

How to use the CAREWare AIDS Drug Assistance Program (ADAP) Module to complete the ADAP Data Report (ADR)

CAREWare 5.0

November 2012

Introduction

The CAREWare ADAP drug services module is designed to allow grantees who manage these services to track in detail client level AIDS Drug Assistance information. The module includes a complete medication list, searchable by generic medication name, brand name, or NDC and *includes all client-level fields required for the ADAP Drug Report or ADR.*

The HRSA/HAB reporting requirements for the ADR are available here:
<http://hab.hrsa.gov/manageyourgrant/adr.html>

New additions in version 5 include:

- Ability to track longitudinal enrollment history
- Efficiently establish drug dispensing fees for all or selected items

At the bottom of this document is a table listing each ADR field and where it is entered-or how it is calculated- in CAREWare.

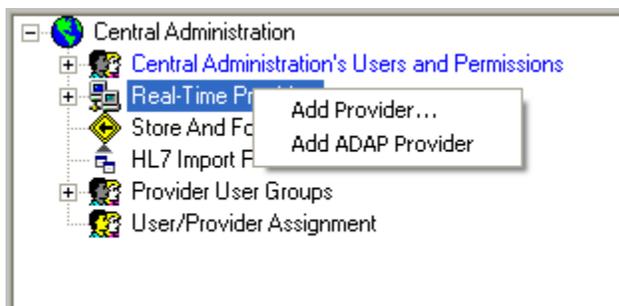
Getting Started

If you are new to CAREWare, you will need to refer to the set of user guides available on the following website: <http://hab.hrsa.gov/manageyourgrant/careware.html>

This guide only addresses issues associated with the ADAP module!

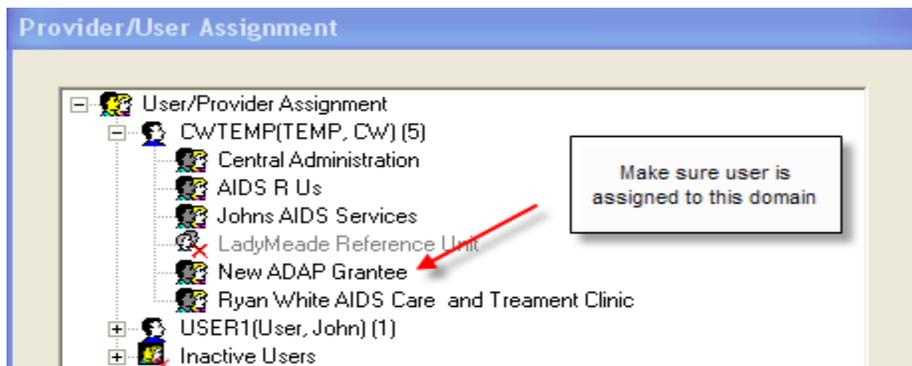
You must first activate the ADAP module by creating an ADAP domain. Current users can skip this section!

1. Log into Central Administration
2. Select Administrative Options
3. Go to the Provider/User Manager
4. Right-click the item labeled Real-time Providers > Select 'Add ADAP Provider' and supply CAREWare with the name



5. Go up to the new ADAP Provider entry (it will be named whatever you called it when you created it) and assign permissions. As a default, the ADAP provider will already have the basic permissions needed to use ADAP features.
6. Right-click the "User/Provider Assignment" node on the bottom and open that screen. Assign the user of interest (in this case "CWTEMP") to the new domain, as

