

Services

Purpose	Add, review, update, delete, print, or export service records for a client.
Who should do this	CAREWare users who enter or manage client services.
Use this guide when you need to	Record and edit services.
Main warning	Before saving a Ryan White service, review any eligibility warning for the service date.

Quick path

Client record > Services > Add > enter service details > Save

Service data used in reports

The service date and category can affect data required for federal reports. Use your program's reporting rules when you enter services.

RSR

For the Ryan White HIV/AIDS Program Services Report (RSR), the date and service category support questions 76 and 77; questions 16-44, 75, and 78; question 47; question 48; and question 74.

ADR

For the AIDS Drug Assistance Program Data Report (ADR), the date and service category support question 20, Receipt of Health Care Coverage Services, and question 25, Receipt of Medication Services.

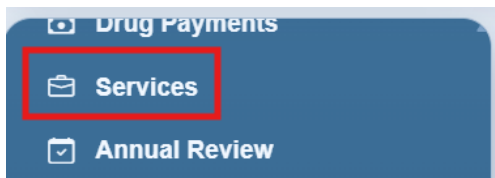
EHE Triannual Report

For the Ending the HIV Epidemic (EHE) Triannual Report, the date and service category identify these services:

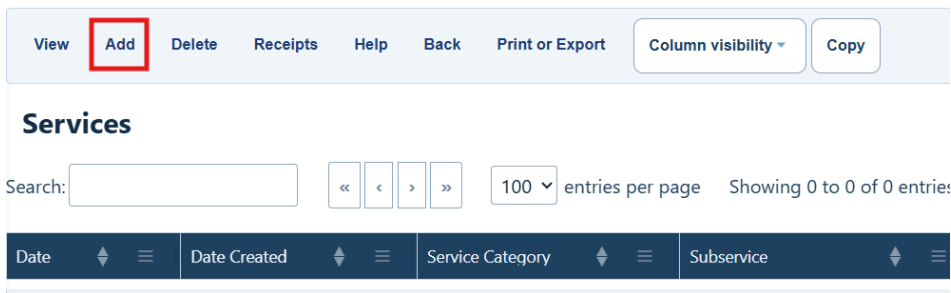
- 1 – Any RWHAP or initiative service
- 1a – Ending the HIV Epidemic initiative services
- 1b – Outpatient/Ambulatory Health Services
- 1c – Medical Case Management, including Treatment Adherence Services
- 1d – Non-Medical Case Management Services
- 1e – Mental Health Services
- 1f – Substance Abuse Outpatient Care
- 1g – Residential Substance Abuse Services
- 1h – Housing

Add a service to a client record

Step 1. Open the client record. In the left menu, select Services.



Step 2. Click Add..



Service menu options

Button	What it does
View	Open the selected service record.
Add	Add a new service record.
Delete	Remove the selected service from the client record.
Receipts	Add or review a receipt record for the selected service.
Help	Open the CAREWare help guide for Services.
Print or Export	Create a printable report or export the service list as a CSV file.
Column Visibility	Choose which columns appear in the service list.

Step 3. Enter the service Date.

[Save](#) [Save And Add](#) [Add Receipt](#) [Back](#)

Add Service

Client:

Date: 

Add Service menu options

Button	What it does
Save	Save the service record.
Save and Add	Save the current record and add another service record for the client.
Add Receipt	Add a receipt.
Back	Return to the list of services.

Step 4. Select the contract from the dropdown list.

[Save](#) [Save And Add](#) [Add Receipt](#) [Back](#)

Add Service

Client:

Date: 

Contract: 

Step 5. Select the service from the dropdown list.

