CAREWare 6

June 2019

Quick Start Guide #2

Setting Up Contracts and Services

CAREWare Quick Start Guides will walk you through the basics of setting up, managing, and using the main CAREWare functions. It is intended for non-technical users who need to get basic information in and out of CAREWare.

PLEASE NOTE: The client data used in these manuals is purely fictional.

First Things First

What are contracts?

CAREWare has been set up to mirror the way services are delivered in the real world. For instance, your agency may have a contract to provide Outpatient Ambulatory Health Services (OAHS) services, funded by the Ryan White HIV/AIDS Program (RWHAP) Part B. Under that contract, you may provide a variety of subservices - including lab, medical visit, nurse visit etc. In CAREWare, you'll be setting up your contracts to reflect those subservices.

Remember:

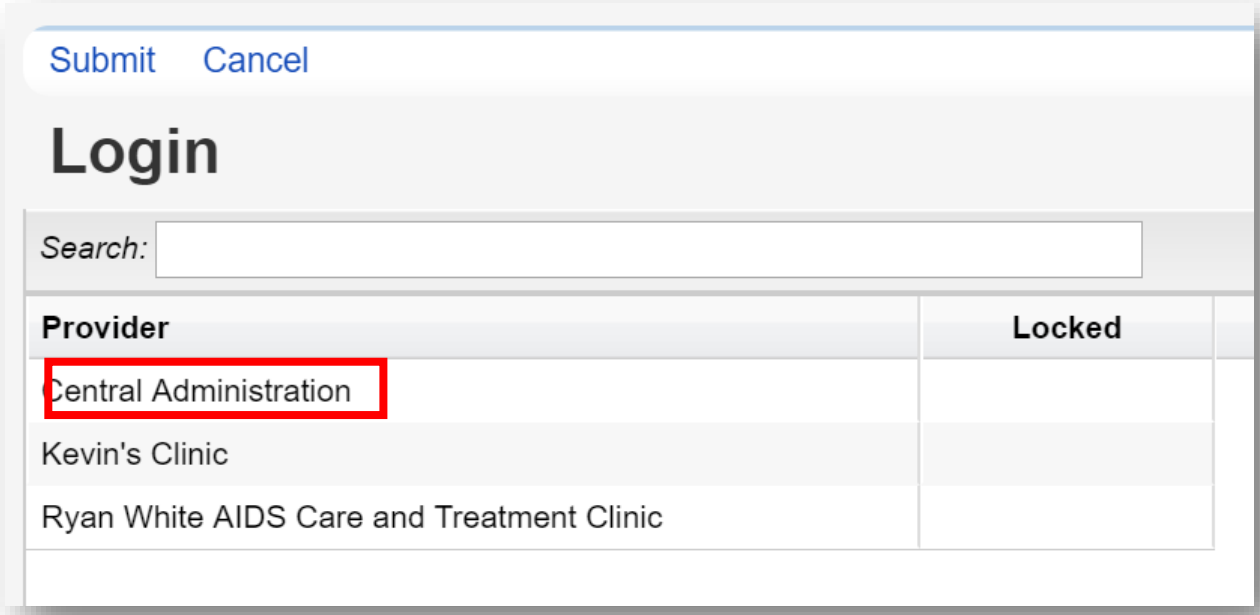
- At least one contract must be set up in CAREWare before you can begin entering services!
- A client needs to have received at least one CARE Act-funded service AND reported as RWHAP Eligible within the reporting period to be included in the RSR report.
- Standardized setup of contracts, services, and subservices in CAREWare is essential to ensure accurate client-level data collection and throughout the reporting year. Proper setup of contracts before you begin data entry helps avoid data inconsistencies in the future.
- Starting in 2019, a new funding source, "Ryan White-related (including program income and pharmacy rebates)" has been added to CAREWare 6 and can now be used.

What do I need to get started?

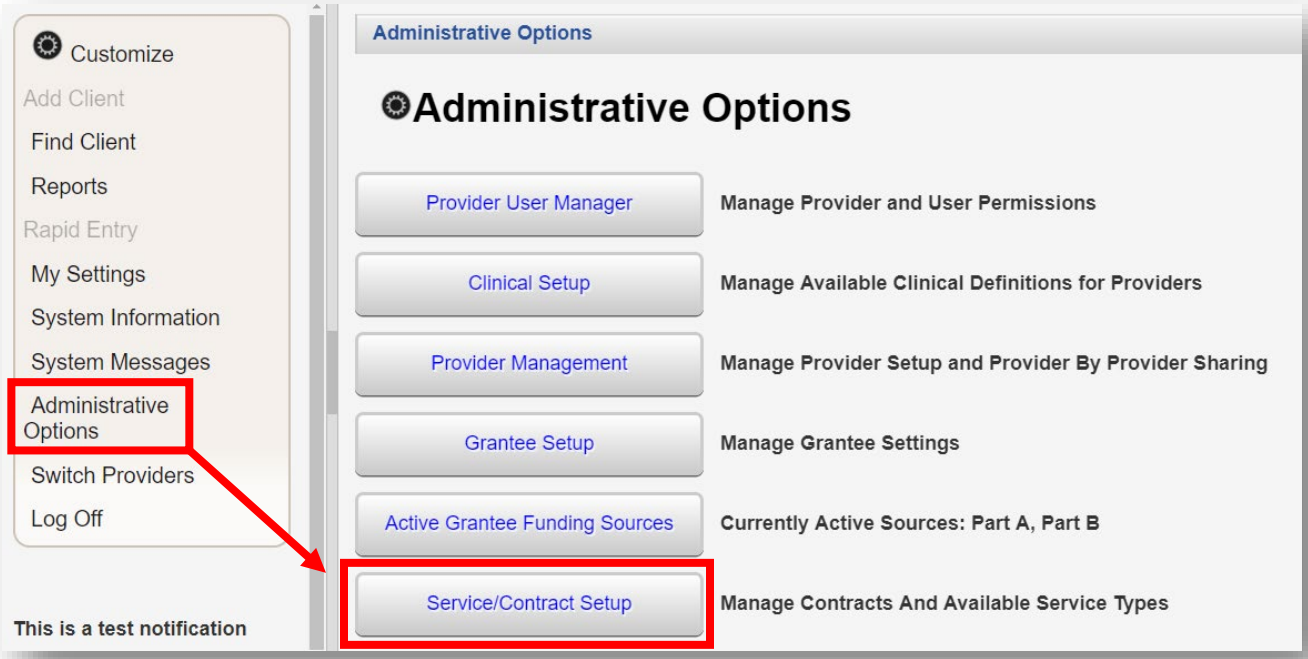
- You will need to know the funding sources and services provided for each of your agency program contracts to configure them properly in CAREWare.
- If you have multiple providers, it is recommended that contracts be created in the Central Administration domain (and therefore only editable by users with access to Central Administration) for quality control purposes.

