CAREWare 6 Quick Start Guide #5

Clinical Setup and Medical Data Entry

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.

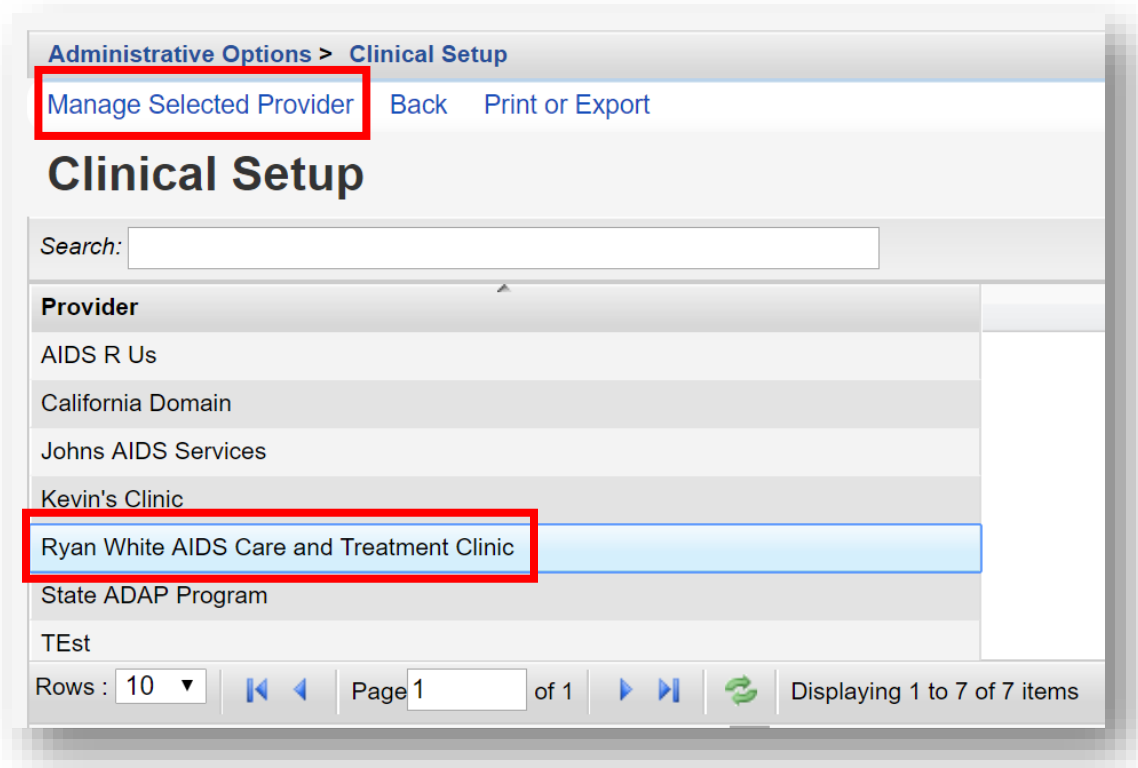2. Select **Administrative Options** from the **Menu of Links** and then **Clinical Setup** from the administrative options.

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.**

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic

Back

⦿Ryan White AIDS Care and Treatment Clinic

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 labs are clearly listed with an X under the HRSA column. In this example, ten (10) lab tests are listed.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Lab Setup

Edit   View   Add   Delete   Activate   Deactivate   Activate All   Deactivate All   Back   Print or Export

Lab Setup

Search: [   ]

Active	HRSA	Test	Low	High	Decimals
X	X	CD4 Count	0	1200	0
X	X	Viral Load	0	1000000000	0
X	X	HDL	30	90	0
X	X	WBC	2	11	1
X	X	CD4 Percent	0	100	1
X	X	Glucose	70	115	0
X	X	Hemoglobin	12	18	1
X	X	Platelets	130000	370000	0
X	X	Albumin	3.5	5.5	1
X	X	Total Cholesterol	90	200	0

3. A system warning will appear upon any attempt to **Edit** a HRSA Defined lab, screening lab, screening, or immunization record in CAREWare.

The lab record is HRSA defined and can not be edited

...nical Setup > Ryan White AIDS Care and Treatment Clinic > Lab Setup

Edit   View   Add   Delete   Activate   Deactivate   Activate All   Deactivate All   Back   Print or Export

Lab Setup

Search: [   ]

Active	HRSA	Test	Low	High	Decimals
X	X	CD4 Count	0	1200	0

4. To add a custom lab test, begin by clicking **Add** from the **Lab Setup** screen.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Lab Setup

Edit   View   Add   Delete   Activate   Deactivate   Activate All   Deactivate All   Back   Print or Export

Lab Setup

Search:

Active	HRSA	Test	Low	High	Decimals
X	X	CD4 Count	0	1200	0
X	X	Viral Load	0	1000000000	0
X	X	HDL	30	90	0
X	X	WBC	2	11	1
X	X	CD4 Percent	0	100	1
X	X	Glucose	70	115	0
X	X	Hemoglobin	12	18	1
X	X	Platelets	130000	370000	0
X	X	Albumin	3.5	5.5	1
X	X	Total Cholesterol	90	200	0

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.**

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic

Back

⚙Ryan White AIDS Care and Treatment Clinic

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 Screening Labs are clearly listed with an X under the HRSA column. In this example, ten (10) screening lab tests are listed.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Screening Lab Setup

Edit   View   Add   Delete   Activate   Deactivate   Activate All   Deactivate All   Back   Print or Export

Screening Lab Setup

Search:

Active	HRSA Defined	Test	Titer	Treatment
X	X	IGRA		X
X	X	Hepatitis A Ab-Total		
X	X	Hepatitis B surface-antigen (HBsAg)		
X	X	Hepatitis B surface-antibody (HBsAb)		
X	X	Hepatitis C antibody		X
X	X	Cytomegalovirus (CMV)		
X	X	Syphilis	X	X
X	X	Toxoplasma IgG antibody		
X	X	Chlamydia	X	X
X	X	Genital Herpes	X	X

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**.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Screening Lab Setup > Add

Save   Cancel

Add

Test Name:

Titer: ☐

Treatment: ☐

Test Name For HRSA Reporting:

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.**

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.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Screening Setup

Edit   View   Add   Delete   Activate   Deactivate   Activate All   Deactivate All   Back   Print or Export

Screening Setup

Search: pap

Active	HRSA Defined	Test	Test Class	Action Class	Excluded Gender
X	X	Pap Smear	Pap Test		Male
X	X	Colposcopy	Pap Test		Male
X	X	Pelvic exam	Pelvic/Rectal Pap		Male
X		Rectal Pap Smear	Pelvic/Rectal Pap		
		Anal Pap	analpapres	analpapact	Female

