

Insurance Assessments

Purpose	Document a client's medical insurance so staff can meet Ryan White payor-of-last-resort requirements and complete required reporting for the RSR and ADR .
Who should do this	CAREWare case managers, medical staff, and other users who maintain annual client information.
Use this guide when you need to	Add an insurance assessment to identify primary and secondary health coverage.
Main distinction	CAREWare allows one primary insurance and multiple secondary insurances for each assessment.

Quick path

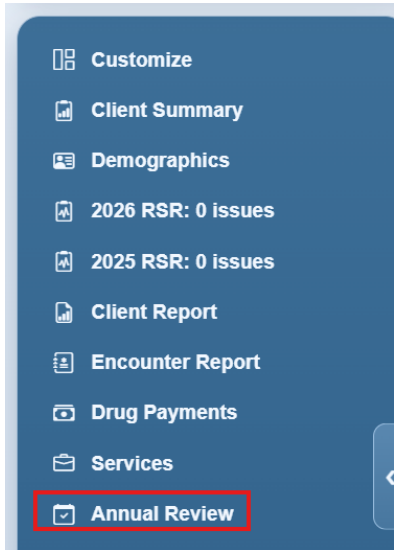
Client record > Annual Review > Insurance Assessments > Add

Before you begin

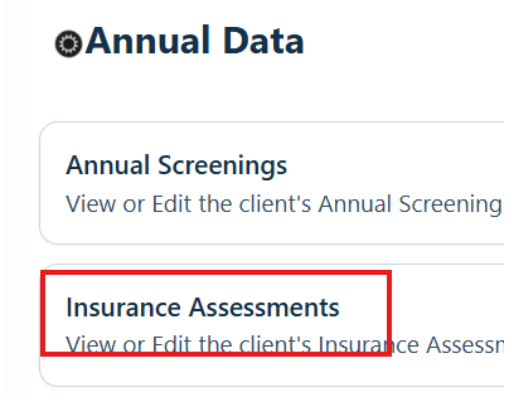
- Identify all health insurances for the client, including which insurance serves at the primary source of healthcare coverage.
- HRSA-defined insurance types are built into CAREWare. Custom insurance types can be added through [Insurance Setup](#) in Central Administration.

Add an insurance assessment

Step 1. Click Annual Review in the left-hand menu.



Step 2. Click Insurance Assessments.



Step 3. Click Add.

View

Add

Edit

Delete

Back

Help

Print or Export

Column

Insurance Assessments

Search:

<<

<

>

>>

100

entries per

Date

Primary Insurance

No Re

Insurance Assessments buttons

Use these commands to manage assessment records.

Item	What it does
View	Open the selected record.
Add	Create an insurance assessment record.
Edit	Change the selected assessment.
Delete	Remove the selected assessment.
Back	Return to the Annual Data menu.
Help	Open this user guide for Insurance Assessments.
Print or Export	Print or export the insurance assessment list.
Column Visibility	Choose columns shown in the list.

Step 4. Complete the Insurance Assessment Date.

Insurance Assessments

Insurance Assessment Date: 07/24/2026

Primary Insurance:

DCD/ADD

Step 5. Select the client's primary insurance from the dropdown list.

Insurance Assessments

Insurance Assessment Date: 07/24/2026

Primary Insurance:

Association Plan: Aetna description

High Risk Insurance: Affinity Health Plan

Indian Health Service: AFLAC

Medicaid, CHIP or Other Public Plan: Association Plan

Medicare (unspecified): High Risk Insurance

Medicare Part A/B: Indian Health Service

Medicare Part A/B: Insurance provided to volunteers.

Reporting note

Other Plan is reported as "Unknown" on the RSR.

Insurance Assessment Date, Primary Insurance, and secondary insurances complete RSR Q.15 (client health coverage) and ADR Q.13 (client health insurance).

Step 6. Check the boxes for all secondary insurances for the client.

Primary Insurance: Medicare Part A/B

RSR/ADR

Association Plan: ☐

High Risk Insurance: ☐

Indian Health Service: ☐

Medicaid, CHIP or Other Public Plan: ☐

Medicare (unspecified): ☐

Medicare Part A/B: ☒

Medicare Part C: ☐

Medicare Part D: ☐

No Insurance: ☐

Other Plan: ☐

Private - Employer: ☐

Private - Individual: ☐

VA, Tricare and other military health care: ☐

Step 7. Click Save.

Save

Cancel

Insurance Assessments

Insurance Assessment Date:

07/24/2026



Primary Insurance:

Medicare Part A/B



RSR/ADR

Association Plan:

☐

High Risk Insurance:

☐

How to confirm it worked

The new assessment appears in the Insurance Assessments list with its date and coverage information.

Insurance Assessments

Search:

« < 1 > »

Go to page entries per page Showing 1 to 1 of 1

Date	Primary Insurance	Secondary Insurance	Full LIS
07/24/2026	Medicare Part A/B	Other Plan	

Troubleshooting and common questions

What if a client's insurance is not listed?

Use the Insurance Setup feature in CAREWare to add custom insurance types. Please note that custom insurance types are not reported on the RSR or ADR.

Related References

Document	Use it for
RSR Documents	RSR documents, such as location of RSR fields in CAREWare.
ADR Documents	ADR documents, such as location of ADR fields in CAREWare.
Insurance Setup	Add custom insurance types to CAREWare. Please note that these values are not reported on the RSR or ADR.