**LAS VEGAS TGA**
**PART A HIV/AIDS PROGRAM**
**POLICY & PROCEDURES**

**UPLOADING OF SCANNED CARE PLANS TO CAREWARE**

**Effective Date: 6/1/2015**

**PURPOSE:**
To guide the scanning and uploading of care plans to the CAREWare database. All medical case managers are required to complete and/or update a care plan (individual service plan) for their clients every 6 months. Having these care plans available in a client's CAREWare account will facilitate the sharing of this information and improve care coordination between agencies.

**POLICIES:**
Medical case managers will be responsible for scanning and uploading care plans to CAREWare within 3 business days of creating the care plan. Other providers working with the client will be responsible for accessing the care plan from CAREWare and utilizing it to best coordinate care.

Only upload care plans to the *Care Plan Attachment* link; do not upload other client documents to this link. The care plan should be uploaded at a minimum of every 6 months and when it is updated. When scanning, all pages must be face up and face the same direction. Scanned documents must be saved as a PDF file. Only PDF files can be uploaded to CAREWare. Files must be labeled according to the following convention:
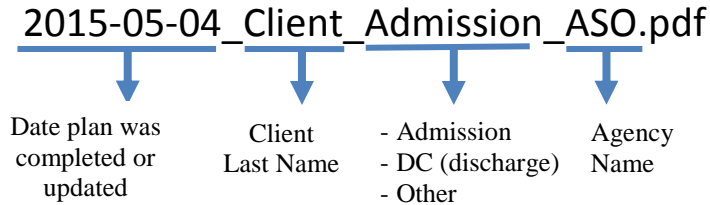YYYY-MM-DD_ClientLastName_Admission/DC/Other_AgencyName

Keep scanned documents in a secure folder on your network and do not leave client documents on scanning devices. It is the responsibility of each Provider to maintain the security and confidentiality of their client files. Compromises in client information are not the responsibility of the Grantee.

Any destruction or shredding of documents is to be based on each Provider's policies and procedures, and will not be the responsibility of the Grantee. Consult your agency's policy before disposing of any client documents.

**PROCEDURES:**

## _Scanning and Uploading to CAREWare_

1. Scan the completed care plan and save as a PDF file. Make sure all pages are face up and legible. Label the file with the date the plan was completed (YYYY-MM_DD); client's last name; Admission, DC (discharge), or Other (additional and revised care plans); and the agency name For example, Fake Client is a new client who completed their care plan on 05/04/2015 at AIDS Service Organization (ASO) so their file would be labeled as follows:



2015-05-04_Client_Admission_ASO.pdf

| Date plan was completed or updated | Client Last Name | - Admission<br>- DC (discharge)<br>- Other | Agency Name |

Each scanning and computer system is different.  If you have questions on how to scan to your computer, consult with your IT staff.

2. Log in to CAREWare and go to the client's account. Click on the _Referral Documents_ tab. If you do not see this tab, click on the arrow in the top right corner to scroll to the right.
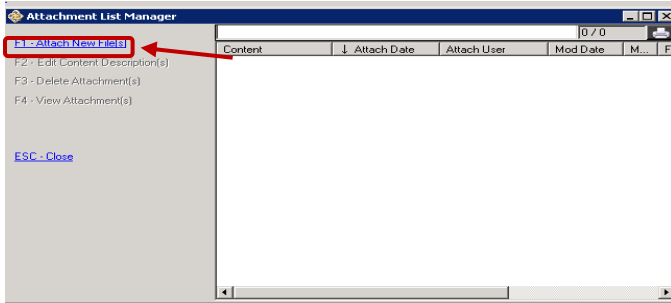