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

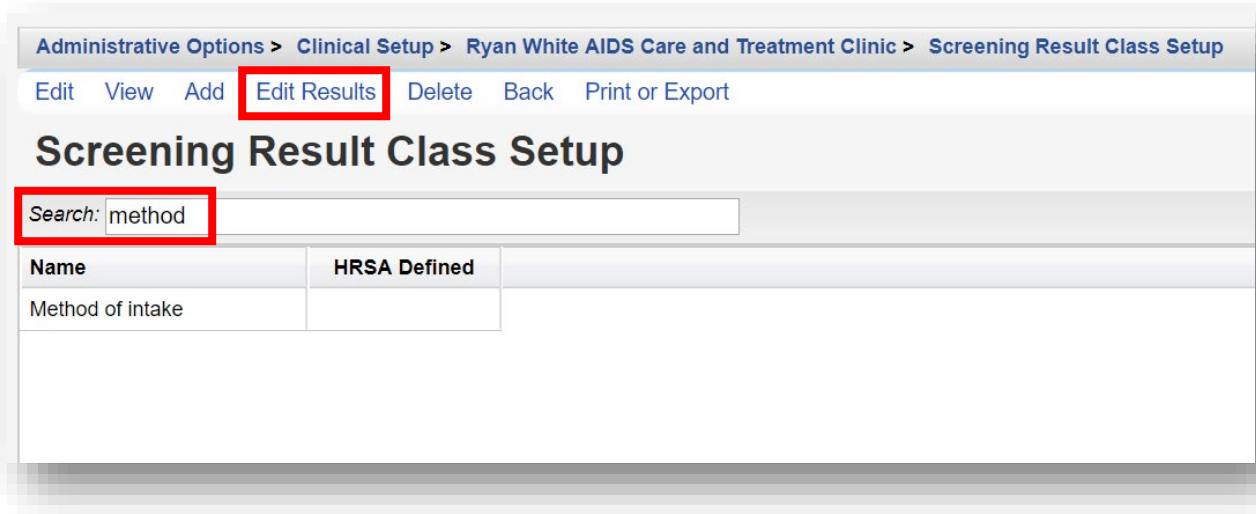4. In this example, a custom screening test will be created for *Tobacco Use.*

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Screening Setup > Add

Save   Cancel

Add

|	
Test Name:	Tobacco Use
Result Class:	
Action Class:	
Excluded Gender:	
Min Score:	
Max Score:	
Score Decimal Places (0-2):	
Test Name For HRSA Reporting:	

(!)   **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**.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Screening Result Class Setup

Edit   View   Add   Edit Results   Delete   Back   Print or Export

Screening Result Class Setup

Search: [   ]

Name	HRSA Defined
AdherenceScore	
analpapres	
appetite	
bowels	
Geno/Pheno	
Good_bad	
Housing Arrangement	X
HQ Adherence Rating	
HQ Substance Abuse Result	
HQ Tobacco Result	

8. Enter the **Name** for the **Screening Result Class**. Click **Save**.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Screening Result Class Setup > Add

Save   Cancel

Add

Name: [Method of intake]

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**.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Screening Result Class Setup

Edit   View   Add   Edit Results   Delete   Back   Print or Export

Screening Result Class Setup

Search: method

Name	HRSA Defined
Method of intake	

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

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Screening Result Class Setup > Method of intake Results

Edit   View   Add   Delete   Back   Print or Export

Method of intake Results

Search:

Name	Code	HRSA Defined
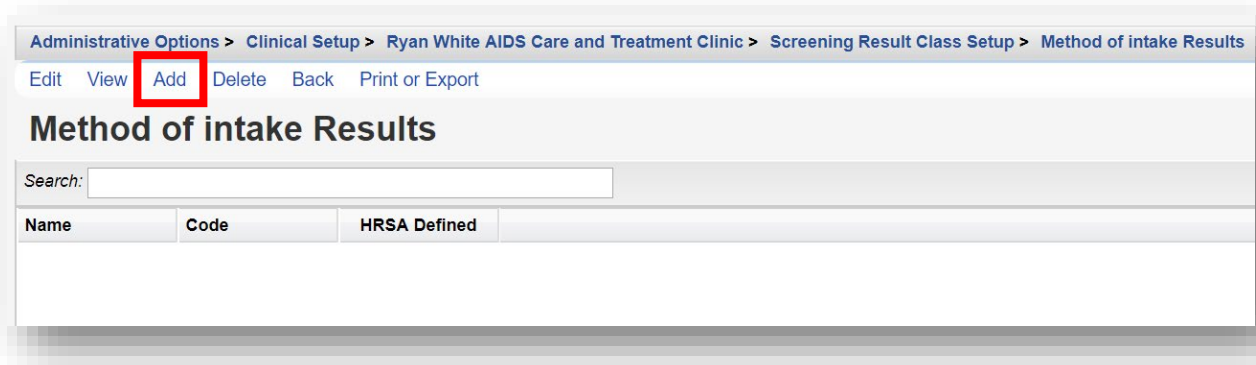
11. Enter in the **Name** and **Code** (optional). For this example, we will create a result called *Cigarette (CIG)*. Click **Save**.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Screening Result Class Setup > Method of intake Results > Add

Save   Cancel

Add

Name: Cigarette

Code: CIG
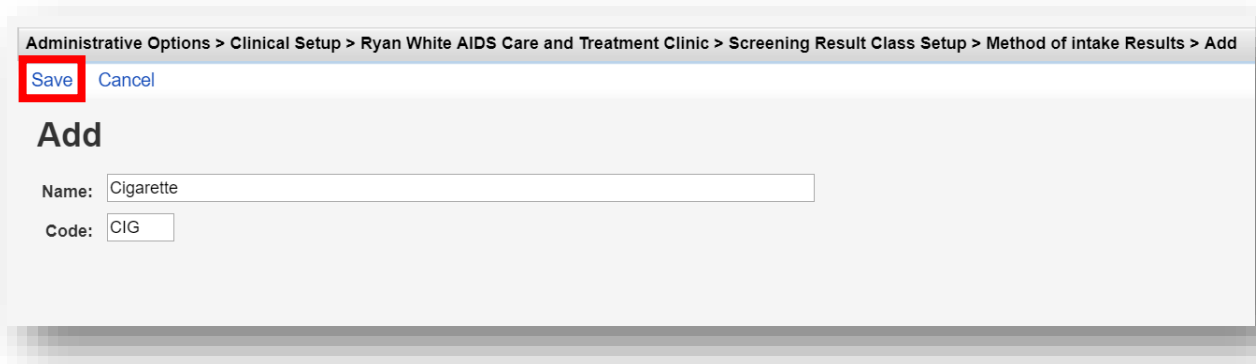
12. The new result now appears on the Method of intake Results screen. To return to the **Manage Selected Provider** screen, click the name of the provider in the **breadcrumb trail** or click **Back**.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Screening Result Class Setup > Method of intake Results

Edit   View   Add   Delete   Back   Print or Export

Method of intake Results

Search: [   ]

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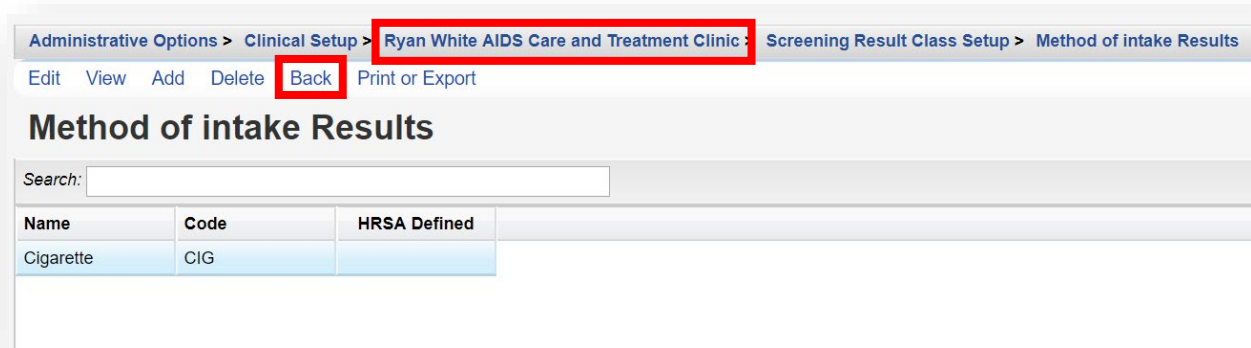
13. To add a new **Screening Action Class**, from the **Manage Selected Provider** screen, select **Screening Action Class setup**. If this option is not available, you may need to configure the Personal Menu Settings by clicking the gear icon next to the selected provider's name.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic

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⊛Ryan White AIDS Care and Treatment Clinic

Lab Setup	31 / 33 Labs Activated
Screening Lab Setup	28 / 39 Screening Labs Activated
Screening Setup	34 / 49 Screenings Activated
Screening Action Class Setup	16 total Action Classes
Screening Result Class setup	31 total Result Classes
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

14. On the **Screening Action Class Setup** menu, select **Add**.

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Screening Action Class Setup

Edit   View   Add   Edit Actions   Delete   Back   Print or Export

Screening Action Class Setup

Search:

Name	HRSA Defined
analpapact	
Counseled By	X
HQ Adherence Acti	
HQ Literacy Action	
HQ Mental Health A	
HQ Substance Abu:	
HQ Tobacco Action	
Mamm_Tx	
None Defined	
Pos_neg	

15. Enter the **Name** for the **Screening Action Class**. Click **Save**.

Administrative Options > Clinical Setup > Screening Result Class setup > Add

Save   Cancel

Add

Name: Nicotine Patch

16. The newly created custom Screening test is now setup and ready for use.

Find Client > Search Results > Demographics > Screenings > Add

Save   Back

Add

Test Date:	4/9/2019
Test Definition:	Tobacco Use
Result:	Cigarette
Action:	Nicotine Patch
Test Score:	

Immunization Setup

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

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic

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⚙Ryan White AIDS Care and Treatment Clinic

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 Immunizations are clearly listed with an X under the HRSA column. In this example, four (4) immunizations are listed.

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

Diagnosis Setup

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

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic

Back

⚙Ryan White AIDS Care and Treatment Clinic

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. 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. 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).
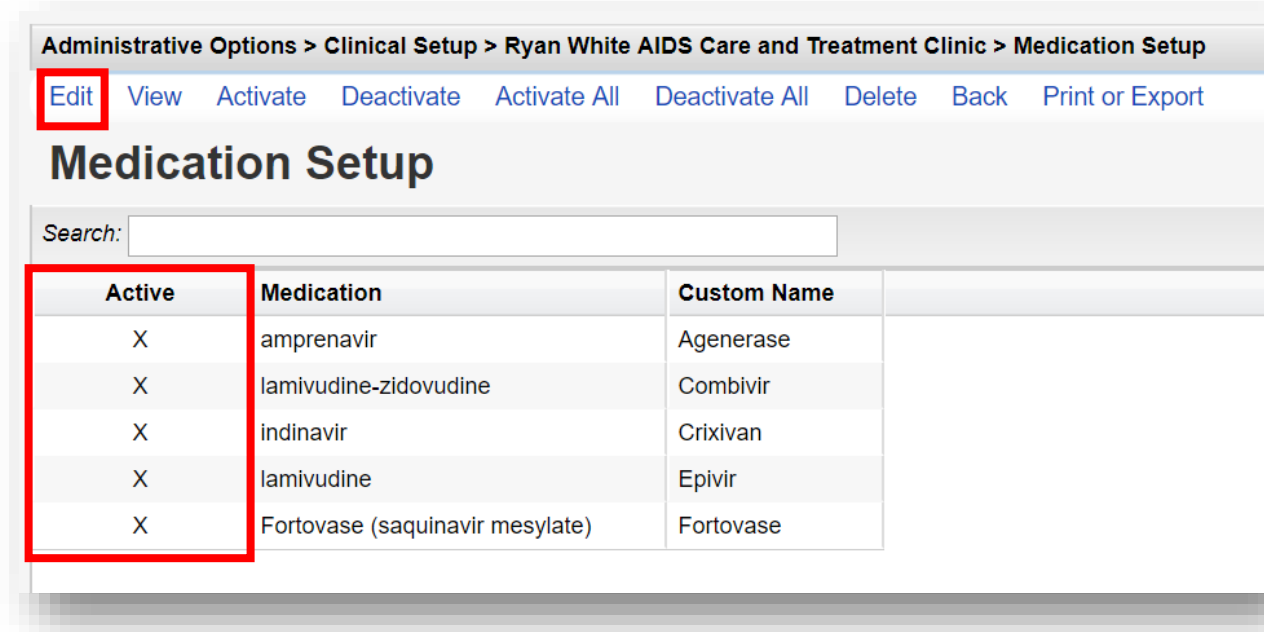
3. To add a Custom or Brand name to an active Medication name, click **Edit** (see previous screenshot).

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

Administrative Options > Clinical Setup > Ryan White AIDS Care and Treatment Clinic > Medication Setup > Edit

Save   Cancel

Edit

Medication: abacavir

Custom Name: Ziagen (abacavir)