Contract Management

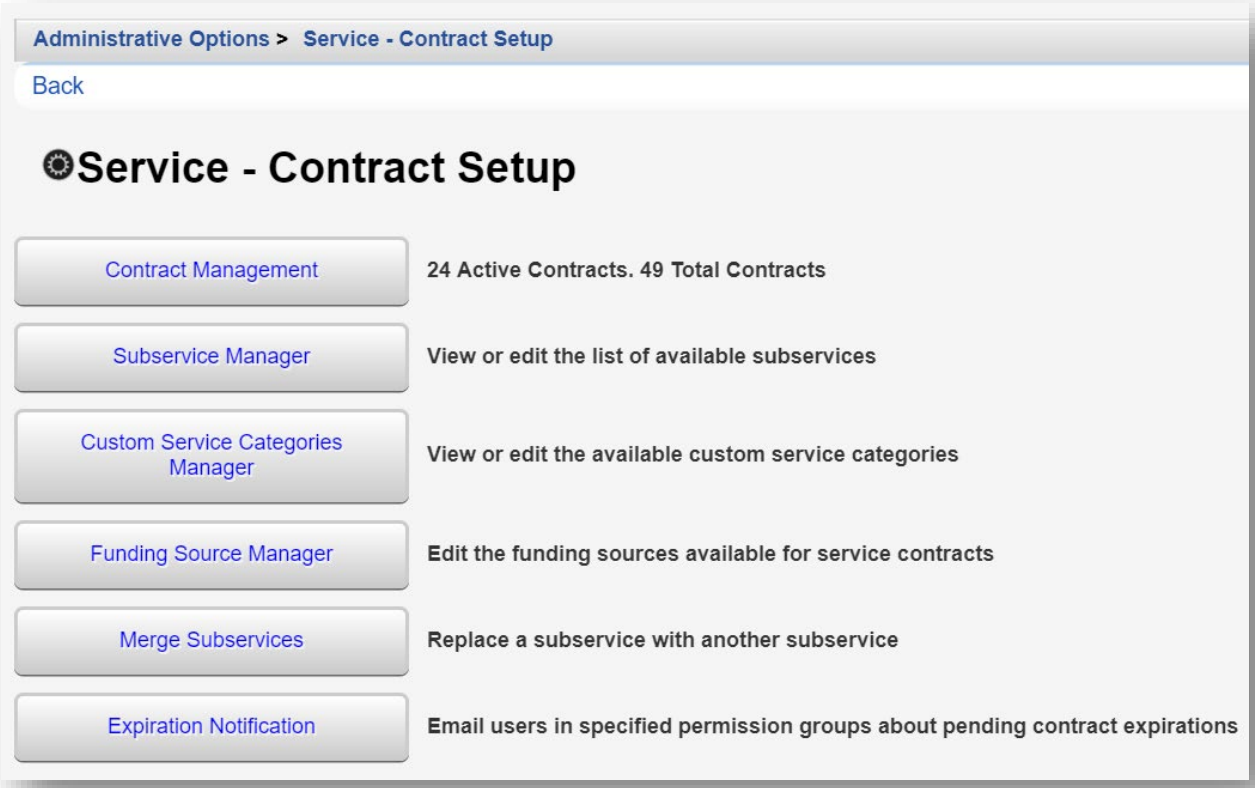
1. Log into CAREWare with sufficient permissions to manage and configure provider contracts, services, and subservices. For security and quality management purposes, we recommend configuring all contracts under the **Central Administration** domain.



2. Select **Administrative Options** from the **Main Menu** and then **Service/Contract Setup** from the **Links** menu.

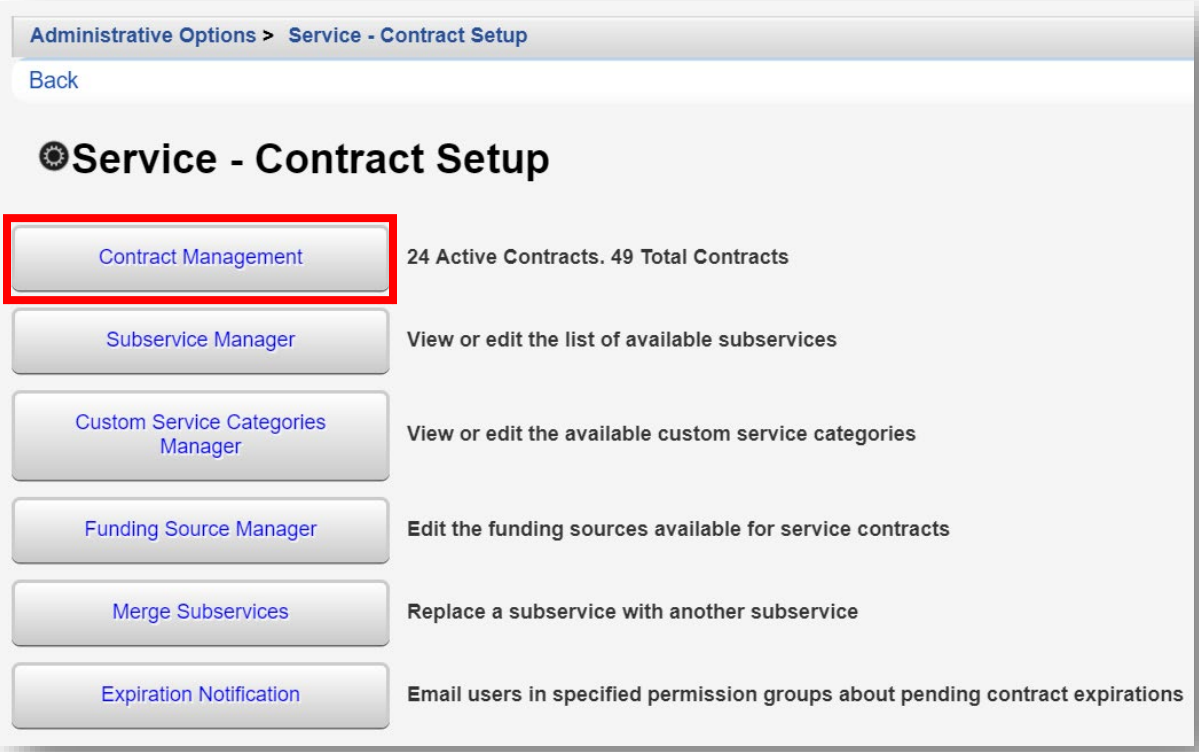


3. You will now be on the **Service - Contract Setup** menu.

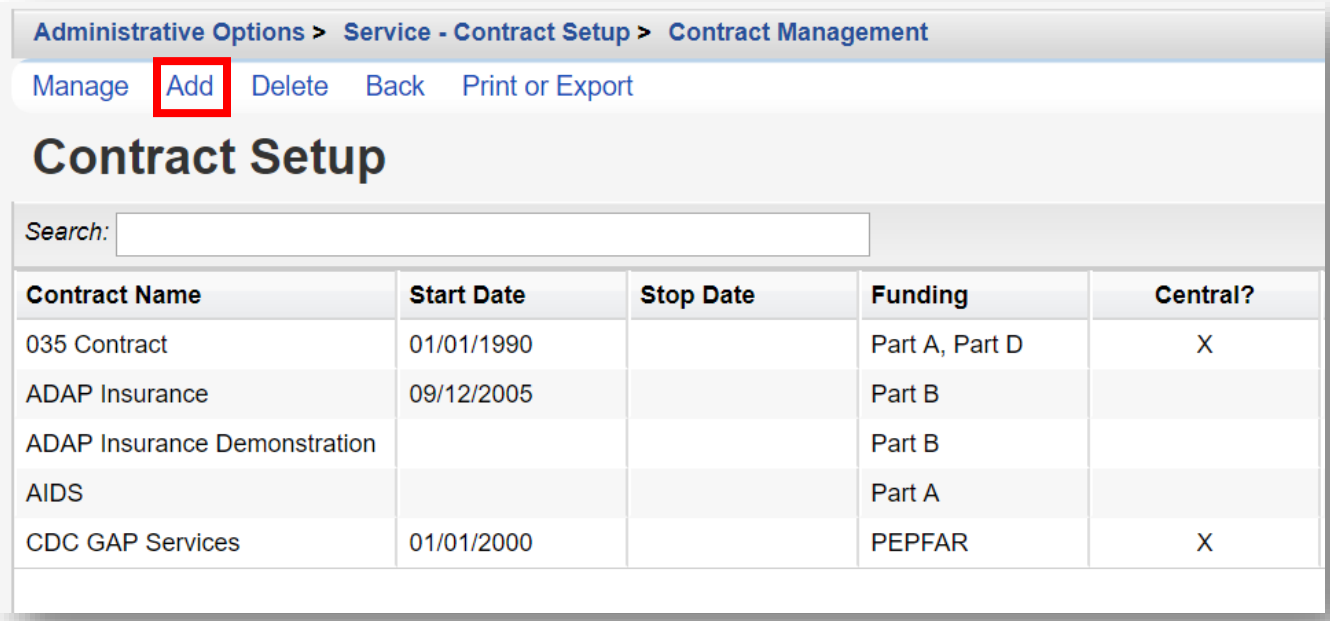


Adding a Contract

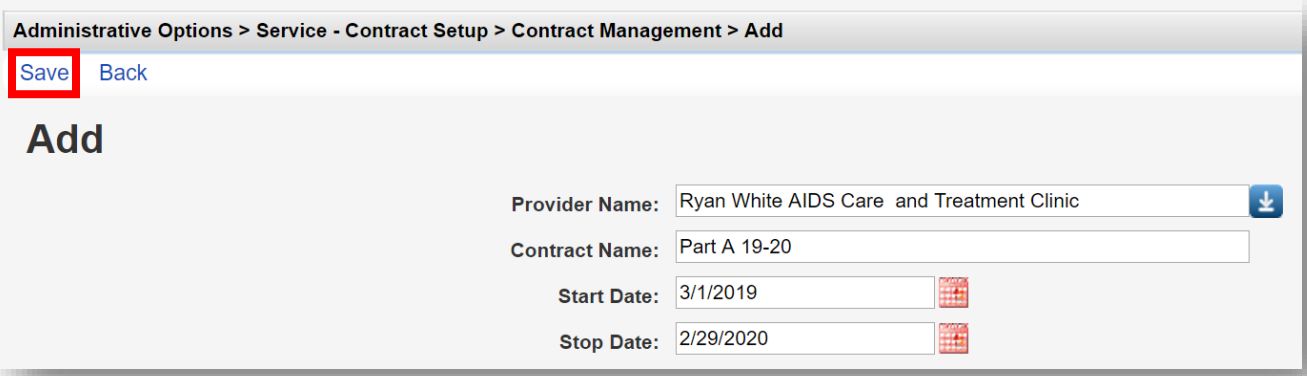
1. From the **Service - Contract Setup** menu, select **Contract Management**.



