CAREWARE USER MANUAL

CLEVELAND TGA

Ryan White Part A
Cleveland TGA

CUYAHOGA COUNTY
BOARD OF HEALTH
YOUR TRUSTED SOURCE FOR PUBLIC HEALTH INFORMATION

HRSA
Ryan White HIV/AIDS Program

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INTRODUCTION

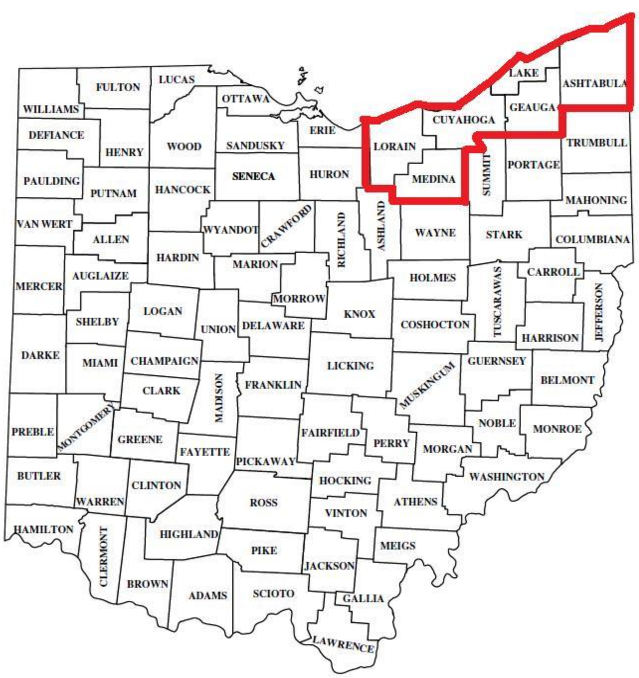
Who Was Ryan White?

Ryan White and his mom courageously fought AIDS-related discrimination and helped educate the nation about his disease.

Ryan White was diagnosed with AIDS at age 13. He and his mother, Jeanne White Ginder, fought for his right to attend school, gaining international attention as a voice of reason about HIV/AIDS. At the age of 18, Ryan White died on April 8, 1990, just months before Congress passed the AIDS bill that bears his name – the Ryan White CARE (Comprehensive AIDS Resources Emergency) Act.

About the Ryan White HIV/AIDS Program (RWHAP)

The Ryan White HIV/AIDS Program provides HIV-related services for those who do not have sufficient health care coverage or financial resources to cope with HIV disease. The program is federally funded through the U.S. Department of Health and Human Services (HHS), Health Resources and Services Administration (HRSA), and the HIV/AIDS Bureau (HAB). Annually, the Ryan White HIV/AIDS Program serves an estimated 533,036 individuals living with HIV/AIDS throughout the United States. In 1996, HRSA first designated the six-county Cleveland Region as a Part A Transitional Grant Area (TGA).



The Cuyahoga County Board of Health (CCBH) serves as the Administrator of the Cleveland TGA grant, which serves the following Ohio counties:

- Cuyahoga
- Ashtabula
- Geauga
- Lake
- Lorain
- Medina

According to the Ohio Department of Health, as of December 31, 2022 there were a total of 6,037 individuals living with HIV/AIDS throughout the TGA region. The Cleveland TGA Part A program provided care and support services to a total of 3,163 individuals in 2023, or 52% of the region's total population living with HIV/AIDS.

Ending the HIV Epidemic (EHE) Background

The Ending the HIV Epidemic initiative focuses on four key strategies that, implemented together, can end the HIV epidemic in the U.S.: Diagnose, Treat, Prevent, and Respond. Cuyahoga County was identified as one of the 57 priority jurisdictions in the U.S. that account for more than half of new HIV diagnoses. The 10-year project aims to end the HIV epidemic in the United States by reducing transmission by 90% by 2030.

Federal Reporting Requirements

As a condition of the grant awards, Ryan White HIV/AIDS Program (RWHAP) recipients are required to report client-level data, including demographics, services, clinical indicators, and expenditures.

What is client-level data?

The Ryan White Services Report (RSR) was created to monitor client data through a single reporting system. HAB's goal was to have a system that provides data on the characteristics of the funded recipients, their providers, and the clients served.

The data submitted through the RSR will be used to do the following:

- Monitor the outcomes achieved on behalf of HIV/AIDS clients and their affected families receiving care and treatment through RWHAP recipients and/or providers;
- Address the disproportionate impact of HIV in communities of color by assessing organizational capacity and service utilization in minority communities;
- Monitor the use of RWHAP for appropriately addressing the HIV/AIDS epidemic in the United States;
- Address the needs and concerns of Congress and the Department of Health and Human Services (HHS) concerning the HIV/AIDS epidemic and RWHAP; and
- Monitor progress toward achieving the goals identified in the National HIV/AIDS Strategy.

HAB considers these data the property of the grantee and will not share the data with other grantees without the permission of the reporting grantee.

What is CAREWare?

The Cleveland TGA uses CAREWare to manage and monitor HIV clinical and supportive care.

CAREWare is free, HRSA sponsored software used to manage and monitor HIV clinical and supportive care, as well as produce federally required service reports. CAREWare is updated regularly to be compliant with HAB reporting requirements. The software is scalable and can be customized to meet local needs.

CAREWare on a local level

The Cleveland TGA CAREWare database is hosted on our own secure server and meets all federal, state and local privacy and security standards. All Cleveland TGA sub-recipients are required to enter data using the CAREWare system.

Due to changes in HRSA/HAB reporting requirements and availability of new features or modules, the Cleveland TGA CAREWare software is typically updated every 6-8 months. Only clients that meet out TGA's eligibility requirements should be entered into the Cleveland TGA's CAREWare system.

QUICK TIP SHEET

1. When adding clients, check for the "duplicated client" prompt. If there is a change in the legal name and/or gender for an existing client, update the information in the **existing client record**. Do not create a new client record, as this causes duplicate client records.

2. When entering compound or hyphenated names, do not use any spaces or apostrophes. For example: *William O'Connor, Jr*. should be entered as: Last Name: **OConnor Jr** list surname(s) afterwards, First Name: **William**. Addresses should use the same format, **123 N Main St Apt 3** *without* punctuation.

3. Remember to enter **both** *Ethnicity* and *Hispanic Subgroup,* **and** *Race and Race Subgroup, when applicable*, as these entries are treated as separate and required fields – remember not to leave either section 'Blank.'

4. The *Enrollment Date* (mm/dd/yyyy) should be the client's First service (Intake) at your agency. A *Case Closed Date* is required anytime the *Enrollment Status* is reported differently than '**Active.**' If the *Vital Status* is reported as '**Deceased**,' a *Date of Death* is also required.

5. When reporting the *HIV Status*: be sure to fill in the corresponding *HIV+ Date* **and** *AIDS Date*, as applicable. When selecting the *HIV Risk Factor(s):* this refers to client's current risk factor(s) for HIV infection, which may not necessarily be the initial mode of HIV infection.

6. Remember to complete all sections under the Annual Review tab, including, **Insurance** and **Federal Poverty Level**. (For clients with no income, enter zero (0) in the Household Income field, CAREWare auto-fills the dollar sign and decimals, to show $0.00; and will calculate the Poverty Level Percent (%), once the household size is entered.)

7. The only Annual Screening that is required is **Housing Arrangement**; Annual Review information should be verified every twelve (12) months for recertification, specifically **Income** and Medical **Insurance**. If there are no changes, the 'Bring Forward' feature may be used.

8. It is highly recommended to schedule regular time throughout the week and month, to enter and correct client-level data in CAREWare and avoid waiting until the last day of the month.

9. ****IMPORTANT:** First correct the **TLSMissingRyanWhiteEligibility** report, then the **RSR Client Report Viewer** correcting all *Missing* and *Unknown* values, and remaining **TLS Missing** data reports until *'No records were found. The report will not be displayed.'* for each custom missing data report – prior to submitting monthly agency reimbursement requests.

USING CAREWARE

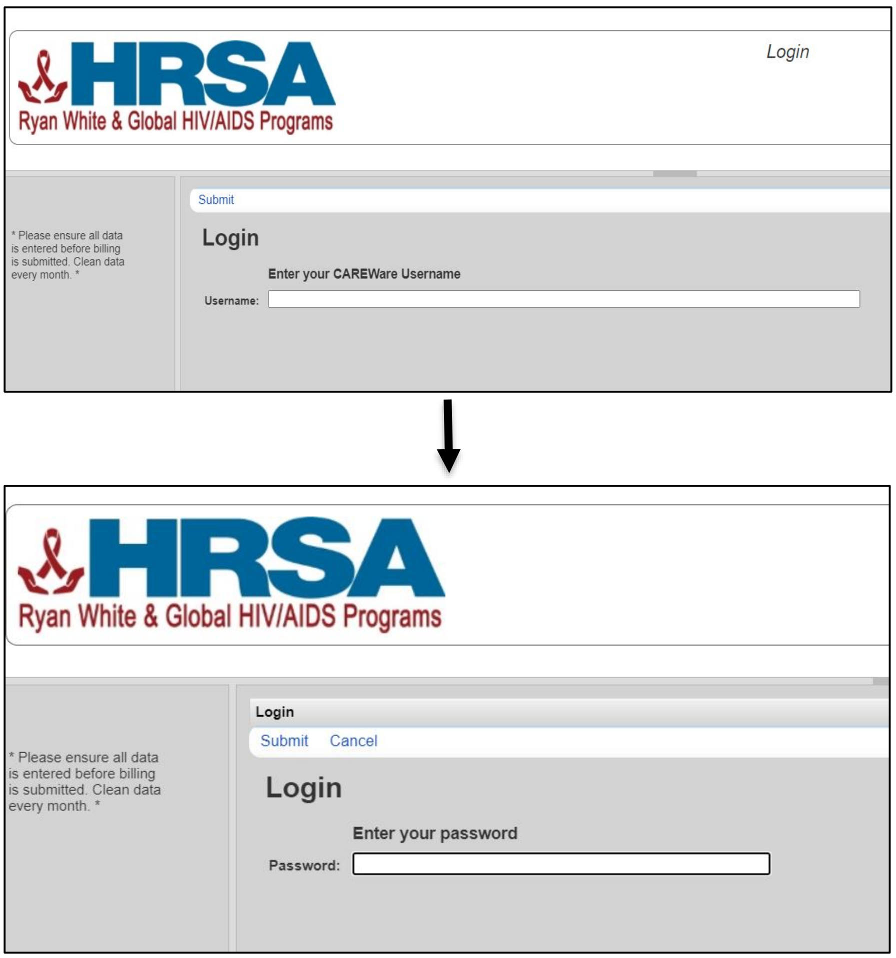
CAREWare 6.0 is a web-based system, thus no installation is needed. One can simply access CAREWare 6.0 by entering the following web address into your internet browser (the approved web-browsers for CW6 are Microsoft Edge, Google Chrome, Firefox, and Safari; Microsoft Internet Explorer will not work with CW6):

https://carewarecl.ixn.com

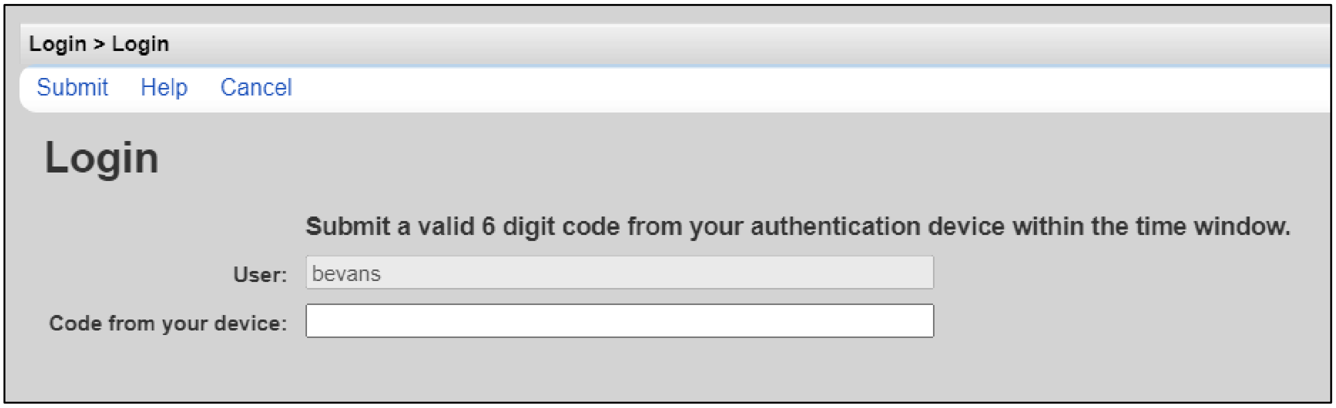
It is recommended to use the Google Chrome browser.

