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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Co-Lead

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Data & Helpdesk Coordinator

Becky Milner
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

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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)

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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

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CONNECTING TO THE SERVER

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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

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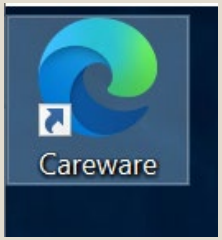
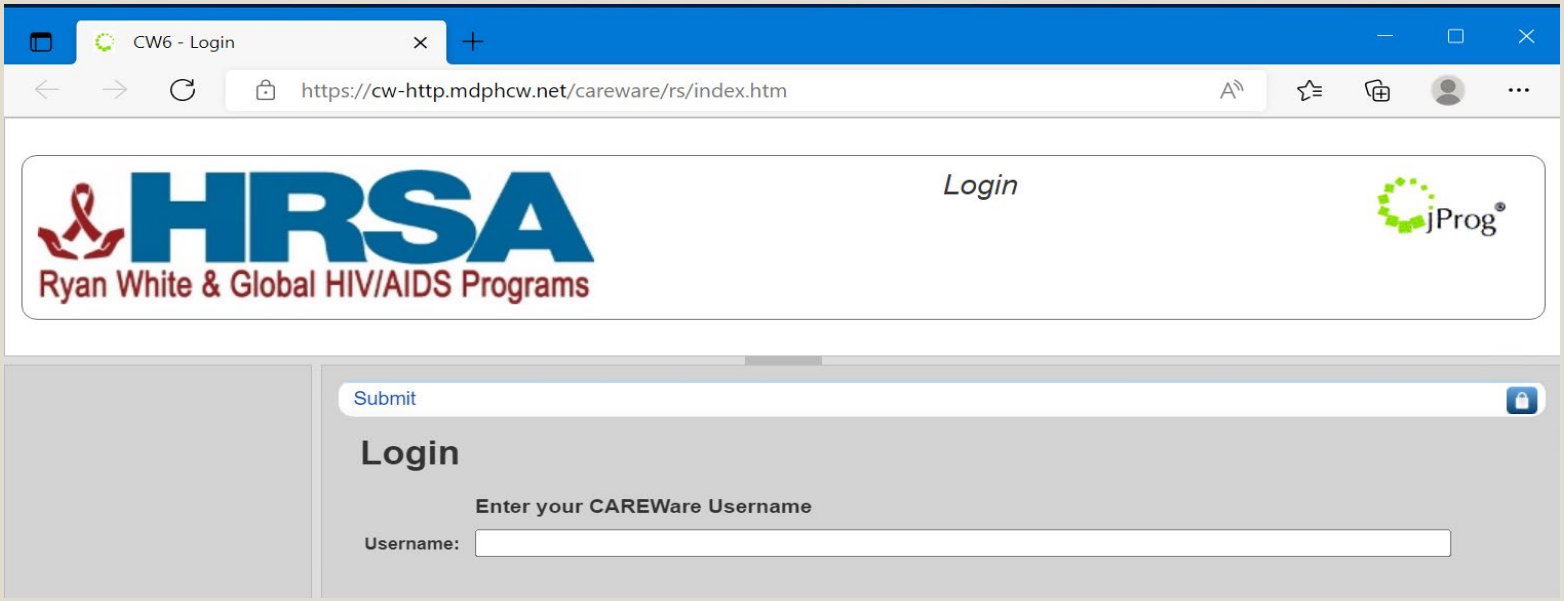
CAREWARE 6: NAVIGATION

