Welcome!

CAREWare Quick Start guides will walk you through the basics of setting up, managing and using the main CAREWare functions. It is intended for non-technical users who just need to get basic information in and out of CAREWare.

About This Guide #4:
Customizing Tabs and Fields

PLEASE NOTE: The client data used in these manuals is purely fictional.

Guides in this series:

1. *Downloading and installing CAREWare*
2. *Creating contracts and services*
3. *Entering Clients and their Service and Clinical Data*
4. *Customizing tabs and fields*
5. *Customizing clinical data*
6. *Working with CAREWare's prebuilt reports (including the RSR)*
7. *Creating basic custom reports*
8. *Creating more advanced reports*
9. *User and System administration*

For additional information:

Please refer to the **Frequently Asked Questions** page on the CAREWare programmers' website:

http://www.jprog.com/wiki/

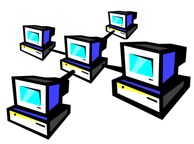
Or contact the help desk at cwhelp@jprog.com.

Revision date: September 21, 2012

First Things First

What do I need to get started?

- You should have at least one client entered in the system so you can see how your custom tabs and fields will look.
- You should think about the organization of the custom information you want to add. For instance, you may want to create a “Food Bank” custom tab, with fields relevant to food bank services such as whether a client is diabetic, how many visits a month they are approved for, etc.



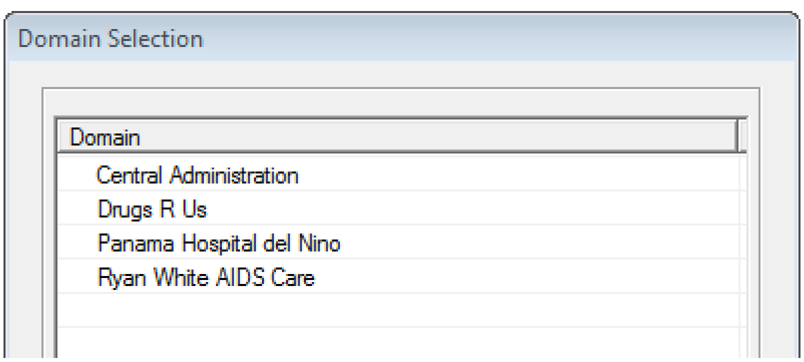
A note for multiple provider networks:

Please be aware that custom tabs and fields are data which are available to multiple providers without the need to activate client sharing. For instance, if you create a field where you can specify that a client is diabetic, that information will be available to **all** providers who have access to this client’s record and activate the relevant field on a custom tab. (This would not apply to a custom service field as service data is provider specific.)

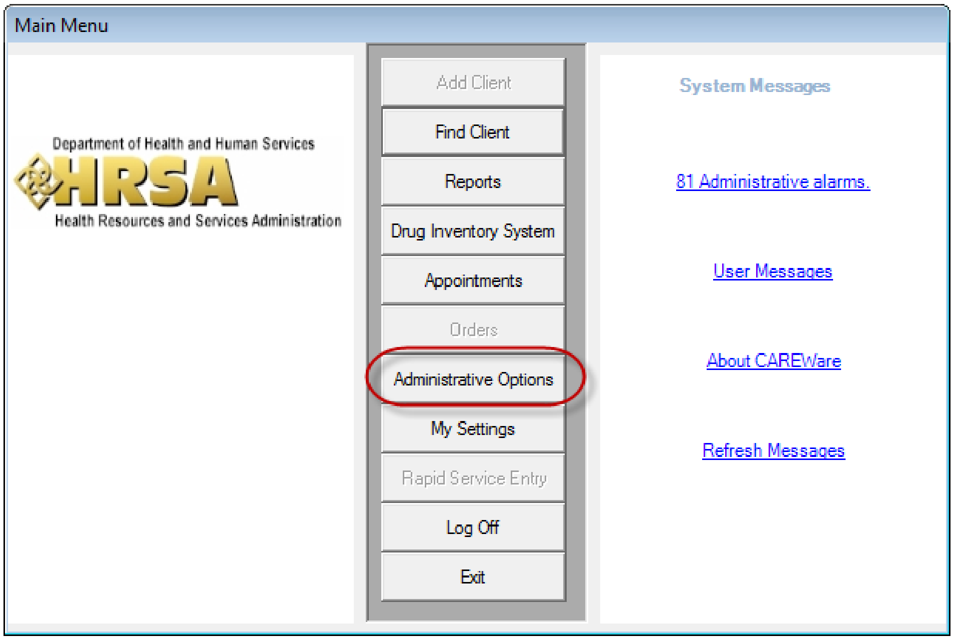
Customizing Custom Tabs

CAREWare offers a variety of custom tabs you can use to expand the range of client data you collect and report. In our samples below, we’ll set up a tab to collect information we can use to run a food bank program. All custom fields can be used in custom reports.