2. From the **Contract Setup** menu, select **Add**.

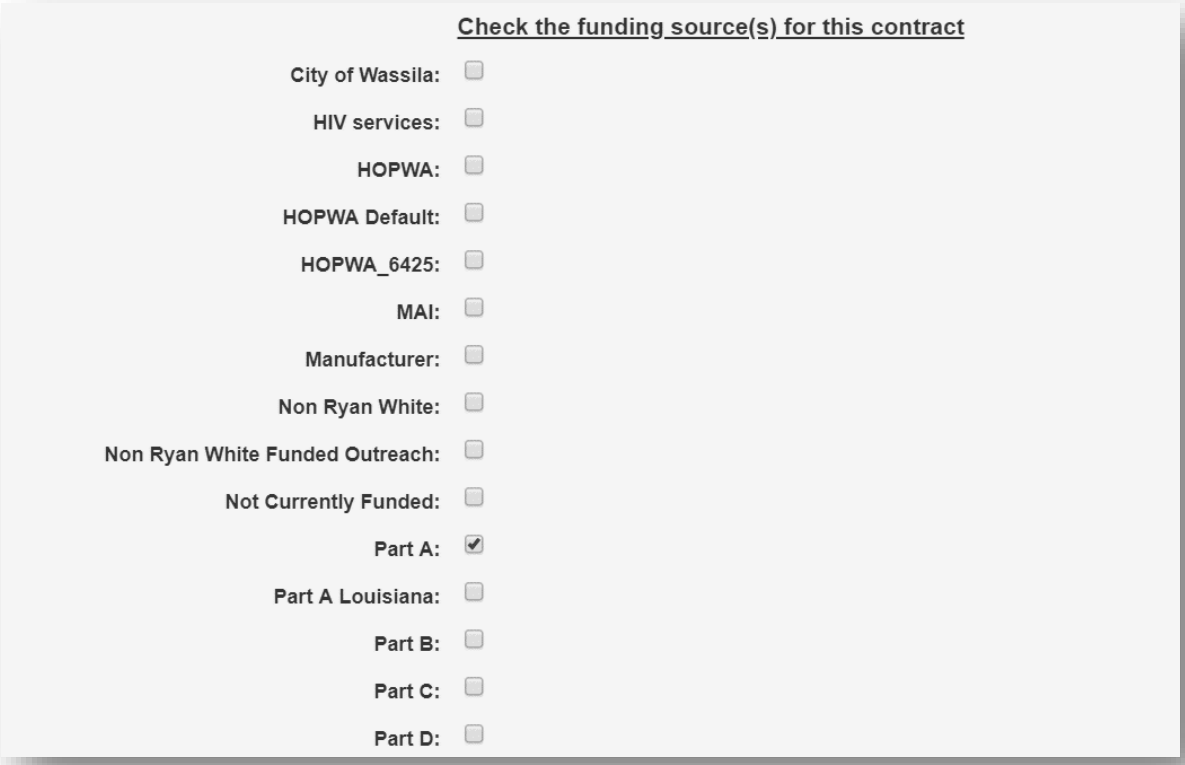


3. Enter in the following information (as applicable).
   - **Provider Name**
   - **Contract Name**
     - It is recommended to use the CARE Act-funded grant source in the name of your contract(s).
   - **Start Date**
   - **Stop Date** (optional)



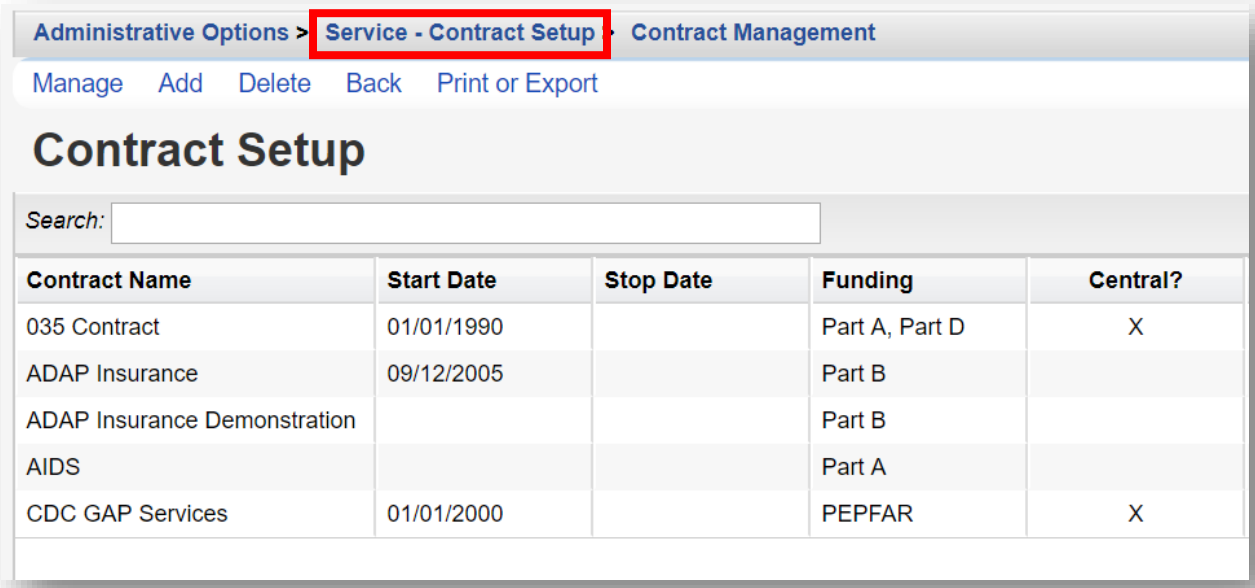
If a **Stop Date** is entered, services cannot be entered past this date! You may wish to enter a stop date for quality control purposes or if your contracts and services vary from year-to-year.

4. Scroll down and select the **funding source** for the contract. Once complete, click **Save** (see previous screenshot). You will now return to the **Contract Setup** menu.



NOTE: It is highly recommended that you setup contracts under a single funding source, such as, Part A or Part B or Non-RWHAP. If multiple funding sources are selected for a single contract, separation of services by individual funding sources will not be possible.