> (!) **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

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).
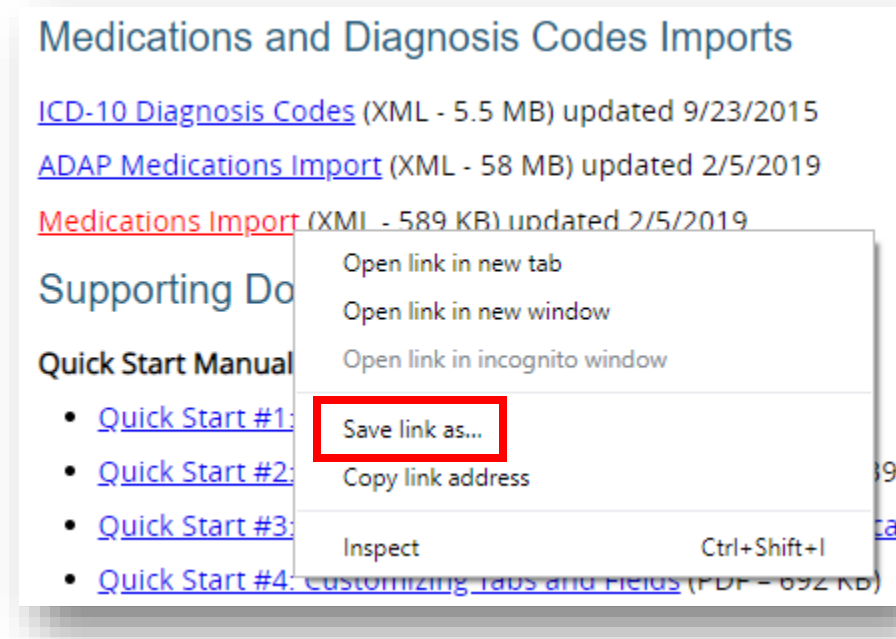
4. On the Medication Import screen, click **Upload New Medication File**.
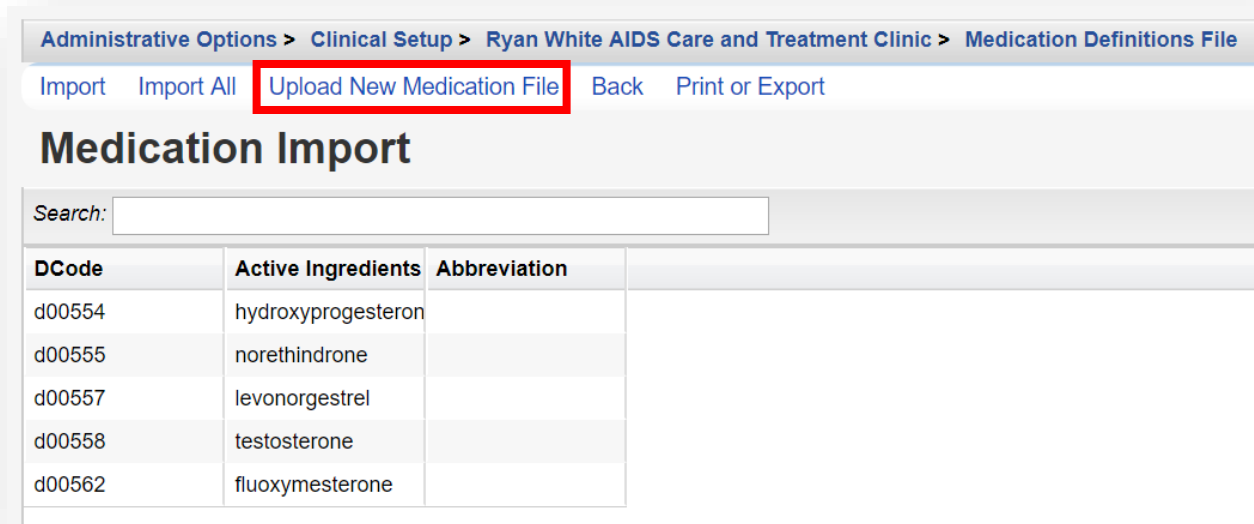
5. Click **Choose File** and browse to the saved location of the **medications-(year-month-day).xml** file. Once you receive the Upload Completed Successfully message, click **Save**.
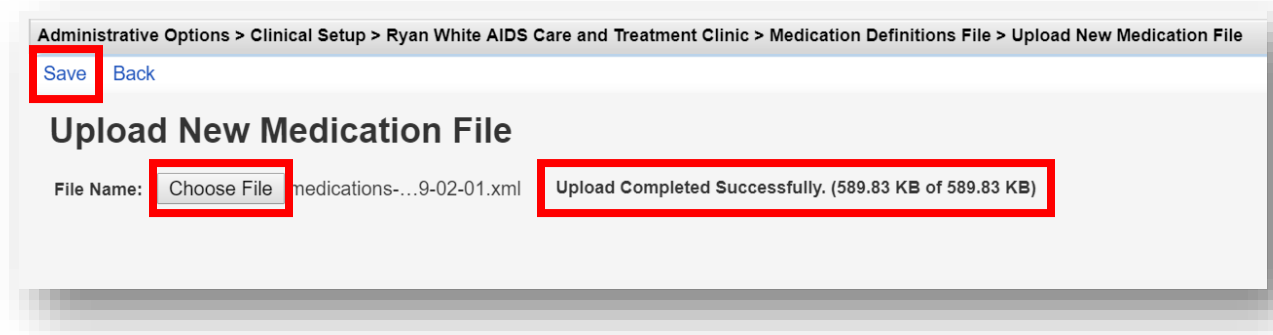
Entering Clinical Data

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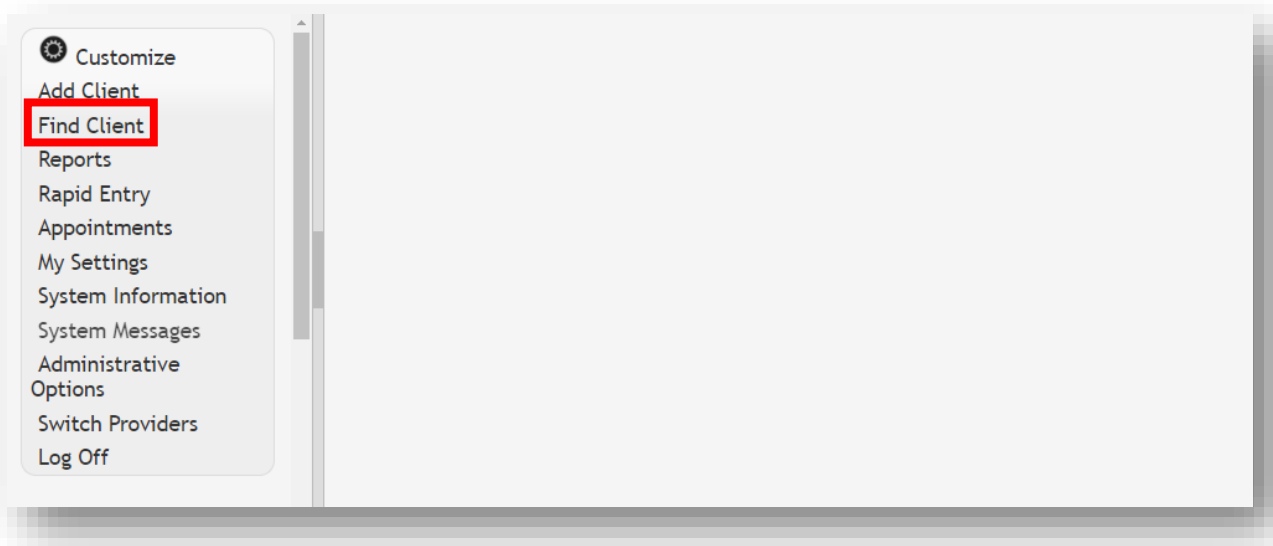
2. Search by any of the available fields; in this case we'll use the last name. Click **Client Search**.

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.
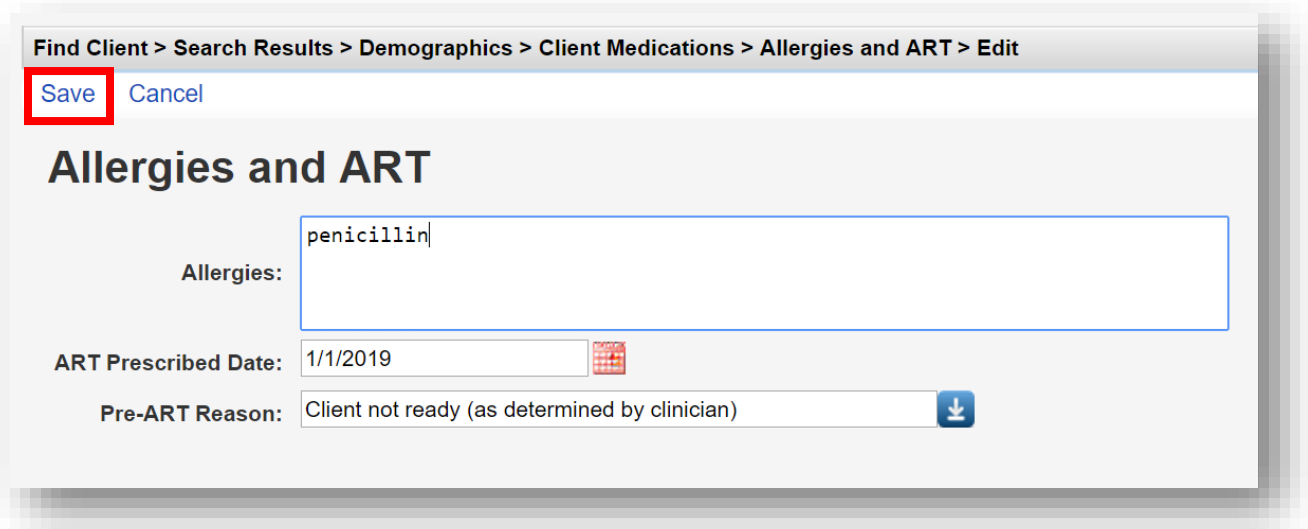
Medications

