MASSACHUSETTS careware

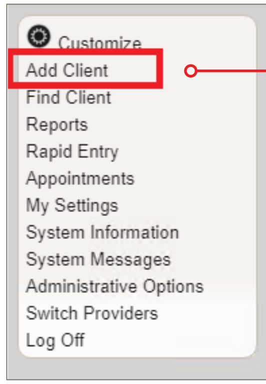
DATA ENTRY TIP SHEET FOR NEW CLIENTS

Search for the client to make sure their record does not already exist in CAREWare. See "CAREWare Client Searching Tip Sheet."

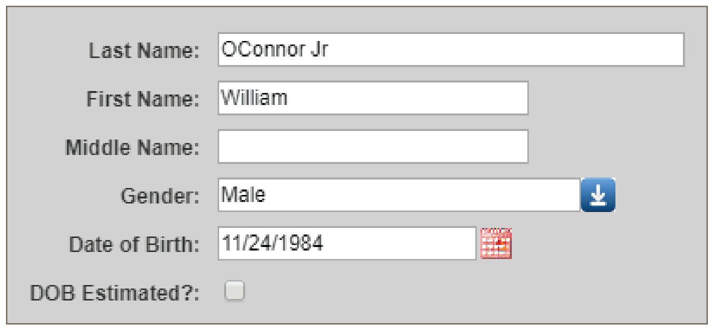
Only enter new clients into CAREWare after the initial Intake or first client service has been completed at your agency. Work from top to bottom as you click on the tabs in RW CAREWare:

- Demographics, Service, and Annual Review, completing ALL required fields and dropdowns.
- Enrollment Date AND Eligibility History record will now need to be manually entered for all new clients!

Ask the client to provide their legal name, official date of birth and self-reported gender. It is important to use the same information consistently over time to avoid creating duplicate client records in CAREWare.
[Note: If there is a change in the gender and/or legal name for an existing client, update the information in the existing client record. Never create a new client record.]



This figure shows how to add a new client, the



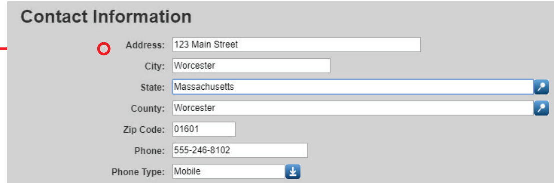
**Click "Add Client" to save the information.
The client record will appear.**

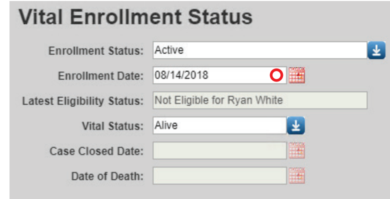
When entering compound or hyphenated names, do not leave any spaces or use apostrophes. For example: William O'Connor, Jr. should be entered as: Last Name: OConnor Jr, First Name: William. Enter a suffix (such as Jr, Sr, III) after the last name.

- Avoid embedded spaces, special characters, including hyphens (' - & etc.), and accent marks.
- Place middle names (or initials) in the middle name field only (never in first- or last-name fields).
- Do not use nicknames (i.e. "Ken" for "Kenneth")
- If a client has two last names enter both into the last name field. If the client has a legal ID, enter the name as it is stated on the ID.
- If the client has conflicting documentation, verify the correct name with the client.

TechTIP!: Run the RSR Data Validation Report and all Custom Missing Data Reports every month. Ensure zero (0) # Errors are listed for each Data Validation Rule, and 'No records were found. The report will not be displayed.' for each missing data.

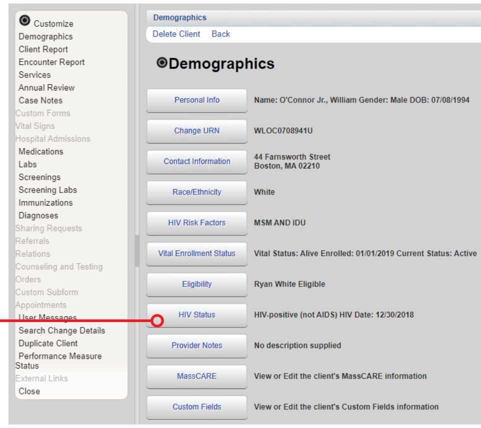
Addresses should use the same format as United States Postal Service website. For example: 123 N Main St Apt 3 (without punctuation, with abbreviations).

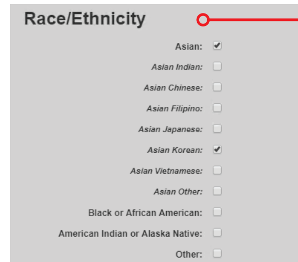




The Enrollment Date (mm/dd/yyyy) should be the client's First service (Intake) at your agency. A Case Closed Date is required anytime Enrollment Status is not 'Active'. If the Vital Status is reported as 'Deceased', a Date of Death is also required.

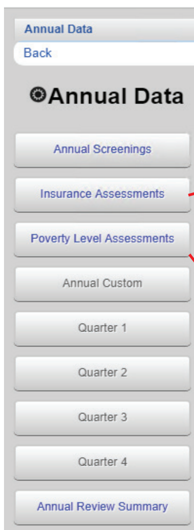
When reporting the HIV Status: be sure to fill in the corresponding HIV+ Date (date of HIV diagnosis, if known) and AIDS Date (date of AIDS diagnosis, if known), as applicable. When selecting the HIV Risk Factor(s): this refers to client's current risk factor(s) for HIV infection, which may not necessarily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

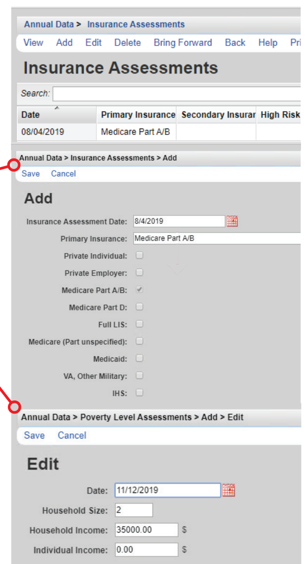




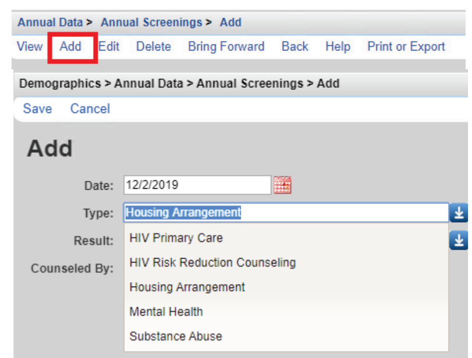
Enter Ethnicity and Race, and Hispanic Subgroup and/or Race Subgroup (if applicable). These are required in CAREWare, do not leave either section 'Blank' unless the client refused to provide.

Remember to complete all sections under the Annual Review tab, including, Insurance and Federal Poverty Level. At a minimum, review and update this information at the end of the calendar year before RSR submission. (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.)





Complete other Annual Screening fields, Housing Arrangement; HIV Risk Reduction Counseling, Mental Health and Substance Abuse, as applicable. At a minimum, review and update this information at the end of the calendar year before RSR submission. [The HIV Primary Care field is obsolete and can be disregarded.]



Annual Review information should be verified every year, every six (6) months for recertifications; specifically, Income and Insurance. If there are no changes - the 'Bring Forward' feature may be used.

TechTIP!: 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.

Questions? *Contact JSI at CAREWareMAhelpdesk@jsi.com*