Logging in

The first step to access CAREWare is to enter your username and password into the login page:



After entering your password, you will see the following screen:



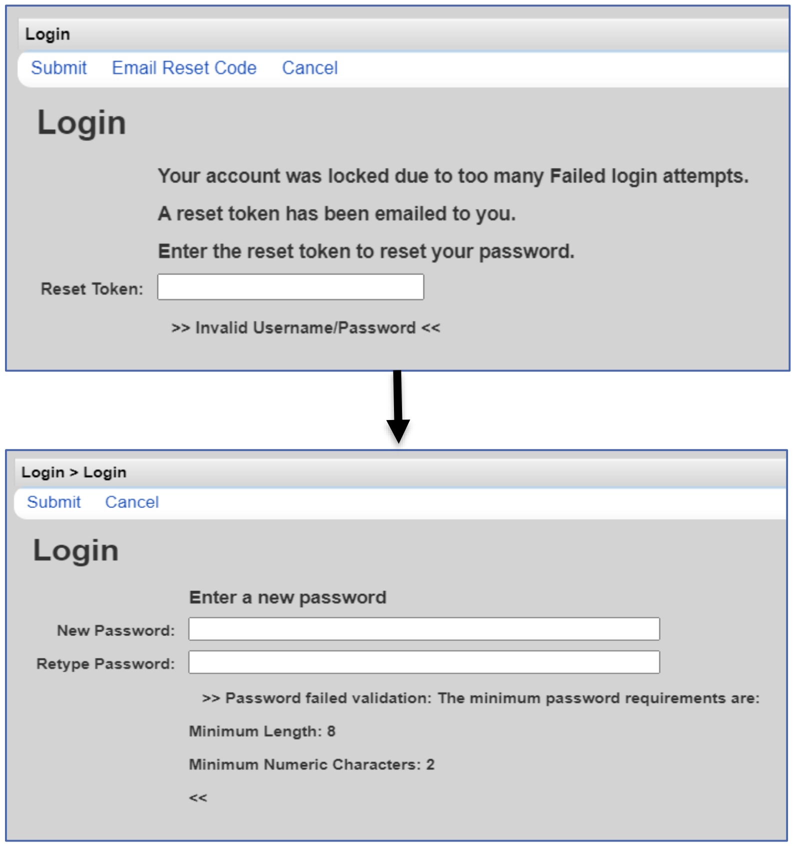
Enter the 6-digit code from your authentication device.

To set up two-factor authentication, follow the instructions in the link below:

https://www.jprog.com/wiki/Configuring-your-device-for-Two-Factor-Authentication-2FA-for-CAREWare-5.ashx

Password Reset

After three (3) failed login attempts, CAREWare will show the following user message and password reset instructions:

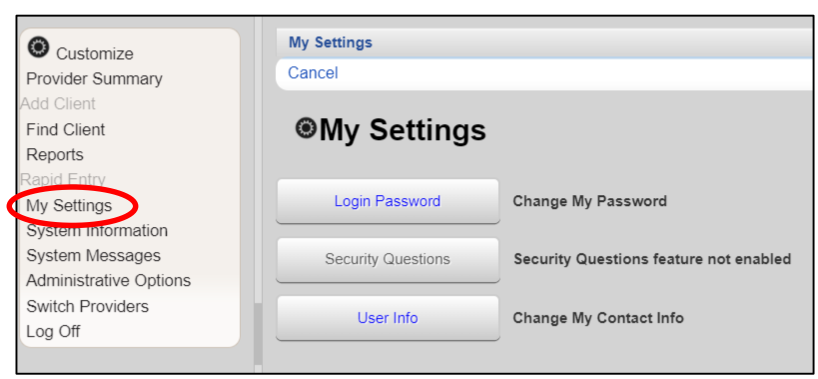


****NOTE:** User account has to be locked in order to see the reset prompt screen.

****IMPORTANT:** Users that do not sign in to CAREWare at least once every 6 months are subject to automatic account deactivation, per security protocol.

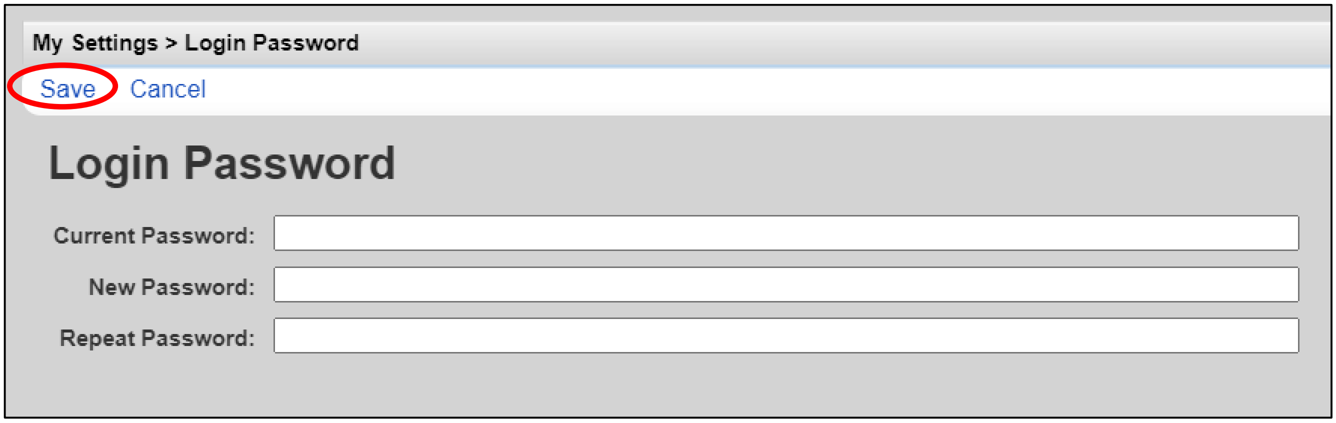
Change your password when already logged in

Click on **My Settings** from the selection menu on the far left of the screen. This will bring you to the following:



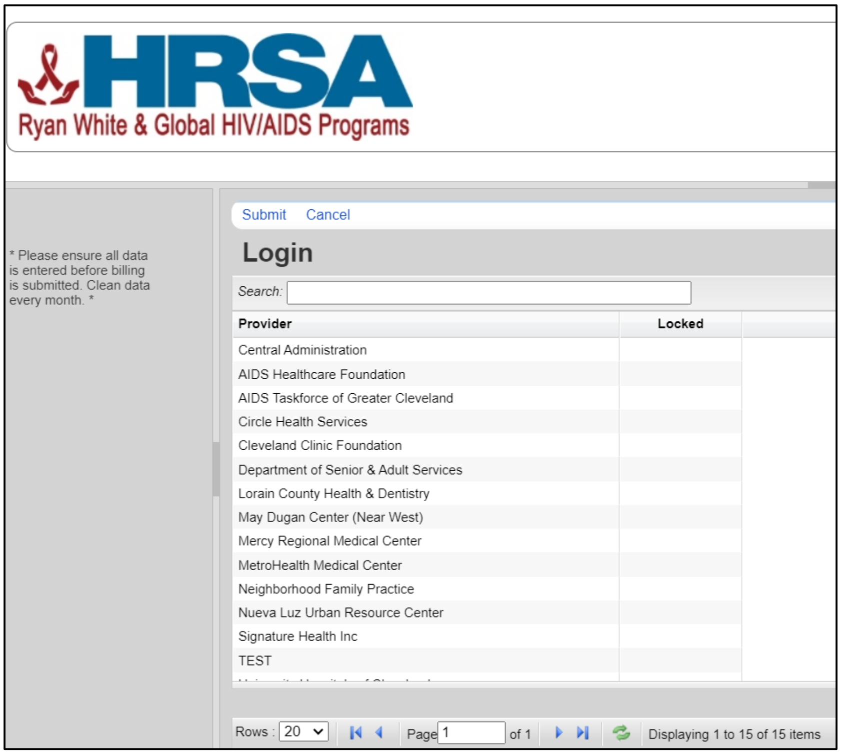
Select the blue hyperlinked **Login Password** to change your password. On the next screen you will enter your new password.

****NOTE**: Make sure to click **Save** (above where it says “Login Password” and is in blue) before navigating elsewhere on the site - otherwise the new password will NOT be saved.

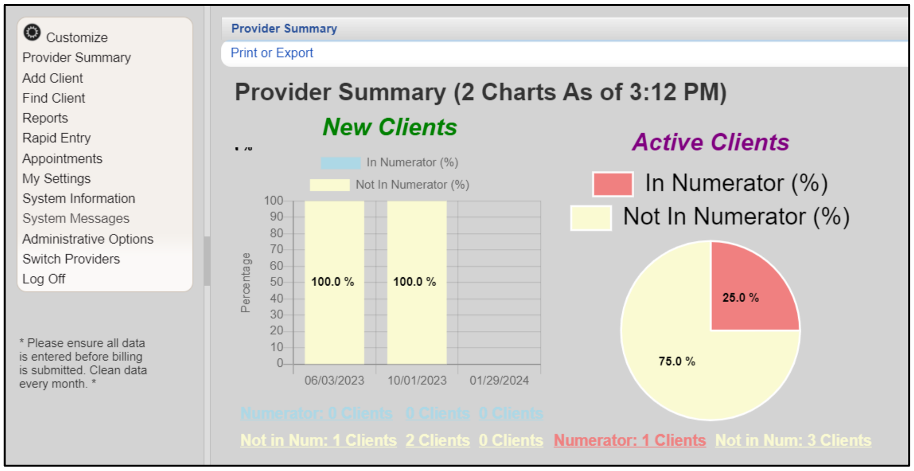


Navigating CAREWare

After entering your login and password, the first screen you will encounter is the following:

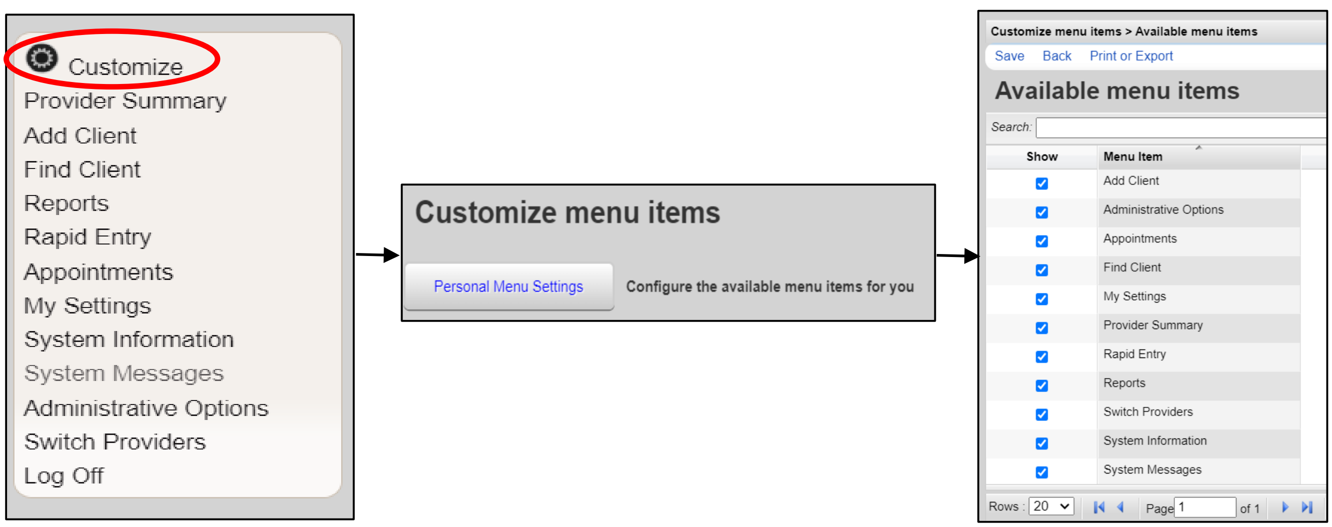


From this screen, double click on the name of your organization. This will take you to the following screen:



From this screen, take note of the navigation pane on the far left. From this, you can access the many functions used in CAREWare just as before (i.e. add/find client, reports, settings, etc.).

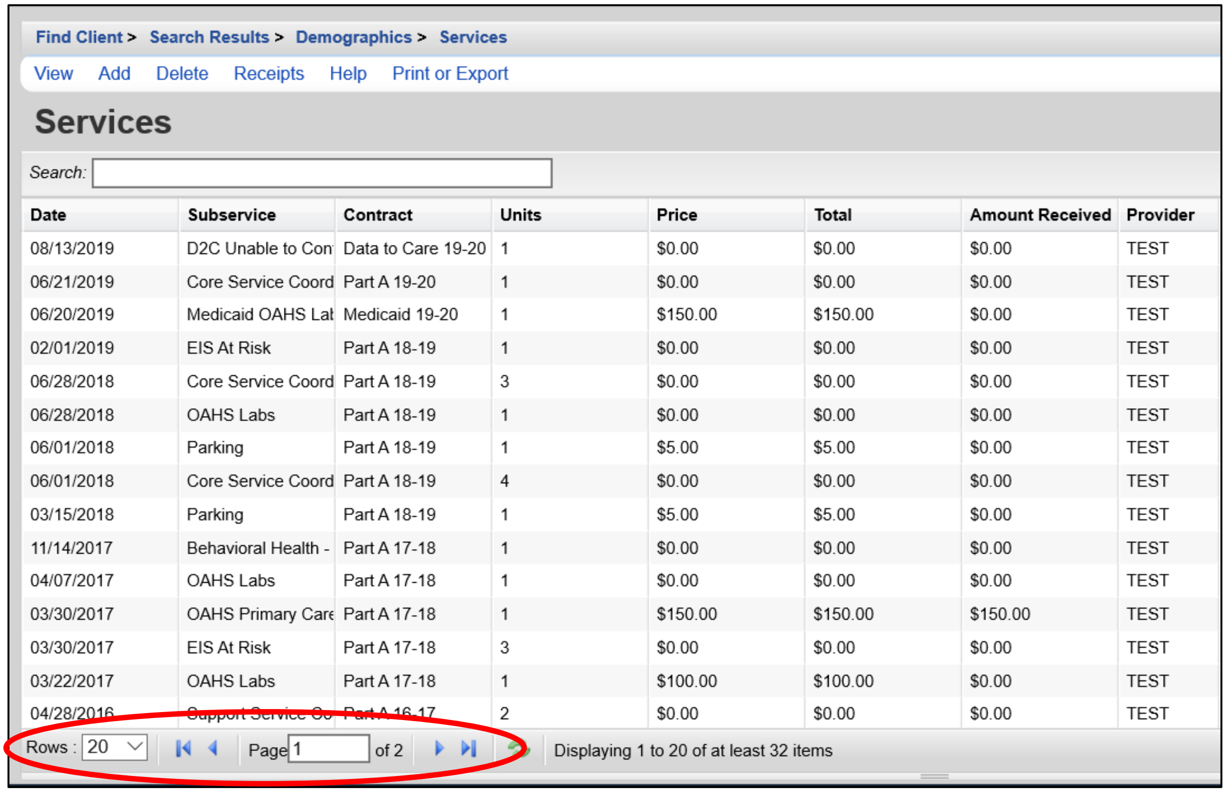
The list of functions on the far left navigation pane can be customized to the user's preference.