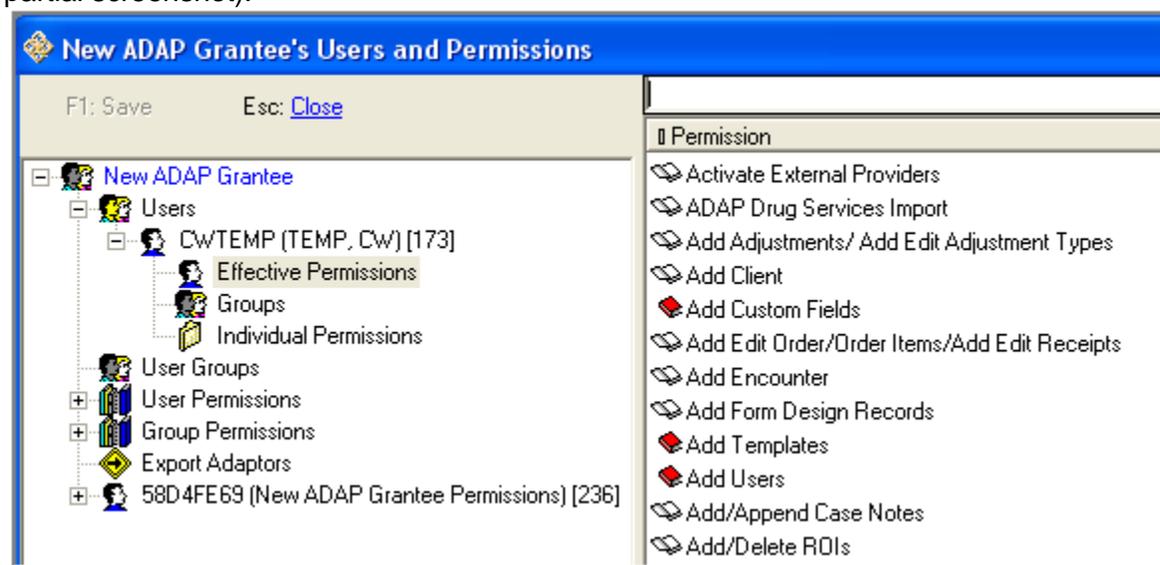
shown here, by simply selecting that user. If a user is not assigned to a specific domain, you will see a red X:



- Grant permissions to the user that you just added to this domain. A quick way to do this is simply to right-click the user and select **“Add template permissions.”** Select the ADAP Template.

Remember that user rights are hierarchical: You must first grant the Provider domain the right to perform specific functions before any user within that domain can perform those functions. If you need more information about assigning user rights, please refer to Quick Guide #9 “User and System Administration”.

We can look at the rights of this specific user and tailor them as needed (this is only a partial screenshot):



Again, please refer to Quick Guide #9 for further information on assigning user rights.

Once you've created the ADAP domain and given a user the rights to use it, you're ready to begin setup.

- Logout of the Central Administration Domain and log into the new ADAP Domain.
- If a user has not been added to the ADAP domain then they would not see that domain available to them after they log in.

Once you're logged into the ADAP domain:

- Go to Administrative Options > ADAP Setup

Activating the ADAP Formulary Medications List

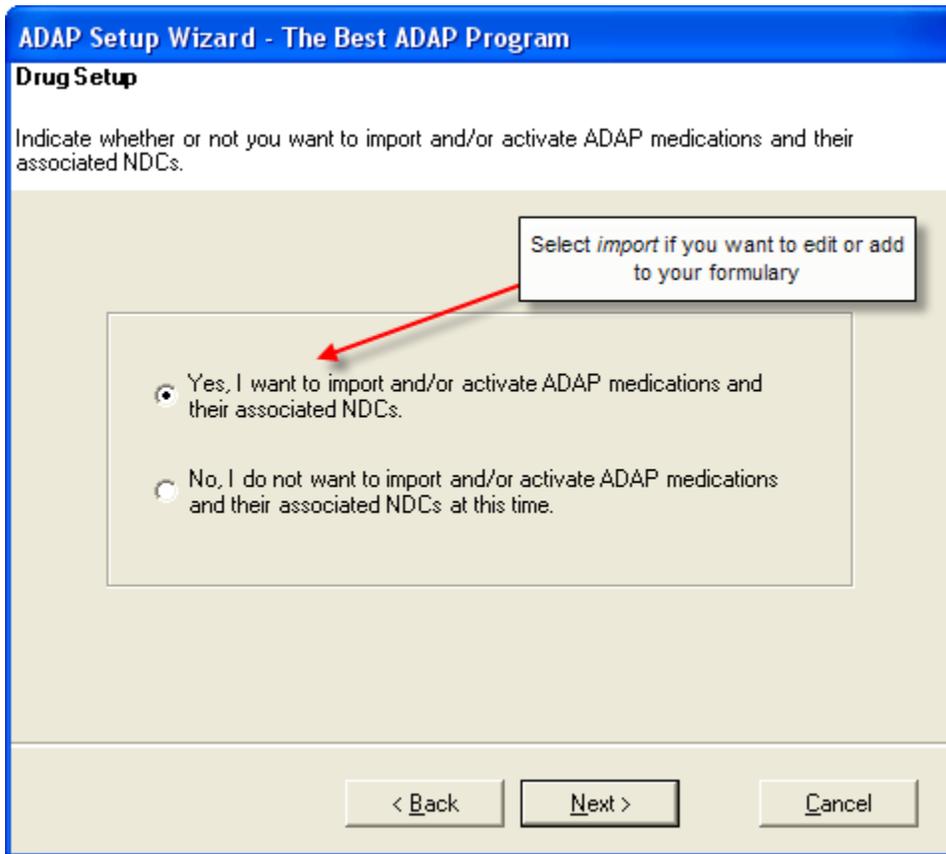
In order to enter ADAP drug services for your clients, you'll need to setup your active formulary. This includes finding the medications, adding them to your active list, and supplying any available default information such as drug dispensing fee, unit cost of the medication, and days (typically) prescribed. These settings can always be edited and even changed at the point of client-level data entry!

