



Indiana
Department
of
Health

Breakout Session 1

CAREWare Features

Traci Johnson

OUR MISSION:

**To promote, protect, and improve
the health and safety of all Hoosiers.**

OUR VISION:

**Every Hoosier reaches optimal health
regardless of where they live, learn,
work, or play.**



IDOH CAREWare Team

Traci Johnson and Tracy Grimme

-Assist with user access, removal, CAREWare guidance/support

Doug Mellinger

-Adds Clients to system or to appropriate domain and CAREWare support

Tri Young

-CAREWare errors and locked account assistance

-IDOH Administrative Support

Marion County Public Health Department

-Shared system with IDOH, assists in maintaining user access for multiply funded sites, support of day-to-day activities, and guidance on reports, etc.

Case Notes Announcement

- Case Notes are now live in all IDOH funded agencies
- Case Notes can be read by anyone within your agency domain
- Available for all service categories but are not required for all
 - Case Note Authors need to be built into CW we will work with each agency on this process
 - Case notes should not detail medical treatment plans
- IDOH will be working on additional guidance on case notes in CAREWare

Case Note Details

The screenshot shows a web application interface for managing case notes. On the left is a vertical navigation menu with a gear icon at the top, containing the following items: Customize, Client Summary, Demographics, Client Report (highlighted with a red border), Encounter Report, Services, Annual Review, Case Notes, Custom Forms, Vital Signs, Hospital Admissions, Medications, Labs, and Screenings. The main content area has a breadcrumb trail at the top: Find Client > Search Results > Demographics > Case Notes. Below the breadcrumb is a 'Back' button. The main heading is 'Case Notes' with a gear icon. There are two primary buttons: 'Case Note Entry' with the description 'Enter a new case note for the client', and 'Case Note Report' with the description 'Run a report on case notes entered for this client'.



CAREWare Standard Reports

Report Options



The screenshot displays the CAREWare Reports interface. On the left is a sidebar menu with the following items: Customize (selected), Provider Summary, Add Client, Find Client, Reports, Rapid Entry, Appointments, My Settings, System Information, System Messages, Administrative Options, Switch Providers, and Log Off. The main content area is titled "CAREWare Reports" and features a sub-header "CAREWare Reports" with a gear icon. Below this are five report options, each in a button format with a description to its right:

| Report Option | Description |
|----------------------|------------------------------------|
| HRSA Reports | RSR and ADR |
| Custom Reports | Run or manage custom reports |
| Performance Measures | Run or Manage Performance Measures |
| Client Data Reports | Run reports on client information |
| Financial Report | Setup and run the financial report |

Client Data Reports

- Each agency has at least 1 person that can run reports. If you need to add additional staff to have this permission, please e-mail Tracy Grimme.
- Services Detail Report
- Financial Reports

Service Detail Reports

- Report will show all services/sub-services provided for clients over a specific date range
- Report will show date, service, unit, contract, and provider

Test, Client Test

URN: **CITS1010102U**


| Date: | Service Name: | Contract: | Units: | Total: | Recieved: |
|--------------|----------------------|-----------------------------|---------------|---------------|------------------|
| 5/6/2021 | RS-Follow -up | Part B Rebates 2020-2021 | 1 | \$0.00 | \$0.00 |


Financial Report

CAREWare Reports > Financial Report Settings

Funding Source Filter Edit Filter Run PDF Help Cancel

Financial Report Settings

Begin Date: 

End Date: 

Funding Sources:

Include Subservice Detail?:

Include Provider Information?:

If you need help with filters, please reach out to RW Services Team

Financial Reports

| Housing Services | Clients: | Units: | Total: |
|---------------------------------|-----------------|---------------|---------------|
| HS-Housing Assistance | 4 | 5 | \$0.00 |
| HS-Housing Counseling Visit | 32 | 99 | \$0.00 |
| Housing Services Totals: | 34 | 104 | \$0.00 |

| Case Management (non-medical) | Clients: | Units: |
|--|-----------------|---------------|
| NMCM-Discharge Visit | 1 | 1 |
| NMCM-Follow -up Visit | 339 | 1505 |
| NMCM-Initial Visit | 2 | 2 |
| Case Management (non-medical) Totals: | 340 | 1508 |



Service Entry

Staff Billing for Services

Staff Billing for Service:

- NMCM-Bethany Bryant-ES
- NMCM-Carrie Kaser-RIC
- NMCM-Dorothy Wilson
- NMCM-Julie Helman
- NMCM-KeeKee Coleman
- NMCM-Nerkis Roberts

If interested in building this into your CAREWare contract, e-mail RWCAREWare@isdh.in.gov



Custom Reports

Custom Reports

- IDOH is working with Marion County and Tri Young to build custom reports
 - Service Utilization Report called- "Part B services"

The screenshot shows a web application interface for generating reports. At the top, a breadcrumb trail reads: CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Part B services. Below this is a 'Back' button. The main heading is 'Part B services' with a gear icon. There are three main sections, each with a button and a description:

| | |
|-----------------|--|
| Run Report | Start Date : 01/01/2021, End Date : 01/31/2021, Clients with services |
| Report Layout | Part B services, Service |
| Field Selection | Staff Billing for Service , Name, Contract, Srv Short Name, Srv Date, Srv Qty, Srv Total |

On the right side of the interface, there is a 'Go Top' link.

Part B Services Report

Data Scope: AIDS Ministries/AIDS Assist
Report Start Date: 05/12/2021
Report End Date: 05/12/2021

| <u>Staff Billing for Service:</u> | <u>Name:</u> | <u>Contract:</u> | <u>Srv Short Name:</u> | <u>Srv Date:</u> |
|-----------------------------------|-------------------|----------------------------|------------------------|------------------|
| NMCM-Dorothy Wilson | Test, Client Test | Part B Rebates 2020 - 2021 | EFA-Housing | 05/12/2021 |



What's Next?

Upcoming Projects

- The ability for Case Notes in all domains.
- Sharing of services across agencies, will be coordinated with Marion County Public Health Department
- Service unit revisions
- Annual User Agreement signatures
- RWISE implementation
- Migration of pre-2020 services data into CAREWare (Summer/Fall 2021)

Contact

IDOH CAREWare Team:

RWCAREWare@isdh.in.gov

Tri Young Team:

rwsupport@triyoung.com

