

Insurance Setup

Purpose	Add, organize, and map custom insurance options in CAREWare.
Who should do this	Central administrators who manage clinical setup.
Use this guide when you need to	Add insurance coding systems or codes and map them to Ryan White Services (RSR) insurance options.
Main warning	Map each custom code to the correct RSR option so reports count insurance correctly.

Quick path

Central Administration > Administrative Options > Clinical Setup > Central Clinical Setup > Insurance Setup

Important: Custom insurance codes must be mapped to the right RSR insurance option before they are used in client records.

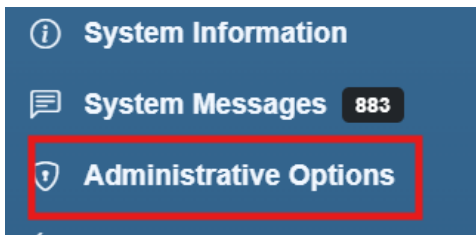
Before You Begin

- Understand the HRSA-defined insurance types that are built into CAREWare and how Insurance Setup may affect reporting for the RSR and ADAP Data Report (ADR)
- Review insurance tracking needs based on custom options under Insurance Assessment in client records, mapping custom options to RSR insurance categories, and grouping insurance options under Insurance Coding Systems.

Open Insurance Setup

Important: Insurance Setup is only available under Central Administration.

Step 1. Log in to Central Administration, and then select Administrative Options.



Step 2. Select Clinical Setup.

⚙️ Administrative Options

Clinical and Data Configuration

 **Clinical Setup**
Clinical definition and code management.

Step 3. Select Central Clinical Setup.

⚙️ Clinical Setup Options

Central Clinical Setup
Setup clinical options and centralized coding terminol

Step 4. Select Insurance Setup.

Medication Setup
Activate medications.EPIC, HRSA Code,

Insurance Setup
Setup and manage insurance codes

Add a New Insurance Coding System

Step 1. Select Insurance Coding Systems.

⚙️ Central Insurance Setup Options

Map Insurance Codes
Create And configure lab definitions And map coding syste

Insurance Coding Systems
Create, activate And modify insurance coding systems

Step 2. Select Add System.

[Activate](#)[Deactivate](#)[Add System](#)[Edit System Info](#)[Manage Codes](#)[Export Metadata](#)[Create from PDI Mappings](#)[Delete](#)[Back](#)[Print or Export](#)

Column visibility ▾

Copy

Insurance Coding Systems buttons

Button	What it does
Activate	Activate an existing insurance coding system.
Deactivate	Deactivate an existing insurance coding system.
Add System	Add a new insurance coding system.
Edit System Info	Edit information for an existing system.
Manage Codes	Add or manage codes in an existing system.
Export Metadata	Export metadata for an existing system.
Create from PDI Mappings	Create a system based on PDI mappings.
Delete	Delete an existing insurance coding system.
Back	Return to Central Insurance Setup Options.
Print or Export	Print or export the list of systems.
Column Visibility	Choose which columns appear in the list.

Step 3. Enter a name for the new coding system.

[Save](#)[Back](#)

Insurance Coding Systems

Name:

Test Insurance Coding

Step 4. Select Save.

Save

Back

Insurance Coding Systems

Name:

Test Insurance Coding

Manage Codes in an Insurance Coding System

TIP

After the insurance coding system is added, the next step is to add the insurance options under the new coding system.

Step 1. Select the system, and then select Manage Codes.

[Activate](#) [Deactivate](#) [Add System](#) [Edit System Info](#) **[Manage Codes](#)** [Export Meta](#)

Column visibility ▾

Copy

Insurance Coding Systems

Search:

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PK	Active	Name
e49c5d50-5a9f-4c0b-bf12-0cfc34f3197c	Yes	RSR
1330e85e-9b9a-4934-a8bc-158e08745778	Yes	Patagonia
31733385-d283-47fe-8c4a-1ed2030b2e29	Yes	Test Insurance

Step 2. Select Add.

[Add](#) [Edit](#) [Delete](#) [Back](#) [Print or Export](#)

Column visibility ▾

Insurance Codes

Search:

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Go to page

Code	Description
Test Insurance	Test Insurance

Insurance Codes Menu Options

Button	What it does
Add	Add a new insurance code.
Edit	Edit an existing insurance code.
Delete	Delete an existing insurance code.
Back	Return to the Insurance Coding Systems menu.
Column Visibility	Show or hide columns in the list of insurance codes.

Step 3. Enter a code name and description.

[Save](#) [Back](#)

Insurance Codes

Code	New Insurance Code
Description	This is a new insurance code.

Step 4. Select Save.

[Save](#) [Back](#)

Insurance Codes

Code:	New Insurance Code
Description:	This is a new insurance code.

Important: The new code added to the selected coding system. The next step is to map it under Map Insurance Codes.

Important: When you manage codes, CAREWare shows the codes for the selected system.

Activate and Map a New Insurance Code

Step 1. Return to the Central Insurance Setup Options menu, and select Map Insurance Codes.

Central Insurance Setup

[Map Insurance Codes](#)
Create And configure lab definition

Step 2. Select an Insurance Type.

CodingBackPrint or Export

Column visibility

Insurance Setup

Search:

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PK	Insurance Type	Type
094DA930-1FC5-444C-8880-B6576E9BCE98	Aegon	UniqueCoc

Step 3. Select Coding.

CodingBackPrint or Export

Column visibility

Insurance Setup

Search:

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PK	Insurance Type	Type
094DA930-1FC5-444C-8880-B6576E9BCE98	Aegon	UniqueCoc

Step 4. Select Add.

AddEditDeleteBackPrint or Export

Column visibility

Insurance Codes

Search:

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Go to pag

Insurance Codes Menu Options

Button	What it does
Add	Add a new insurance code.
Edit	Edit an existing insurance code.
Delete	Delete an existing insurance code.
Back	Return to Insurance Setup.
Print or Export	Print or export the list of insurance codes.
Column Visibility	Show or hide columns in the Insurance Codes list.

Step 5. Select the System, Code, and use.

SaveBack

Insurance Codes

System *:

Test Insurance

Code *:

New Insurance Code - This is a new insurance code.

Use *:

Optional

Step 8. Select Save.

SaveBack

Insurance Codes

System *:

Test Insurance

Code *:

New Insurance Code - This is a new insurance code.

Use *:

Optional

Important: When a user selects a custom insurance option in a client record, CAREWare automatically selects the RSR insurance option that is mapped to the custom insurance code.

How to confirm it worked

- Open an Insurance Assessment in a client record. Select the custom insurance option and confirm that CAREWare also checks the RSR/ADR option you mapped to it.
- Run the RSR/ADR Client Report, use the RSR or ADR Viewer, and verify that the client's insurance was properly reported.

Related References

Document	Use it for
Insurance Assessments	Add insurance assessments to client records.
RSR Viewer	View the RSR Client Report.
RSR Documents	Review documents for RSR reporting.
ADR	Run the ADR.
ADR Viewer	View the ADR Client Report.