

Massachusetts Department of Public Health

New User CAREWare Training

December 2025



Introductions



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Please share

- Your Name, Agency and Role
- Your favorite holiday food

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

Logging in to MA CAREWare



Getting approval to access MA CAREWare

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

- Submit to JSI by fax c/o Katie James: 617-482-0617
- Due 12/30/25, sign and submit yours now!

Approved access list

- Submit the IP address for your agency
- Only approved IP addresses will be allowed to access the server
- This is for security purposes

Resource:
User
Agreement

Connecting to MA CAREWare

- In July 2023 CAREWare transitioned from using Remote Desktop Connection to a Secure Web Browser: **ma-careware.mdphcw.net**
 - One set of credentials instead of two
 - Two-Factor Authentication
 - User Password Reset function if locked out
 - Less need for SFTP



Resource:

CAREWare Log-In Tip Sheet

Browser Transition FAQ

DEMO

CONNECTING TO CAREWARE



User Password Reset

- If locked out from 3+ failed login attempts, a password reset token will be sent to the email address listed in your ‘User Info’ under ‘My Settings’
- You can always call or email the helpdesk to ask for a new password

Login

Submit Email Reset Code Cancel

Login

Your account was locked due to too many Failed login attempts.

A reset token has been emailed to you.

Enter the reset token to reset your password.

Reset Token:

>> Invalid Username/Password <<

Resource:
Password Reset Tip Sheet
[Instructional Video](#)

CAREWARE 6: NAVIGATION

Adjust screen size

The screenshot shows a web browser window with the following elements:

- Header:** Department of Health and Human Services, HRSA (Health Resources and Services Administration). The HRSA logo is highlighted with a red box.
- Page Title:** CW6 Training > training3, CW6 (Birthdate: 1/1/1996, Last service:)
- Page Content:** Find Client > Search Results > Demographics. The Demographics section is displayed, with the Personal Info tab selected. It shows the client's name, gender, and DOB. Other tabs include Change URN, Contact Information, and Race/Ethnicity, each with a "No description supplied" message.
- Context Menu (Open in New Tab):** A context menu is open in the top right corner of the browser window. It includes options: New tab (Ctrl+T), New window (Ctrl+N), New incognito window (Ctrl+Shift+N), History, Downloads (Ctrl+J), Bookmarks, and Zoom.
- Zoom Control:** The Zoom control is highlighted with a red box. It shows the current zoom level at 100%.

Active paths

CAREWare Reports > Custom Reports > Manage Run Custom Reports > TLSClientList

Back

TLSClientList

Run Report	Start Date : 03/05/2017, End Date : 11/11/2019, Clients with services, Report Display as : Download as CSV
Report Layout	TLSClientList, Demographics
Field Selection	Name, Gender, DOB, Race/Ethnicity, Enrl Date, Enrl Status, Last Service, Case Manager Name
Report Filter	Report Filter is empty

DATA REQUIREMENTS

Client Demographics

- 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
- Relations

Personal Info

- First Name
- Middle Name
- Last Name
- 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*



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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)

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
- 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

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

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

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 Datum
Date:	10/20/2022 <input type="button" value="Calendar"/>
Contract:	July 1, 2022 - June 30, 2023 (Part B) <input type="button" value="Download"/>
Service Category:	Medical Case Management <input type="button" value="Download"/>
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: Channing Tatum [Go To Top](#)

Date: 10/20/2022 

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

Service Category: Medical Case Management 

Service Name: MCM Initial acuity assessment 

Units: 1

Price: 0.00 \$

Total: 0.00 \$

Acuity Score: HIV Care Adherence:

Acuity Score: Current HIV Health Status:

Acuity Score: Other Non-HIV Related Medical Issues:

[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 Datum

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:

Status of Referral: Financial benefits &

Confirmation of Referral Date: &

Food/nutrition support services

Housing

Legal

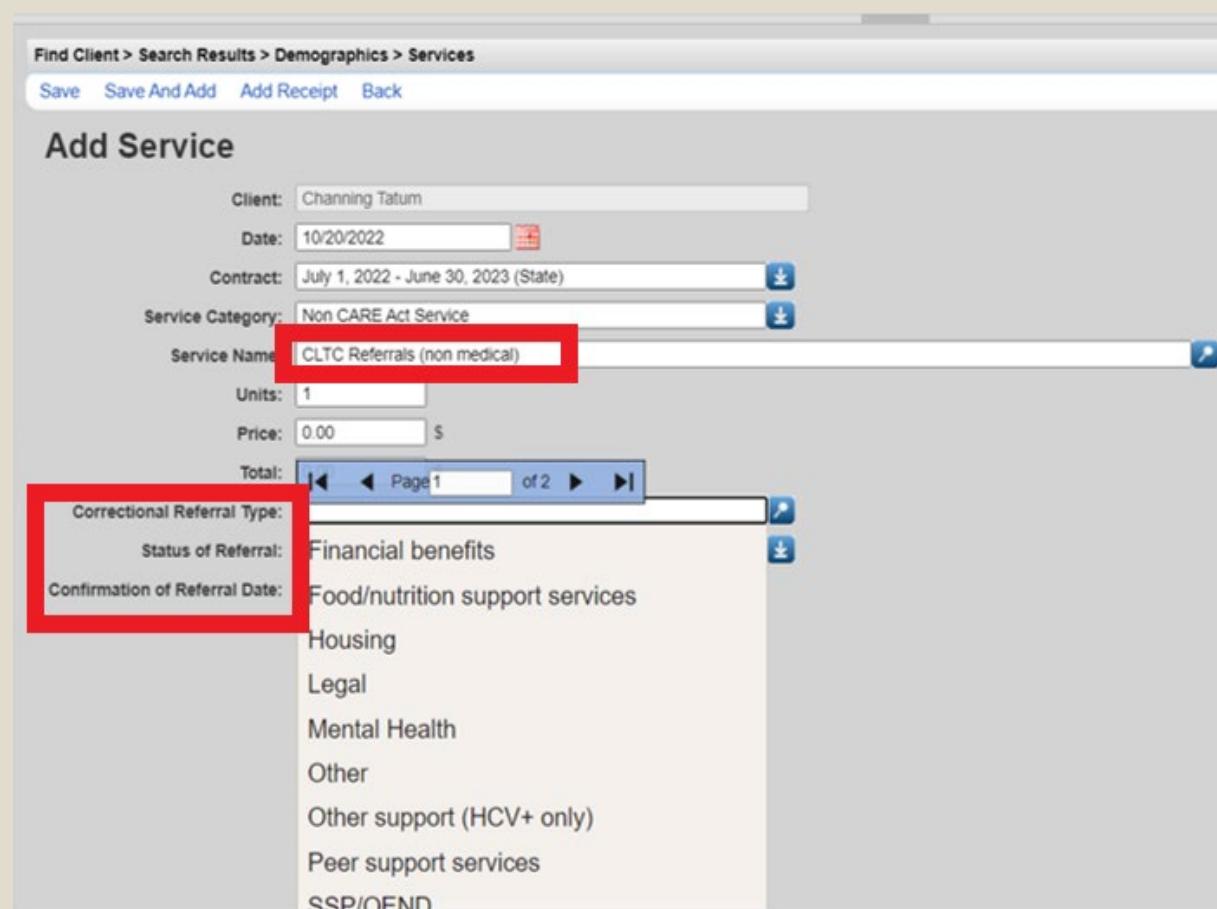
Mental Health

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 Datum
Date:	10/20/2022 <input type="button" value="Calendar"/>
Contract:	July 1, 2022 - June 30, 2023 (Part B) <input type="button" value="Download"/>
Service Category:	Medical Case Management <input type="button" value="Download"/>
Service Name:	MCM Linkage to medical care
Units:	1
Price:	0.00 \$
Total:	0.00 \$
Linkage Type:	<input type="button" value="Download"/>
Linkage Status:	HCV <input type="button" value="Download"/>
Confirmation of Linkage Date:	HIV Non-HIV Related STI Screening

DATA ENTRY DEMO

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

Demo Client

Name: Billy Porter

Sex at Birth: 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

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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REPORTS

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

Financial Report

CAREWare Reports > Financial Report Settings

[Funding Source Filter](#) [Edit Filter](#) [Run](#) [PDF](#) [Save to My Reports](#) [Help](#) [Cancel](#)

Financial Report Settings

Begin Date: 07/01/2023 

End Date: 12/01/2023 

Funding Sources: Part B, State Funding

Include Subservice Detail?