Browser





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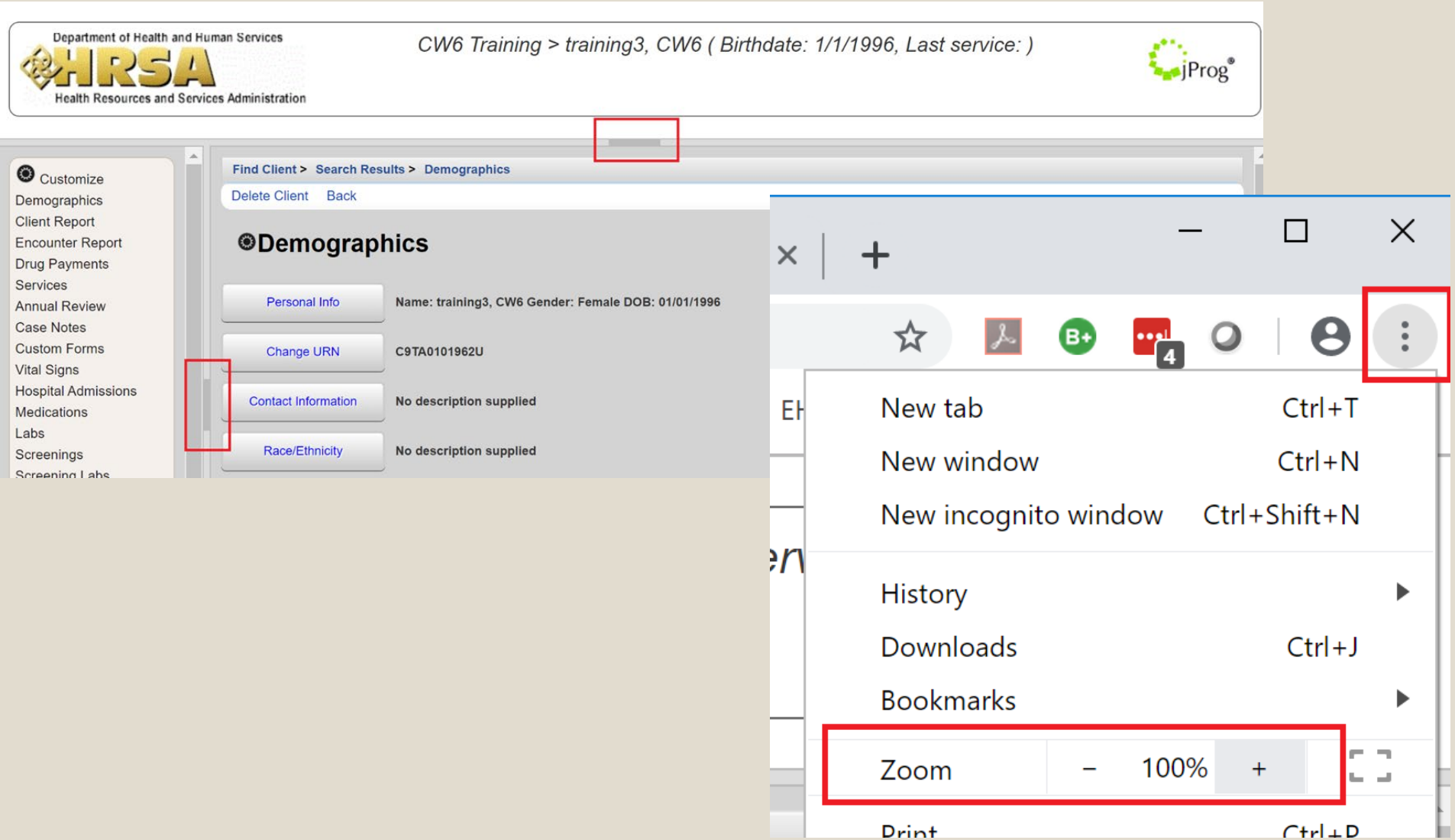
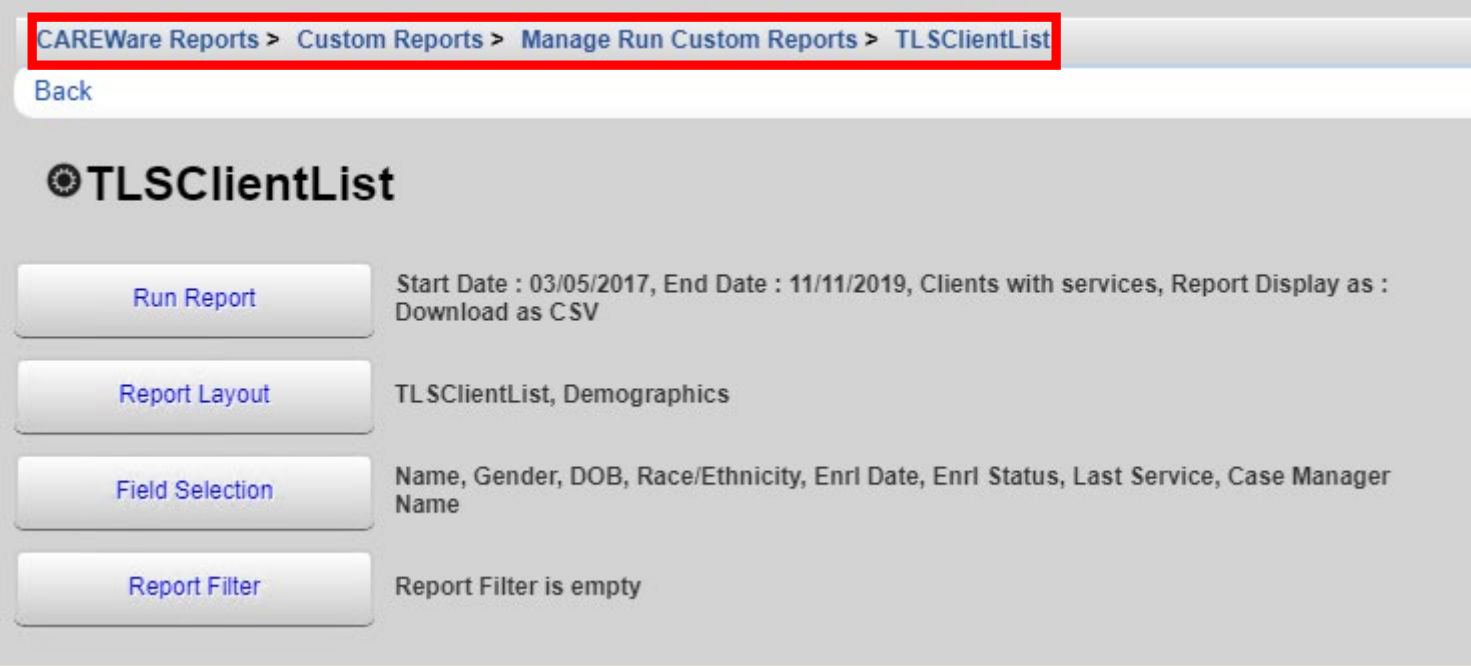
Adjust screen size



Active paths



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DATA REQUIREMENTS

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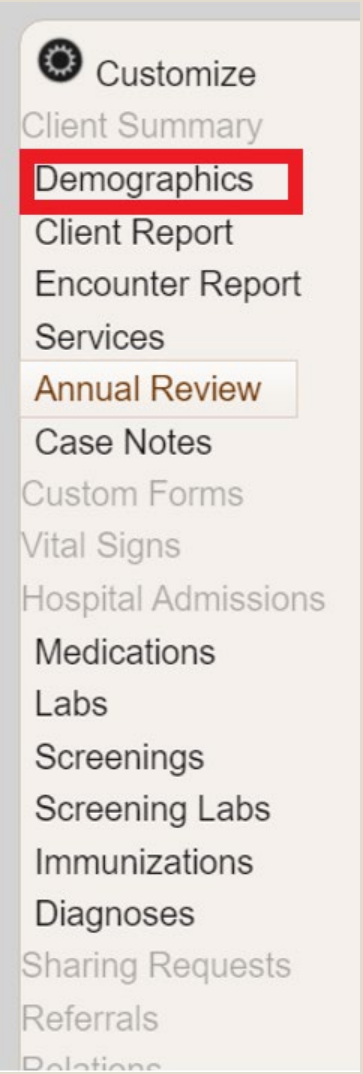
Client Demographics



