

Using CAREWare to Refer Clients Across Providers

An Introduction to CAREWare for
Medical Case Managers

Memphis Ryan White Program 2018



Your Shelby Co. CAREWare Contact

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How does CAREWare handle records?

- Each provider has its own domain.
- One unique client record exists per client per domain; if a client has a visit at a provider, they have a record there.
- Data is shared across domains
- The URN is the “key” that connects the same client record across domains.
- So then, if the URN is not identical, CAREWare thinks it’s a different client.



The URN

- Unique Record Name
- How Clients are synchronized across Domains.
- Based on:
 - Last Name – 1st, 3rd letter
 - First Name – 1st, 3rd letter
 - Gender – coded, 1=M, 2=F, 3=TG, 9=unknown
 - Birth Date – full DOB
- E.g., Joe Smith, Male, DOB 12/20/68 = JESI1220681

Client new to you, not to TGA

- So what happens when you get a client who is new to you, but has services at other Memphis TGA providers?
- Please, speak up if you've done this! What's your process?
- You have to get the last and first name, gender, and date of birth.
 - Where do you get these?
 - How are they transmitted to you? Securely? (PII)
- If you enter them accurately, you get this screen:
- If you don't get this screen and the client exists in the real world, you just created an unlinked, erroneous record, and it doesn't tell you.

Possible Duplicate Client List

The new client information you have entered generates a URN that is shared by at least one existing client. View the details of the possible matching client(s) listed below to determine whether or not the client you are entering is really a new client.

Last Name:	First Name:	Unique ID:
Mouse	Mickey	MCMU010...

[View more information about the selected client.](#)

[Cancel the add client process.](#)

Why use CAREWare referrals?

- Eliminates error-prone process of linking client records across domains.
- Secure – no need to transmit PII over open channels.
- Can include comments/message to recipient.
- Tracking is built-in (as long as people use it).



How do you send an outgoing referral?

- Find the client you want to refer and open their demographics window, then click on the “Referrals” tab.

The screenshot shows a software interface for a patient named Mickey Mouse. The window title is "Mouse, Mickey". At the top, there are several tabs: "Appointments", "Orders", "Forms", "ChangeLog", "Client Report", "Duplicate Client", and "Delete Client". Below these are buttons for "Find List", "New Search", and "Close". A secondary set of tabs includes "Demographics", "Drug Services", "Service", "Annual Review", "Encounters", "Referrals" (which is highlighted in yellow), "HIV C&T", "Relations", "Custom Tab 1", "Custom Tab 2", "Custom Tab 3", and "Subform".

The "Referrals" tab is active, displaying various fields for patient information and HIV status. The "First Name" is Mickey, "Middle Name" is blank, and "Last Name" is Mouse. The "Unique ID" is MCMU0101501U and the "Encrypted URN" is qqB2ChWsJ. The "Date of Birth" is 1/1/1950, and the "Gender" is Male. The "Enrollment Status" is Active, "Enrollment Date" is 9/20/2018, and "Eligibility Status" is Not Eligible for Ryan White. The "Vital Status" is Alive. The "HIV Status" is HIV-positive (not AIDS), "HIV+ Date" is 9/20/2018, and "AIDS Date" is blank. The "HIV Risk Factors" are Male who has sex with male(s). The "Address" section shows 160 N. Main St, Memphis, Tennessee, 381. The "Race(s)" is White and "Ethnicity" is Non-Hispanic. A note at the bottom states: "This record added by data analyst for training purposes. If overlooked or inconvenient please delete!"

How do you send an outgoing referral?

- Click the blue “F1: Add Referral” button that looks like a link.

The screenshot shows a software window titled "Mouse, Mickey" with a menu bar containing "Appointments", "Orders", "Forms", "ChangeLog", "Client Report", "Duplicate Client", "Delete Client", "Find List", "New Search", and "Close". Below the menu bar is a tabbed interface with tabs for "Demographics", "Drug Services", "Service", "Annual Review", "Encounters", "Referrals", "HIV C&T", "Relations", "Custom Tab 1", "Custom Tab 2", "Custom Tab 3", and "Subform". The "Referrals" tab is active, displaying the "Add/Edit Referral Information" form. The form includes fields for "Referral Date", "Type", "Refer-To Provider", "Requested Service Category Type", and "Referral Class". There is an "Add" button next to the "Requested Service Category Type" field. Below these fields are "Referral Status" and "Referral Complete Date" dropdowns, and a "Referral Comments" text area. At the bottom of the form are buttons for "Silent Referral", "Save", and "Cancel". Below the form are three buttons: "F1: Add Referral" (highlighted in yellow), "F2: Edit Referral", and "Del: Delete Referral". At the bottom of the window is a search bar with "0 / 0" and a search icon, and a table with columns: "Direction", "Referral ...", "Provider", "Service Category", "Status", "Complete...", and "Referral Class".

How do you send an outgoing referral?

- Enter the date you're making the referral.
- ALWAYS select "Internal" for "Type."
- "Refer-To Provider" is the provider you want to refer to. 😊
- Requested Service Category Type: services that provider contracts.
- "Referral Comments" are optional but recommended!