Note: The formulary that you create here is your State ADAP formulary and will also be used to populate the Grantee report.

You'll need to advance through a few screens in the ADAP Setup Wizard before you reach the one that asks if you want to import and activate the ADAP medications. The opening screen of the Setup Wizard looks like this:



Keep clicking Next until you reach the screen below
Select the first option to do this.

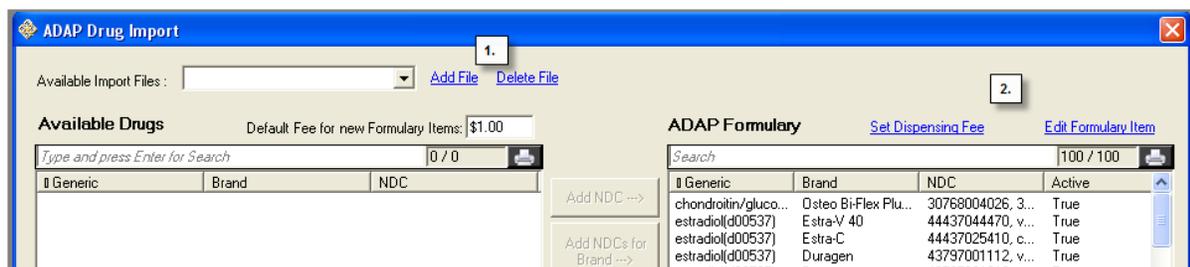


- The medications list is extensive, and contains virtually all approved drugs, cross-referenced by Generic ingredient, along with the associated d-codes, Brand Name, and NDC.

Here's a view of the ADAP Drug Import screen.

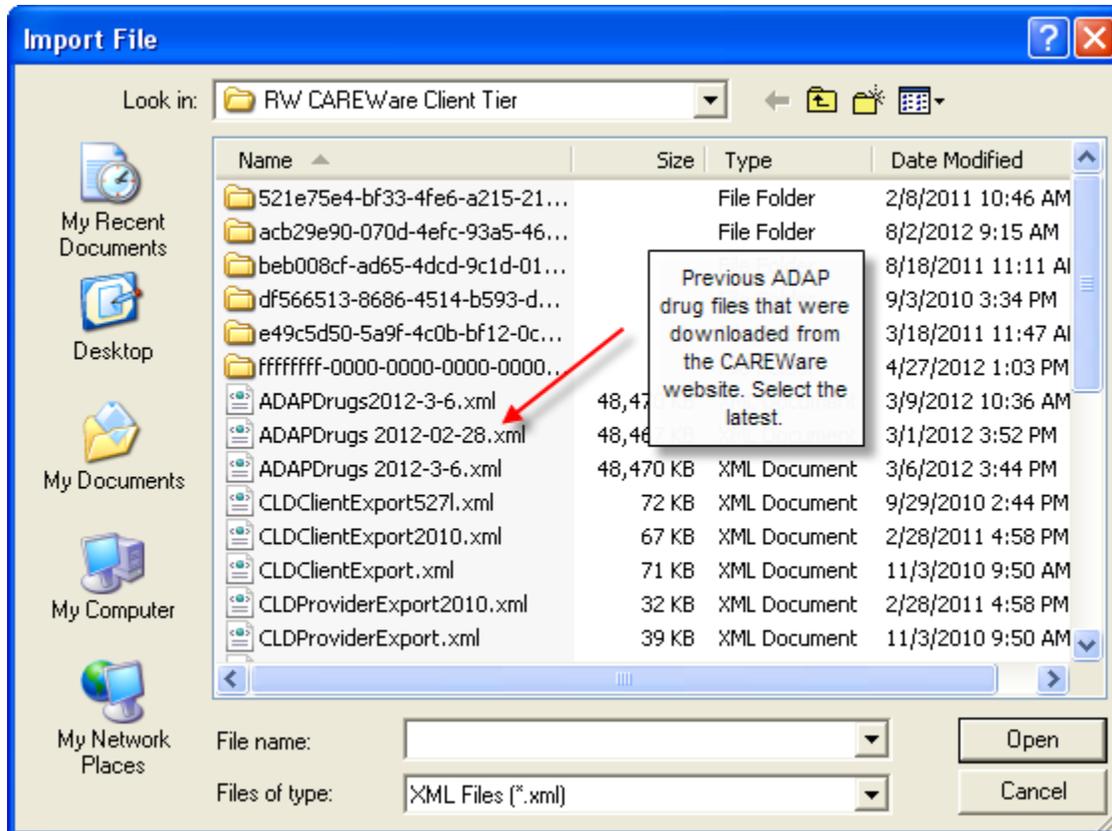
- The left-hand side shows all **Available Drugs** (after you've attached to the appropriate XML file)
(How do you move drugs from "Available Drugs" to "ADAP Formulary"?)
- The right-hand side lists your actual **ADAP Formulary**. Again, both lists are long, and the screen only shows a small portion. You can scroll through these lists by clicking NEXT on the bottom or, faster yet, typing in search criteria on the top.