Include Provider Information?:

Pull Amount Received from receipts in the date span?:

Apply Filter:

Filter Description: Report Filter is empty

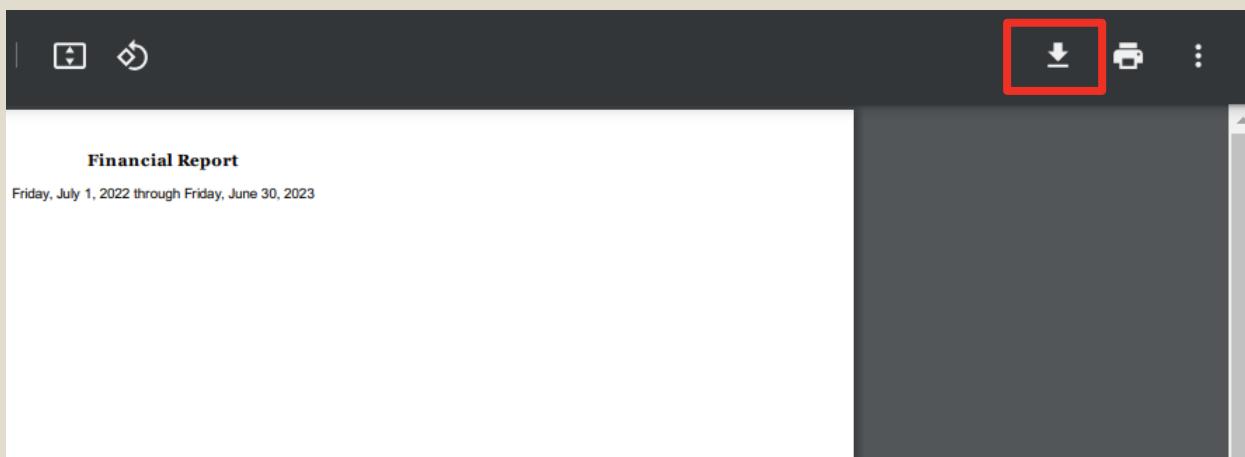
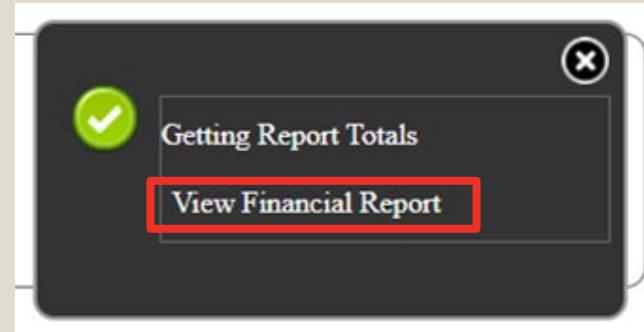
Financial Report

CAREWare Reports > Financial Report Settings

Funding Source Filter Edit Filter **Run** **PDF** Save to My Reports Help Cancel

Run: Opens in a new window that can be printed

PDF: Creates a PDF in a new window

A screenshot of a browser window displaying a "Financial Report" page. The page header includes the text "Financial Report" and "Friday, July 1, 2022 through Friday, June 30, 2023". The browser's toolbar at the top includes a download icon, a print icon, and a more options icon. The download icon is highlighted with a red rectangular border.

Financial Report

Financial Report

Friday, July 1, 2022 through Friday, June 30, 2023

Report Criteria:

Providers:	MDPH
Funding Sources:	Part B, State
Group By Providers:	False
Include Subservice Detail:	True
Receipts In Period:	False

MDPH

	Clients:	Units:	Total:	Amount Received:	Not Received:
Housing Services					
HS&A Phone or Video Session	1	3	\$0.00	\$0.00	\$0.00
Housing Services Totals:	1	3	\$0.00	\$0.00	\$0.00
Medical Case Management					
MCM Acuity Reassessment	2	5	\$0.00	\$0.00	\$0.00
MCM Care Access acuity reassessment	1	1	\$0.00	\$0.00	\$0.00
MCM Commnication w ith medical Provider	1	1	\$0.00	\$0.00	\$0.00
MCM Initial acuity asessment	2	2	\$0.00	\$0.00	\$0.00
MCM In-Person session	1	4	\$0.00	\$0.00	\$0.00
MCM ISP/Care Plan	2	2	\$0.00	\$0.00	\$0.00
MCM Referrals (non medical)	1	1	\$0.00	\$0.00	\$0.00
Medical Case Management Totals:	5	16	\$0.00	\$0.00	\$0.00
Provider Totals:	5	19	\$0.00	\$0.00	\$0.00

REPORTS DEMO

CONTRACT MANAGER DATA REVIEW



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?

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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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

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

CAREWARE MA SUPPORT & RESOURCES



CAREWare MA Helpdesk Support

- Go to www.CAREWareMA.jsi.com
- Email CAREWareMAhelpdesk@jsi.com
- Fax 617-482-0617

QUESTIONS?