

Massachusetts Department  
of Public Health  
New User CAREWare Training

November 2022



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# Introductions



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Co-Lead



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Coordinator



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Communications  
Coordinator

***Please share in the chat:***

- Your Name and Agency
- Pronouns, if you would like to share
- What is your favorite fall activity?



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# Agenda

- Background
- Connecting to the server
- CAREWare navigation
- Data entry requirements
  - Data entry demo
- Reports
  - Reports demo
- Contract manager data review
- Support and resources
- Questions

# Why CAREWare?

- Implemented as a client-level data collection system in November 2016 by the Massachusetts Department of Public Health Office of HIV/AIDS (OHA) and the MassCARE Program
- Monitor and report demographic, health status, and service utilization data
- Report high quality data to support quality assurance/quality improvement and program evaluation activities
- Generates the HRSA Ryan White Services Report (RSR)

# How is CAREWare set up in MA?

- Supports multiple users simultaneously within and across agencies
- Automatic software updates
- Networked data system
  - All providers log into the same system but each has their own “domain”
  - Data are not shared across providers

# CONNECTING TO THE SERVER

# Getting approval to access the server

All users need to sign a user agreement, with supervisor approval

- Submit to JSI by fax c/o Shelby Ingerick: 617-482-0617
- Annual re-submission - **due 12/30/22, sign and send yours now!**

**Resource**

:

User  
Agreement

Approved access list

- Submit the IP address for your agency
- Only approved IP addresses will be allowed to access the server
- This is the highest level of security possible with remote servers.



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# Connecting to the server

- Two sets of credentials (username/password):
  - For remote server (at least 12 characters, 1 number, 1 symbol)
  - For CAREWare (at least 8 characters, 2 non-alpha characters)
  - Passwords must be different for security reasons
- In June 2022 there was an update to the login settings/computer name

## **Resource:**

CAREWare Login  
Instructions

# CAREWARE 6: NAVIGATION

# Browser



A screenshot of a web browser window. The address bar shows the URL "https://cw-http.mdphcw.net/careware/rs/index.htm". The page content includes the HRSA logo (Ryan White &amp; Global HIV/AIDS Programs) on the left, the word "Login" in the center, and the jProg logo on the right. Below this is a "Submit" button, a "Login" heading, and a form labeled "Enter your CAREWare Username" with a "Username:" label and an input field.

# Adjust screen size

Department of Health and Human Services  
**HRSA**  
Health Resources and Services Administration

CW6 Training > training3, CW6 ( Birthdate: 1/1/1996, Last service: )

jProg®

Customize  
Demographics  
Client Report  
Encounter Report  
Drug Payments  
Services  
Annual Review  
Case Notes  
Custom Forms  
Vital Signs  
Hospital Admissions  
Medications  
Labs  
Screenings  
Screening Labs

Find Client > Search Results > Demographics  
Delete Client Back

### Demographics

**Personal Info** Name: training3, CW6 Gender: Female DOB: 01/01/1996

**Change URN** C9TA0101962U

**Contact Information** No description supplied

**Race/Ethnicity** No description supplied

Window control buttons: Close (X), Maximize (□), Minimize (—)

Browser icons: Home (☆), PDF (📄), Bookmarks (B+), Notifications (🔔), Profile (👤), Menu (⋮)

- New tab Ctrl+T
- New window Ctrl+N
- New incognito window Ctrl+Shift+N
- History ▶
- Downloads Ctrl+J
- Bookmarks ▶
- Zoom: - 100% +
- Print Ctrl+D

# Active paths

CAREWare Reports > Custom Reports > Manage Run Custom Reports > TLSCientList

[Back](#)

## ⊙ TLSCientList

[Run Report](#)

Start Date : 03/05/2017, End Date : 11/11/2019, Clients with services, Report Display as :  
Download as CSV

[Report Layout](#)

TLSCientList, Demographics

[Field Selection](#)

Name, Gender, DOB, Race/Ethnicity, Enrl Date, Enrl Status, Last Service, Case Manager  
Name

[Report Filter](#)