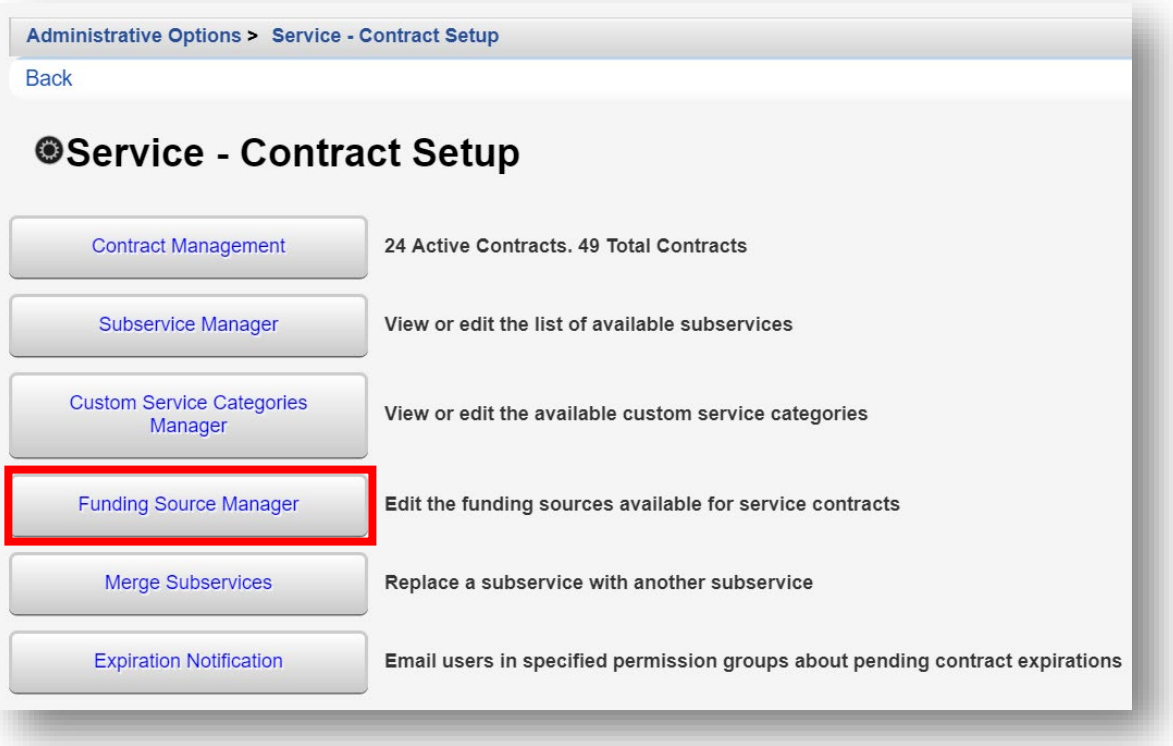
5. From the **Contact Setup** menu, click **Service - Contract Setup** within the **Bread Crumb** trail to return to the **Service - Contract Setup** menu.



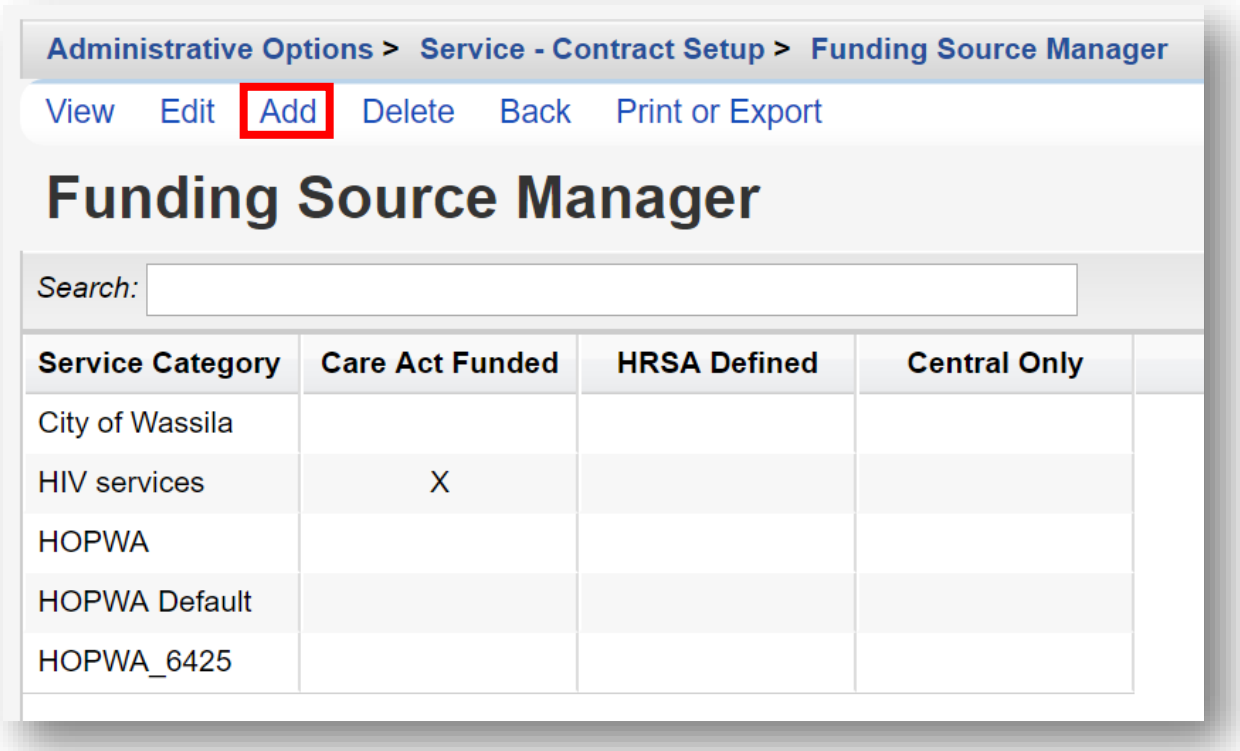
Contract Name	Start Date	Stop Date	Funding	Central?
035 Contract	01/01/1990		Part A, Part D	X
ADAP Insurance	09/12/2005		Part B	
ADAP Insurance Demonstration			Part B	
AIDS			Part A	
CDC GAP Services	01/01/2000		PEPFAR	X

Adding Custom Contract Funding Sources

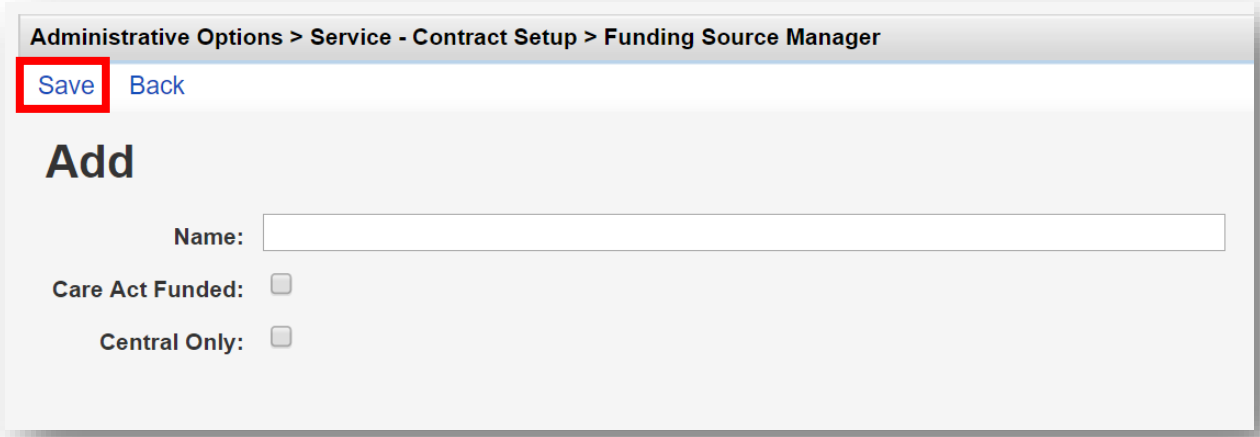
1. From the **Service - Contract Setup** menu, select **Funding Source Manager**.



2. From the **Funding Source Manager** menu, select **Add**.



3. Enter in the following information (as applicable).
   - **Funding Source Name**.
   - Use the check box to indicate if the funding source is **Care Act Funded**.
   - Use the check box to indicate if the funding source is **Central Only**.