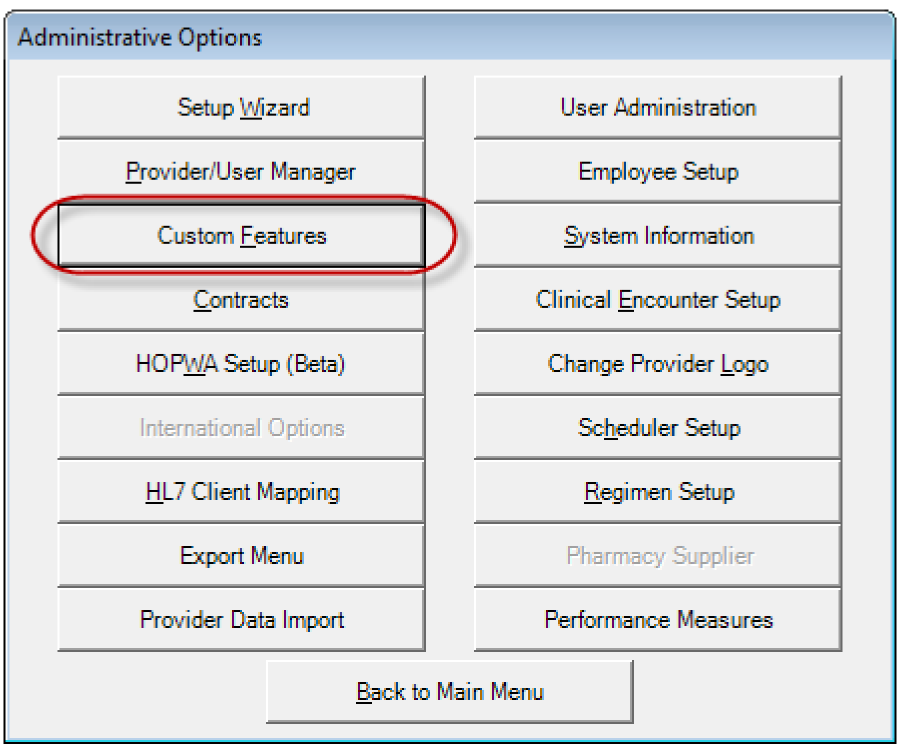
1. Log into CAREWare. If you have administrative privileges and are asked to choose between Central Administration and Provider (“Default” until you change the name), you may wish to log in as Central Admin for this function. This will give you more control over the domains which can access the features you create.



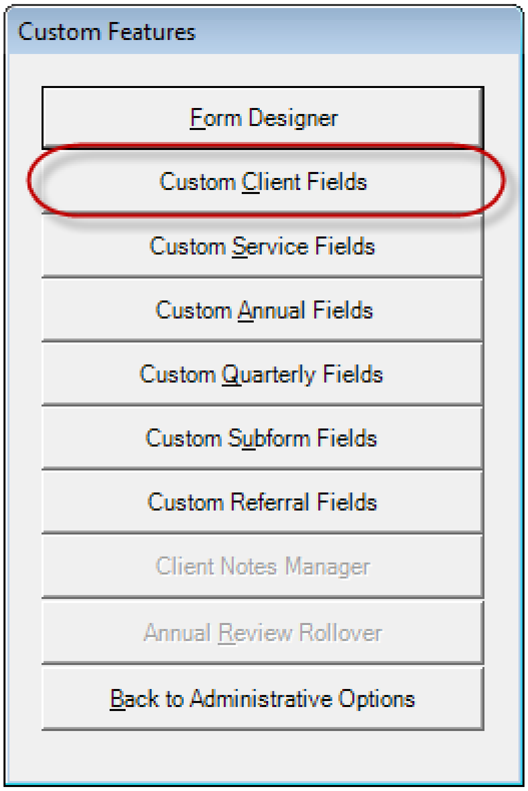
2. Select **Administrative Options** from the main menu.



