **Find Client** from the **Menu of Links** of a provider domain. Note: All data-entry must be entered in a Provider domain.

![Find Client Image]
2. Search by any of the available fields; in this case we’ll use the last name. Click **Client Search**.

3. A list of matches to your search appears. Select the correct name from the list and click **View Details**. The client Demographics information window appears.
Medications

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

2. Select Allergies and ART.

3. Select Edit to enter allergies and ART information.
4. After making the desired edits, click **Save** and then **Back** (see previous screenshot) to return to the **Client Medications** screen.

5. From the **Client Medications** screen, select **All (Start, Stop, Change)**.
6. Select **Start** to enter a new client medication.

   ![Image of Start button]

7. 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

   ![Image of medication entry form]

8. Click **Save**, then **Back**.
Labs

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

2. Enter the following information (as applicable) and then click Save.
   - Date
   - Lab
   - Test Operator
   - Test Result
   - Assay
   - Comment
Screenings

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

2. 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 Lab

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

2. Enter the following information (as applicable) and then click Save.
   - Test Date
   - Test Definition
   - Result
   - Treatment
   - Titer 1
   - Test Comments

**NOTE:** The Titer 1 field will be displayed for tests where titer is indicated (e.g. syphilis). The viral titer is the lowest concentration of a virus that still infects cells.
For the **Result** field, Not Medically Indicated (NMI) is often selected from the drop-down menu for hepatitis tests to show that the client has already been exposed to the virus; this prevents your reports from counting these clients as not having been tested for hepatitis.

**Immunizations**

1. From the Demographics screen, select **Immunizations** from the **Menu of Links**. On the **Immunizations** screen, click **Add**.
2. Enter the following information (as applicable) and then click **Save**.
   - Date
   - Vaccine
   - Received
   - Immunity
   - Amount Administered
   - Units Administered
   - Lot Number
   - Manufacturer Name
   - Manufacturer Code

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**.

Note: Additional clinical information, including, **Vital Signs, Hospital Admissions**, and **Orders** (clinical appointments), can be collected in CAREWare. They are entered the same way as Medications, Labs, Screenings, Screening Labs, and Immunizations.

However, this information is not required for the RSR Report or HAB Performance Measures, so it is optional and will not be detailed here.