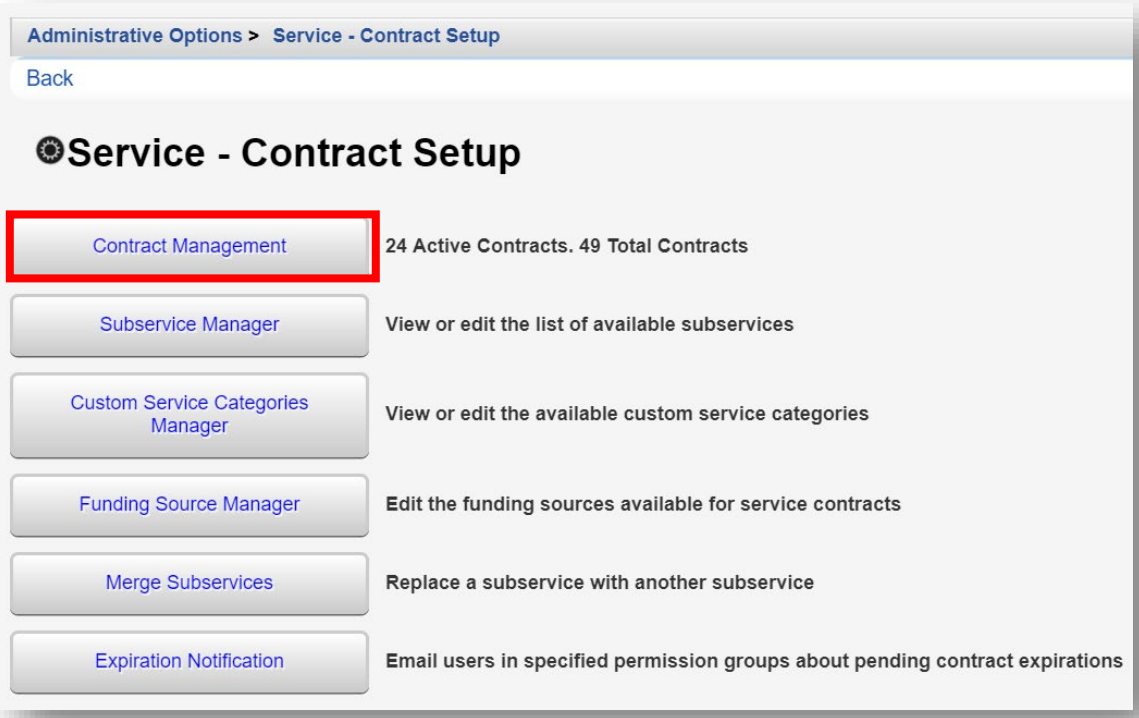


4. Once complete, click **Save** (see previous screenshot). You will now return to the **Funding Source Manager** menu.

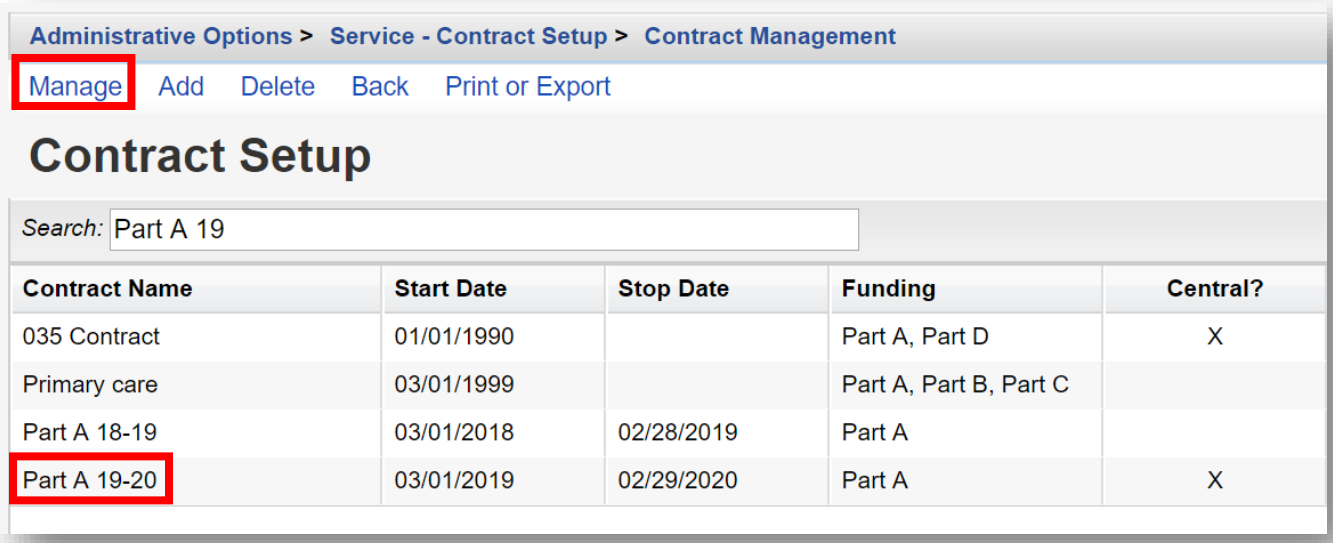
5. From the **Funding Source Manager** menu, click **Service - Contract Setup** within the **Bread Crumb trail** to return to the **Service - Contract Setup** menu.

Adding Contract Items

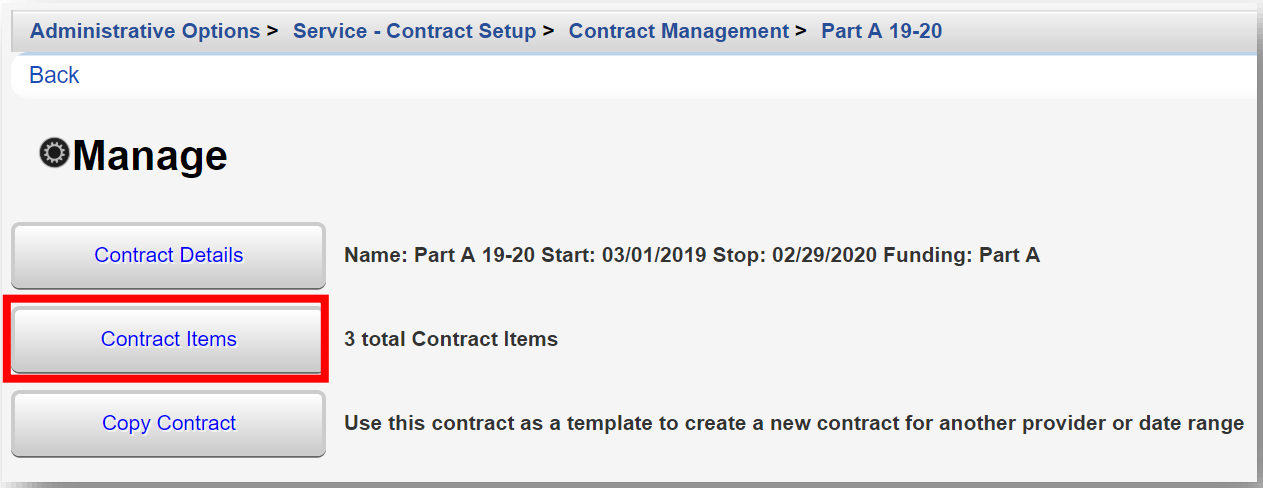
1. From the **Service - Contract Setup** menu, select **Contract Management**.