3. Select **Custom Features** from the Administrative Options menu.

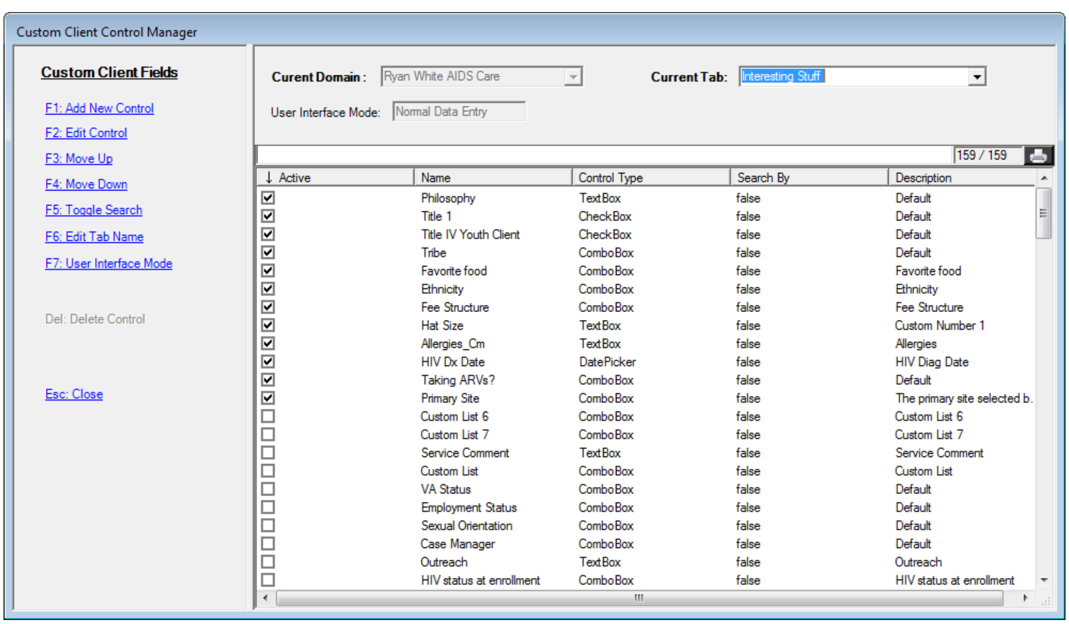


4. Select **Custom Client Fields** from the Custom Features menu.

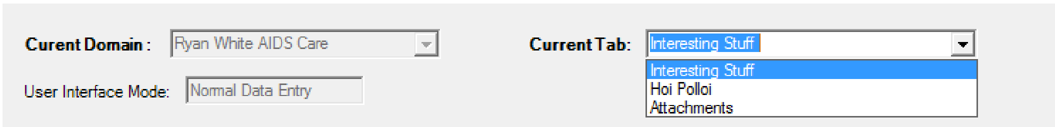


5. The **Custom Client Control Manager** menu appears. From this menu, you can create new fields, edit the properties of existing ones, add or remove fields from a custom tab, and change the tab names.

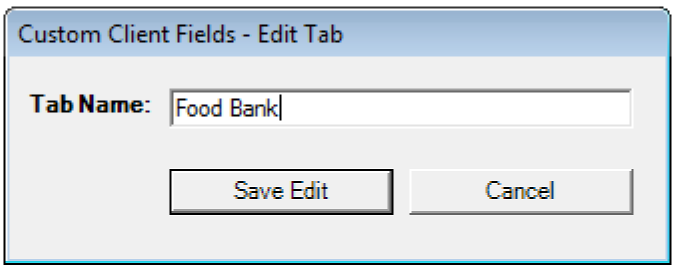
   NOTE: The three custom tabs are named here already; in a fresh CAREWare install, they will be named Custom Tab 1, 2 and 3.



You can use the  arrow next to the Current Tab drop down menu to see available tabs.



6. Select the tab you want to work with and click **F6 Edit Tab Name** to modify it. (When a command starts with a function key name like "F6," you can also just press that function key on your keyboard instead.) Type in the new name and click **Save Edit** when done.