1. Select "Add File" to attach to the adapimport.xml file. You may have a few that you've downloaded previously from the CAREWare website. Make sure you attach to the latest one.



ADAP files can be downloaded here: <http://hab.hrsa.gov/manageyourgrant/careware.html>

Go to the bottom of the page for the link.



Place this file in the following folder: C:\Program files\CAREWare\RWCarewareClientTier.

1. For example, if we wanted to add the drug tenofovir to our formulary, you can type in all or part of the name and hit enter; you can search by any string you want—generic, brand name, or NDC. CAREWare will return all medications that contain that string, for example as shown here.

Available Drugs Default Fee for new Formulary Items: \$1.00

tenofov | 11 / 11

Generic	Brand	NDC
efavirenz/emtricitabine/tenofovir(d05847)	Atripla	5456958
efavirenz/emtricitabine/tenofovir(d05847)	Atripla	1558401
efavirenz/emtricitabine/tenofovir(d05847)	Atripla	3535600
efavirenz/emtricitabine/tenofovir(d05847)	Atripla	3535600
emtricitabine/lopinavir/ritonavir/tenofovir(d0...	AccessPak for HIV PEP...	5515400
emtricitabine/nelfinavir/tenofovir(d07532)	AccessPak for HIV PEP...	5515400
emtricitabine-tenofovir(d05352)	AccessPak for HIV PEP...	5515400
tenofovir(d04774)	Viread	6195804
tenofovir(d04774)	Viread	5456953
tenofovir(d04774)	Viread	3535600
tenofovir(d04774)	Viread	3535600

2. You can now add any of the items on this list to our formulary. Select one entry in the group. To add multiple items at once, select one of the three top buttons in the center depending on your need: Add a specific NDC; add NDCs for Brand (all NDCs

for that Brand Name will be added to your formulary); or add NDCs for Generic.

New in version 5: When you add a new drug to your formulary, you can also set the **Default Dispensing Fee**. Enter that in the box on the top. In the example shown, the dispensing ~~dispensing~~ fee of \$1.00 will be added for these drugs. We can always change that at the point of data entry..

- Remember that each medication entry within a brand or generic group is unique by NDC; the details are listed in the fields below, including the strength and the manufacturer/labeler.
- Just as you've added groups of medications to your Formulary on the right, you can remove them by groups; that is the function of the bottom three buttons in the center of the screen. **You can't remove a medication if it has been prescribed to any client, but you can deactivate it.**
- Once you've moved a medication over to the formulary, you can click '**Edit Formulary Item**' on the bottom right to provide additional important information on that medication. Here's a view of the ADAP Formulary Edit Screen.