2. From the **Contract Setup** menu, select the relevant contract under the Contract Name column and click **Manage**.

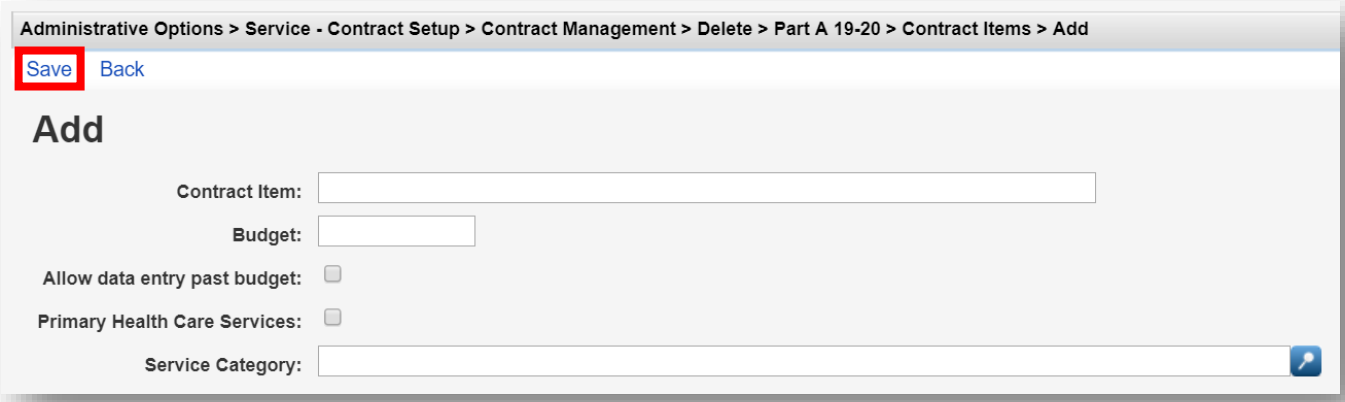


3. From the **Manage** menu, select **Contract Items**.



4. From the **Contract Item Setup** menu, click **Add**.

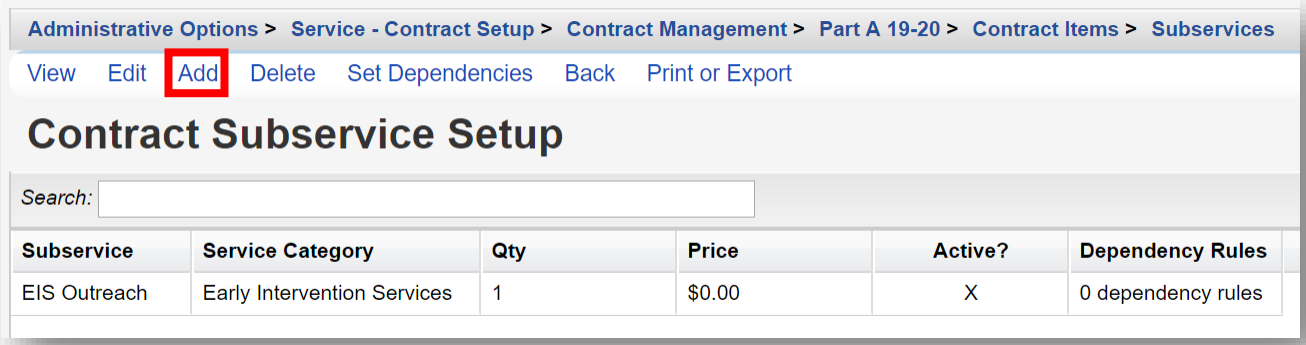
5. Enter in the following information (as applicable).
   - **Contract Item**
     - It is recommended that 1) contracts be single-source funded (such as Part A, Part B, Part C, etc.) and 2) contract items mirror HRSA-defined Service Categories, such as Outpatient Ambulatory Health Services (OAHS) and Medical Case Management (MCM).
   - **Budget** amount (optional),
     - Can be useful for fee-for-service programs or to designate per-unit costs of subservices to track overall expenditures in CAREWare.
   - **Allow data entry past budget** checkbox (optional)
   - **Primary Health Care Services** checkbox (optional)
   - **Service Category** (recommended)



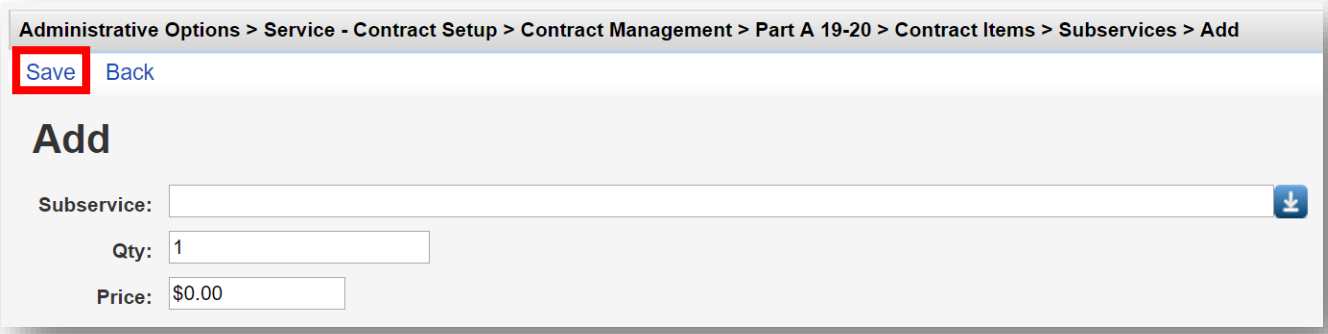
6. Once complete, click **Save** (see previous screenshot). You will now return to the **Contract Item Setup** menu.

7. To add a Subservice, select the relevant contract item under the Contract Item column and click **Subservices** from the action bar.

8. From the **Contract Subservice Setup** menu, click **Add**.



9. Enter in the following information (as applicable).
   - **Subservice**
     - The **Subservice** box can be used to search for available subservices.
   - **Qty** (quantity)
     - Default is "1" (recommended).
     - For agencies that provide Medical Case Management services—including, intake, assessment, face-to-face, and non face-to-face, etc.— one unit of "case management" could represent a unit of time, such as 15 or 30 minute increments. For example, if a client assessment took 2 hours to complete by the case manager, it may be represented in CAREWare as entering 8 units of service (if each unit of service equals 15 minutes).
   - **Price** (optional)
     - If tracking expenditures, a unit cost (price) can be entered or remain at the default value of "0."

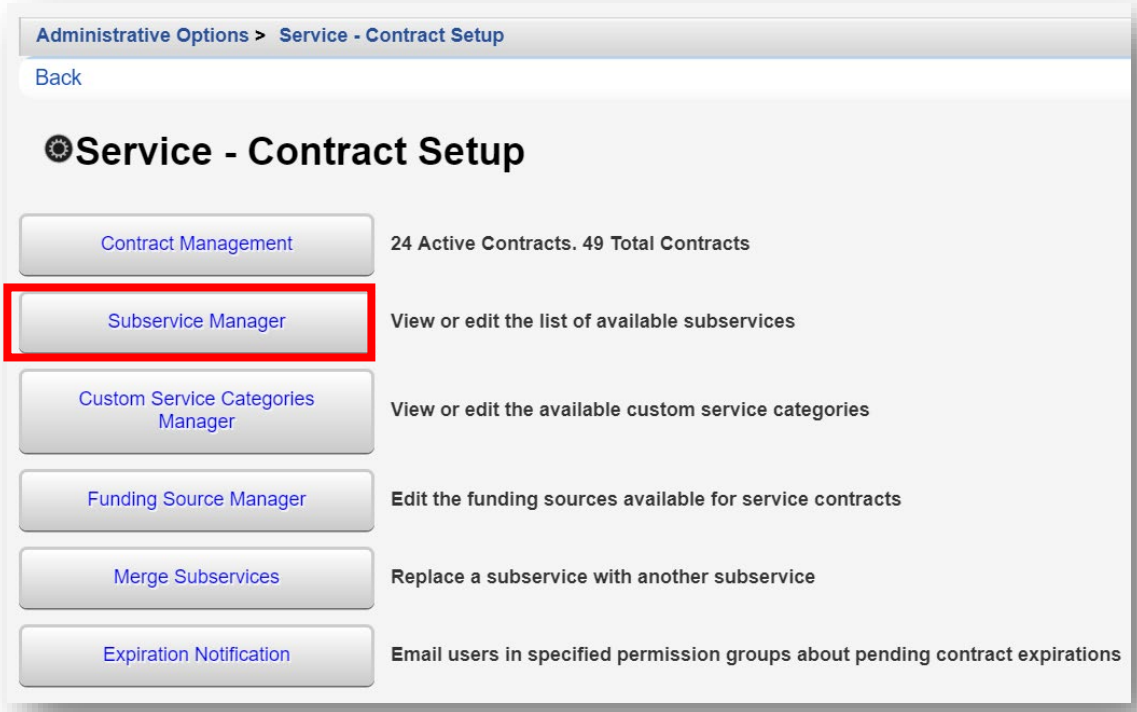


10. Once complete, click **Save** (see previous screenshot). You will now return to the **Contract Subservice Setup** menu.