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

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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)

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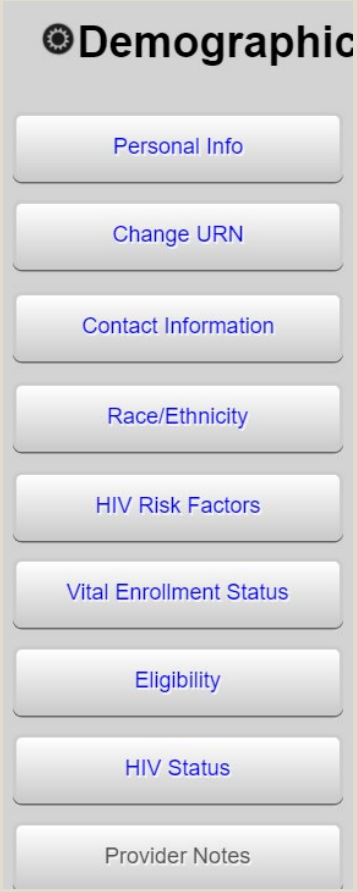
Client Demographics (Optional)



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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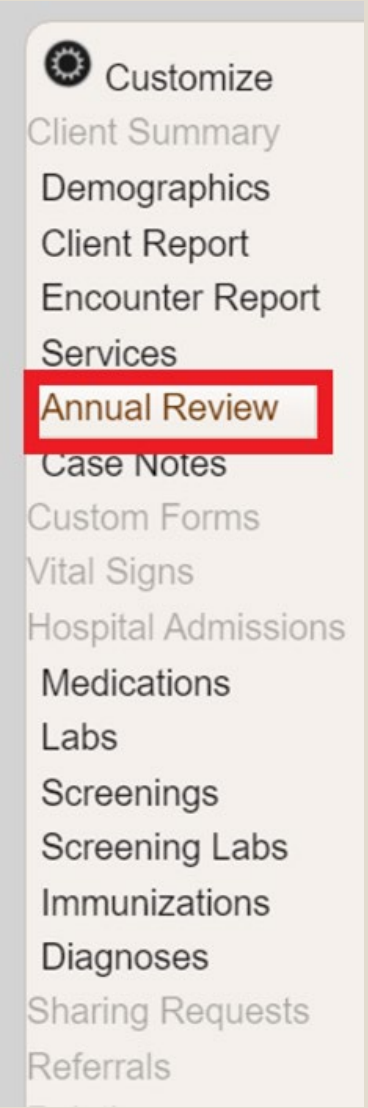
Annual Review



- **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

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SERVICE DATA

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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

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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

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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

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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

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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**

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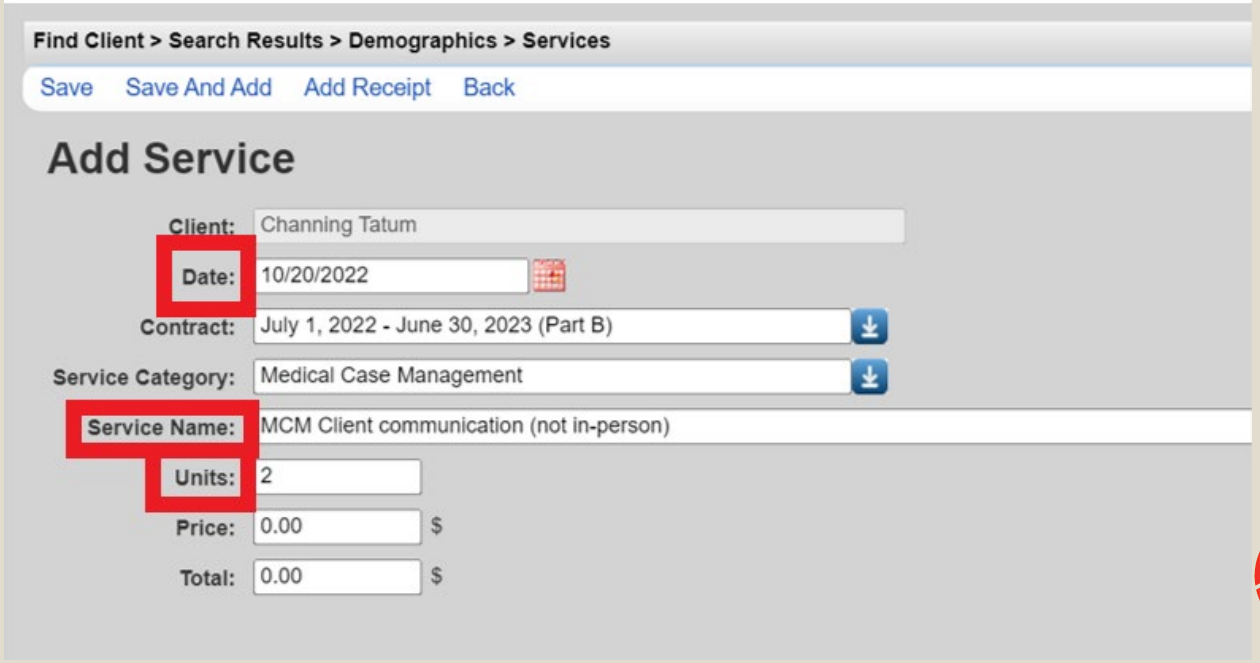
Entering Data