Notice the check boxes next to each "Menu Item." You can choose to show (or not show) a menu item by checking (or unchecking) the corresponding box. Be sure to **Save** your preferences before navigating away from this screen.

If you cannot see the full text in any column, you can expand the column by selecting the right margin of a column header and dragging it to the right.

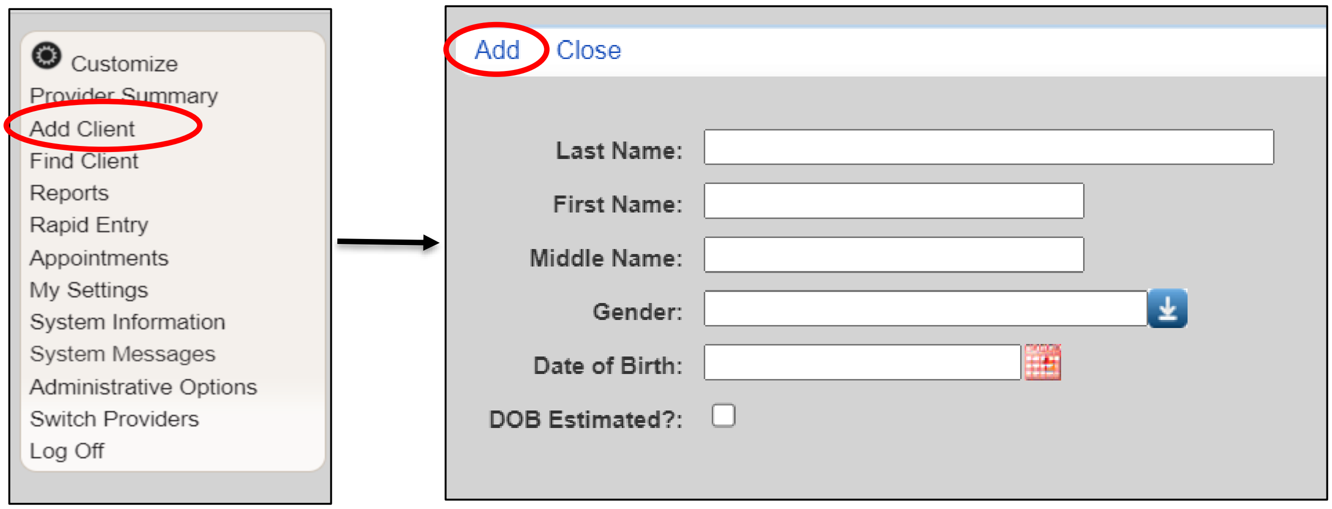
Menus only allow for 20 rows of information/items *per page*. Thus, you must use the navigation buttons at the bottom to view more information/services/menu items. For example, “this client had more than 20 services” – to see the rest of the services, you must utilize the bottom navigation buttons to view additional services over the 20 listed here.



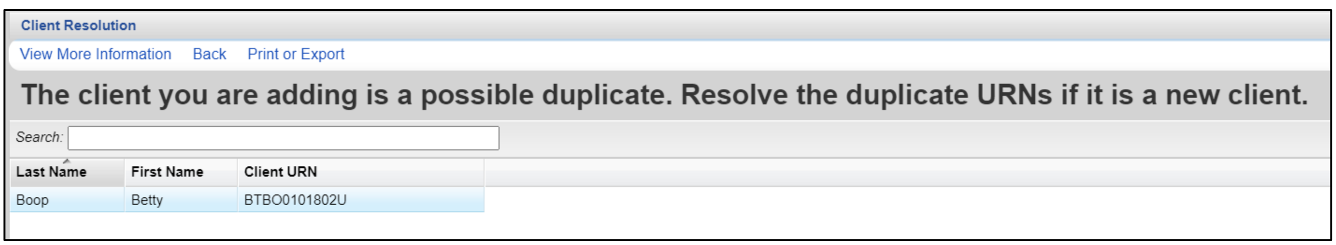
Date	Subservice	Contract	Units	Price	Total	Amount Received	Provider
08/13/2019	D2C Unable to Con	Data to Care 19-20	1	$0.00	$0.00	$0.00	TEST
06/21/2019	Core Service Coord	Part A 19-20	1	$0.00	$0.00	$0.00	TEST
06/20/2019	Medicaid OAHS Lat	Medicaid 19-20	1	$150.00	$150.00	$0.00	TEST
02/01/2019	EIS At Risk	Part A 18-19	1	$0.00	$0.00	$0.00	TEST
06/28/2018	Core Service Coord	Part A 18-19	3	$0.00	$0.00	$0.00	TEST
06/28/2018	OAHS Labs	Part A 18-19	1	$0.00	$0.00	$0.00	TEST
06/01/2018	Parking	Part A 18-19	1	$5.00	$5.00	$0.00	TEST
06/01/2018	Core Service Coord	Part A 18-19	4	$0.00	$0.00	$0.00	TEST
03/15/2018	Parking	Part A 18-19	1	$5.00	$5.00	$0.00	TEST
11/14/2017	Behavioral Health -	Part A 17-18	1	$0.00	$0.00	$0.00	TEST
04/07/2017	OAHS Labs	Part A 17-18	1	$0.00	$0.00	$0.00	TEST
03/30/2017	OAHS Primary Care	Part A 17-18	1	$150.00	$150.00	$150.00	TEST
03/30/2017	EIS At Risk	Part A 17-18	3	$0.00	$0.00	$0.00	TEST
03/22/2017	OAHS Labs	Part A 17-18	1	$100.00	$100.00	$0.00	TEST
04/28/2016	Support Service Co	Part A 16-17	2	$0.00	$0.00	$0.00	TEST

Adding Clients

To add a client, select **Add Client** on the navigation pane. This will bring you to the following screen in which you will enter the appropriate information and then hit the blue **Add.**



CAREWare may prompt you if a similar client record already exists.

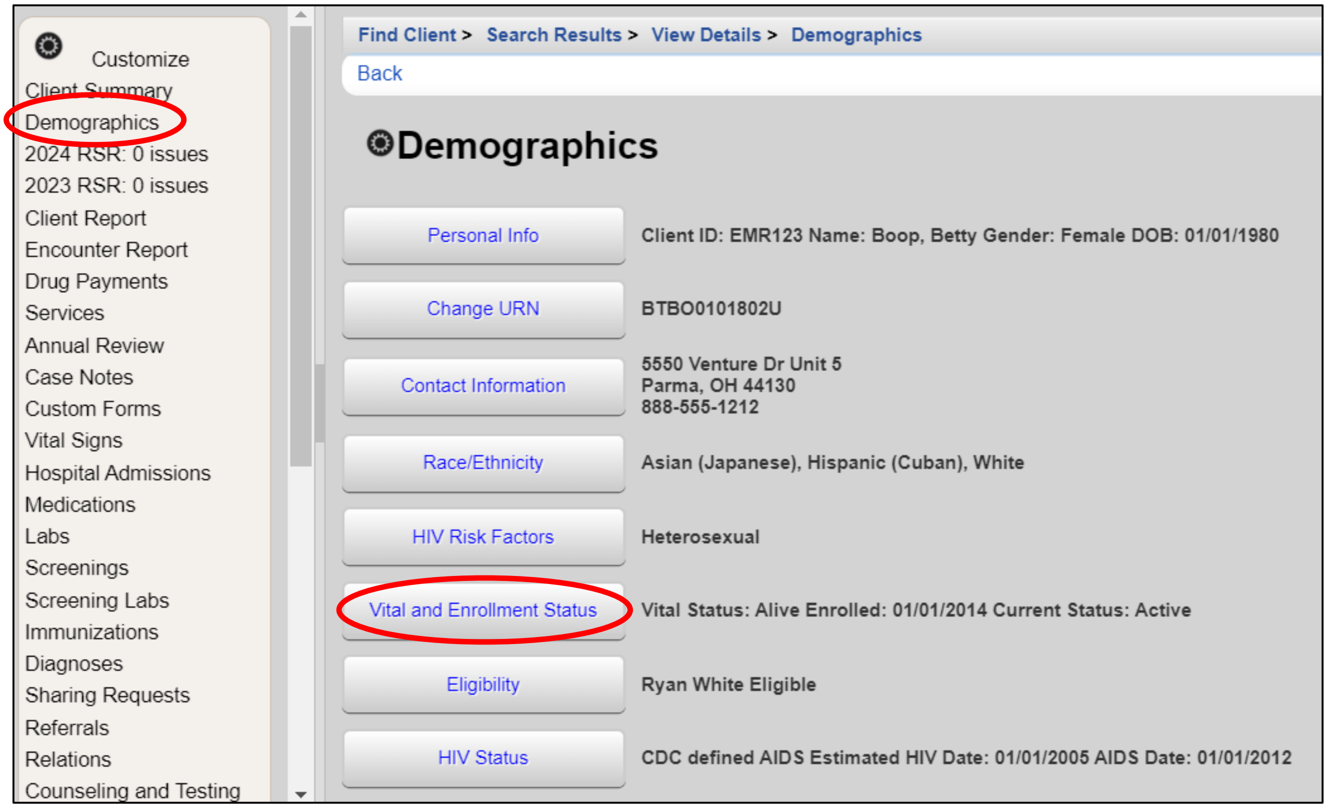


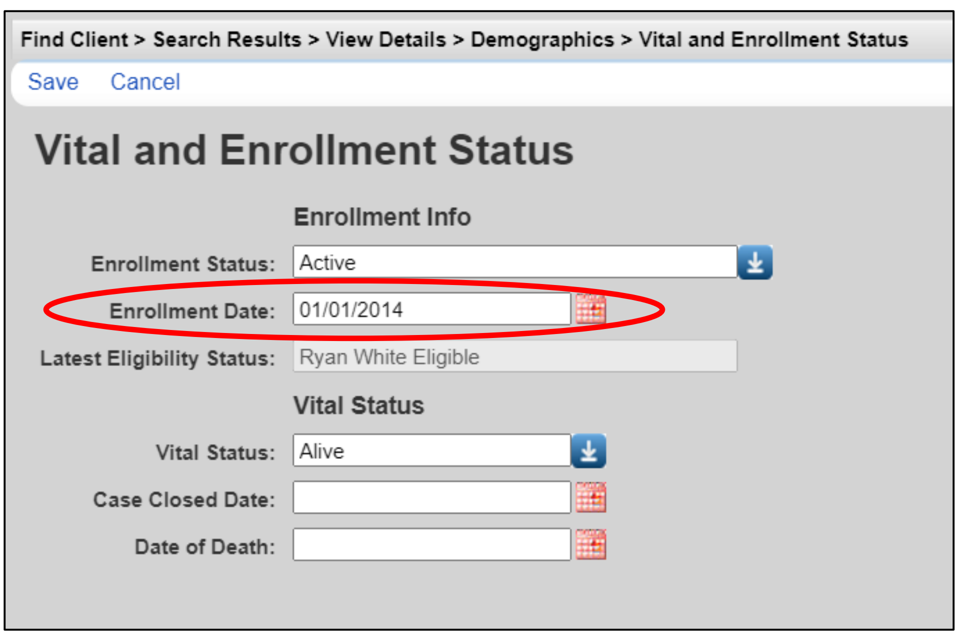
Enrollment Date

The *Enrollment Date* (mm/dd/yyyy) should be the client's First service (Intake) at your agency.

IMPORTANT: The client's initial Enrollment Date should always be the First Date of Service or Intake Date at your agency. The enrollment date should never be changed after that, regardless of any changes in the client's enrollment status. This includes clients that are active or inactive, alive or deceased, in or out of care, receiving services or not.