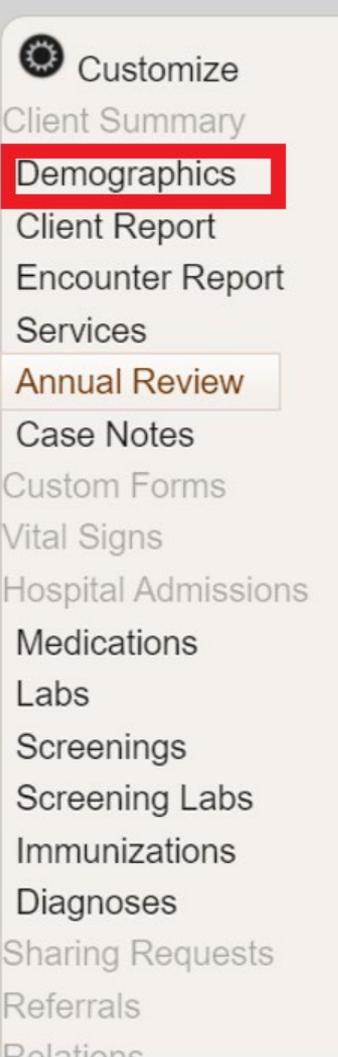
Report Filter is empty



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# DATA REQUIREMENTS

# Client Demographics



## Personal Info

- First Name
- Middle Name
- Last Name
- Gender
- Date of Birth
- Sex at Birth

## Contact Info

- ZIP Code

## HIV Status

- Status
- HIV+ Date (if applicable)
- AIDS Date (if applicable)

## HIV Risk Factors (if applicable)

- (Select all that apply)

## Race/Ethnicity

- Race
- Asian Subgroup
- Pacific Subgroup
- Ethnicity

## Vital Enrollment Status

- Enrollment Status
- Enrollment Date
- Vital Status

## Eligibility

- Ryan White Eligibility Status

## Custom Fields

- Care Access Client Checkbox

# Important note about HIV status!

- If the client is **at risk for HIV / HIV negative**:
  - Select “HIV-negative (affected)”  
(even though the client may not be an affected family member)
  - Make sure to leave the eligibility as “Not Eligible for Ryan White”
  - Do not enter data for HIV Risk Factors (this field captures exposure categories for HIV diagnosis)

# Client Demographics (Optional)

## Demographic

Personal Info

Change URN

Contact Information

Race/Ethnicity

HIV Risk Factors

Vital Enrollment Status

Eligibility

HIV Status

Provider Notes

## Personal Info

- Preferred Name
- Preferred Language
- Client ID

## Contact Information

- Address
- City
- State
- County
- All Phone Fields
- All Mailing Address Fields

## Provider Notes

## Custom Fields

- Case Manager Name
- Date closed out of MCM
- Date closed out of Housing Services
- Date Closed out of CLTC
- Reason for Closing Case
- Next Acuity Assessment



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# Annual Review

 Customize

Client Summary

Demographics

Client Report

Encounter Report

Services

**Annual Review**

Case Notes

Custom Forms

Vital Signs

Hospital Admissions

Medications

Labs

Screenings

Screening Labs

Immunizations

Diagnoses

Sharing Requests

Referrals

- **Housing status**

- Find under “Annual Screenings”
- Add type “Housing Status”
- Enter Date and Select an option

- **Insurance status**

- Find under “Insurance Assessments”
- Enter Date and Select an option

- **Poverty Level**

- Find under “Poverty Level Assessments”
- Enter Household size and Household income
- Poverty Level % is automatically calculated



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# Clinical Data

(MEDICAL CASE MANAGEMENT ONLY)

*Not required, but encouraged to submit if available:*

- Labs
  - CD4
  - Viral Load
- Screenings
  - Rectal Pap Smear
  - TB Chest Radiograph
  - TST
- Screening Labs
  - Chlamydia
  - Gonorrhea
  - HCV (RNA)
  - Hepatitis C Antibody
  - IGRA
  - Syphilis

Customize  
Demographics  
Client Report  
Encounter Report  
Services  
Annual Review  
Case Notes  
Custom Forms  
Vital Signs  
Hospital Admissions  
**Medications**  
**Labs**  
**Screenings**  
**Screening Labs**  
Immunizations  
Diagnoses  
Sharing Requests  
Referrals  
Relations  
Counseling and Testing  
Orders  
Custom Subform  
Appointments  
User Messages  
Search Change Details  
Duplicate Client  
Performance Measure  
Status  
External Links  
Close