1. From the Demographics screen, select **Medications** from the **Menu of Links**.
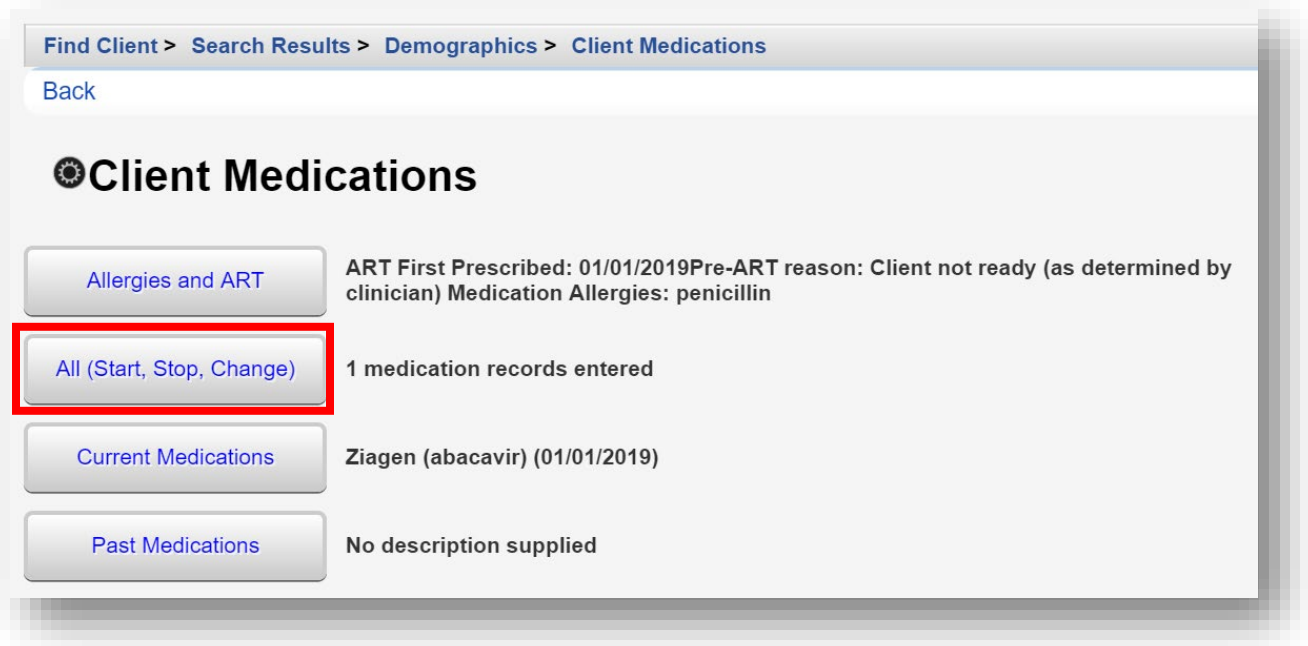
2. Select **Allergies and ART.**
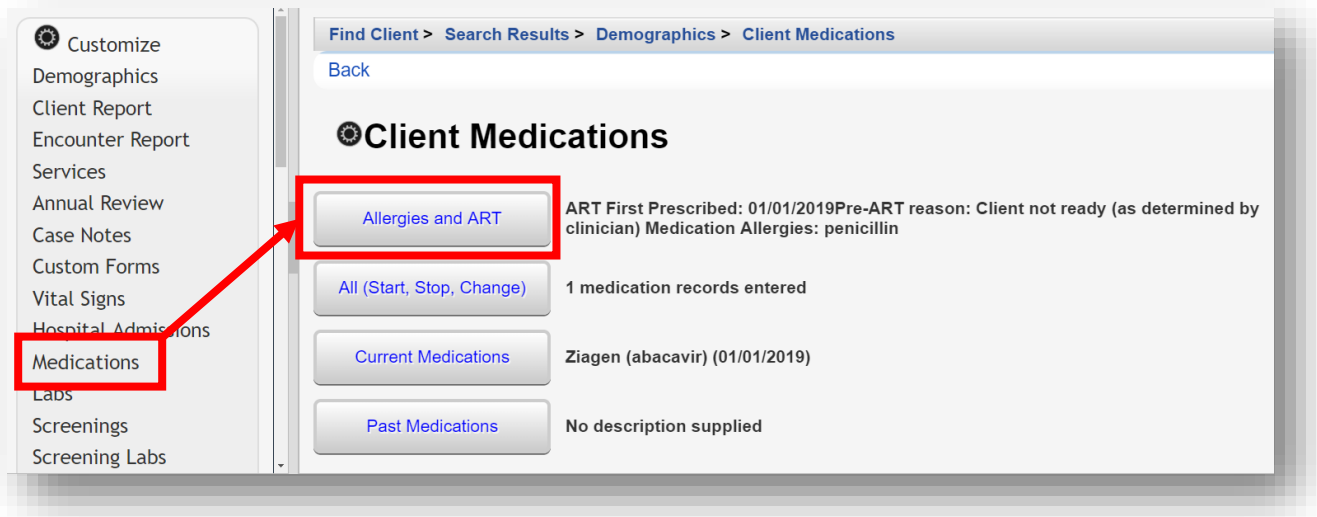
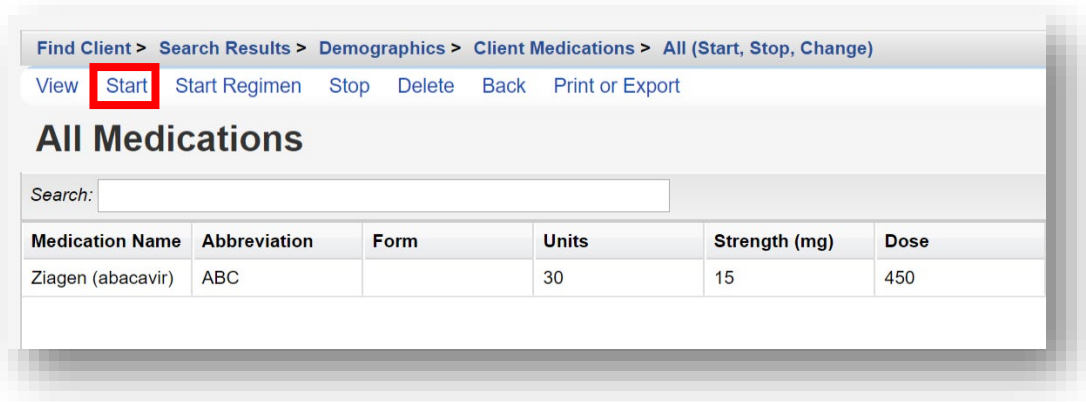3. Select **Edit** to enter allergies and ART information.
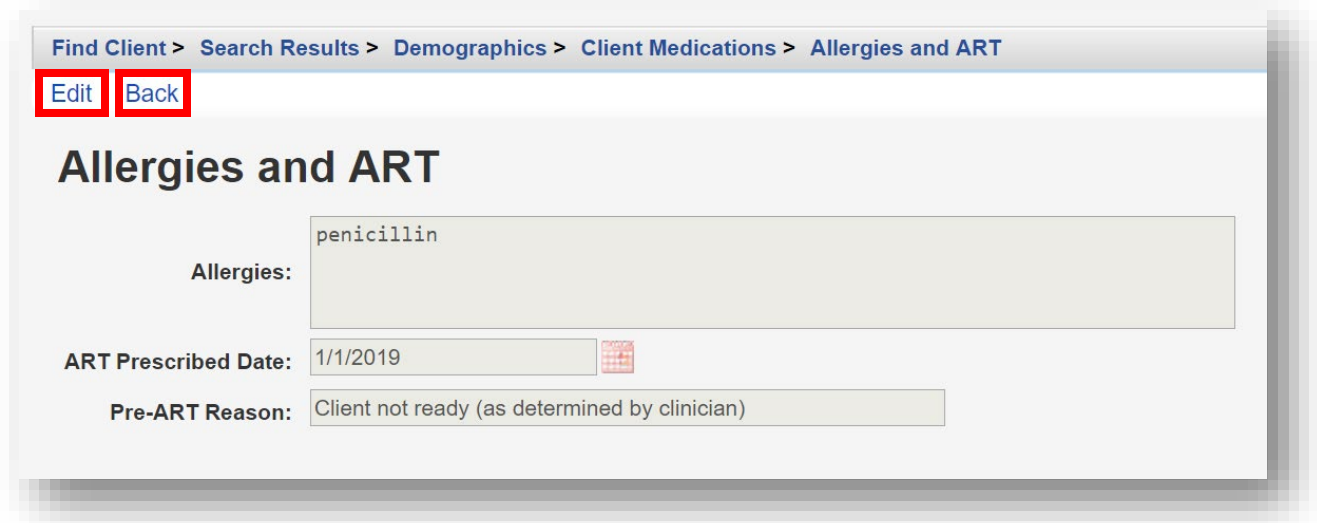
4. After making the desired edits, click **Save** and then **Back** (see previous screenshot) to return to the **Client Medications** screen.