[Save](#) [Save And Add](#) [Add Receipt](#) [Back](#)

Add Service

Client:

Date: 

Contract: 

Tag: 

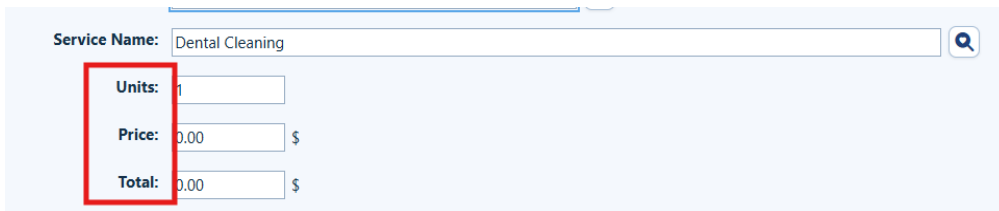
Service Name:

Dental

Dental Cleaning

CAREWare fills in Units, Price, and Total based on the subservice setup in the [contract](#). You can change these values when needed.

- If you change Units, CAREWare recalculates Total as Units x Price.
- If you change Price, CAREWare recalculates Total as Units x Price.
- If you change Total, CAREWare recalculates Price as Total divided by Units.



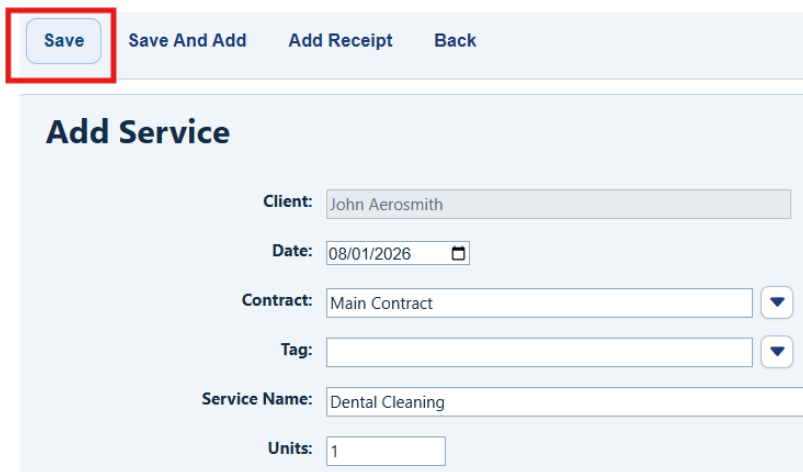
Service Name: Dental Cleaning

Units: 1

Price: 0.00 \$

Total: 0.00 \$

Step 5. Select Save.



Save Save And Add Add Receipt Back

Add Service

Client: John Aerosmith

Date: 08/01/2026

Contract: Main Contract

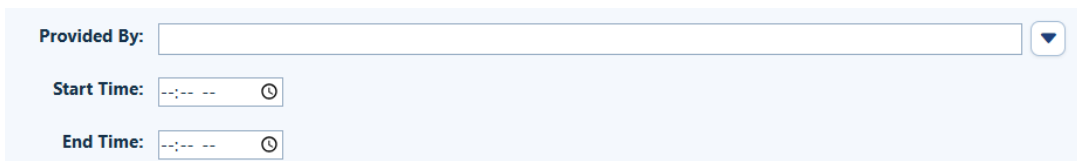
Tag:

Service Name: Dental Cleaning

Units: 1

Third-party billing fields

If [third-party billing](#) is turned on for the provider domain, three more fields appear after you select the service name.



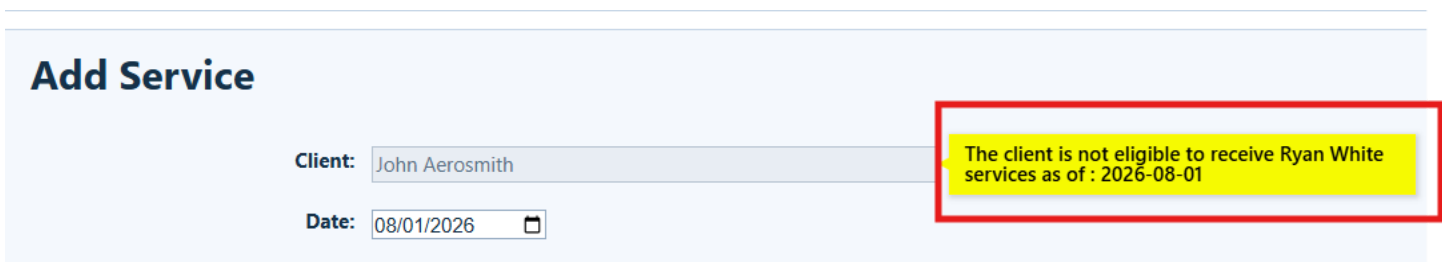
Provided By:

Start Time: --:-- --

End Time: --:-- --

Ryan White eligibility check

CAREWare displays a quality check when the client is not eligible for Ryan White on the service date. Update eligibility in the Eligibility tab when appropriate.



Add Service

Client: John Aerosmith

Date: 08/01/2026

The client is not eligible to receive Ryan White services as of : 2026-08-01

Add a service receipt

Use receipts to record payments tied to a service, such as a payment from an insurance carrier.

Step 1. Select the service record, and then select Receipts.

SaveSave And AddAdd ReceiptBack

Step 2. Select Add.

ViewAddEditDeleteBackPrint or ExportColumn visibility ▾Copy

Service-Amount Received

Search: « < > » 100 ▾ entries per page Showing 0 to 0 of 0 entries

Receipt Date	Amount	Source
No Records to display		

Step 3. Enter the Date, Amount, and Source. If needed, select Out of Pocket Expense.

SaveBack

Add Service

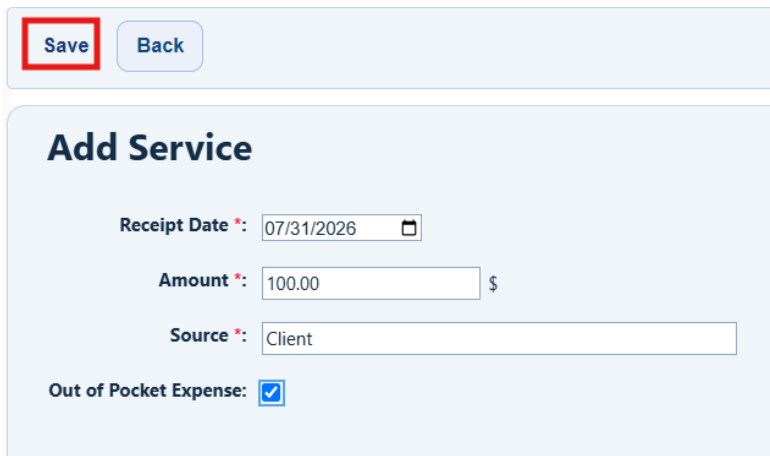
Receipt Date *: 07/31/2026

Amount *: 100.00 \$

Source *: Client

Out of Pocket Expense: ☒

Step 4. Select Save.



Save **Back**

Add Service

Receipt Date *: 07/31/2026 

Amount *: 100.00 \$

Source *: Client

Out of Pocket Expense: ☒

How to confirm it worked

- The saved service appears in the client's Services list.
- The service date, category, contract, units, price, and total are correct.
- Any saved receipt appears with the service record.
- The printed report or CSV file contains the expected service records and columns.

Troubleshooting and common questions

Why do I see a Ryan White eligibility warning?

The client is not eligible for Ryan White on the service date. Review the date and the client's Eligibility tab before you continue.

Why did the price or total change?

CAREWare calculates the values from Units x Price. Changing Units, Price, or Total may cause another value to be recalculated.

Why do I see extra billing fields?

Third-party billing is turned on for the provider domain. Complete the fields required by your program.

Related references

Document	Use it for
Third Party Billing	Record billable services, billing insurance providers, records of staff providing billable services, and other functions.
Contract Manager	Set up and manage contracts for recording services in client records.