Using the navigation pane, click on **Demographics**, then **Vital and Enrollment Status:**

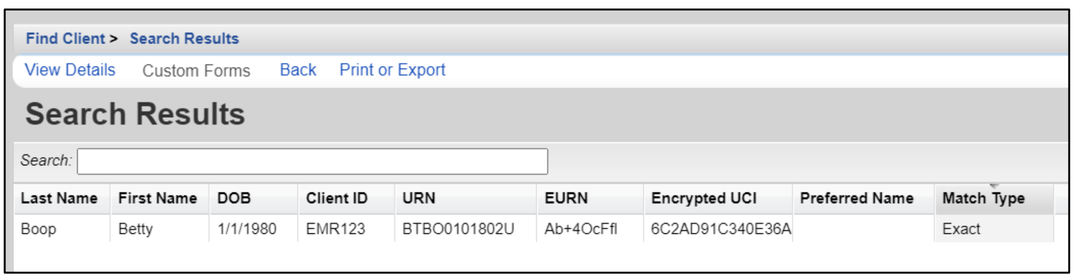

Customize
Client Summary
Demographics
2024 RSR: 0 issues
2023 RSR: 0 issues
Client Report
Encounter Report
Drug Payments
Services
Annual Review
Case Notes
Custom Forms
Vital Signs
Hospital Admissions
Medications
Labs
Screenings
Screening Labs
Immunizations
Diagnoses
Sharing Requests
Referrals
Relations
Counseling and Testing
Find Client > Search Results > View Details > Demographics
Back
Demographics
Personal Info
Client ID: EMR123 Name: Boop, Betty Gender: Female DOB: 01/01/1980
Change URN
BTBO0101802U
Contact Information
5550 Venture Dr Unit 5
Parma, OH 44130
888-555-1212
Race/Ethnicity
Asian (Japanese), Hispanic (Cuban), White
HIV Risk Factors
Heterosexual
Vital and Enrollment Status
Vital Status: Alive Enrolled: 01/01/2014 Current Status: Active
Eligibility
Ryan White Eligible
HIV Status
CDC defined AIDS Estimated HIV Date: 01/01/2005 AIDS Date: 01/01/2012


Find Client > Search Results > View Details > Demographics > Vital and Enrollment Status
Save
Cancel
Vital and Enrollment Status
Enrollment Info
Enrollment Status:
Active
Enrollment Date:
01/01/2014
Latest Eligibility Status:
Ryan White Eligible
Vital Status
Vital Status:
Alive
Case Closed Date:
Date of Death:

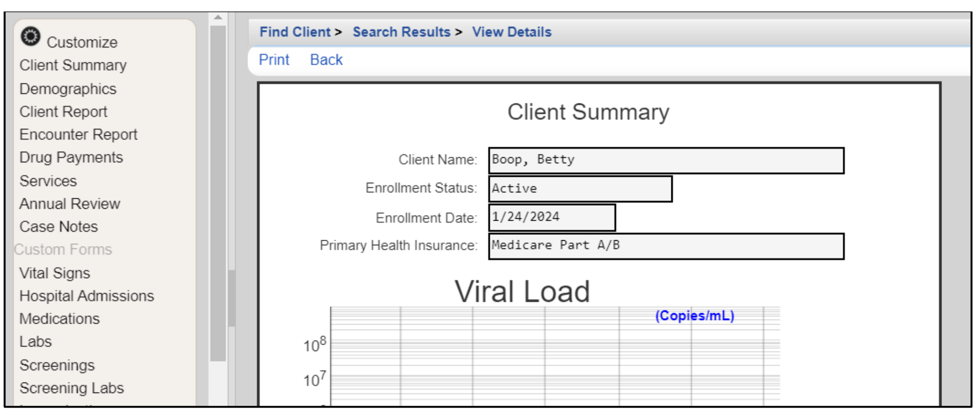
Finding Clients

Finding a client is done in the same way – select **Find Client** from the navigation pane which will bring you to the following search parameters screen.

After filling in the search parameters, click on **Client Search**, to initiate the search. The search results will display as follows:



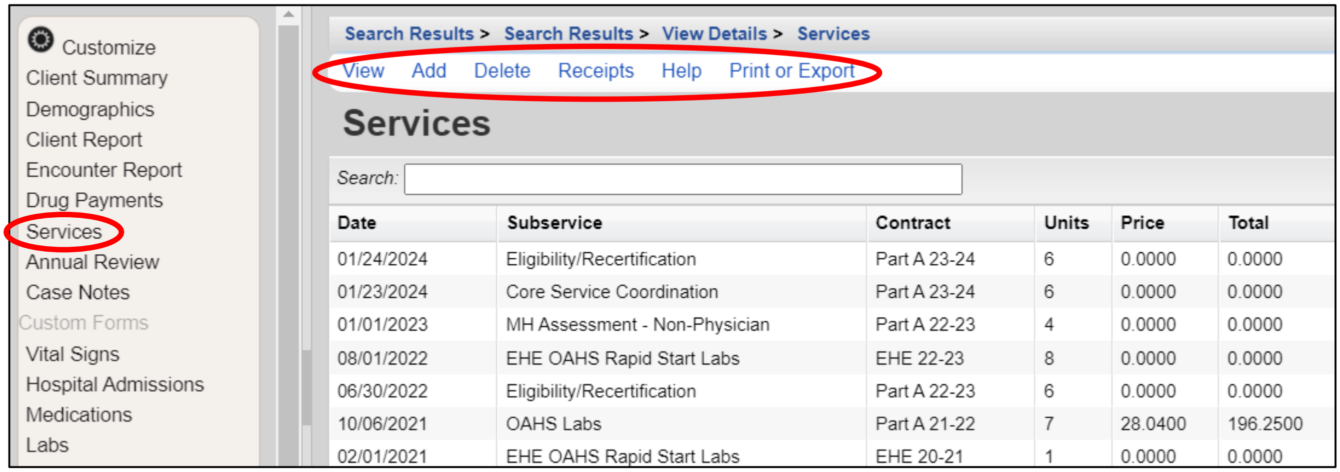
Either double-click the client name, or select the client and hit "view details" to open the client file. The client record will open in a separate tab in your browser. You will still be able to access the home screen and functions such as "Reports" or "add/find client" since it is in a separate tab.



Upon opening the client record, you will first encounter the **Client Summary** screen. From this point, you can navigate freely using the far left navigation pane to see the client's information (e.g. Demographics, Screening Labs, Services, Referrals, Appointments, etc.).

Viewing, Adding, & Deleting Services

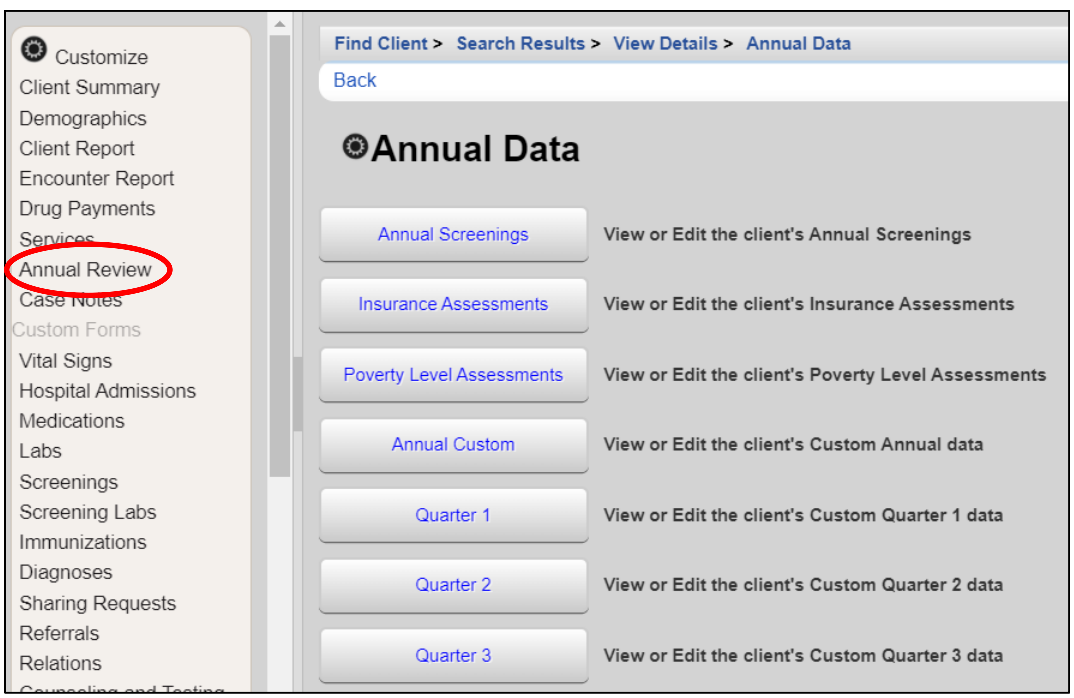
Select “Services” from the navigation menu on the far left. From this menu, all services delivered are listed. You can view, add/delete a service, see the receipt for the service, and print/export. You can view the details of a service either by selecting the service and selecting “View,” or by double-clicking the service.



Annual Review

Annual Review, just like the other functions, can be found on the far left navigation pane after a client record is selected. Each of the subsections (Annual Screenings, Insurance Assessments, Poverty Level Assessments, etc.) can be clicked to view or edit the details.

<u>All Providers</u> are required to report Annual Screenings, Insurance Assessments, and Poverty Level Assessments whenever any client service is delivered at the start of each calendar year.

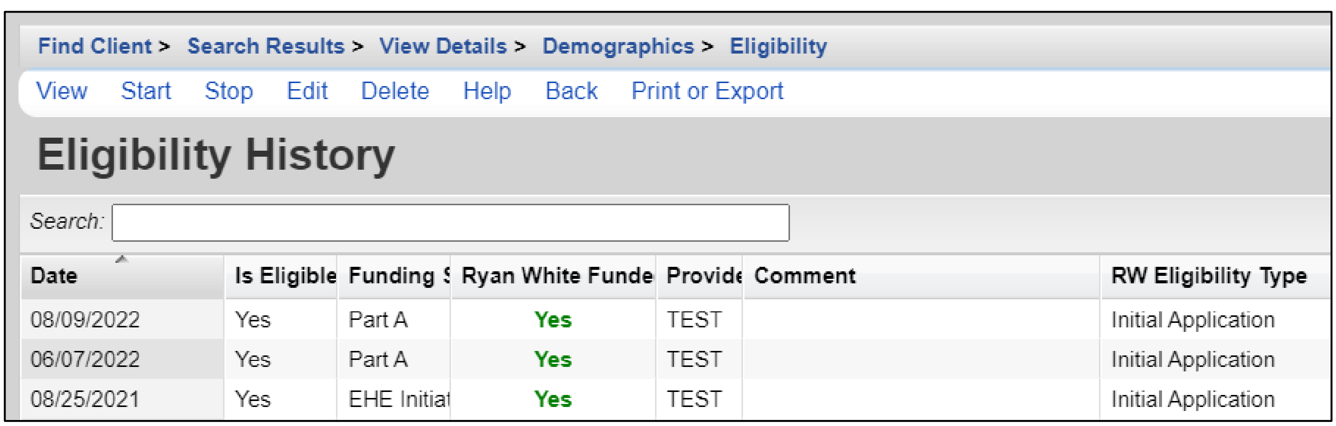


ELIGIBILITY

Electronic Eligibility is the centralized storage of all Ryan White Part A client eligibility documents in the CAREWare database. To accomplish this, provider agencies upload eligibility documents in the **Eligibility** link in individual client CAREWare records. The eligibility link and attached documents are considered "common data". Each agency that provides services for the same client can view the uploaded eligibility documents. Eligibility can be found on the **Demographics** page:

Upon selecting the eligibility link, you will be brought to the "Eligibility History." You can double click any eligibility entry to view and/or edit its details.

****NOTE**: Ensure RW Eligibility is determined before services are entered.



Find Client > Search Results > View Details > Demographics > Eligibility

View Start Stop Edit Delete Help Back Print or Export

Eligibility History

Search:

Date	Is Eligible	Funding S	Ryan White Funde	Provide	Comment	RW Eligibility Type
08/09/2022	Yes	Part A	Yes	TEST		Initial Application
06/07/2022	Yes	Part A	Yes	TEST		Initial Application
08/25/2021	Yes	EHE Initiat	Yes	TEST		Initial Application

Getting Started

Prior to upload, each eligibility document must be assigned the correct file name:

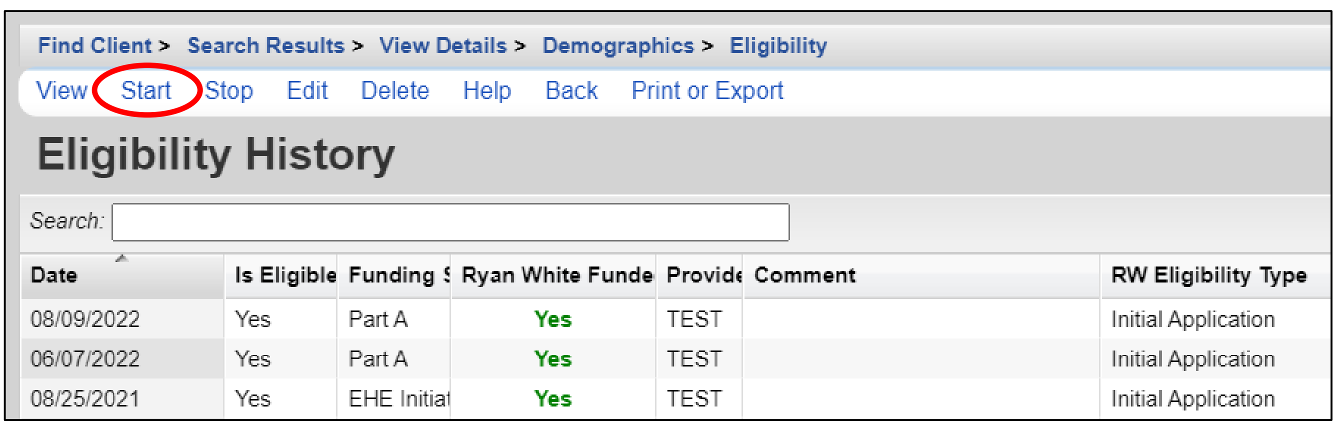
- In assigning the file name, the Eligibility Document Type[1] determines the File Name Format[2] used. The client eligibility date, located on the Eligibility Application, is used to populate (mm dd yy) in the file name.