The screenshot shows a form for editing a medication entry. The fields are as follows:

Generic:	tenofovir(d04774)	Brand:	Viread					
NDC:				61958040101, 300 mg, 30, Gilead Sciences				
Active Date:	Unit Price:	Disp. Fee:	Total:	Days:	Units:	Indication:	<input checked="" type="checkbox"/> Active	
10/10/2012	\$0.00	\$1.00	\$1.00	30	30	Antiretrovirals	<input checked="" type="checkbox"/> Requires Protocol	
				Save	Cancel			

For each entry we can supply:

- Active Date: (Date this drug was made active/available in your formulary)
- Unit Price (price per pill, tablet, or vial), used to calculate item #29 in the ADR.
- Dispensing Fee (if not already populated): used to populate item #31
- (Total Dispensing fee : this field is auto-calculated)
- Days of prescription (New for ADR): used to populate item #28
- Units (number of pills, etc. dispensed)
- Indication (Antiretroviral, Opportunistic Infection Treatment or Prevention, Other.)
- And on the right you can check if this medication is active or requires a protocol. This information will be used to populate the Grantee level report.

NOTE: The values entered here in the formulary setup will auto-populate when you enter a record for a client, but these values can always be overwritten.

New in version 5: Advanced dispensing fee setup feature.

Select "Set Dispensing Fee" on top right above your formulary list. This box will appear:



As the radio buttons make clear, you can set dispensing fees for selected medications or update the fee for all medications in your formulary. The latter may take a moment depending on the size of your list.

Use your control button and mouse to highlight selected medications.

Now that we've set up our formulary, we're ready to enter the rest of the service data on the clients.

Entering enrollment history and Drug and insurance Services for a client

The two main ADAP-related screens in the client record are Drug Services and Insurance Services. Here's a view of the Drug Services screen for a specific client:

New in Version 5: The biggest additions to the Drug Services screen are:

- Enrollment History feature (far right with red arrow!). Also accessible on Insurance Services tab
- Application Receipt Date
- ADAP Enrollment status (new values required for ADR)

Brown, Buster

Appointments | Orders | Forms | Change Log | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | **Drug Services** | Insurance Services | Annual Review | Encounters | Referrals | HIV C&T | Relations | Custom Tab 1 | Custom Tab 2 | Cus

Year: 2012 | Vital Status: Alive | Deceased Date: | App Receipt Date: 9/29/2011 | ADAP Enrollment Status: Enrolled, receiving services | Latest Enrollment Date: 08/12/2012 | [Enrollment History](#)

Add/Edit Service Detail:

Date: | Dispenser: | Drug / NDC : Select Drug / NDC | Funding Source:

Days: | Units: | UnitPrice: | Drug Cost: | Dispense Fee: | Total Cost: | Save | Cancel

Search 3 / 3

#	Date:	Dispenser:	NDC:	Units:	Unit price:	Drug Cost:	Dispense Fee:	Total Cost:	Days:
10/3/2012	State of Calif...	00904150160	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
8/2/2012	State of Miss...	00054208025	10	\$0.50	\$5.00	\$15.00	\$20.00		
3/7/2012	State of Miss...	00093538506	30	\$1.00	\$30.00	\$0.00	\$30.00		

Here's a look at the Enrollment History screen:

Date:	Enrollment Status:	Reason for Disenrollment:
10/11/2012	Disenrolled	Did not fill prescription
8/12/2012	Enrolled, receiving services	

Unlike prior versions, users can now track a complete longitudinal history of enrollment in ADAP. Simply add new records as the client is re-enrolled or disenrolled for some reason.

- The ADAP application date (date application completed) will serve as the initial ADAP enrollment date. (ADR item #15)
- If client is disenrolled, select from the list of values shown above to indicate why. (ADR item #19)
- Except for the addition of the field “Days” to capture the length of the prescription, data entry for a drug service is largely unchanged from earlier version. The value for Days is typically 30, 60, or 90, but can be set to any number that accurately describes the prescription on this date. (ADR item #28)
- As we saw above in the formulary setup, you can enter a “typical” number of days for any medication, and that number will auto-populate when you enter that drug for a client, but you can always edit the value.

In order, the fields are as follows:

- **Date:** Date medication dispensed to client (ADR item #27)
- **Dispenser:** Add dispenser name here. Click the ellipsis to the right of the field to add Dispenser names.
- **Drug/NDC:** Select the hyperlink “Select Drug/NDC”. That will bring up a new screen allowing for a quick way to search for any medication.
- **Funding Source:** Select ADAP or Other.
- **Days:** Duration of prescription, as described above.