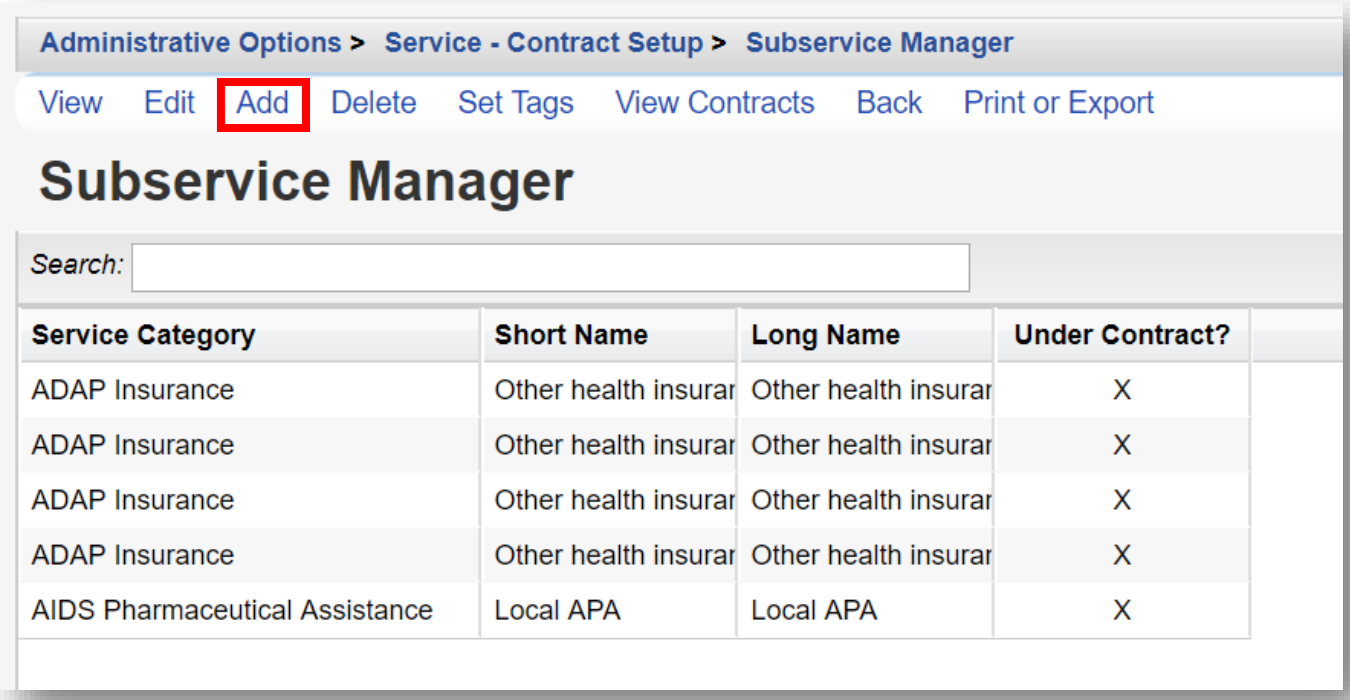
NOTE: In a new CAREWare installation, there are no pre-loaded subservices. To create new subservices or make changes to the available subservices, follow the instructions below.

Managing Subservices

1. From the **Service - Contract Setup** menu, select **Subservice Manager**.



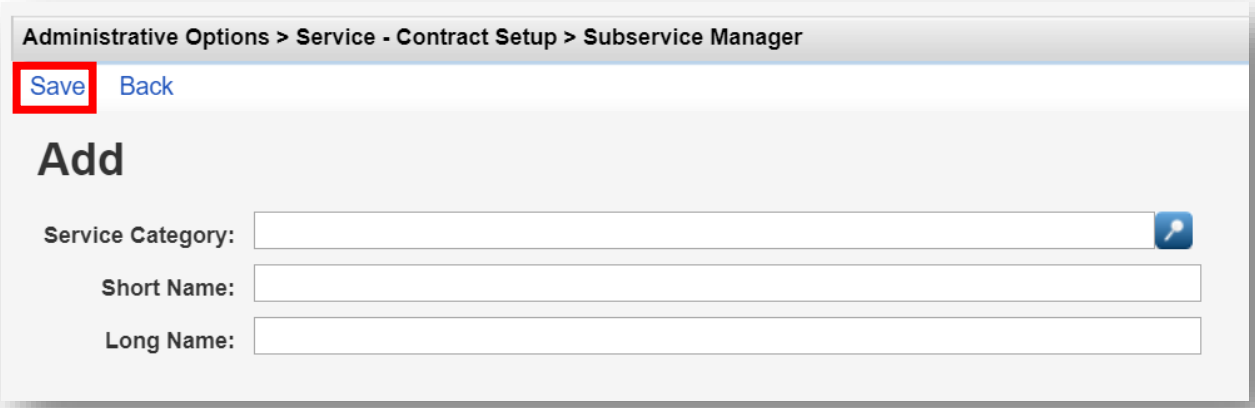
2. From the **Subservice Manager** menu, select **Add**.



To add a subservice, you'll need to specify the **Service Category** (also known as the service). The Category is a HRSA-defined Service Category and matches the RSR report.

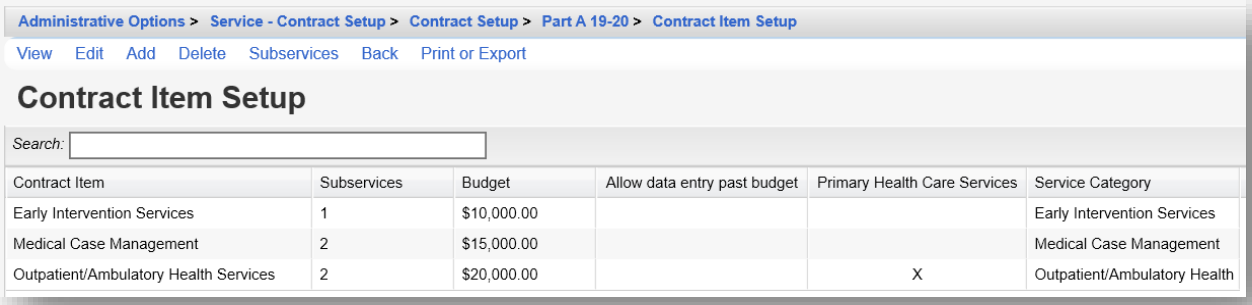
- Create a **Short Name**
  - This is the subservice name which will be displayed in the drop-down menu during service data entry.
- Create a **Long Name**

It is recommended to use clear, easily understood subservice names, perhaps beginning each with service category abbreviations. Please note, it is very important to ensure consistent subservice names across contracts.



3. Once complete, click **Save** (see previous screenshot). You will now return to the **Subservice Manager** menu.

Repeat these steps as necessary to complete all other contracts, service categories, and subservices. Here is a sample of a RWHAP Part A contract with three contract items.



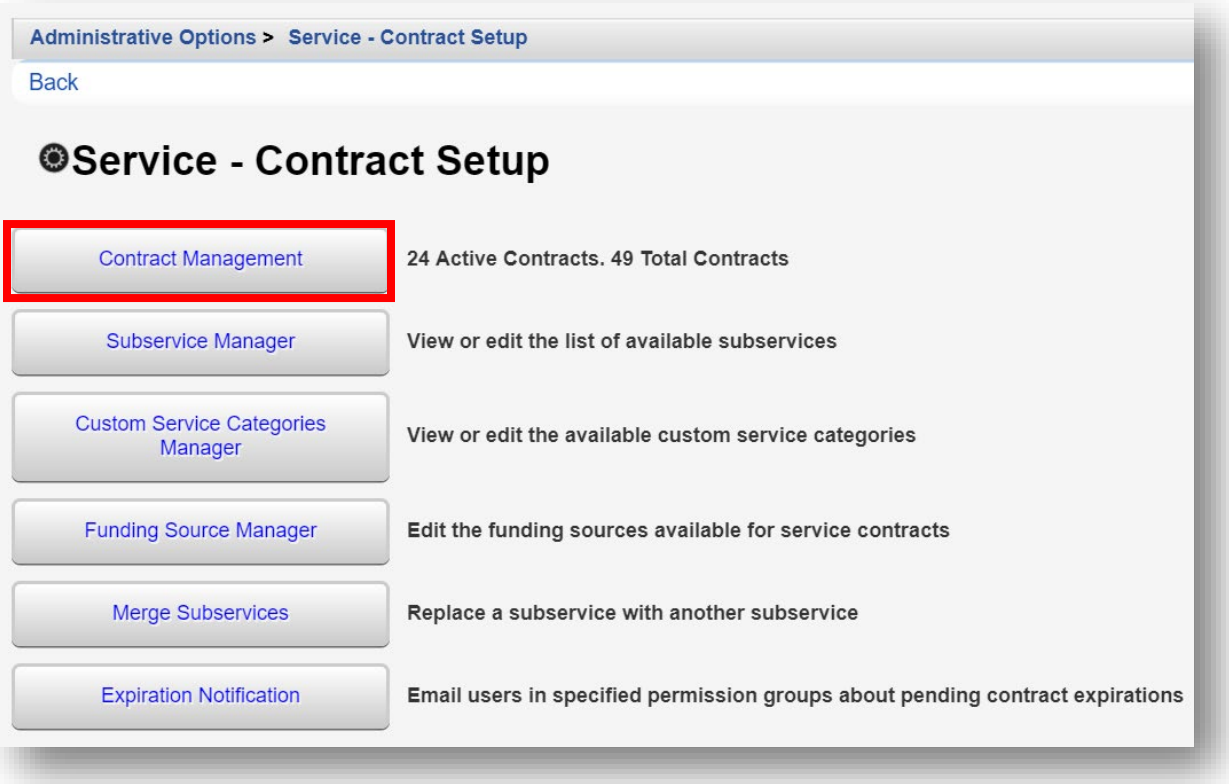
Contract Item	Subservices	Budget	Allow data entry past budget	Primary Health Care Services	Service Category
Early Intervention Services	1	$10,000.00			Early Intervention Services
Medical Case Management	2	$15,000.00			Medical Case Management
Outpatient/Ambulatory Health Services	2	$20,000.00		X	Outpatient/Ambulatory Health