> If you cannot see the _Referral Documents_ tab, click on this arrow to scroll to the right and see all the tabs.
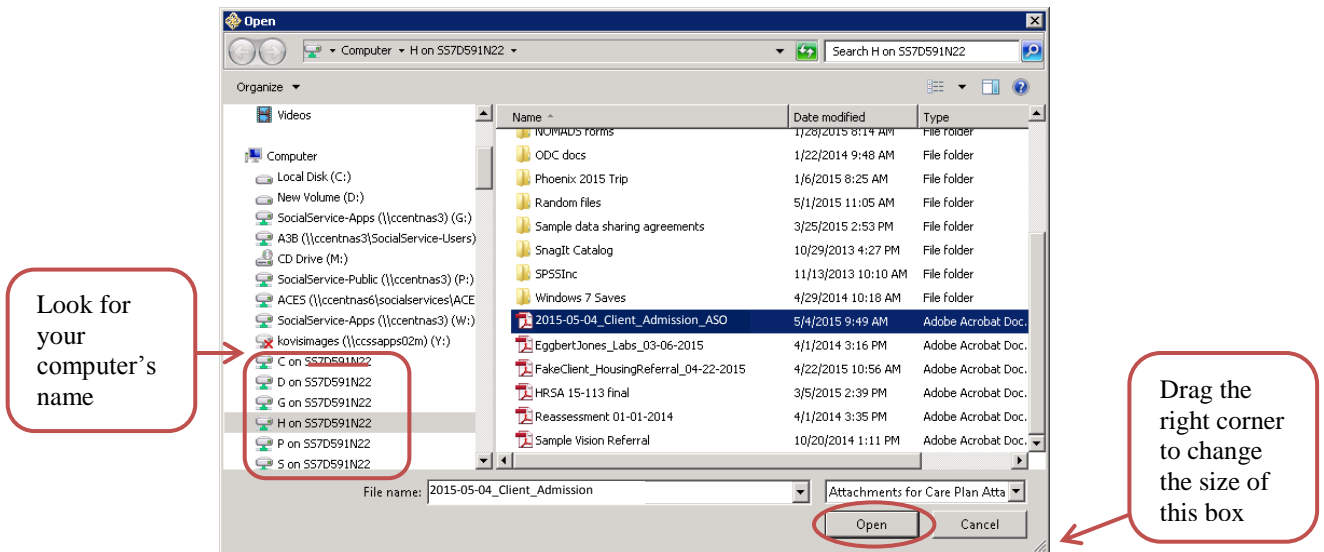
3. Click on the _Care Plan Attachment_ link.
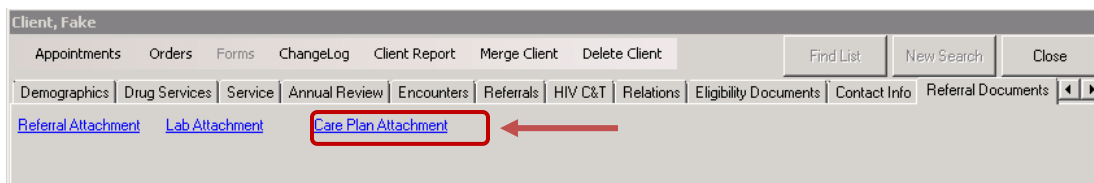
4. Click *F1 - Attach New Files* in the *Attachment List Manager* window.



5. A screen with your computer files will appear. Make sure to scroll down to where you see your computer name and folders. Select the file you would like to upload and click *Open*.
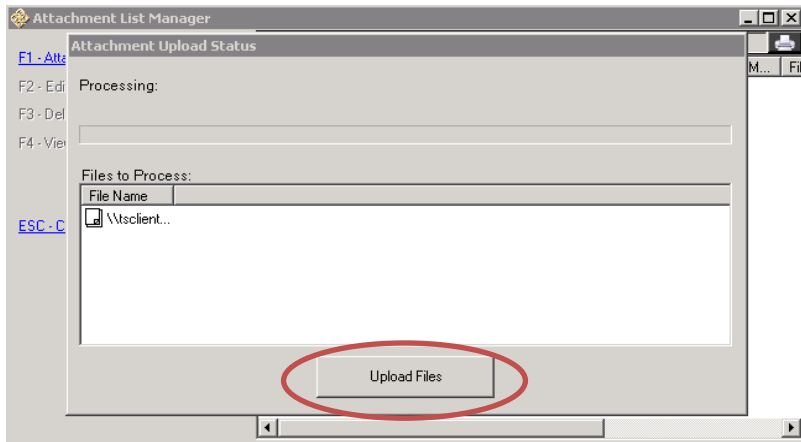


