Hosting a CAREWare Network

Key Roles and Responsibilities

Overview

The purpose of this document is to outline key roles and responsibilities in hosting a CAREWare network. This list is not intended to be exhaustive but rather to help Ryan White HIV/AIDS Program (RWHAP) recipients in their planning process. Recipients may determine that engaging a contractor to address some of the responsibilities may be helpful; however, it will be important to ensure that a recipient staff member with an understanding of program activities remains engaged in CAREWare activities.

Below, we have compiled lessons from the field that we think are beneficial when planning to host a CAREWare network. On page 3 of this resource, there is a table with roles and responsibilities for different staff types.

Lessons from the Field

To help inform the development of this document, input was gathered from RWHAP recipients who currently host a CAREWare network. They shared lessons learned that they found helpful in hosting a CAREWare network.

General

- The CAREWare Help Desk is a good resource and email is usually the best method of contact (cwhelp@jprog.com). The CAREWare Help Desk can also be reached by phone at 877-CWHELP1 or 877-294-3571.
- Be sure that you have a test server and plan for it to be updated routinely from Production. Use it to test each new CAREWare build before installing that build in Production.
- While it can be useful to allow data staff to have access to the SQL server, you need to ensure that they have SQL knowledge and skills. Otherwise, this is not recommended.
- Some jurisdictions have agency super-users or regional leads (for Part Bs) who complete some program staff responsibilities. Given that these tasks can impact data quality, system security, and information that is used/released (reports), an extensive review of the feasibility of using non-recipient staff should be completed before delegating activities.
- If your CAREWare support team is different from your clinical quality management (CQM) team, remember to be actively involved in quality work. This will facilitate leveraging CAREWare data for quality activities as well as developing custom performance measures.

IT/Program Staff Resources

- If feasible, provide resources to IT to help support CAREWare.

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- Pay part/all of salary support for specific IT staff. If possible, ensure that CAREWare support is listed in their job responsibilities.
- Pay for the server on which CAREWare is hosted (if hosted internally or if IT uses cloud hosting)

❖ Invest in adequate program staff to provide needed support to CAREWare users.

- The number of staff needed depends on the number of agencies and users.
- Activities can be difficult to predict on any given day, so it can be more challenging for staff who have limited time set aside to support CAREWare users (e.g., employees who are not full-time).

CAREWare User Access/Customization

❖ Consider how you customize CAREWare, add users, etc. It can be better to have strict standards initially and then expand as feasible.

❖ Take feedback from CAREWare users to inform customization.

❖ Limit what agencies can add/customize.

Emergency Preparedness

❖ Program and IT staff should develop a downtime policy to ensure continuity of documentation and access to client contact information during emergencies (this is more geared to provider activities, as IT would have their own disaster recovery plan).

Have Additional Questions?

There are several TA providers available to assist you. Contact DISQ or the CAREWare Help Desk for support.

DISQ would like to thank Kevin from the CAREWare Help Desk and the following recipients for their input on this resource:

- *Alyssa Roberts & Emily Wilkins, North Carolina Department of Health and Human Services*
- *Tara Thomas, Maine Department of Health and Human Services*

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Roles and Responsibilities

Role	Responsibilities
IT Staff/ Contractor	Keep server running
	Manage SQL Server maintenance to improve efficiency
	Install CAREWare build updates including Business Tier and HTTP Server (keeping both components on the same build)
	Ensure server security; configure CAREWare security settings, such as two-factor authentication and password policies
	Back up CAREWare SQL Server database routinely and before every build upgrade
	Delineate disaster recovery plan (and implement if needed)
	Run a query in SQL Server (when needed) to resolve issues
	Manage issues related to sending files via the business tier (e.g. network, file folder permissions, or other configuration setting)
	Manage secure web access to CAREWare including HTTP Server URL, TLS certificate installation and renewal, firewall/port rules, and the IIS reverse proxy (if used)
	Provide logs and other CAREWare documentation to inform resolution of issues
	Routinely update .NET Framework, Message Queuing, Windows and SQL Server
Recipient Program Staff/ Contractor	Set up and manage contracts (annually, with updates as needed)
	Establish subservices and units across agencies
	Set up and manage users (e.g. remove if no log in after 120 days, add when new, retire when leave); have users sign annual User Agreements; resolve user lockouts
	Set up and manage user groups (determining access users need, user profiles so not multiple unique groups)
	Routinely review data quality (client deduplication, eligibility, align with funding expectations, enter within 30 days)
	Routine and ad-hoc training and documentation development
	First tier helpdesk support with escalation to IT/CAREWare helpdesk as needed
	Create and manage custom reports and performance measures
	Manage data imports
	Communicate system issues to users including maintaining local CAREWare user mailing list and CAREWare admin mailing list
	Support and manage agency-specific customization; ensure customization is uniform across providers to reduce duplication of customized fields
	Direct CAREWare activities for RSR preparation including guidance to correct data quality issues
	Coordinate testing of new builds; approve IT staff to move forward with upgrades
	Manage agency-level data-sharing agreements

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