Copying Contracts

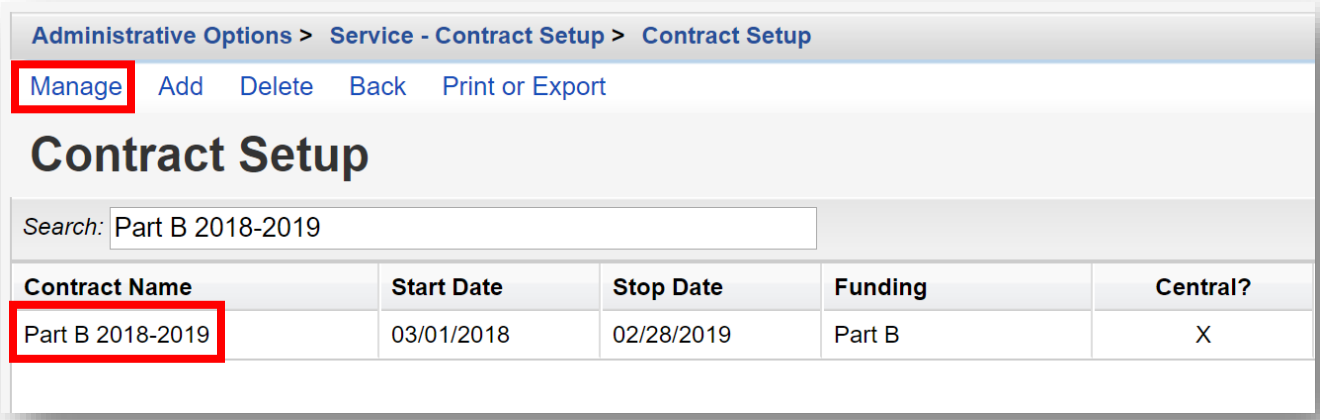
For programs where agency contracts differ widely from year-to-year, the “Copy Contract” feature can be very useful. Note, that many contracts may stay the same from year to year or change only slightly. These contracts don’t need to be copied.

To assist in the management of contracts from year to year, provider contracts can be copied in CAREWare, including funding source, contract items, and subservices. The **Copy Contract** feature is only available under the Central Administration domain.

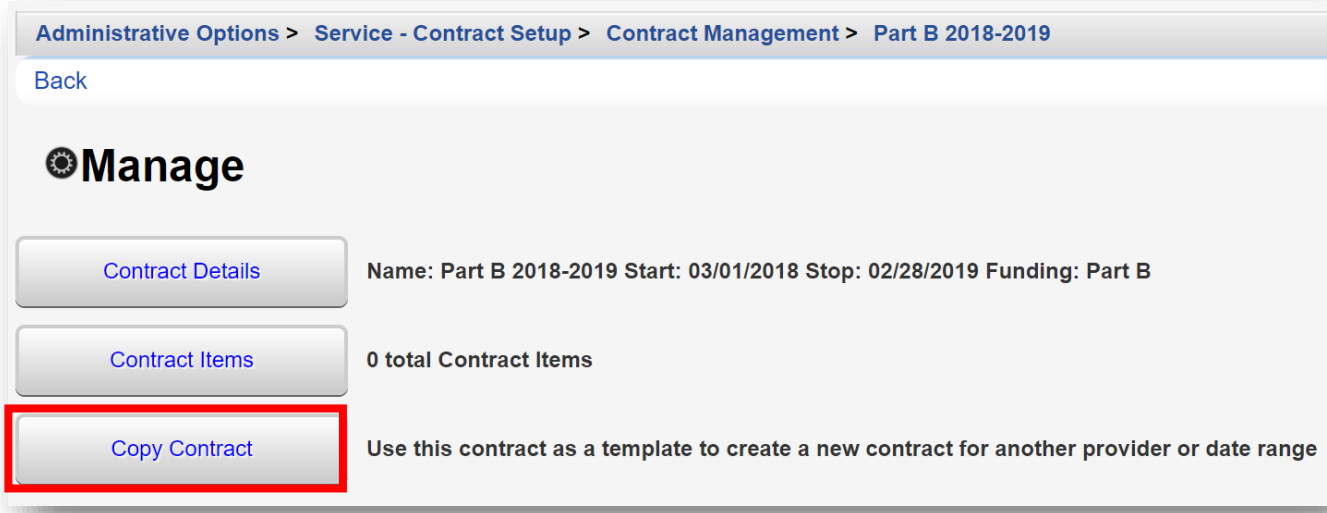
1. From the **Service - Contract Setup** menu, select **Contract Management**.



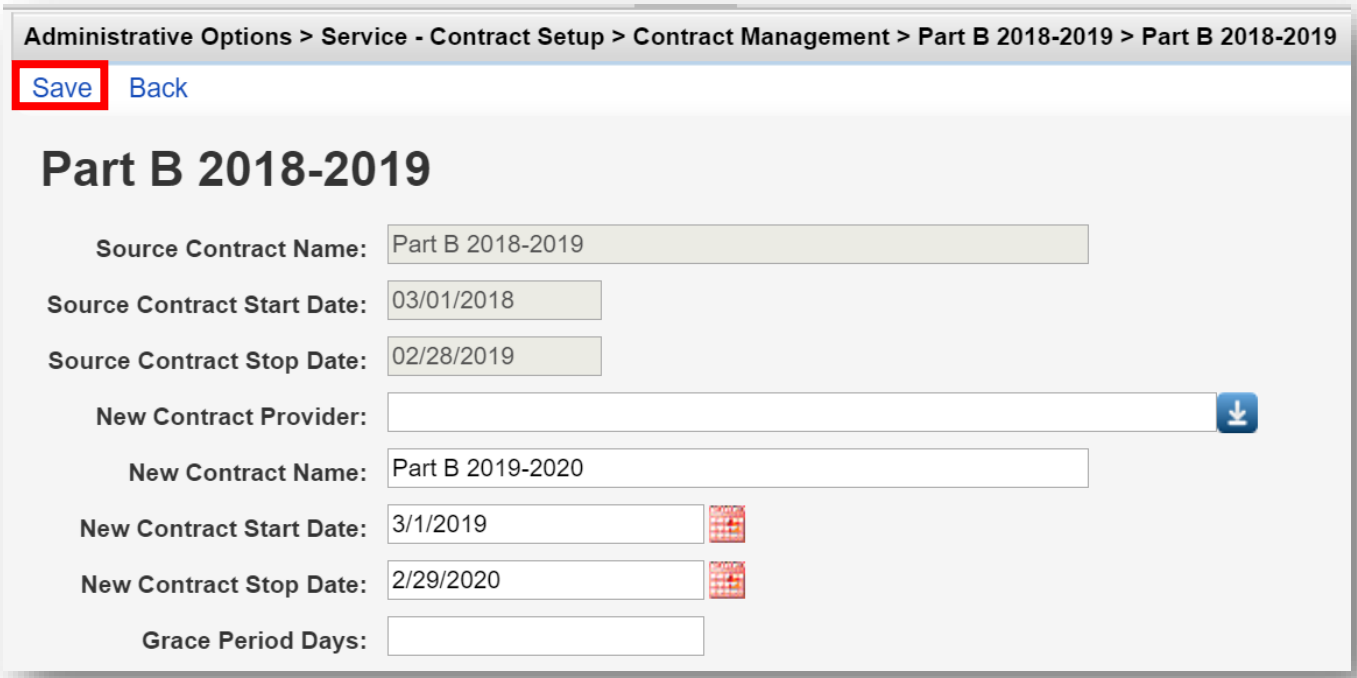
4. From the **Contract Setup** menu, select the desired contract to copy under the Contract Name column and click **Manage**.



5. From the **Manage** menu, select **Copy Contract**.



6. Source Contract Name, Source Contract Start Date, and Source Contract Stop Date will be prepopulated. Enter in the following information (as applicable).
   - **New Contract Provider** (can be the same provider or a different provider)
   - **New Contract Name** (must be different from existing contract name)
   - **New Contract Start Date**
   - **New Contract Stop Date**
   - **Grace Period Days**



7. Once complete, click **Save** (see previous screenshot). You will now return to the **Manage** menu.