- 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)



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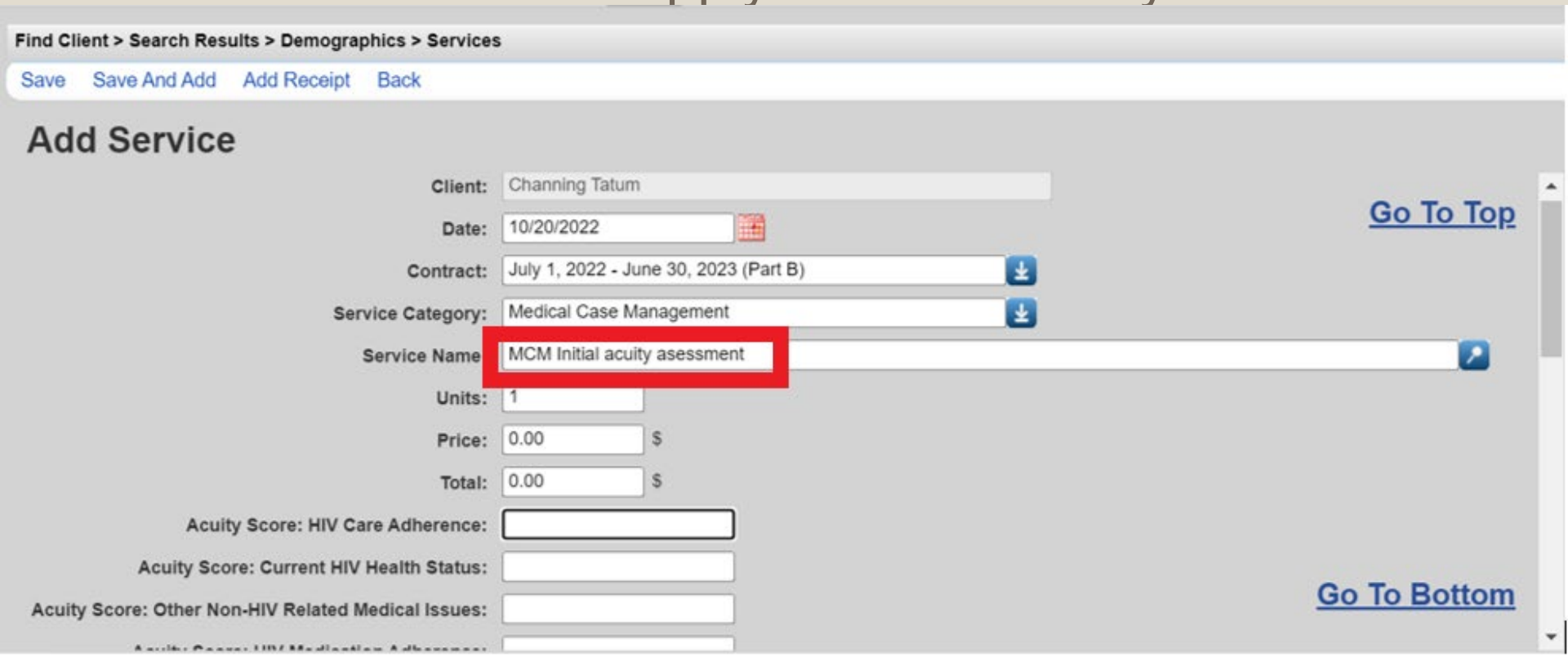
Entering Data

ACUITY ASSESSMENTS

Fill in all fields that apply to the service you entered



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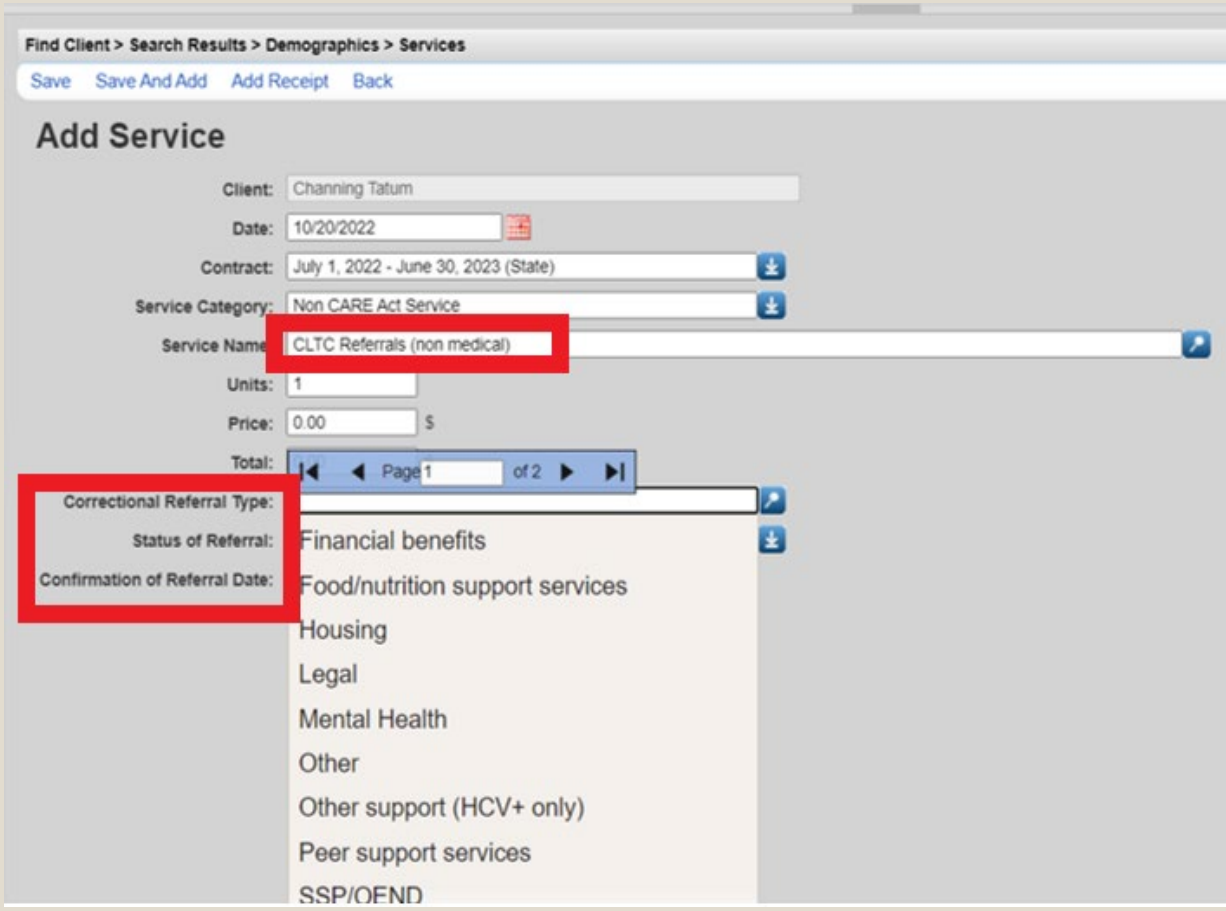
Entering Data
REFERRALS