- **Units:** Number of pills, tablets, etc. dispensed. For example, if the days prescribed is 30 and the medication is taken twice a day, the number of units dispensed would be 60.
- **Unit Price:** This is the price of the medication per pill or tablet, etc. The unit price will default to what you've already entered but can be changed here.
- **Drug cost:** This is calculated by multiplying Days x Units x Unit Price.
- **Dispensing fee:** Populated from value entered in formulary, also can be edited here.
- **Total cost :** Auto-calculated as Drug Cost plus dispensing fee.

Entering Insurance Services

You'll need to first create a contract to enter insurance services. ADAP insurance contracts can be created through the Setup Wizard. Insurance service entry works the same way as it does in the regular CAREWare service tab. Please refer to Quick Guide #2 for details.

New in Version 5:

The following new insurance service categories have been added:

Subservice	Category
Medicare Part D Out-Of-Pocket (ADAP)/AIDS Drug Assistance Program	ADAP Insurance
Medicare Part D Co-Payment (ADAP)/AIDS Drug Assistance Program	ADAP Insurance
Medicare Part D Co-Insurance (ADAP)/AIDS Drug Assistance Program	ADAP Insurance

Note: For insurance services that extend over months, CAREWare will ask you to furnish the number of months and the unit cost of that service per month. If you only know the total amount to be furnished for this insurance coverage, and do not know the unit cost (cost/month) simply enter the total value in the Cost field; CAREWare will auto-calculate the unit cost.

For co-pays and other one-time items, simply leave the Units as 1 and enter the cost.

New in Version 5: Demographic fields for the ADR

To meet reporting requirements for the ADR, some additions were made to the health insurance fields in the Annual Review screen:

- High Risk Insurance Pool (item #12 in ADR)
- New categories added for insurance: Medicare Part A/B; Medicare Part D (item #13 in ADR)

They are shown here in this screenshot of the new Annual Review tab:

Demographics | Drug Services | Insurance Services | Annual Review | Encounters | Referrals | HIV C&T | Relations | Custom Tab 1 | Custom Tab 2 | Cus

Annual | Annual RSR View | Annual Custom Fields | Quarterly

Summary Data as of 10/12/2012 Bring Forward

Insurance

Primary Insurance:
Other Insurance:

Federal Poverty Level 7/31/2012
Household Income: **\$24,000.00**
Household Size: 2 Poverty Level: 159%

Annual Screening

HIV Primary Care Hospital outpatient center	7/31/2012
Housing Arrangement Stable/Permanent	8/7/2012
HIV Risk Reduction Counseling Yes	8/2/2012
Mental Health Yes	8/2/2012
Substance Abuse No	8/2/2012

Insurance Add Edit Delete

Insurance Assessment :

Primary Insurance: Medicaid Date: 10/12/2012

Medicaid
 Medicare (unspecified)
 Medicare Part A/B
 Medicare Part D
 No Insurance
 Other
 Other public (e.g. Champus, VA)
 Private
 Medicare (Part unspecified)
 Other
 High Risk Insurance Pool

Save Cancel

Important Note for current users of the CAREWare ADAP module who are updating to the new version 5.

When you upgrade to the new build, values for Enrollment status and reasons for disenrollment will need to be updated, as will the health insurance value for Medicare. The reason for this is that the old values for these fields do not easily match the new ones.