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# SERVICE DATA

# Service Categories

- Medical Case Management (MCM)
- Medical Transportation Services
- Psychosocial support
- Medical Nutrition Therapy
- Housing Services
- Emergency Financial Assistance
- Other Professional Services (Legal services)
- Oral Health Care
- Non CARE Act Services
  - ARCH: Active Retention in Care for Health
  - CLTC: Correctional Linkage to Care

# Types of subservice units

- 1. Encounters, visits, communication:**  
enter “1” unit for each 15 minute increment
  
- 1. Activities** (e.g., assessment, linkage, referrals): enter “1” unit when completed

# MCM: “1” unit each for...

- Linkage to medical care
- Linkage to health insurance
- HDAP linkage and recertification
- Referrals (non-medical)
- Referrals to Partner Services
- Intake/initial assessment
- Initial acuity assessment
- Acuity reassessment
- ISP/Care Plan
- Care Access acuity reassessment

# MCM: “1” unit per 15 mins for...

- Communication with medical provider
- Communication with non-medical provider
- In-person session
- Client communication (not in-person)
- Telehealth Session

# Medical transportation services

- Taxi/Transportation:
  - “1” for **one-way ride**
- Mileage reimbursement:
  - “1” for **completed**
- Public transportation ride:
  - “1” for **one-way ride**
- Public transportation pass:
  - “1” for **pass given**

# Entering Data

- Date of Service
- Service Name
  - To narrow search, begin typing in the service name
  - Contract and Service Category should automatically populate once service is selected
- Update Number of Units (for timed services)

Find Client > Search Results > Demographics > Services

[Save](#) [Save And Add](#) [Add Receipt](#) [Back](#)

## Add Service

Client: Channing Tatum

Date: 10/20/2022

Contract: July 1, 2022 - June 30, 2023 (Part B)

Service Category: Medical Case Management

Service Name: MCM Client communication (not in-person)

Units: 2

Price: 0.00 \$

Total: 0.00 \$

# Entering Data

## ACUITY ASSESSMENTS

Fill in all fields that apply to the service you entered

Find Client > Search Results > Demographics > Services

[Save](#) [Save And Add](#) [Add Receipt](#) [Back](#)

### Add Service

Client:

Date:  

Contract:  

Service Category:  

Service Name:

Units:

Price:  \$

Total:  \$

Acuity Score: HIV Care Adherence:

Acuity Score: Current HIV Health Status:

Acuity Score: Other Non-HIV Related Medical Issues:

Acuity Score: HIV Medication Adherence:

[Go To Top](#)

[Go To Bottom](#)



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# Entering Data REFERRALS

- Enter **date** the referral was initiated.
- Select the **Referral type**
- Select the **Referral status** (open, closed, lost to follow-up – 60 days).
- After changing a status to closed, enter the date in **Confirmation of Referral Date**

Find Client > Search Results > Demographics > Services

Save Save And Add Add Receipt Back

### Add Service

Client: Channing Tatum

Date: 10/20/2022

Contract: July 1, 2022 - June 30, 2023 (State)

Service Category: Non CARE Act Service

Service Name: CLTC Referrals (non medical)

Units: 1

Price: 0.00 \$

Total: Page 1 of 2

Correctional Referral Type:

- Financial benefits
- Food/nutrition support services
- Housing
- Legal
- Mental Health
- Other
- Other support (HCV+ only)
- Peer support services
- SSP/OEND



# Entering Data LINKAGES

- Enter **date** the linkage was initiated.
- Select the **Linkage type**
- Select the **Linkage status** (open, closed, lost to follow-up – 60 days).
- After changing a status to closed, enter the date in **Confirmation of Referral Date**

Find Client > Search Results > Demographics > Services

Save Save And Add Add Receipt Back

### Add Service

Client: Channing Tatum

Date: 10/20/2022

Contract: July 1, 2022 - June 30, 2023 (Part B)

Service Category: Medical Case Management

Service Name: MCM Linkage to medical care

Units: 1

Price: 0.00 \$

Total: 0.00 \$

Linkage Type:   
Linkage Status: HCV   
Confirmation of Linkage Date: HIV   
Non-HIV Related   
STI Screening



# Case Scenario

## Monday

*10:00am-11:00am*

- Case Management Appointment with Client A in person
- During the appointment, Case Manager made a housing referral

## Thursday

*1:00pm-1:45pm*

- Client A has a phone/video session with a housing specialist

## Friday

*11:00am-11:15am*

- Case Manager checks in with Client A's primary care provider on how they are doing