Mouse, Mickey

Appointments Orders Forms ChangeLog Client Report Duplicate Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Relations Custom Tab 1 Custom Tab 2 Custom Tab 3 Subform

Add/Edit Referral Information

Referral Date: 9/20/2018 Type: Internal Refer-To Provider: Le Bonheur Add Requested Service Category Type: Early Intervention Services Referral Class: ...

Referral Status: Pending Referral Complete Date: Referral Comments:

Silent Referral Save Cancel

F1: Add Referral F2: Edit Referral Del: Delete Referral

Search 0 / 0

Direction	Referral ...	Provider	Service Category	Status	Complete...	Referral Class
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How do you send an outgoing referral?

- Finally... Scroll down if you don't see "Save"!!!

Mouse, Mickey

Appointments Orders Forms ChangeLog Client Report Duplicate Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters Referrals HIVC&T Relations Custom Tab 1 Custom Tab 2 Custom Tab 3 Subform

Add/Edit Referral Information

Referral Date: 9/12/2018 Type: Internal Refer-To Provider: Le Bonheur Add Requested Service Category Type: Referral Class: ...

Referral Status: Pending Referral Complete Date: Referral Comments:

Silent Referral **Save** Cancel

F1: Add Referral F2: Edit Referral Del: Delete Referral

Search 0 / 0

Direction	Referral ...	Provider	Service Category	Status	Complete...	Referral Class
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How do you send an outgoing referral?

- You'll see a new outgoing referral on the list, with status "Pending."

Mouse, Mickey

Appointments Orders Forms ChangeLog Client Report Duplicate Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Relations Custom Tab 1 Custom Tab 2 Custom Tab 3 Subform

Add/Edit Referral Information

Referral Date: Type: Refer-To Provider: Requested Service Category Type: Referral Class:

Referral Status: Referral Complete Date: Referral Comments:

Silent Referral Save Cancel

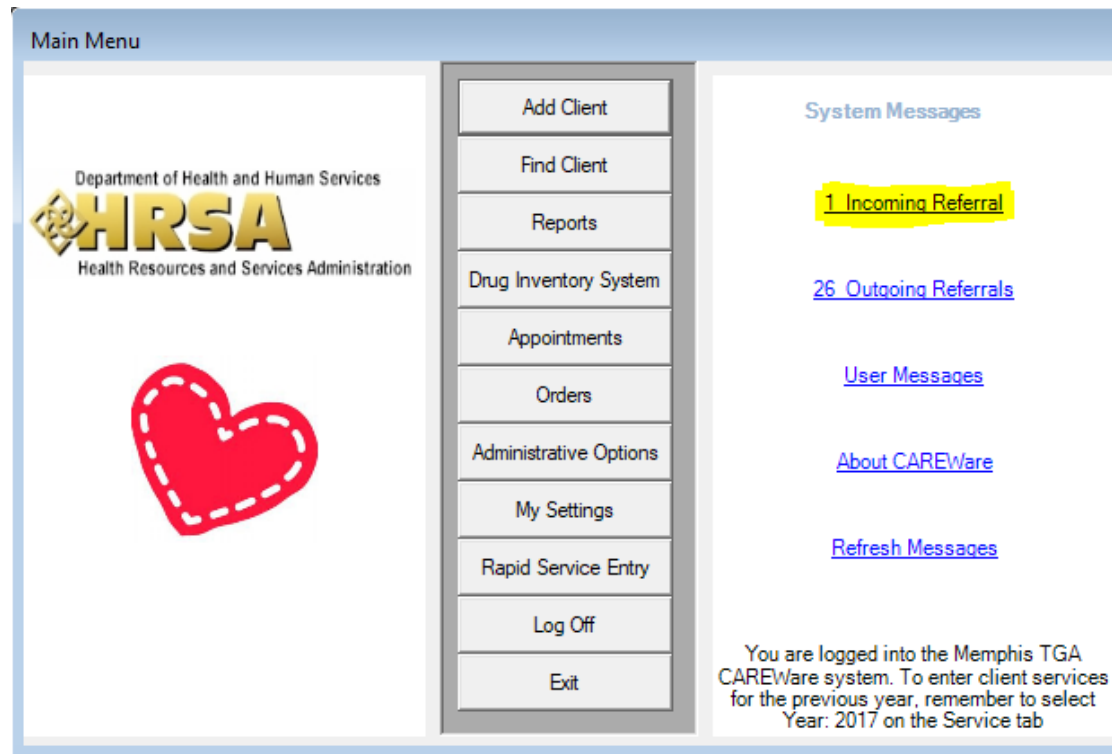
F1: Add Referral F2: Edit Referral Del: Delete Referral

Search 1 / 1

Direction	Referral ...	Provider	Service Category	Status	Complete...	Referral Class
Outgoing	9/12/2018	Le Bonheur	Early Intervention Ser...	Pending		

How do you receive an incoming referral?

- On the main login screen, click the blue “Incoming Referrals” button that looks like a link.