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

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

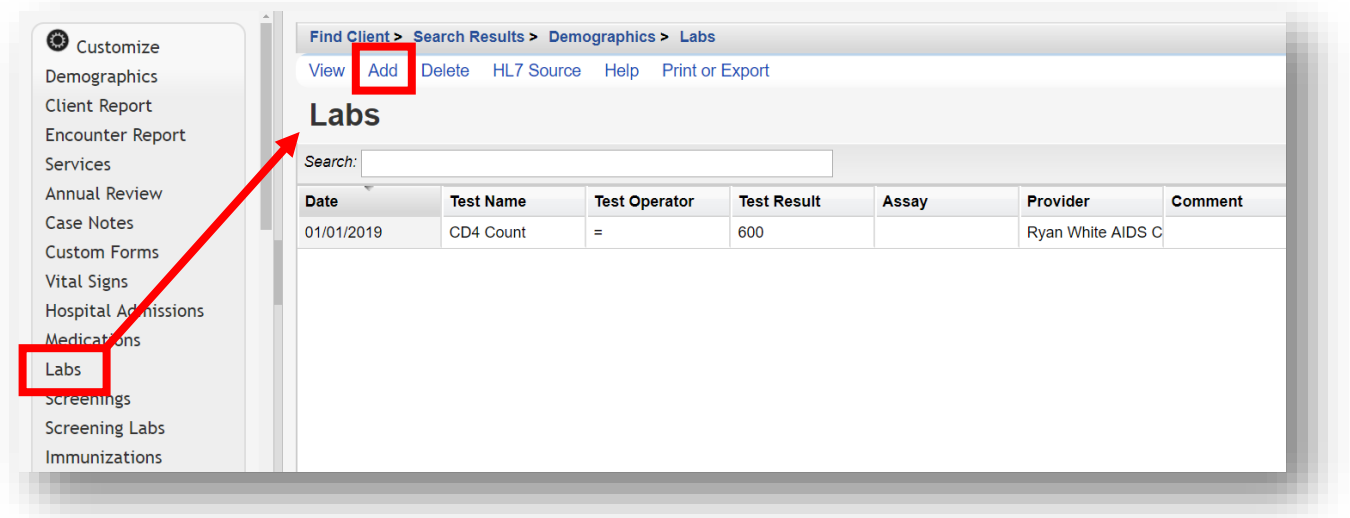**7.** Enter the following information (as applicable):
- **Start Date**
- **Medication Name** – enter the first few letters of the medication to filter results
- **Units** – number of days of the prescription, (30-day or 90-day)
- **Form** – type, capsule, tablet, etc. (optional)
- **Strength** – in 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
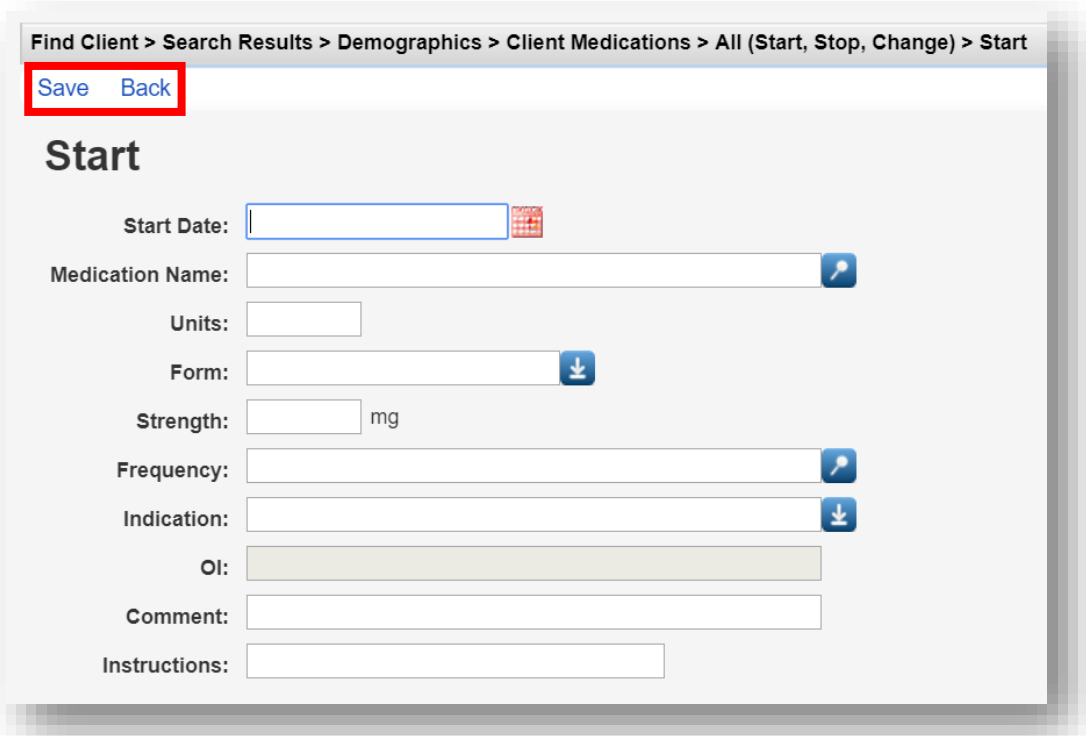
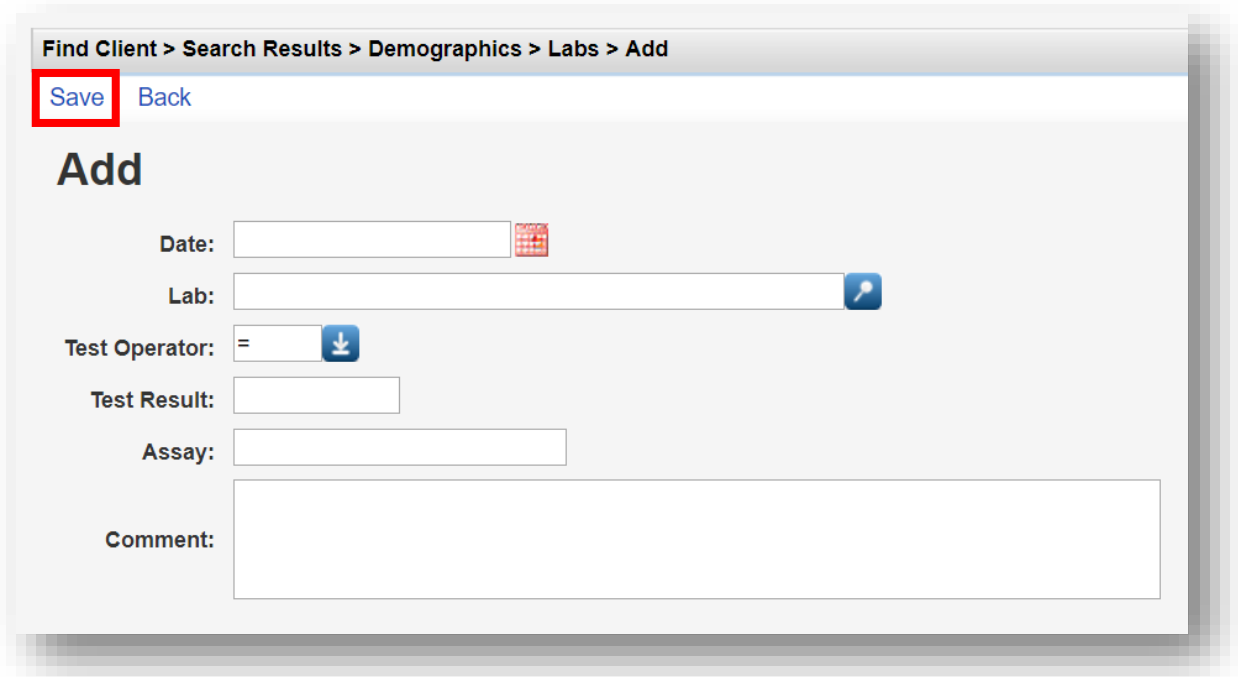**8.** Click **Save,** then **Back.**