# Case Scenario: Data reporting

- **(Monday) MCM In-person session:**
  - 4 units (60 minutes)
- **(Monday) MCM Referrals (non medical):**
  - 1 unit (Referral complete)
- **(Thursday) HS&A Phone or Video Session:**
  - 3 units (45 minutes)
- **(Friday) MCM Communication with medical provider:**
  - 1 unit (15 minutes)

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

[View](#) [Add](#) [Delete](#) [Receipts](#) [Help](#) [Print or Export](#)

## Services

Search:

Date	Subservice	Units	Contract
10/14/2022	MCM Communication with medical Provider	1	July 1, 2022 - June 30, 2
10/13/2022	HS&A Phone or Video Session	3	July 1, 2022 - June 30, 2
10/10/2022	MCM Referrals (non medical)	1	July 1, 2022 - June 30, 2
10/10/2022	MCM In-Person session	4	July 1, 2022 - June 30, 2



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# Data Entry Demo

*\*\*Demo uses test data - No real client data\*\**

- ❖ Logging In
- ❖ Entering a new client into CAREWare
- ❖ Filling in all required demographics
- ❖ Entering Services
- ❖ Annual Review
  - Housing status
  - Insurance Status
  - Poverty Level
- ❖ Labs/Screening Labs
  - Viral Load



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# Demo Client

**Name:** Jamie Foxx

**Gender:** Male

**DOB:** 03/01/1980

**Race:** Black

**Ethnicity:** Non-Hispanic

**HIV Status:** HIV-Positive (Not AIDS)

**Date of Diagnosis:** 01/01/2010

**Most recent Viral Load:** <20

**HIV Risk Factors:** MSM

**Ryan White Eligible:**

Yes (receives Ryan White Part B funded services)

**Housing Status:** Stable

**Insurance:** Medicaid

**Household Size:** 2

**Household Income:** \$20,000



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# DATA ENTRY DEMO

# REPORTS



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# Reports Summary

- **HRSA Reports** (RSR Related)
- **Financial Report** (Count of clients and units for each service)
- **Custom Reports: Client lists and service lists**
  - TLSClientList
  - TLSClientList\_MCM
  - TLSServiceDetailReport
  - TLSServiceDetailReport\_CareAccess
- **Custom Reports: Missing Reports**
  - TLSMissingAnnualReview
  - TLSMissingRyanWhiteEligibility
  - TLSMissingDemographics
- **Custom Reports: Other**
  - **Acuity/ISP List (MCM)**
  - Changes in Acuity
  - Viral Suppression
  - Aggregate Housing Counts
  - *MANY MORE!*
- **Client Data/Clinical Encounter Reports**
  - No Service in X days

**Resource:**  
Report Instructions

# Reports Menu

CAREWare Reports

## ☉CAREWare Reports

HRSA Reports	RSR and ADR
Custom Reports	Run or manage custom reports
Performance Measures	Requires permission: 'Setup performance measures' or 'Run performance measure reports'
Client Data Reports	Run reports on client information
Financial Report	Setup and run the financial report
Administrative Reports	Administrative reports and options
Permission Reports	Run and search permissions held by a user at a point in time
RDR	Manage/Run the RDR



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# Running Reports

CAREWare Reports > Custom Reports > Manage/Run Custom Reports

Manage / Run

Add

Delete

Make Read Only

Back

Help

Print or Export

## Manage/Run Custom Reports

Search:

Name	CrossTab	Report Type	Description	Read Only	D
Acuity/ISP List (MCM)		Demographics		Yes	▲
Acuity_check		Service			
Aggregate Housing Counts (12 months)	Yes	Demographics			
Aggregate Housing Counts (6 months)	Yes	Demographics			
Aggregate Insurance Counts	Yes	Insurance Assessm			
Aggregate Poverty Level Counts		Demographics			
aggregate_testing		Insurance Assessm			
ARCH Clients and Services List		Service			
arch transition		Demographics			▼



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# Running Reports

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Acuity/ISP List (MCM) > Run Report

[Edit Parameters](#)

[Selected Providers](#)

[Open in New Tab](#)

[PDF](#)

[CSV](#)

[Excel](#)

[Help](#)

[Back](#)

## Run Report

### Parameters

Date From:  