- 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**



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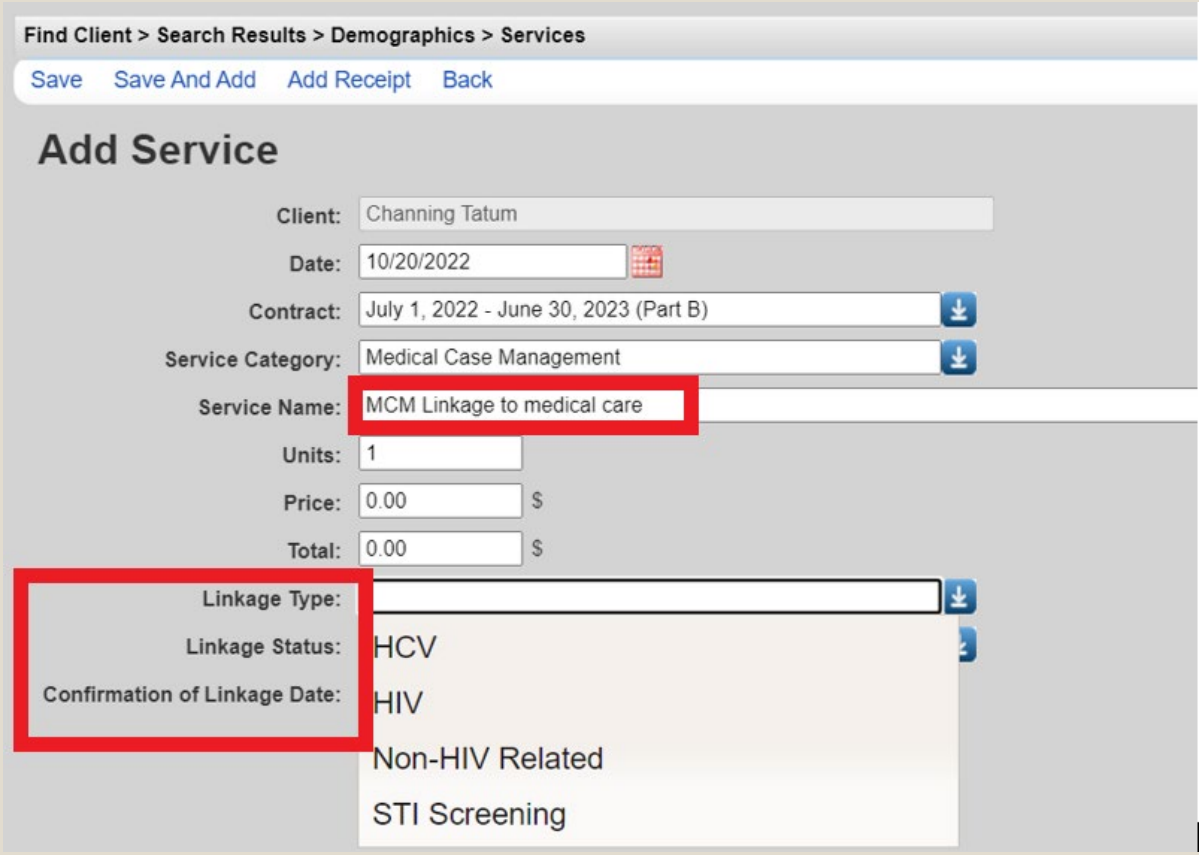
Entering Data
LINKAGES

- 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**



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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