Look for your computer's name

Drag the right corner to change the size of this box

6. The Attachment Properties screen will appear. Click on the *Content Type* field and select *Care Plan*.
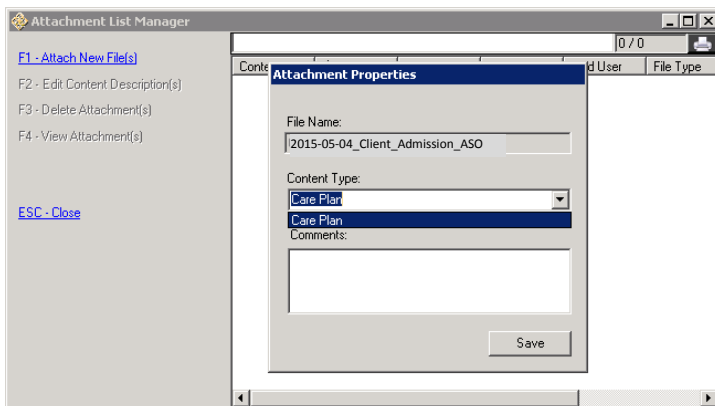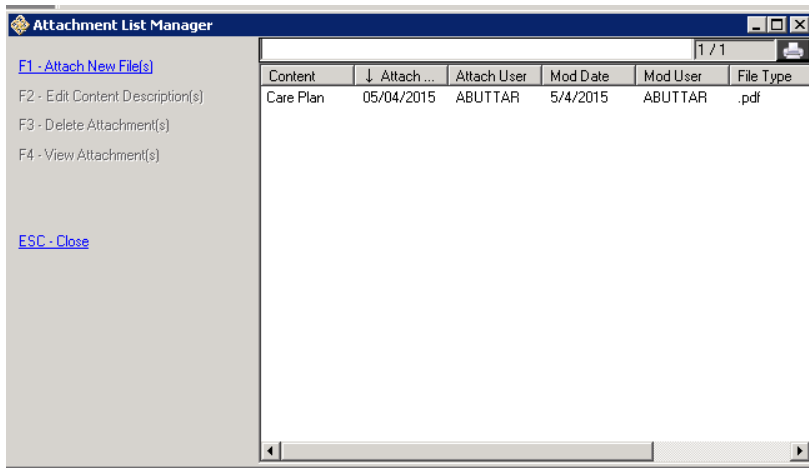
7. Add any comments in the *Comments field.* Click *Save* when you are done.
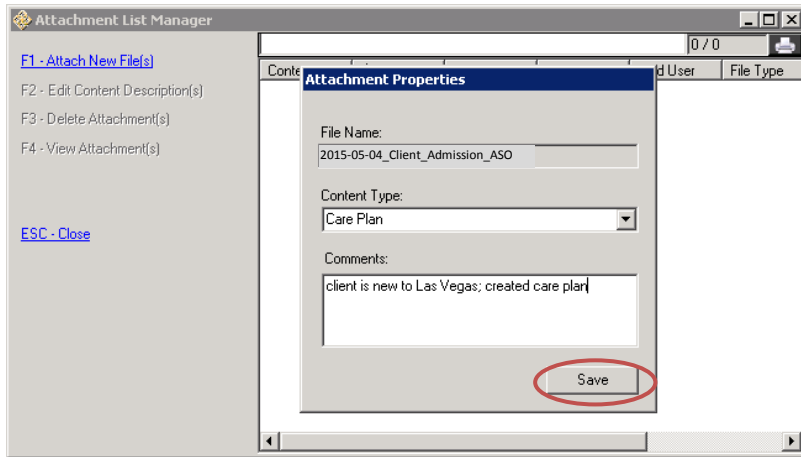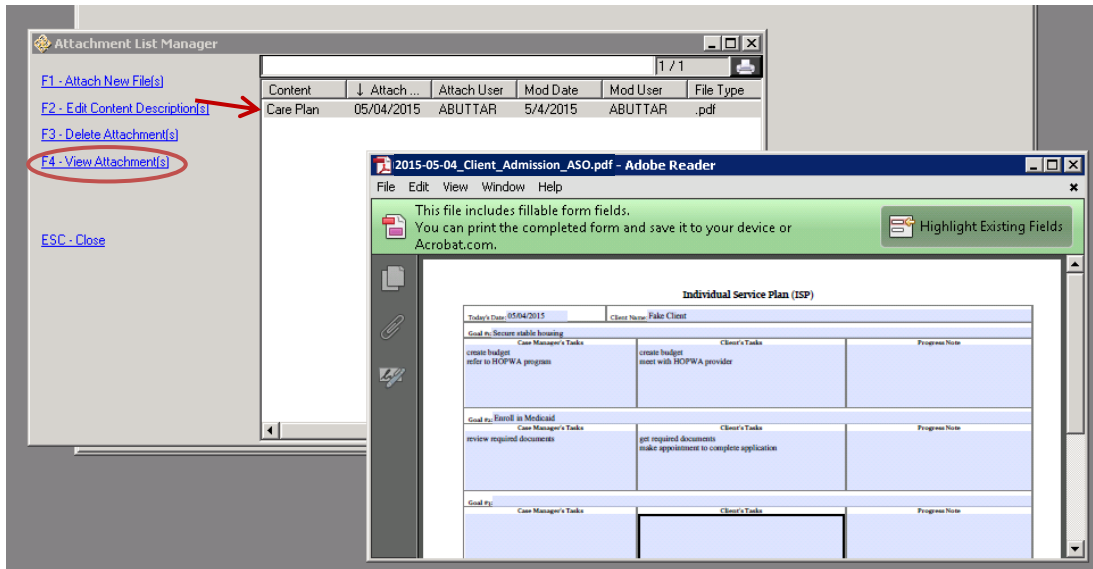


8. You will see the following screen. Click *Upload Files*.



9. When it is done uploading, you will see the screen below

10. Verify that the packet uploaded correctly by selecting the file from the list and then clicking *F4- View Attacments(s)* on the right. The PDF will open.