  ****NOTE:** The value of (mm dd yy) in the file names of an eligibility application and every document supporting it, such as Proof of Income, will be identical.

- Each Eligibility Document Type is assigned a corresponding Custom Attachment Field[3] to which it will be uploaded.

Eligibility Document Type[1]	File Name Format[2] mm dd yy = Eligibility Date	Custom Attachment Field[3]
Eligibility Application	mm dd yy APP	Eligibility Application
Proof of Residency	mm dd yy RES	Proof of Residency
Proof of Income	mm dd yy POI	Proof of Income
Proof of HIV Status	mm dd yy HIV	Proof of HIV Status
Proof of Insurance Status	mm dd yy INS	Proof of Insurance Status

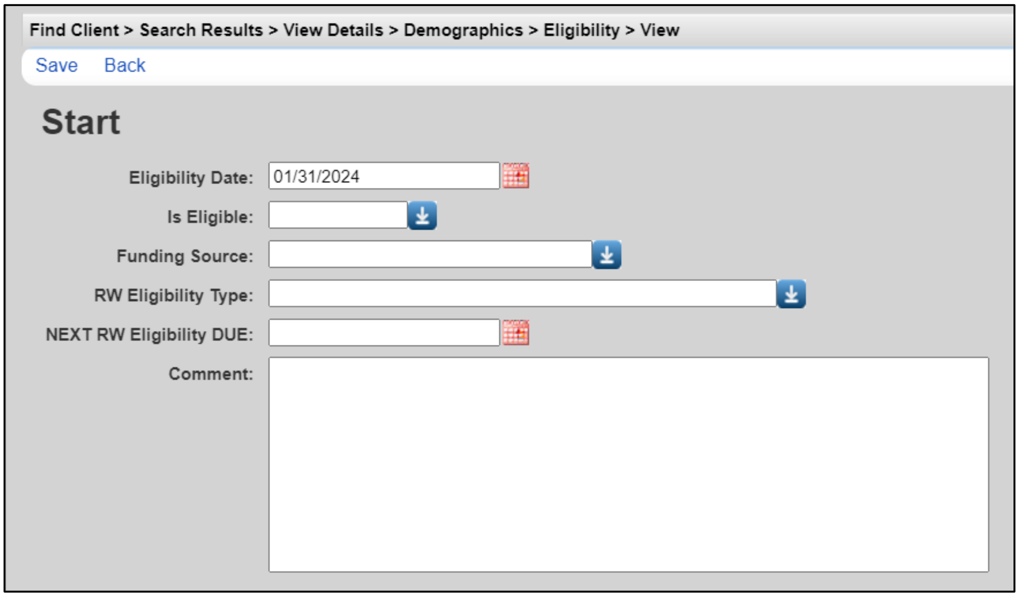
1. Click on “Start” to be taken to the next screen.



2. Complete all Fields under the “Start” tab. “Eligibility Date” should be the date that corresponds with the attachments being uploaded. RW Eligibility Type will be “Initial Application.”

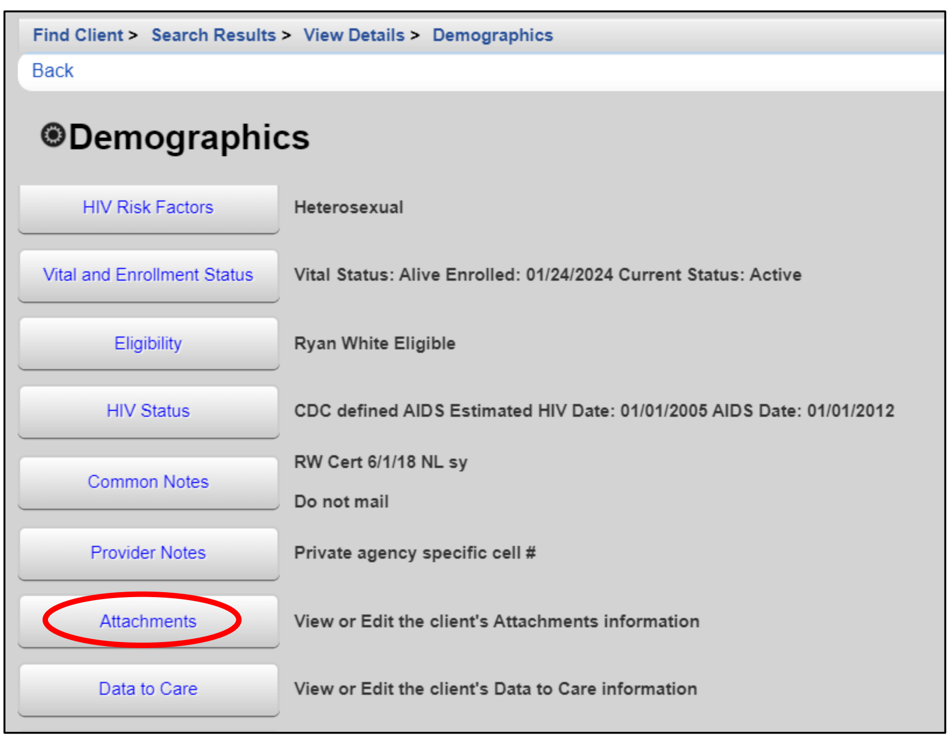
NEXT RW Eligibility Due should be the date **one (1) year** after the "Eligibility Date," or rather, when the client is due to renew their RW Eligiblity.

By entering these fields, your agency will be able to generate a custom eligibility report, that will assist in tracking when a client's eligibility is due.

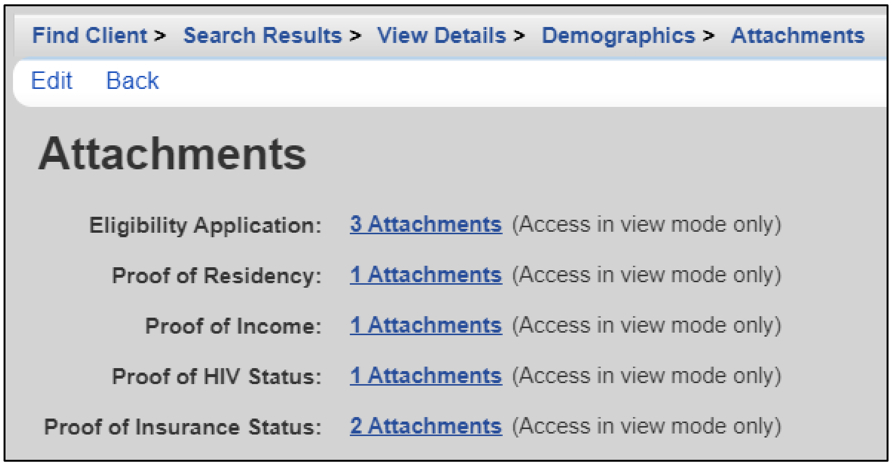


Uploading Documents

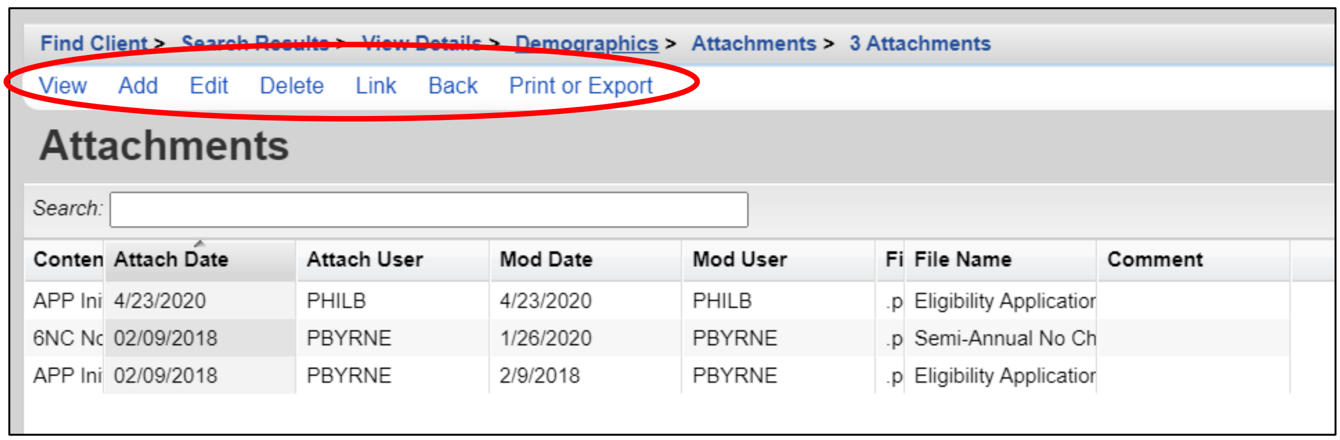
- You will upload all eligibility documents into **Attachments**, which is on the demographics page.



Clicking on “**Attachments**” will bring you to the following screen, from which you can upload eligibility documents.



By clicking on each blue hyperlink, you will see the following screen. From here, you can View, Add, Edit, etc. each attachment:



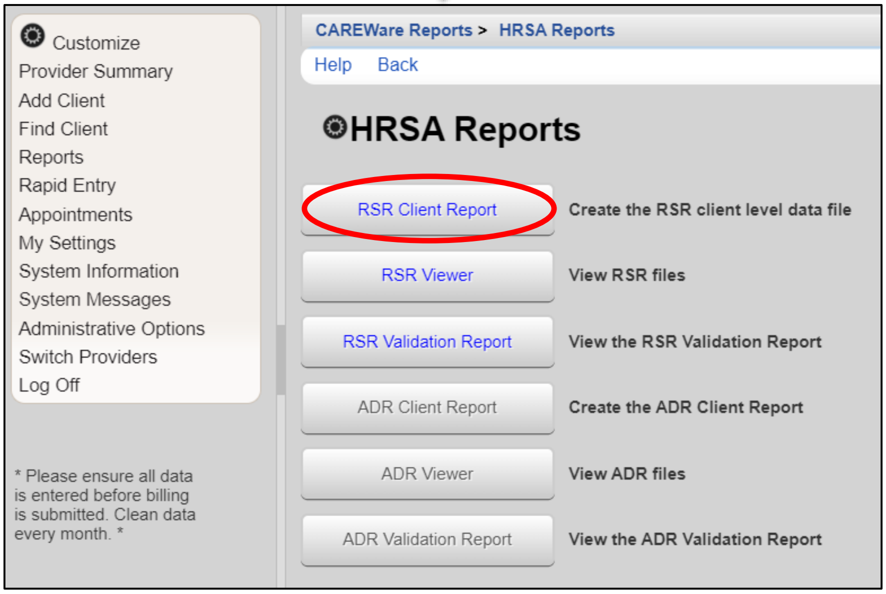
Conten	Attach Date	Attach User	Mod Date	Mod User	Fi	File Name	Comment
APP Ini	4/23/2020	PHILB	4/23/2020	PHILB	.p	Eligibility Applicatior	
6NC Nc	02/09/2018	PBYRNE	1/26/2020	PBYRNE	.p	Semi-Annual No Ch	
APP Ini	02/09/2018	PBYRNE	2/9/2018	PBYRNE	.p	Eligibility Applicatior	

DATA QUALITY

RSR

In CAREWare, enhanced RSR data quality reports are available, including the **RSR Client Report**.

To access this function, you will need to click on **Reports** in the far left navigation pane of the home screen, then select **HRSA Reports.**



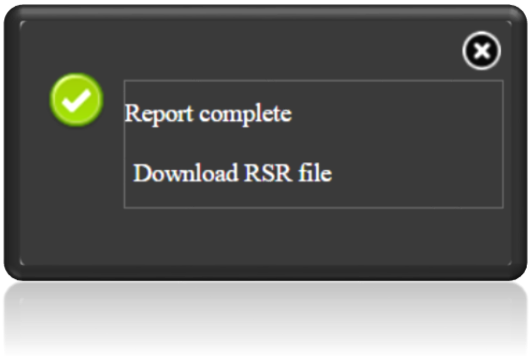
To run an **RSR,** first select **"RSR Client Report."** You will arrive at the following screen from which you can edit the information, edit what filters you want to use, and run the RSR Client Report. You will save this report to your desktop as YEAR_RSR_Export.xml (e.g. 2020_RSR_Export.xml).

****NOTE**: Medical Providers <u>ONLY</u> - check **Cross Provider Labs box.**

RSR Client Report – Steps Summary:

Running the RSR

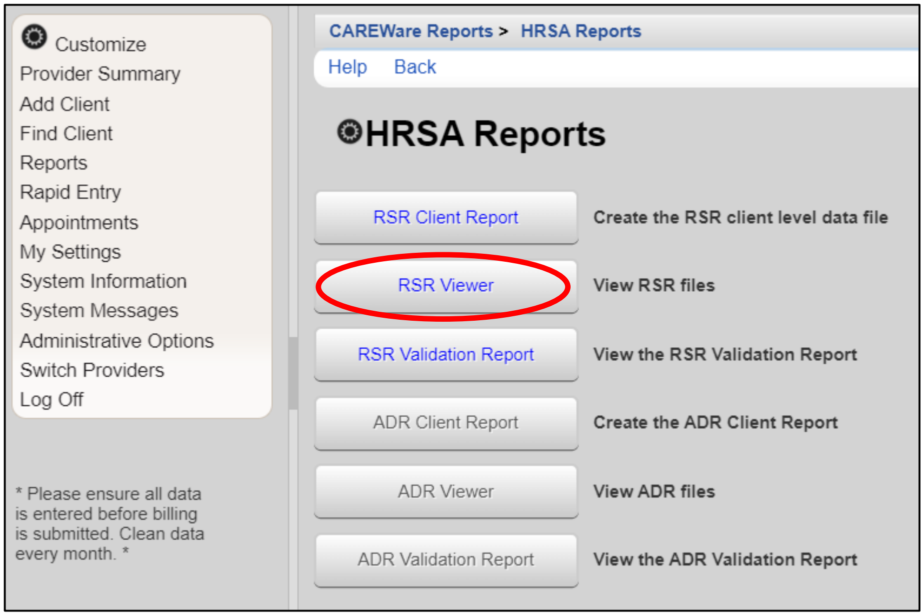
1. From your home screen, select **Reports** from the far left navigation pane.
2. From the **CAREWare Reports** screen, select **HRSA Reports.**
3. From the **HRSA Reports** screen, select **RSR Client Report.**
4. From the **RSR Settings** screen (after editing the desired settings) select *RUN* from the action bar.
5. Once the report is complete, a notification will pop up in the top right of your browser with a text box which says “Download RSR File” – click on that text to download the RSR file to your computer.