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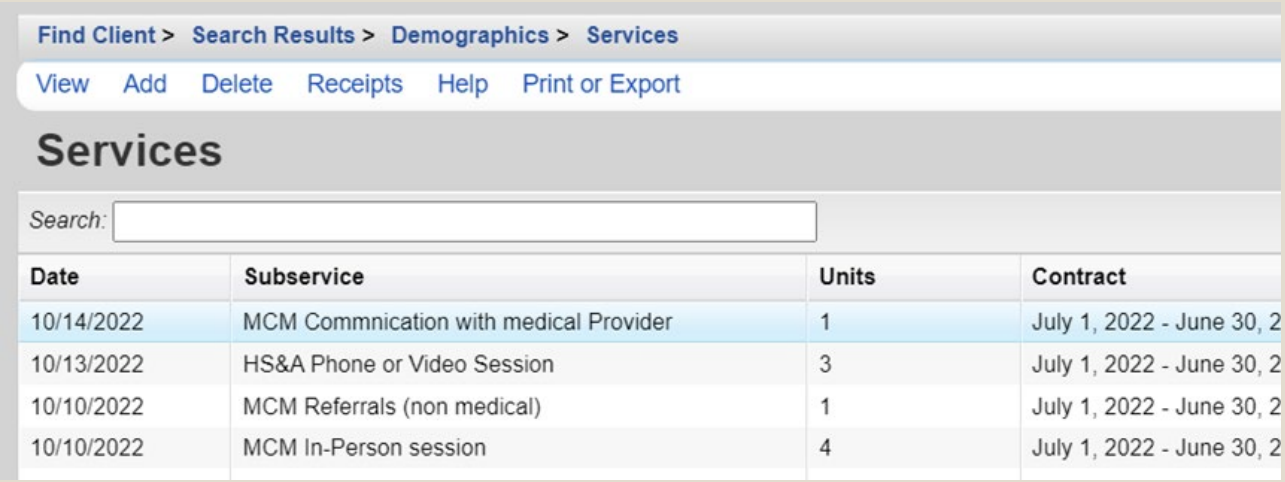
Case Scenario: Data reporting

- **(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)



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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

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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

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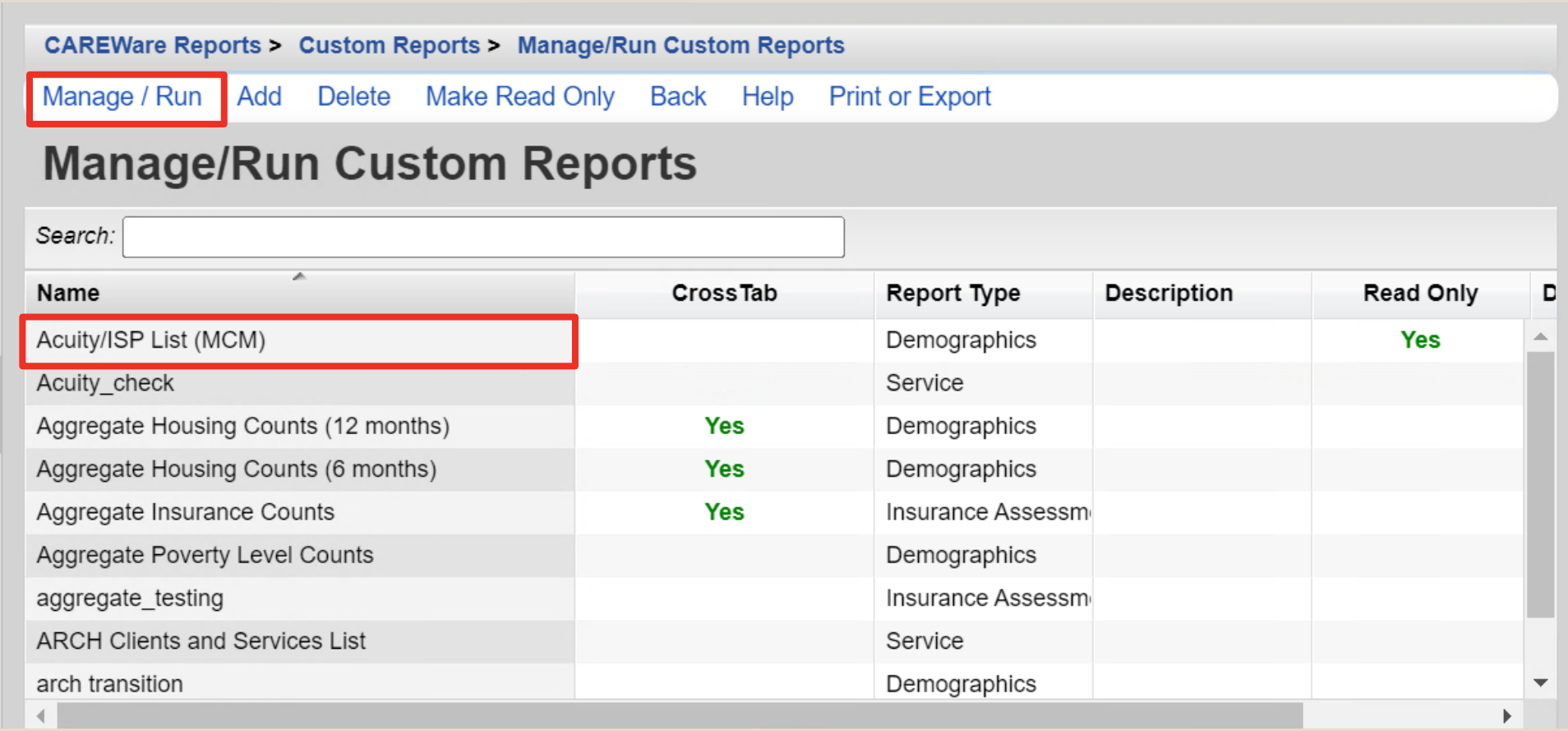
Running Reports