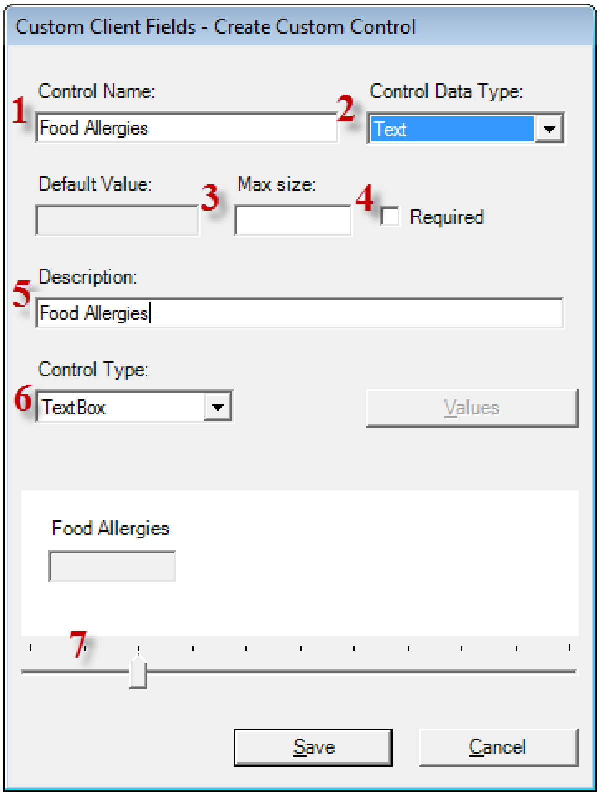


You'll then be ready to add your first "Control," which is the technical name for the custom field.

Creating a text box for free-form data entry:

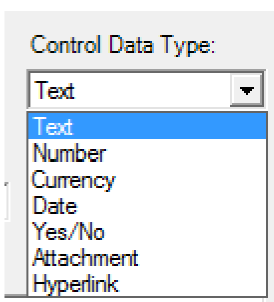
In many cases, you'll want to create "drop down" menus of possible selections a data entry person can choose from. This is best used in cases where you want to standardize data entry from multiple users (i.e., how many food bags a month a client can receive). You may want to create "freehand" text data entry fields for cases where the unexpected can occur (i.e., you may not be able to predict all the possible food allergies a person may have, and may need to add them on the fly). We'll cover both of these, starting with the free form option.

Custom fields have different available parameters, depending on the type.



1. The **Control Name** is what will appear on screen as the field name.

2. The **Control Data Type** determines what kind of information can be entered in the field. Changing the data type changes the other options below. For a free-form data entry field, we select **Text**.



Text type allows free-form data entry of any text, up to the configured size limit, or the creation of combo boxes (drop down menus with preset selections).

Number and **Currency** types allow numeric entry; Currency converts numeric entries into dollar values.

Date type formats the field as MM/DD/YYYY entry only.

Yes/No creates a check box.

Attachment: create a link to a document (such as copies of intake forms, client eligibility documents, etc.)

Hyperlink: create a hyperlink to a website such as HIV treatment guidelines or to the CAREWare website.

There is no **Default Value** for a text box, only for a numeric field.

3. The **Max size** is the maximum number of characters that can be entered in this field. We've specified 20; the maximum is 4,000.

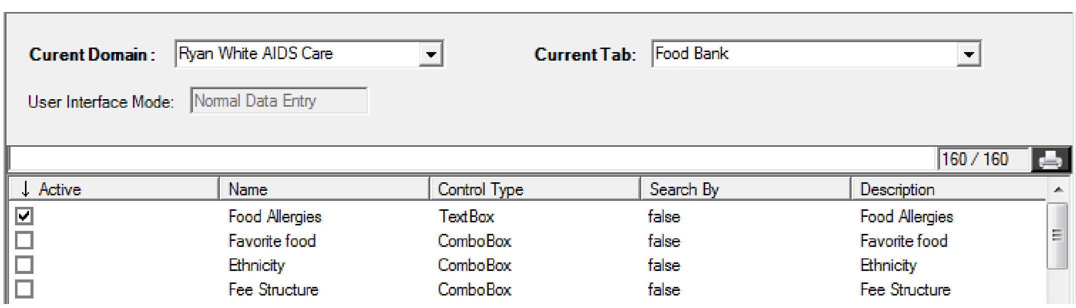
4. The **Required** check box allows you to specify that, once the user clicks inside that field, a value **must** be selected or entered. We don't recommend using this option unless you have a field that has mandatory information for every client.

5. The **Description** is for your own internal use; it's mandatory that you enter something here. We recommend duplicating the field name.

6. The **Control Type** in this case is TextBox for free form data entry, so there are no **Values** to specify.

7. The **Slider** determines the size of the field as it will appear on your tab. For instance, for a field that accepts a maximum of 20 characters, we want to be able to see the complete entry on screen, so we'll slide the slider out far enough to accommodate this.

When you've configured this field's settings, click **Save**. It will appear on the list of controls.