Date Through:  

Clinical Review Year:

Show New Clients only:

Show Clients with Service only:

Show Specifications:

Sum Numeric Fields:

[Go To](#)



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# Running Reports

1. Download as CSV or Excel
  - a. If a report is downloaded it will need to be transferred to your desktop (using WinSCP) to view it.
2. Open in New Tab/Window
3. Open as PDF (recommended)

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Acuity/ISP List (MCM) > Run Report

Edit Parameters Selected Providers Open in New Tab PDF CSV Excel Help Back

## Run Report



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# Downloading the Report



singerick > MDPH

Report generation complete.  
[View TLSCientList](#)

- Customize
- Provider Summary
- Add Client
- Find Client
- Reports
- Rapid Entry
- Appointments
- My Settings
- System Information
- System Messages
- Administrative Options
- Switch Providers
- Log Off

\*\* Connected to the MD  
PH TEST CAREWare S  
erver \*\*

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > TLSCientList > Run Report

[Edit Parameters](#) [Open in New Tab](#) [PDF](#) [CSV](#) [Excel](#) [Help](#) [Back](#)

## Run Report

### Parameters

Date From: 02/16/2021

Date Through: 02/16/2022

Clinical Review Year: 2022

Show New Clients only:

Show Clients with Service only:

Show Specifications:

Sum Numeric Fields:

### Domain Sharing Settings

Show Shared Service Records:

Show Shared Clinical Records:

Show Shared Custom Subform Records:

Show Shared Case Notes:



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# Saving Reports to the SFTP

- The report will open as a new tab. Hover your mouse over the Save icon to download the report.
- Navigate to your agency folder on the “Data (G-Drive: )”
- Save file
  - File name may be a random string of numbers and characters

# Accessing the SFTP

- Log into WinSCP to retrieve file
- The login to WinSCP will be the same as your remote server login
- WinSCP/SFTP Login Instructions available – *we can send via email*

## **Resource:**

Connect to SFTP Site  
(available via email)

# REPORTS DEMO

# CONTRACT MANAGER DATA REVIEW



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# Contract Manager Data Review

<i>Description</i>	<i>Count</i>
Total Number of Clients	217
Total Number of Newly Enrolled Clients	26

<i>Service Category</i>	<i>No of clients</i>	<i>Total Units</i>
Food Bank/Home-delivered Meals	1	1
Medical Case Management	62	1633
Medical Transportation Services	12	144
Psychosocial Support	164	1369

<i>Service Category</i>	<i>Subservice</i>	<i>No of clients</i>	<i>Total Units</i>
Food Bank/Home-delivered Meals	FS Congregate Meals	1	1
Medical Case Management	MCM Acuity Reassessment	23	23
	MCM Client communication (not in-person)	37	201
	MCM Communication with medical provider	2	6
	MCM Communication with non-medical provider	7	22
	MCM ISP/Care Plan	30	30
	MCM In-person session	54	1304
	MCM Initial acuity assessment	9	9
	MCM Linkage to medical care	1	1
	MCM Referrals (non medical)	8	13
	MCM Referrals to Partner Services	1	1
Medical Transportation Services	MCM Telehealth session	9	23
	MT Public transportation pass	1	2
Psychosocial Support	MT Public transportation ride	11	142
	PS Group-level peer support session	85	517
	PS Individual-Level peer support session (in-person)	111	623
	PS Individual-Level peer support session (not in-person)	91	229



# QA is everyone's responsibility

- What data are your contract managers reviewing?
- What will they ask you about?
- What tools can you use to address data quality?

# CAREWARE MA SUPPORT & RESOURCES



# Logging In

- If you get stuck when you enter data for the first time, please contact us!
- Email [CAREWareMAhelpdesk@jsi.com](mailto:CAREWareMAhelpdesk@jsi.com)
- Call 617-385-3991