***Uploaded documents can only be deleted by the Grantee's office. If a document is uploaded in error, please contact Linda Montgomery to delete.***
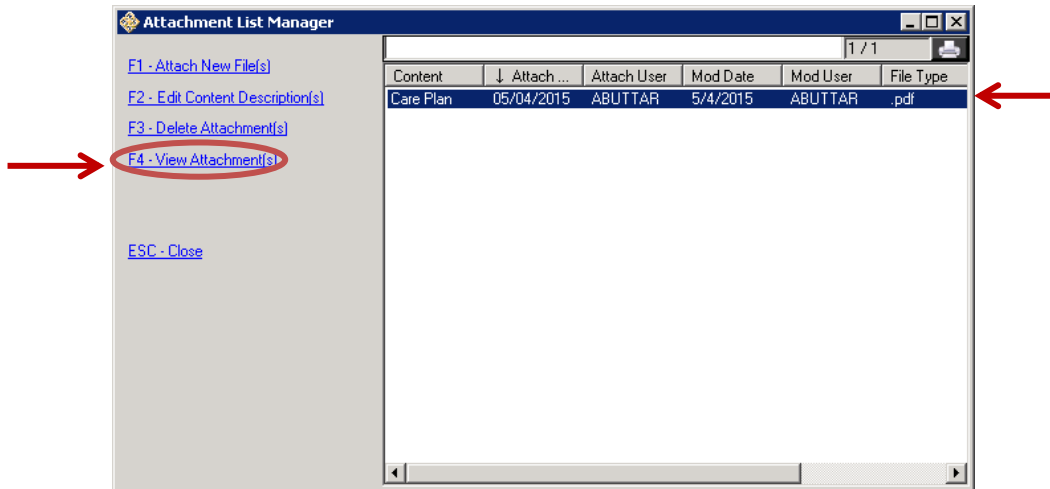
## Downloading Care Plans from CAREWare

1. Log in to CAREWare and go the client's account. Click on the *Referral Documents* tab. If you do not see this tab, click on the arrow in the top right corner to scroll to the right.
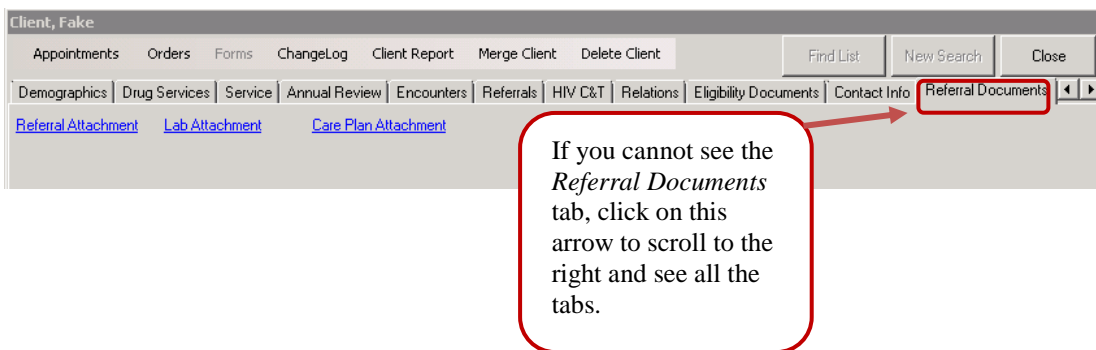


2. Click on the *Care Plan Attachment* link.
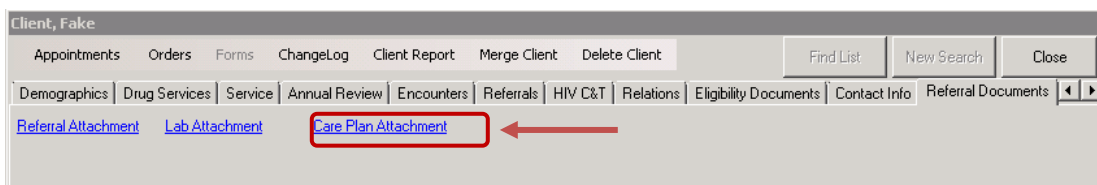
3. Select the plan you would like to view, and then click F4 – View Attachment(s).



4. The care plan PDF will appear in a new window. You can print the referral from this screen. If you have problems printing, please contact your agency's IT staff.