Labs

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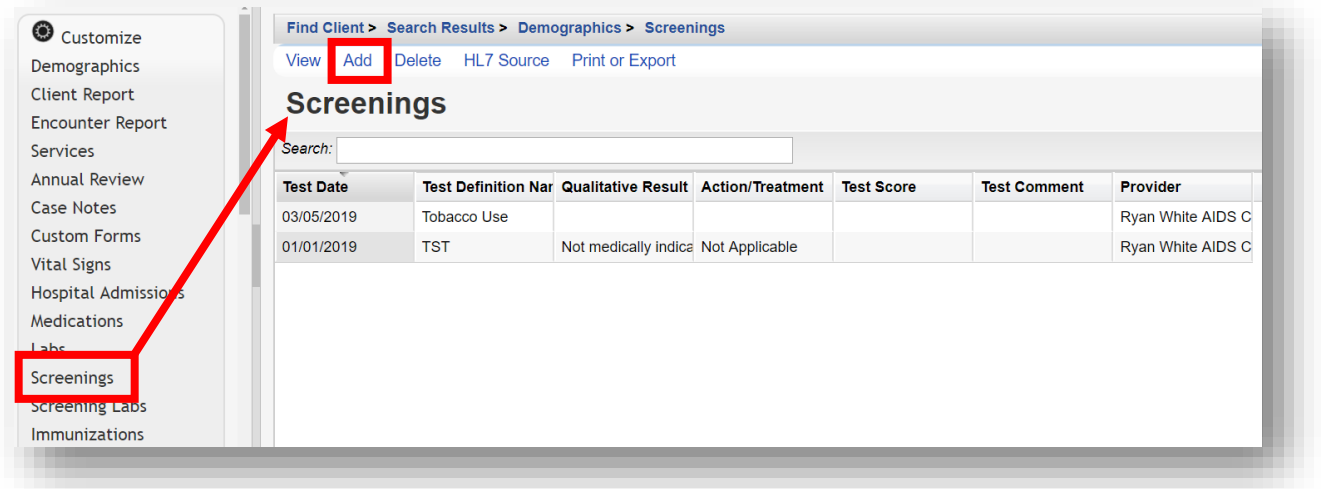

2. Enter the following information (as applicable) and then click **Save**.
   - **Date**
   - **Lab**
   - **Test Operator**
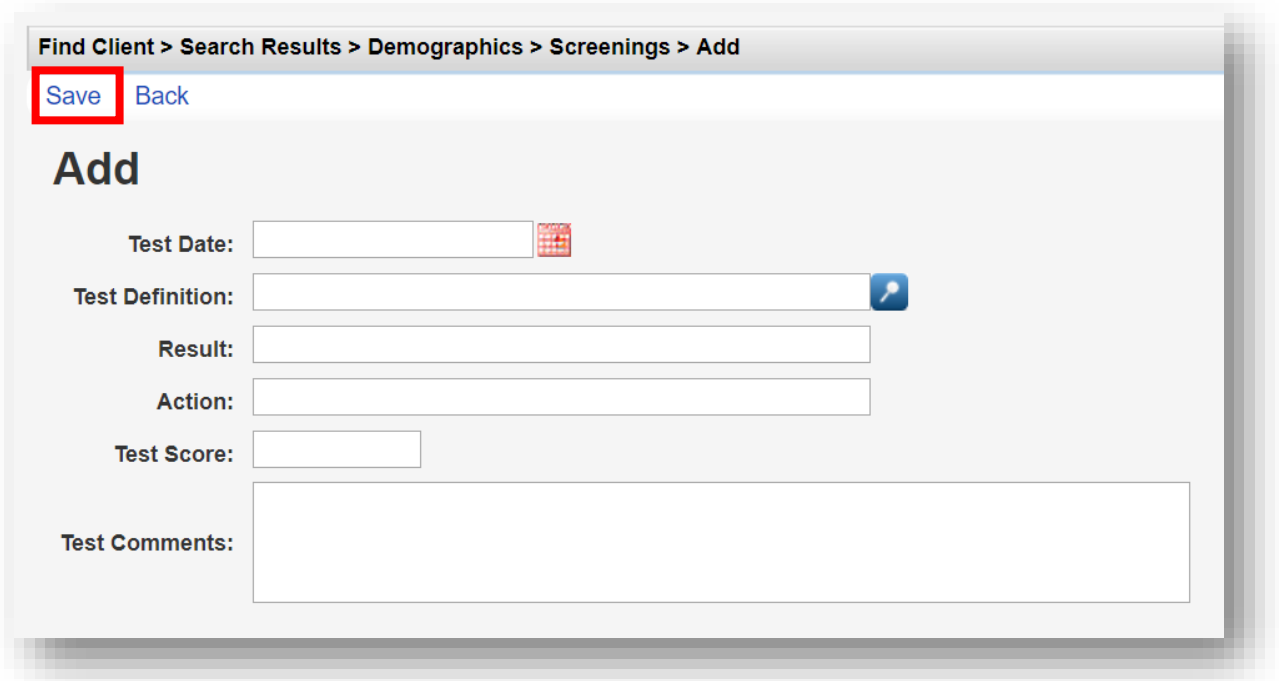   - **Test Result**
   - **Assay**
   - **Comment**