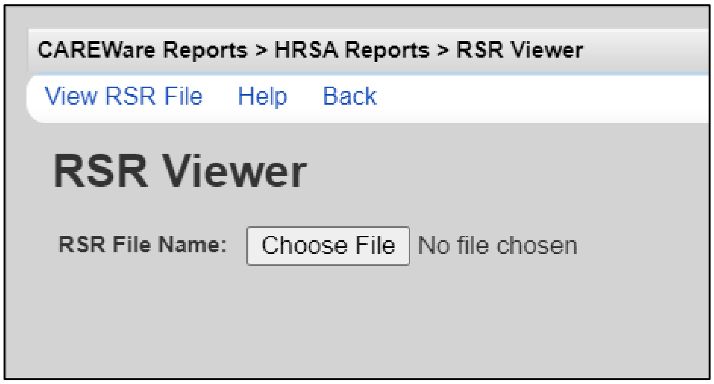
6. Save the file on your computer (it is recommended to save the file to your desktop for easy access) as “YEAR_RSR_Export.xml” (e.g. 2020_RSR_Export.xml).

Viewing the RSR

1. From your home screen, select **Reports** from the far left navigation pane.
2. From the **CAREWare Reports** screen, select **HRSA Reports.**
3. From the **HRSA Reports** screen, select **RSR Viewer.**



4. After selecting **RSR Viewer**, you will be brought to the following screen:



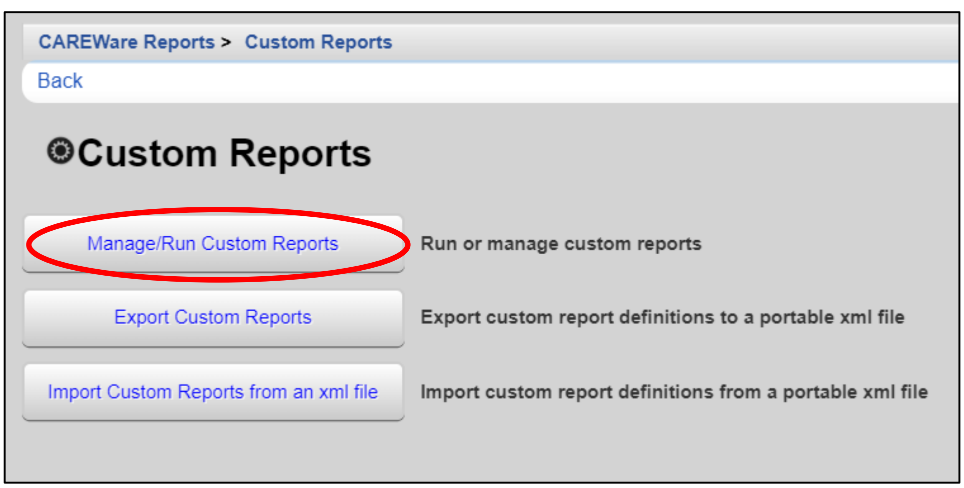
5. From the **RSR Viewer** screen, select **Browse** or **Choose File** and find the RSR XML file that you downloaded onto your desktop when running the RSR Client Report. Click on that file and select "Open" to view the RSR.
6. Select **View RSR File.**

Custom Reports

Following are the five (5) data quality reports used to identify and correct missing client data in CAREWare at your agency. These reports should be run in the order listed, prior to submitting monthly reimbursement requests to the County.

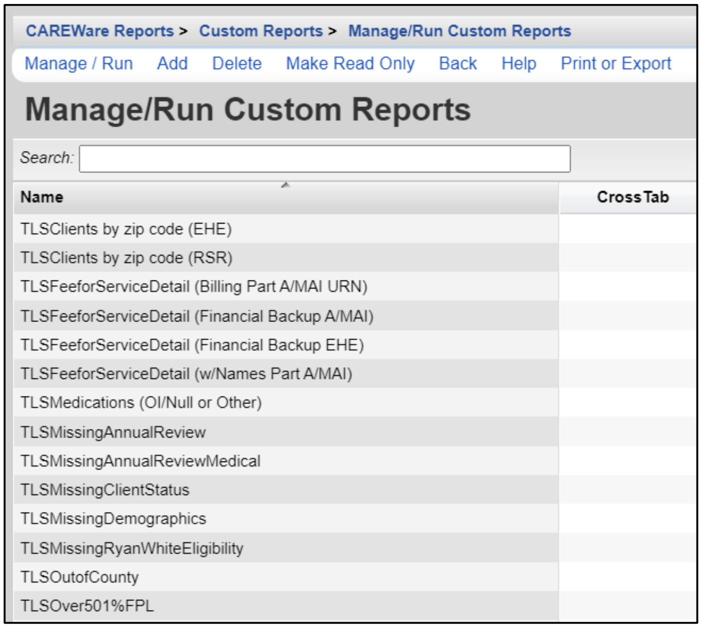
To find these data quality reports, first navigate to the home screen of CAREWare 6 and select **Reports**, then **Custom Reports**:

After selecting **Custom Reports**, you will see the following screen from which the required custom reports can be ran, copied, exported, or imported. To run the reports needed, select **Manage/Run Custom Reports**:

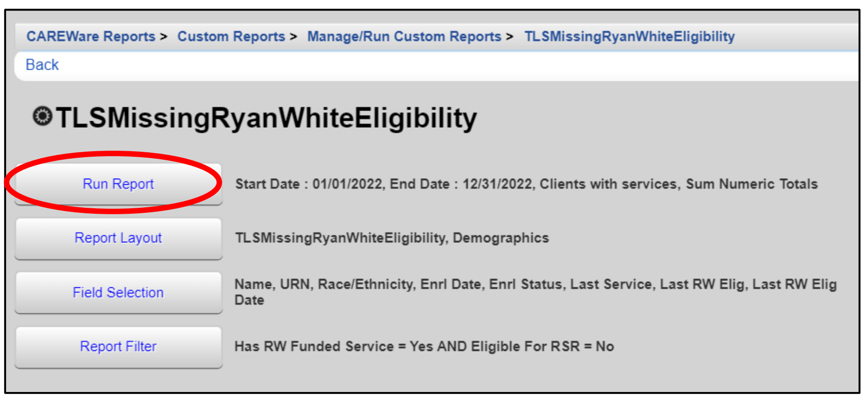


After selecting **Manage/Run Custom Reports**, you will be brought to a list of all custom reports available, shown below.

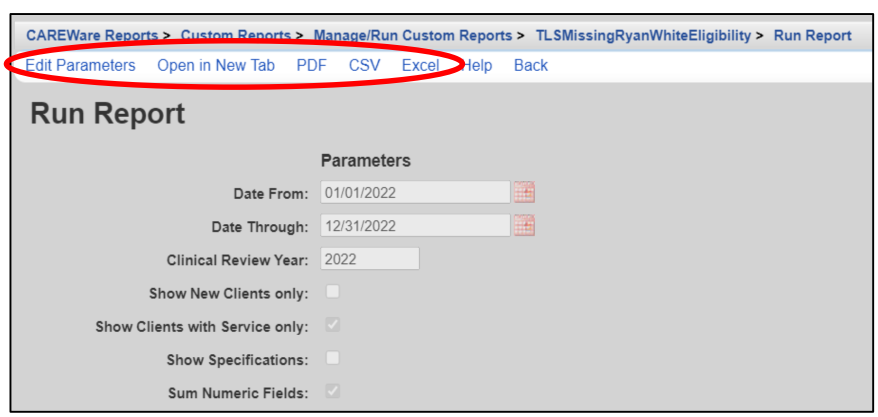
NOTE: the search bar at the top of the list can be used to quickly find a desired report.



Upon choosing a custom report, you will be brought to the following screen. Click **Run Report.**



From here, you can Edit Parameters or view the report by choosing Open in New Tab, PDF, CSV, or Excel.



1. TLSMissingRyanWhiteEligibility
   - Clients listed have been reported as:
     - Not Eligible for Ryan White; however,
     - Have received a Ryan White funded service in the reporting year.
   - **TO RESOLVE:** This information can be updated in the Demographics section add an Eligibility History record for each qualifying Ryan White Funding Source(s); AND/OR delete/change the client service(s) to a non-Ryan White funded contract.

   ****NOTE**: Clients listed on this report will not be included on the annual RSR report, until corrections are made. As a result, your agency will not get full credit for client services or medical tests and screenings provided.

2. TLSMissingAnnualReview (All sub-recipients must use this report)
   - Clients listed may be missing insurance, income, or housing arrangement.
   - **TO RESOLVE:** This information can be updated in the Annual Review section.

3. TLSMissingAnnualReviewMedical (ONLY for OAHS funded sub-recipients)
   - Clients listed may be missing CD4, Viral load, Syphilis, ARV, and Pregnancy.
   - **TO RESOLVE:** Add any missing information to the client file via the Clinical section.

4. TLSMissingClientStatus
   - Clients listed may be missing enrollment date, case closed date if discharged, vital status, HIV status, HIV risk, and/or HIV+ date, or AIDS date.
   - **TO RESOLVE:** Add any missing information to the client file.

5. TLSMissingDemographics
   - Clients listed may be missing ethnicity, race, street address, city, county, state, or zip code.
   - **TO RESOLVE:** Add any missing information to the client file.

6. TLSOutofCounty
   - Clients listed have reported Ryan White funded services, however; are ineligible to receive Ryan White services, due to residing outside a county within the Transitional Grant Area (TGA). Agency reimbursement for client services allocated to Ryan White funding is disallowed.
   - **TO RESOLVE:** Delete all Ryan White funded services or reassign to non-RW funded contracts for all clients listed.

7. TLSOver501%FPL
   - Clients listed have reported Ryan White funded services, however; are ineligible to receive Ryan White services, due to annual household income over 501% of Federal Poverty Level (FPL). Agency reimbursement for client services allocated to Ryan White funding is disallowed.
   - **TO RESOLVE**: Delete all Ryan White funded services or reassign to non-RW funded contracts for all clients listed.

Upon double-clicking/opening any of the TLS, you will see the clients listed that have missing data. If a client is missing data, the field will be blank on the report. For the purposes of the manual, we will be using sample client records–no actual patients' information is displayed here.

TLSMissingAnnualReview

Fields that are missing information are in red text.

Data Scope: CCBH OH ASO
Report Start Date: 10/22/2018
Report End Date: 10/22/2019

Name:	URN:	Primary Ins:	Housing Arr:	HH Size:	HH Income:	PovertyLev:
Adams, Morticia	MRAA1031624U					
holl, margaret n	MRHL0223862U	Medicaid				
Smith, Jonah	JNSI0102031U	Medicaid		3	1.0000	0%
Test, John D	JHTS1212761U	Medicare Part A/B		1	20000.0000	160%
Vicious, Sid	SDVC0101701U	Private - Individual		1	3500000.0000	28,022%
Ziegler, Kristin Kathleen	KIZE0114712U	Medicaid	Temporary	88	1000000000.0000	251,870%

Number of Records : 6

(Count is unduplicated across providers)

** - Restricted Field*

Use the TLS reports to identify which patients are missing information, as well as the type of missing information (i.e. housing, HH size, etc.). In this example we are using TLSMissingAnnualReview and sample clients. Any field that is missing information is in red text.

For instance, for "Adams," the primary insurance, housing arrangement, household size, and household income.

****NOTE:** All missing data reports should be complete upon submitting your monthly invoices.

Need Help with the HRSA EHB or HAB RSR Web Application system?
Please contact the HRSA Contact Center at 877-464-4772, available Mon - Fri, 8am - 8pm ET or electronically: http://www.hrsa.gov/about/contact/ehbhelp.aspx.

Need Help with the HAB RSR data content and/or reporting requirements?
Please contact HRSA Data Support at 888-640-9356 or email: RyanWhiteDataSupport@wrma.com.

Have Program, Fiscal, or Agency Specific Questions? Please contact the Ryan White Part A Program office: Cuyahoga County Board of Health (CCBH) at 216-201-2001 or reference http://www.ccbh.net/ryan-white.

Need Help with CAREWare?
To arrange CAREWare technical support or training, please contact the Ryan White Part A Program office: Cuyahoga County Board of Health (CCBH) at 216-201-2001 or e-mail Brittanie Evans, Ryan White Part A Grant Coordinator, at bevans@ccbh.net.