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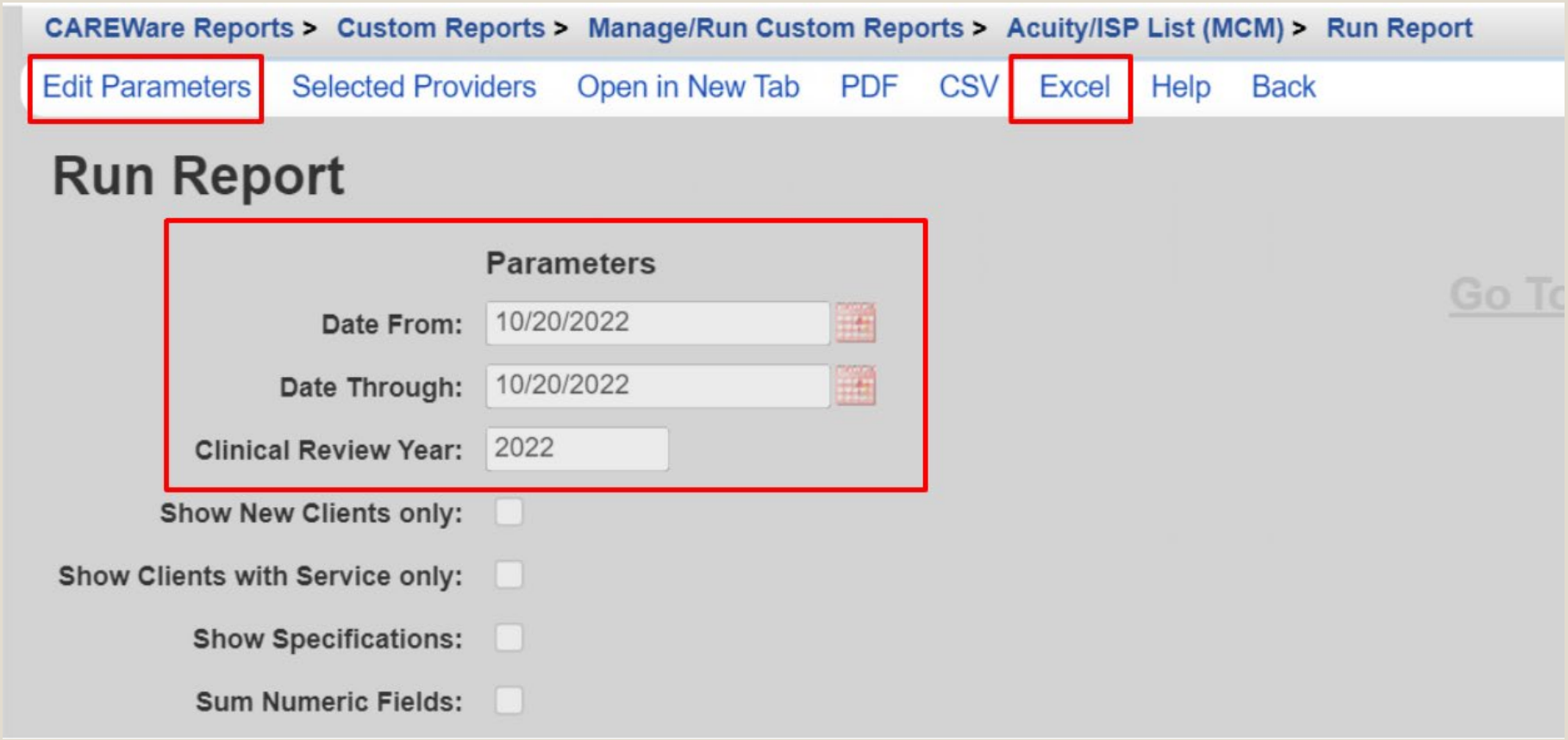
Running Reports



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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)

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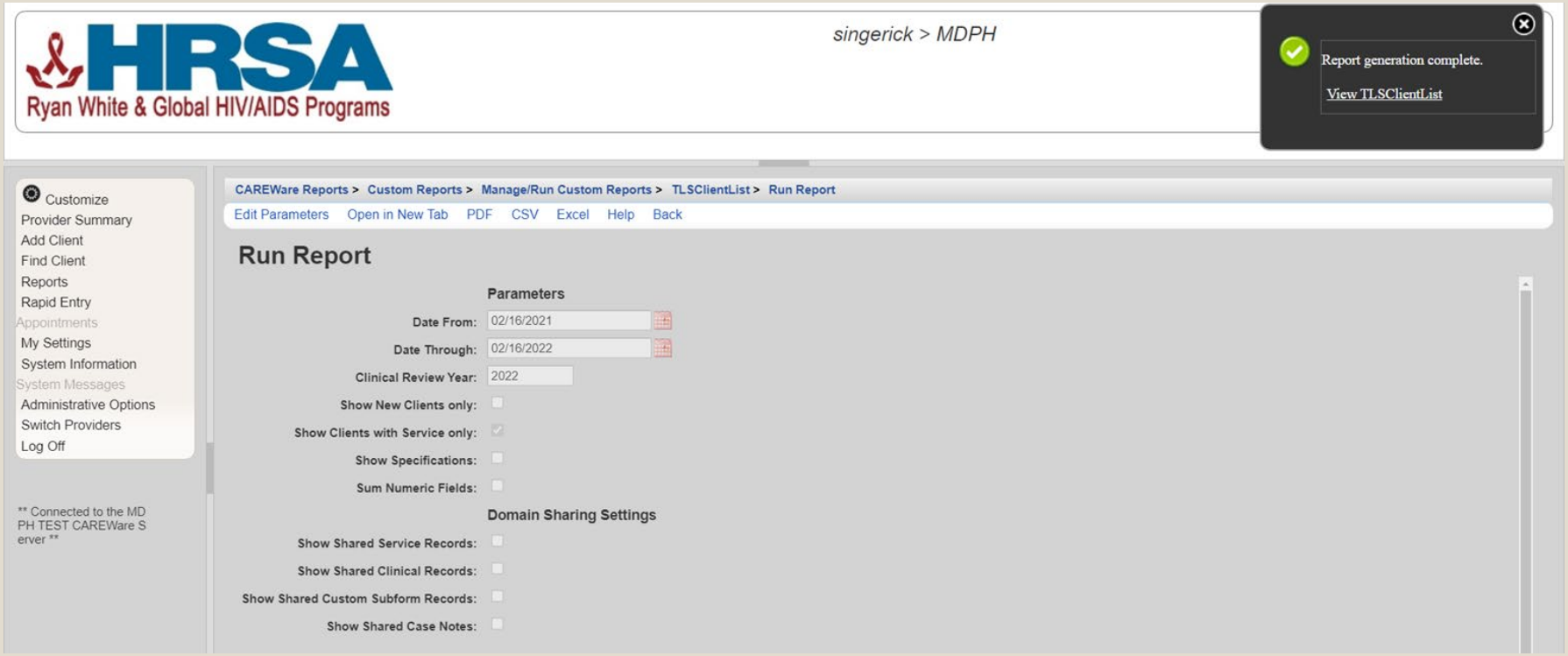
Downloading the Report