## **Resource:**

Log-In Instructions



# CAREWare MA

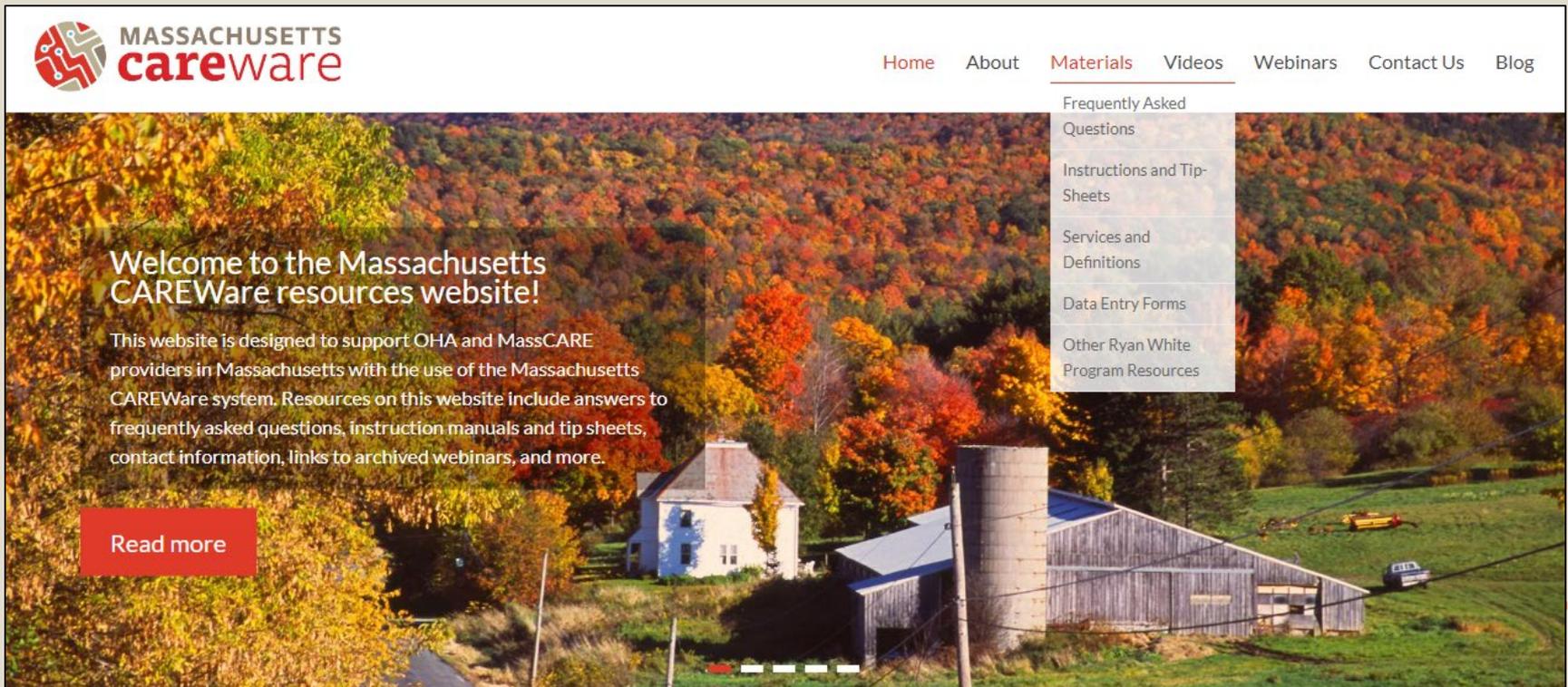
## Documentation

- Log-in instructions
- Log-off instructions
- Data entry tip sheet
- Client search tip sheet
- Subservice Definitions
- Fields and Definitions
- CAREWare User Agreement
- Report instructions
- Provider data import and export manuals
- ISP/Acuity Tip Sheet



# CAREWare MA Website

Find materials and other resources at <http://carewarema.jsi.com/> under “Materials.”



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Home About **Materials** Videos Webinars Contact Us Blog

Frequently Asked Questions

Instructions and Tip-Sheets

Services and Definitions

Data Entry Forms

Other Ryan White Program Resources

Welcome to the Massachusetts CAREWare resources website!

This website is designed to support OHA and MassCARE providers in Massachusetts with the use of the Massachusetts CAREWare system. Resources on this website include answers to frequently asked questions, instruction manuals and tip sheets, contact information, links to archived webinars, and more.

Read more

# CAREWare MA Helpdesk Support

- Go to [www.CAREWareMA.jsi.com](http://www.CAREWareMA.jsi.com)
- Email [CAREWareMAhelpdesk@jsi.com](mailto:CAREWareMAhelpdesk@jsi.com)
- Call 617-385-3991
- Fax 617-482-0617

**QUESTIONS?**