Tech-Logix Systems

BILLING INSTRUCTIONS

All service level data should be entered into CAREWare by your agency's agreed upon internal deadline. We suggest entering in data as close to real time as possible. Your agency should use the FY2021 CAREWare Activity Description spreadsheet to assure that you are using the proper unit descriptions and associated costs. Invoices will not be paid if services data is not entered into CAREWare.

As soon as all service-level data is entered you will need to run the following two reports out of CAREWare: **Financial Report** and **TLSFeeForService.**

If your agency receives funding for Lab services under OAHS, or Emergency Financial Assistance (EFA), you will also need to maintain a monthly spreadsheet that includes the following information:

- **Service Category Name**
- **Client URN (CAREWare ID)**
- **Date of Service**
- **Name of drug or lab service performed**

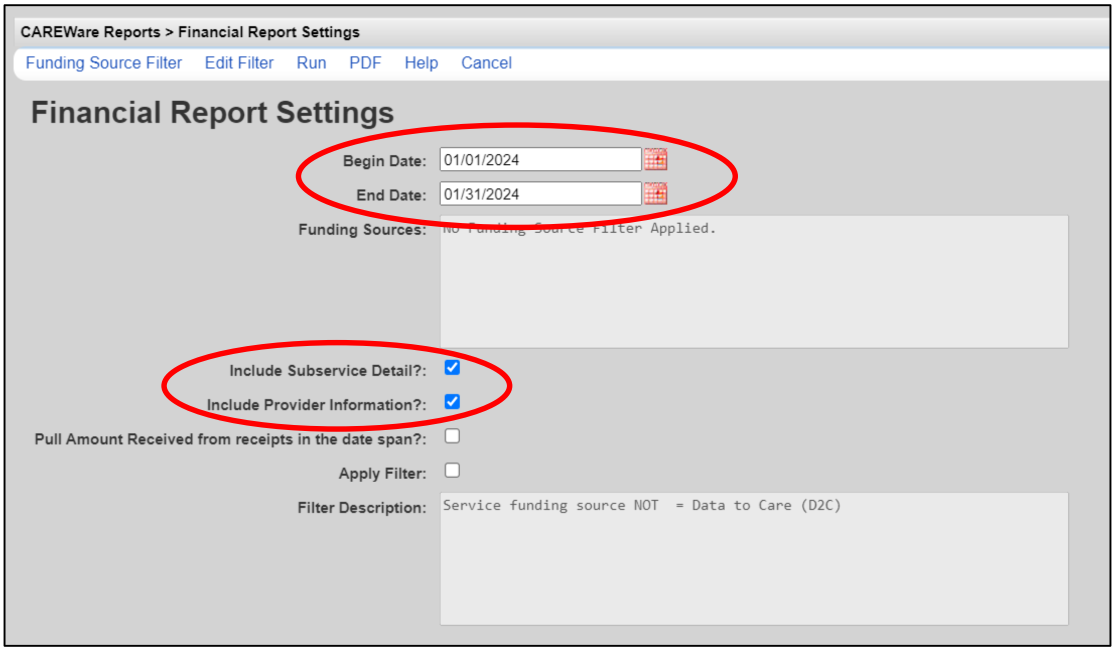
- This spreadsheet should match the total number of units that you have entered into CAREWare and be submitted with your financial package on a monthly basis. Where applicable, a sample spreadsheet has been provided on your FY2024 flash drive.

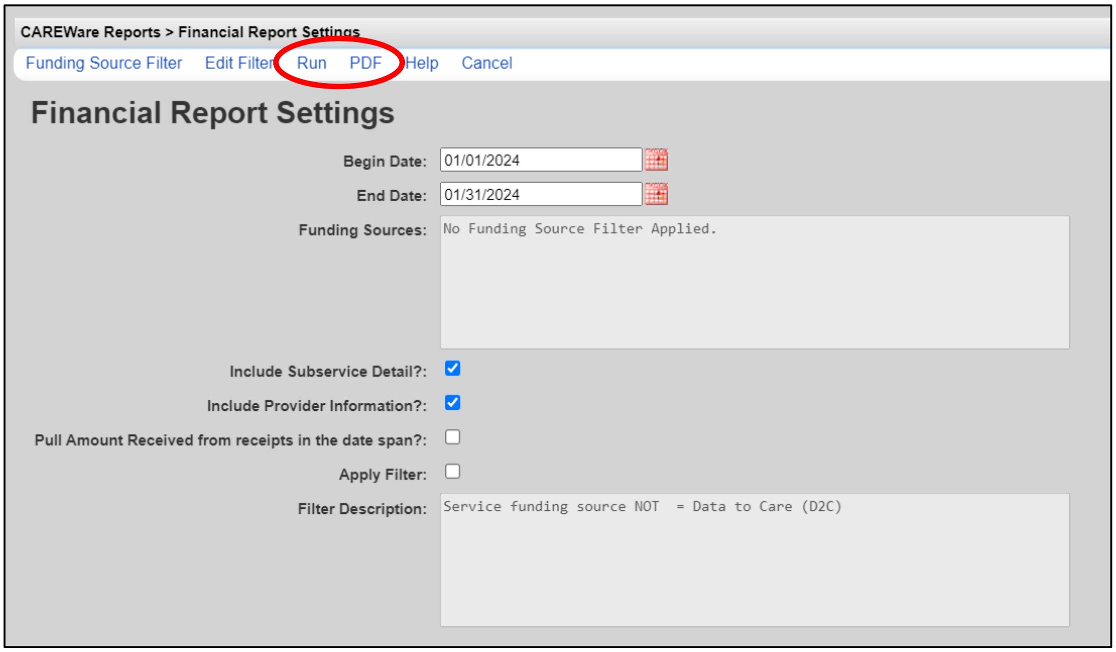
- If you have services within these three categories that are not able to be billed during the current invoice period, you will also need to maintain a spreadsheet outlining back-charges within the grant period. This spreadsheet should also include:
  - **Service Category Name**
  - **Client URN (CAREWare ID)**
  - **Date of Service**
  - **Name of drug or lab service performed**

Financial Report

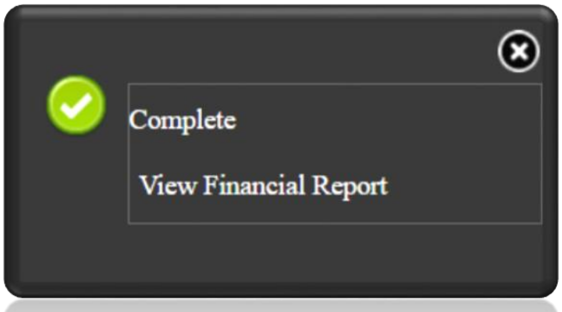
From your home screen you will click the **Reports** tab on the far left navigation pane which will bring you to the following screen. The first report you will run is the **Financial Report**.

When setting up the Financial Report, make sure that you set the date range to the billing month and check the two boxes that say: ***Include Subservice Detail*** and ***Include Provider Information***. Then you run the report.





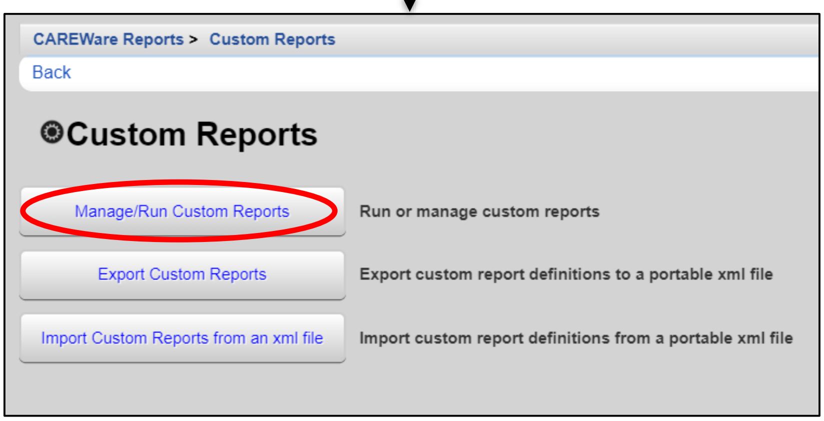
Once you have reviewed and approved the Financial Report, you will need to export it by clicking **PDF.** A black text box will pop up on the top right of the screen. Click “View Financial Report” to open the PDF and save this PDF to your computer.



This report should be printed from your computer and, depending on your agency’s internal process, submitted to your fiscal contact or combined with the required items listed on the FY2024 Fiscal Checklist.

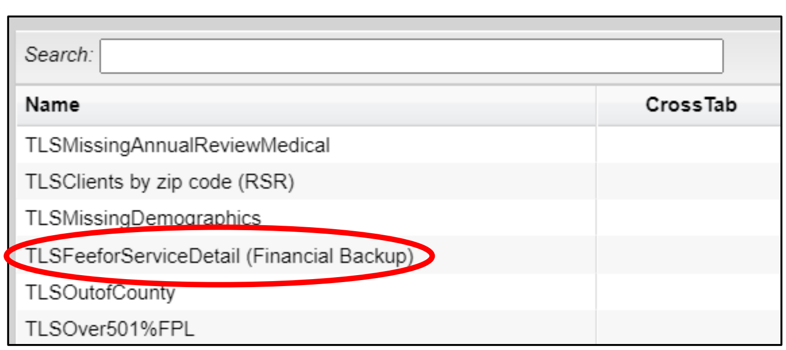
TLSFeeForService

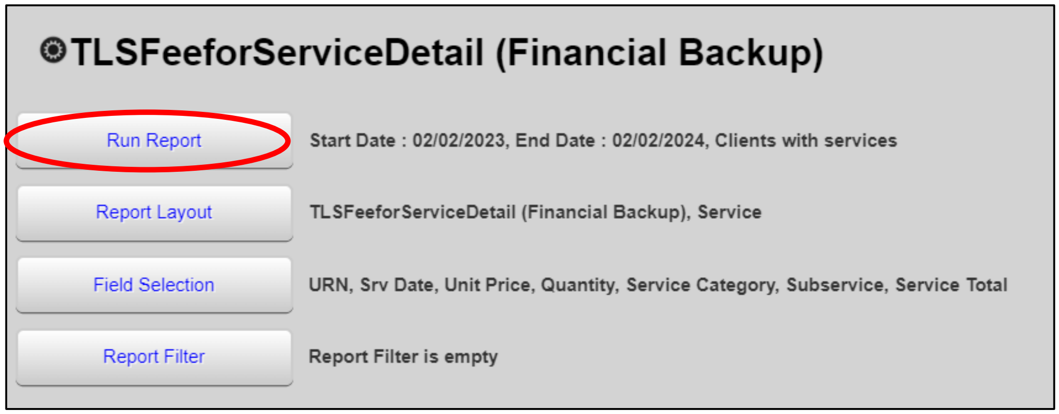
Navigate to this custom report by first going to **Reports** on the left navigation pane, then to **Custom Reports**, then to **Manage/Run Custom Reports**.



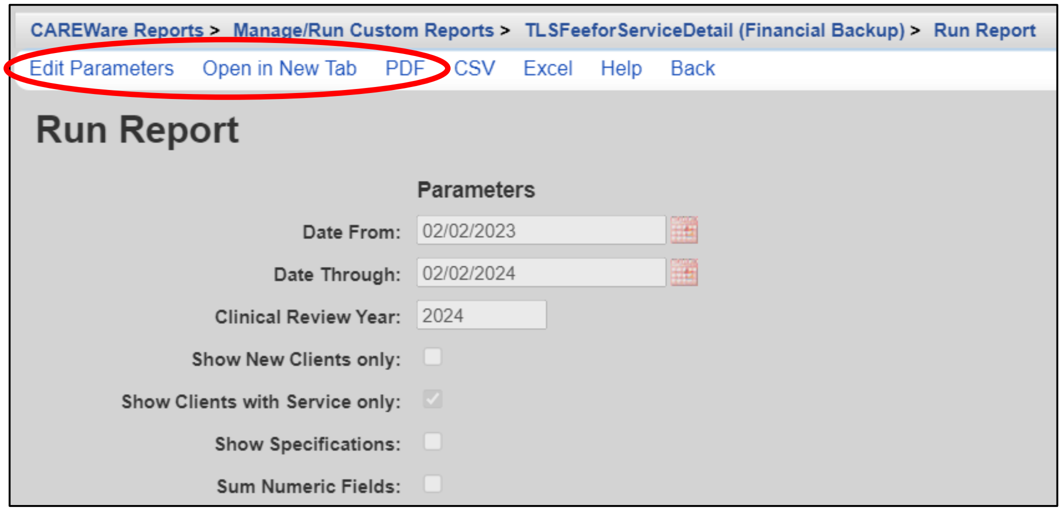
Double-click the listed report labeled **TLSFeeForServiceDetail (Financial Backup)** and run the report.

****NOTE**: Some agencies have the ability to run this report with client names. Please make sure that you are not running the report with names for your invoice submission.





From here, you can **Edit Parameters** as needed, then view the report by clicking **Open in New Tab** or **PDF**.