Screenings

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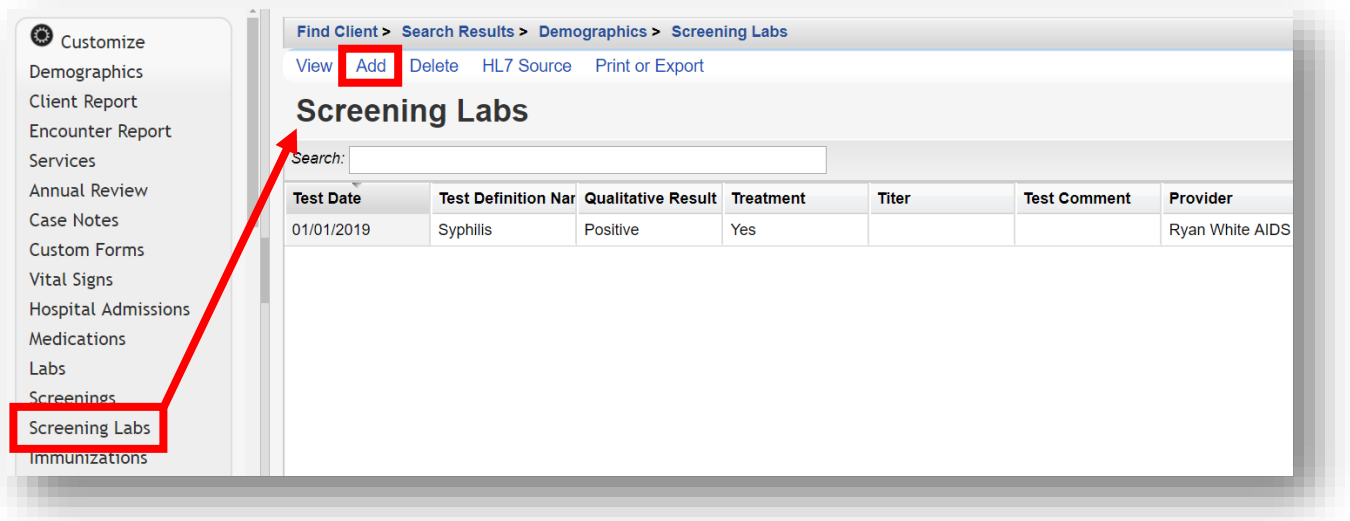

2. Enter the following information (as applicable) and then click **Save**.
   - **Test Date**
   - **Test Definition,** (TST - TB skin test)
   - **Result**
   - **Action**
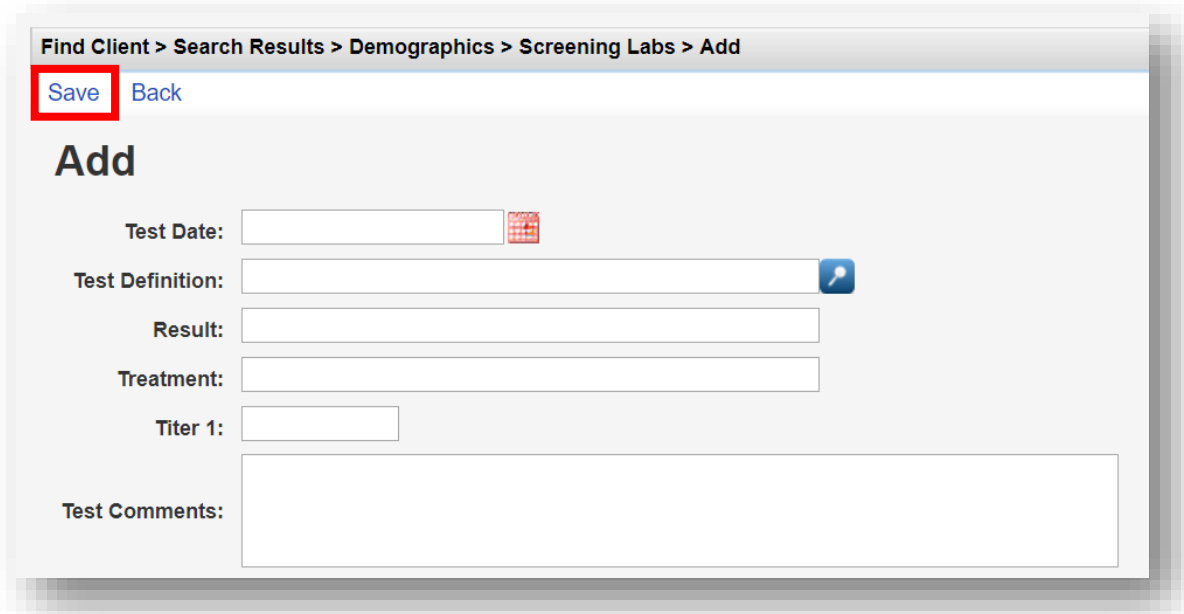   - **Test Score**
   - **Test Comments**

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**.
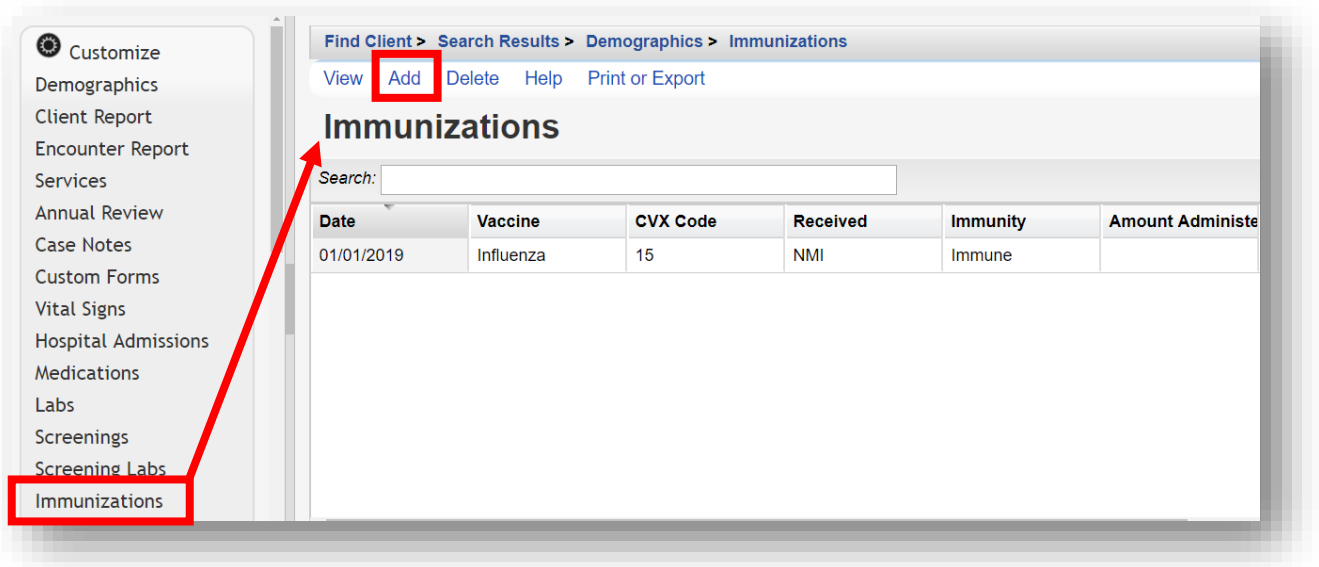
2. Enter the following information (as applicable) and then click **Save**.
    *   **Date**
    *   **Vaccine**
    *   **Received**
    *   **Immunity**
    *   **Amount Administered**
    *   **Units Administered**
    *   **Lot Number**
    *   **Manufacturer Name**
    *   **Manufacturer Code**

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.