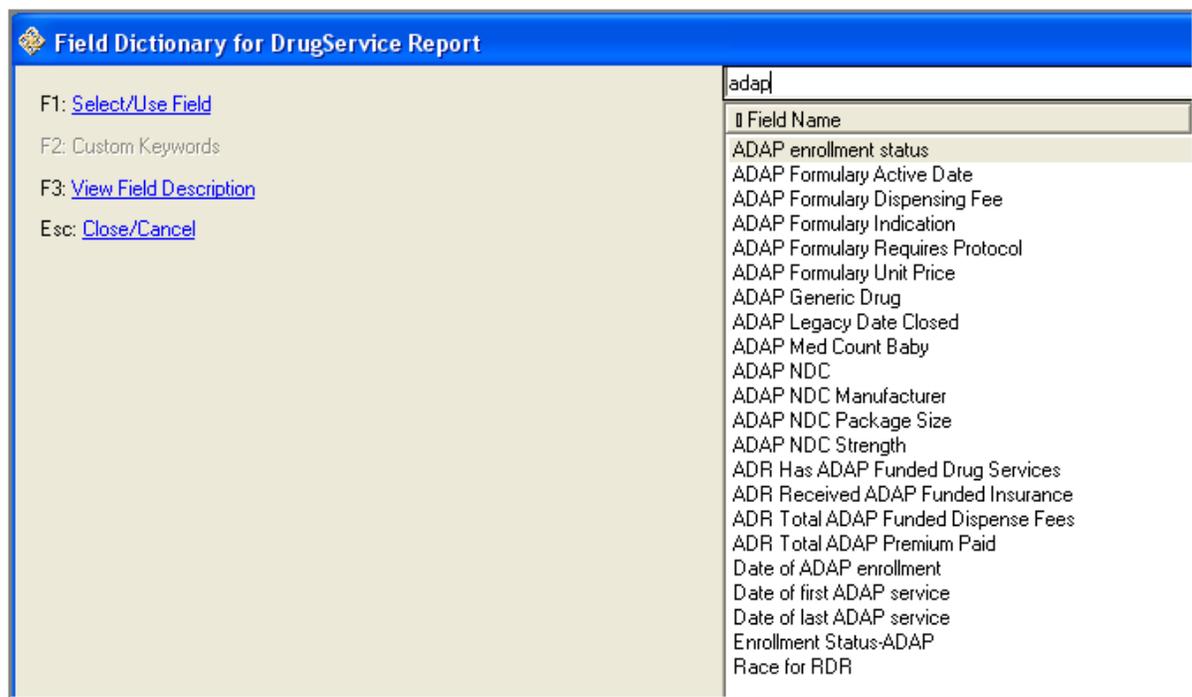
To make it easy to find those clients that will require updates in their values, CAREWare will display them as "Legacy Enrollment" or "Legacy Disenrollment" or, in the case of Medicare, (Part unspecified). Run a custom report or performance measure to find those individuals in your database and update their values.

Drug Service Custom Reports

All the fields in the ADAP module can be used in Custom Reports under the Drug Service report type.

In custom reports, create a new report of report Type Drug Service.

Create a field selection. Add a new field; you'll find all the new drug service fields listed together beginning with ADAP, as shown here:



- See the quick guides #7 and 8 for further information on building custom reports.
- Insurance Services custom report fields are the same as those for non-ADAP services -- use the "Service" report type.

Client-level ADR fields and their Location in CAREWare

#	Field Name	CAREWare Screen
2	Encrypted UCI	Demographic
3	ADAP Number	(Grantee setup)
4	Ethnicity	Demog.
5	Race	Demog.
6	Gender	Demog.
7	Transgender	Demog.
8	Pregnancy Status	Pregnancy tab or Screenings
9	Year of Birth	Demog.
10	HIV/AIDS Status	Demog.
11	Poverty Level	Annual review
12	High Risk Insurance	Annual review
13	Health Insurance	Annual review
14	New or Existing Client	Determined from initial enrollment date entered on drug or insurance service screen
15	Date Completed Application Received	Drug/insurance service screen
16	Date Application Approved	Determined from initial enrollment date entered on drug or insurance service screen
17	Date of Recertification	Enrollment history link on drug or insurance services screen
18	Enrollment Status	Enrollment history link on drug or insurance services screen
19	Reason(s) for Disenrollment	Enrollment history link on drug or insurance services screen
20	Receipt of Insurance Services	Insurance service tab
21	Amount Paid for Premiums	Summed from insurance services tab that are in reporting period
22	Months Coverage of Premiums Paid	Summed from insurance services tab that are in reporting period
23	Amount Paid for Co-pays and Deductibles	Summed from insurance services tab that fall within reporting period
24	Amount Paid for Medicare Part D	Summed from insurance services tab that fall within reporting period
25	Receipt of Medication Services	Drug services tab in reporting period
26	Medications Dispensed	Drug services tab
27	Start Date for Medication	Drug services tab
28	Days Supply of Medication	Summed over drug services in reporting period
29	Amount Paid for Medication	Drug services tab
30	Payment of Separate Dispensing Fees	Dispensing fee in drug services
31	Amount Paid for Separate Dispensing Fees	Summed from dispensing fee in drug services tab
32	Most recent CD4 Count Date	Encounters-labs
33	Most recent CD4 Count Value	Encounters-labs
34	Most recent Viral Load Date	Encounters-labs
35	Most recent Viral Load Value	Encounters-labs