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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

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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)

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REPORTS DEMO

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CONTRACT MANAGER DATA REVIEW

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Contract Manager Data Review

Description	Count
Total Number of Clients	217
Total Number of Newly Enrolled Clients	26

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

Service Category	Subservice	No of clients	Total Units
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
	MCM Telehealth session	9	23
Medical Transportation Services	MT Public transportation pass	1	2
	MT Public transportation ride	11	142
Psychosocial Support	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

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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?

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CAREWARE MA
SUPPORT & RESOURCES

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Logging In

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

Resource:
Log-In Instructions

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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 ar export manuals
- ISP/Acuity Tip Sheet

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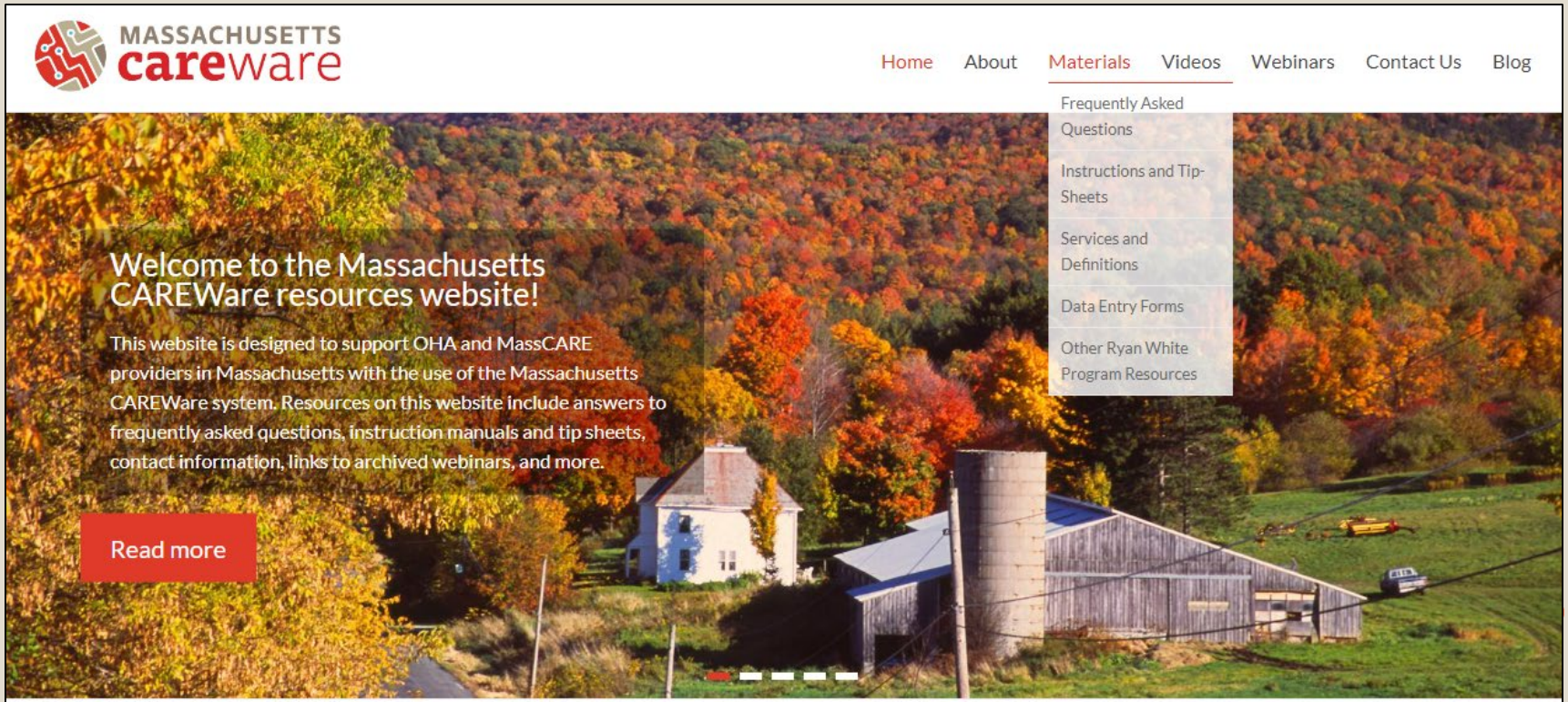
CAREWare MA Website

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



CAREWare MA Helpdesk Support

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- Call 617-385-3991
- Fax 617-482-0617

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QUESTIONS?

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