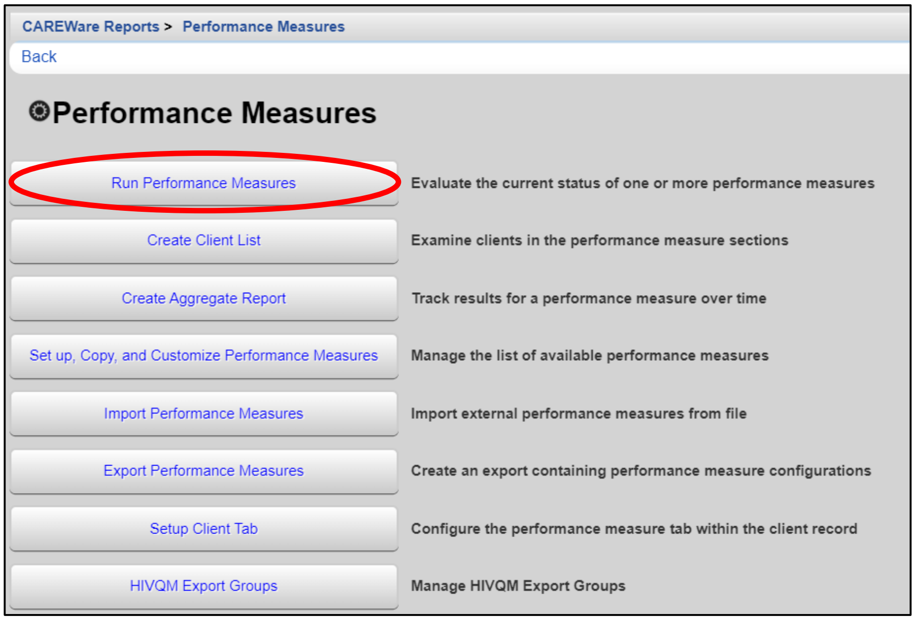
This report should be printed from your computer and, depending on your agency's internal process, submitted to your fiscal contact or combined with the required items listed on the FY2024 Fiscal Checklist.

PERFORMANCE MEASURES

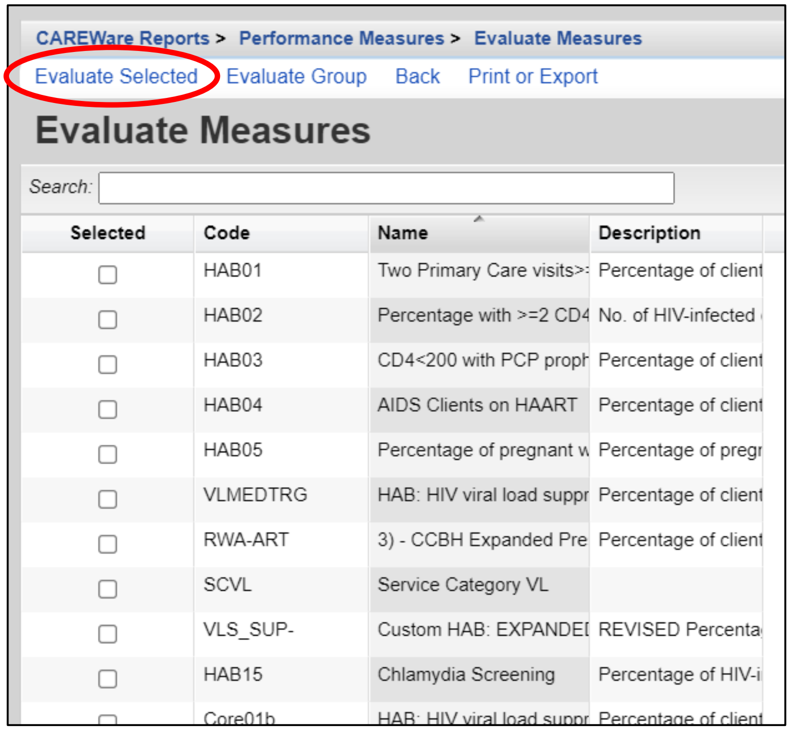
After logging in to your CAREWare account, click on **Reports** from the far left navigation pane, then select **Performance Measures.**

To evaluate a Performance Measure, select **Run Performance Measures**. This will bring you to a list of all the performance measures that can be run.

- For CQM data pulls:
    - Medical providers will use the reports with a code of VLMED, VLMEDYTH, VLMEDTRG, VLMEDMSM, VLMEDALW
    - Non-medical providers will use the reports with a code of VLSUP, VLSUPYTH, VLSUPTRG, VLSUPMSM, VLSUPALW

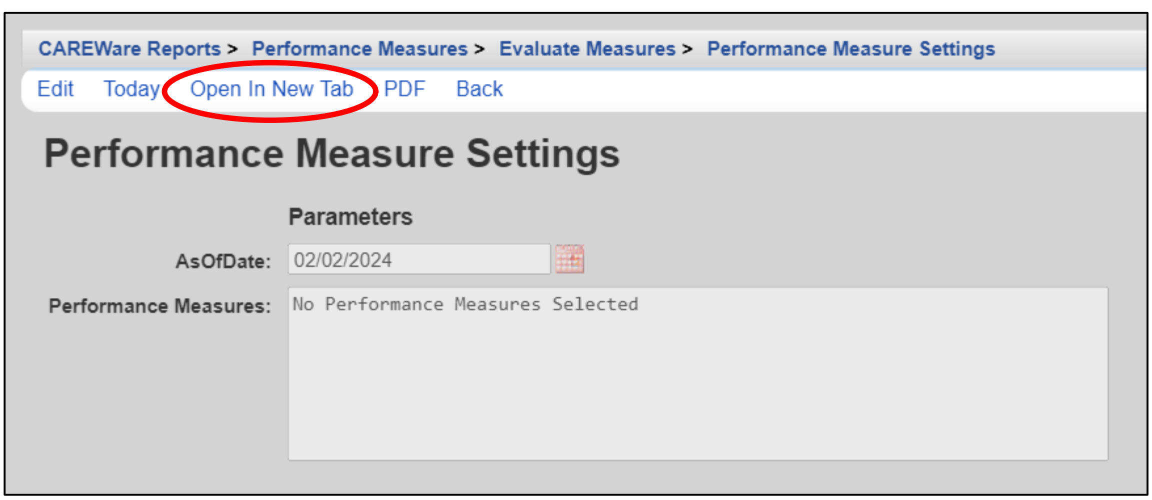


Select the desired Performance Measures and click **Evaluate Selected**.

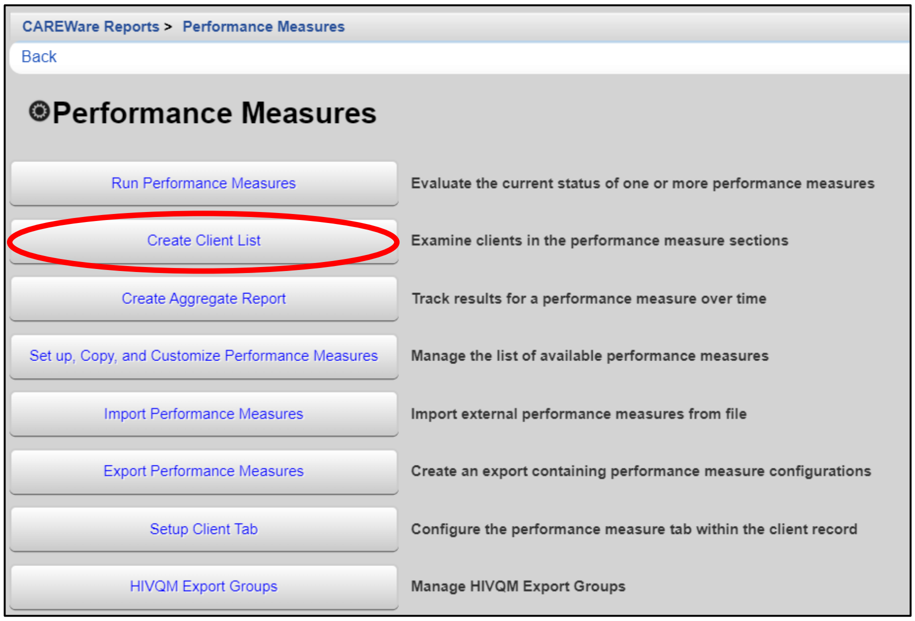


Edit the **As Of Date** as needed and select **Open In New Tab** to generate the Performance Measure report. The report will open in a separate tab on your browser.

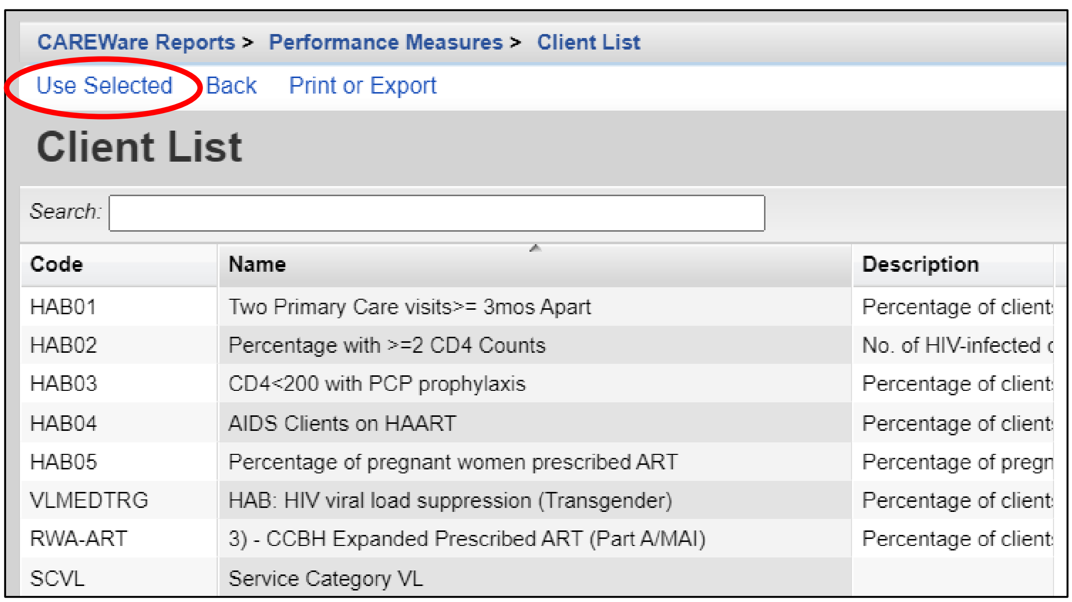
Your report will pull a timeframe of one calendar year behind your As Of Date (ex: As of date 02/03/2020 = Timeframe of 02/04/2019 – 02/03/2020).



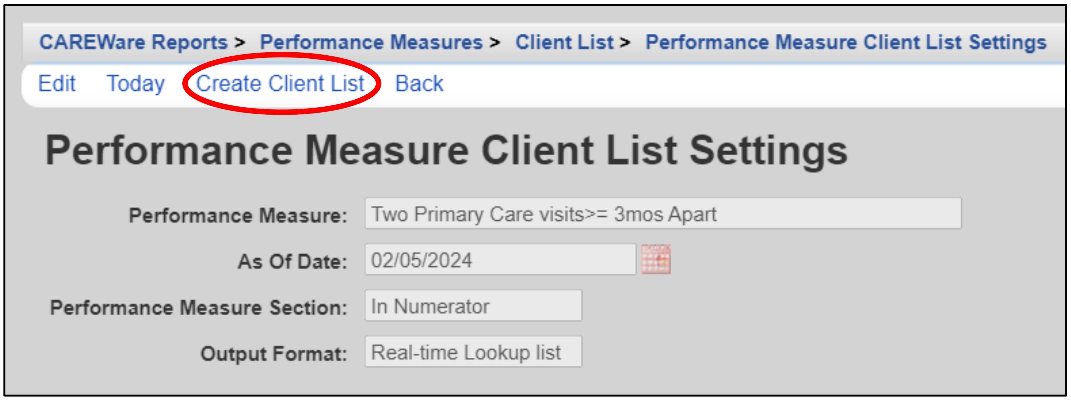
To **Create Client List** of a Performance Measure, select that option on the Performance Measures screen.



Select desired Performance Measures for the client list then click **Use Selected**:



Edit the information as desired and select **Create Client List:**



You can click "Edit" on the screen above to change client list settings.

- Performance Measure Section:
  - Select 'In Numerator' to see those clients that are virally suppressed
  - Select 'Not in Numerator' to see clients who are not virally suppressed
- Output Format:
  - Select 'Real-time Lookup List' to pull list that allows you to click clients to pull up client record.
  - Select 'Quick Paper List' to pull a printable list of clients.

RESOURCES

1. **CAREWare Help Desk**
   - Free technical support for the RW CAREWare software available to end-users nationwide.
     Toll Free: 877-294-3571
     Mon - Fri
     12:00pm - 5:00pm ET
     Email: cwhelp@jprog.com

2. **Using the CAREWare Modules**
   - Link to interactive CAREWare online training modules, developed by the State of Oregon.
     - Scroll to the bottom of the webpage, see 'CAREWare Modules').
     - This training consists of a series of 11 modules demonstrating the features of CAREWare.
     - http://public.health.oregon.gov/DISEASESCONDITIONS/HIVSTDVIRALHEPATITIS/HIVCARETREATMENT/Pages/CaseManagerTraining.aspx

3. **Join or Leave the NIH CAREWare ListServ**
   - Sponsored by the National Institute of Health (NIH), CAREWare ListServ is an online user group forum. End-users can inquire and collaborate with colleagues regarding the use of modules and features in CAREWare.
     - https://list.nih.gov/cgi-bin/wa.exe?A0=CAREWARE

4. **TARGET Center**
   - Resource Library (archived HRSA/HAB webinars), News and Events, Ryan White Community, and Help Desk.
     - https://careacttarget.org/

5. **Cleveland TGA Website**
   - Resources for providers, and the community. Information includes local policy notices, presentations, training materials, service standards of care, and more.
     - www.ccbh.net/Ryan-White