The screenshot displays the 'Main Menu' interface for the Department of Health and Human Services (HRSA). The interface is divided into three main sections:

- Left Section:** Features the HRSA logo (Department of Health and Human Services, Health Resources and Services Administration) and a red heart icon with a dashed outline.
- Center Section:** A vertical list of menu items: Add Client, Find Client, Reports, Drug Inventory System, Appointments, Orders, Administrative Options, My Settings, Rapid Service Entry, Log Off, and Exit.
- Right Section:** Titled 'System Messages', it displays:
 - 1 Incoming Referral** (highlighted in yellow)
 - [26 Outgoing Referrals](#)
 - [User Messages](#)
 - [About CAREWare](#)
 - [Refresh Messages](#)

At the bottom right, a message states: "You are logged into the Memphis TGA CAREWare system. To enter client services for the previous year, remember to select Year: 2017 on the Service tab".

How do you receive an incoming referral?

- Select the client you are expecting and click “Details” and this window will pop up. Click “Yes.”

The screenshot displays a software interface with a 'Pending Referral List' table and a dialog box. The table has columns for Name, Client ID, Gender, Birth Date, Requested..., and Referral. The first row is highlighted with a blue background and contains the text: Mickey Mouse, Client ID, Male, 1/1/1950, Early Interv..., and Region. Below the table, there are two buttons: 'Details' and 'Cancel'. The 'Details' button is highlighted in yellow. A dialog box titled 'Client not found...' is overlaid on the right side of the table. The dialog box contains the text: 'This client is not on your list of clients. Do you want to add this as a new Client?'. At the bottom of the dialog box, there are two buttons: 'Yes' and 'No'. The 'Yes' button is highlighted in yellow.

Name:	Client ID:	Gender:	Birth Date:	Requested...	Refer
Mickey Mouse		Male	1/1/1950	Early Interv...	Region

Client not found...

This client is not on your list of clients. Do you want to add this as a new Client?

Yes No

Details Cancel

How do you receive an incoming referral?

- This will bring you to the “Pending Referrals” screen.
- Select the referral you are working with and click “Edit Referral.”

Mouse, Mickey

Appointments Orders Forms ChangeLog Client Report Duplicate Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Relations Attachments Custom Tab 2 Custom Tab 3 Subform

Add/Edit Referral Information

Referral Date: Type: Refer-To Provider: Requested Service Category Type: Referral Class:

Referral Status: Referral Complete Date: Referral Comments:

F3: Add/Edit Service Save Cancel

F1: Add Referral F2: Edit Referral Del: Delete Referral

Search 1 / 1

Direction	Referral ...	Provider	Service Category	Status	Complete...	Referral Class	Comments
Incoming	9/20/2018	Regional One Me...	Early Intervention ...	Pending			

How do you receive an incoming referral?

- This will bring you to the “Pending Referrals” screen.
- Select the referral you are working with and click “Edit Referral.”

Mouse, Mickey

Appointments Orders Forms ChangeLog Client Report Duplicate Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Relations Attachments Custom Tab 2 Custom Tab 3 Subform

Add/Edit Referral Information

Referral Date: Type: Refer-To Provider: Requested Service Category Type: Referral Class:

Referral Status: Referral Complete Date: Referral Comments:

F3: Add/Edit Service Save Cancel

F1: Add Referral F2: Edit Referral Del: Delete Referral

Search 1 / 1

Direction	Referral ...	Provider	Service Category	Status	Complete...	Referral Class	Comments
Incoming	9/20/2018	Regional One Me...	Early Intervention ...	Pending			

How do you receive an incoming referral?

- Finally, REFERRAL STATUS IS NOT AUTOMATIC. BE A GOOD REFERRAL PARTNER AND UPDATE IT! Referral status is viewable by both the sender and receiver!
- Statuses include: Pending, Complete, Lost to Follow-Up, and Rejected.
- Enter the appropriate Status, Complete Date, optional Comment, and Save. Now your referral partner knows the status without having to get on the phone!!

The screenshot shows a software window titled "Mouse, Mickey" with a menu bar containing "Appointments", "Orders", "Forms", "ChangeLog", "Client Report", "Duplicate Client", and "Delete Client". Below the menu bar are buttons for "Find List", "New Search", and "Close". A secondary menu bar includes "Demographics", "Drug Services", "Service", "Annual Review", "Encounters", "Referrals", "HIV C&T", "Relations", "Attachments", "Custom Tab 2", "Custom Tab 3", and "Subform".

The main form area is titled "Add/Edit Referral Information" and contains the following fields:

- Referral Date: 9/20/2018
- Type: Internal
- Refer-To Provider: Regional One Medical Center A
- Requested Service Category Type: Early Intervention Services
- Referral Class: (empty)
- Referral Status: Completed
- Referral Complete Date: 9/20/2018
- Referral Comments: (empty)
- Care Giver: (empty)

At the bottom of the form, there is a blue link "F3: Add/Edit Service" and two buttons: "Save" and "Cancel".

Feedback please!

- What CAREWare issues do you need or want training on? We are thinking about new dissemination methods.
- Would you prefer
 - 1. Webinar
 - 2. Group session at your organization
 - 3. Group session at SC Gov't
- If you chose #1, could you let me know if you have gotomeeting installed/use it on any regular basis?