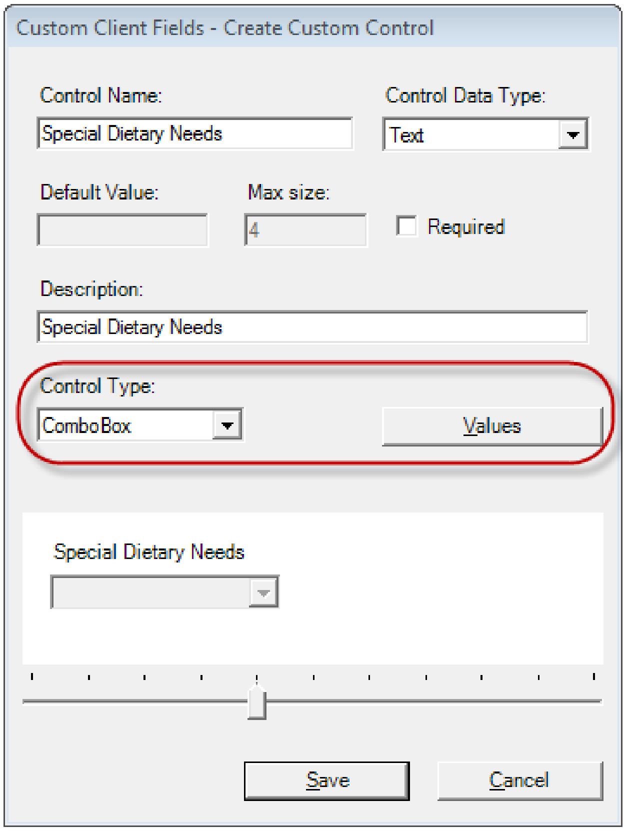
Note that the field is automatically set to **Active** when it's created. This means it will show up on every client's "Food Bank" tab and be available for data entry.

You can only delete these custom fields as a Central Administration user with the proper permissions. **This will delete ALL previous data entered in these fields, so it should be used with extreme caution.**

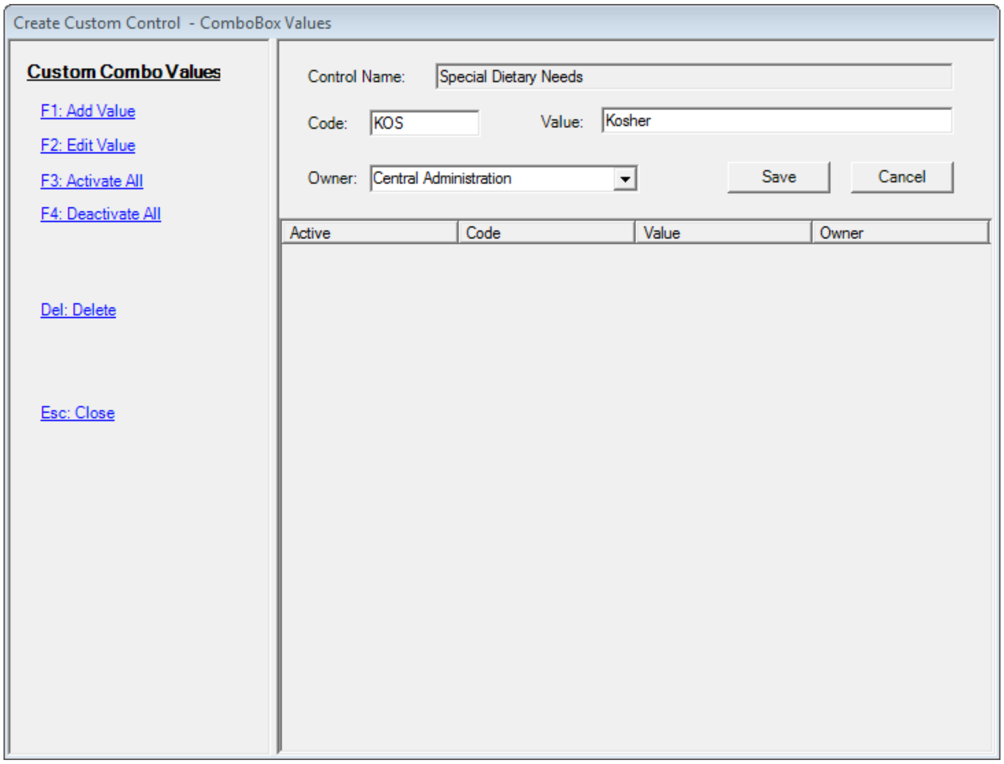
However, you can highlight them here and uncheck the box to remove them from the client's "Food Bank" tab and prevent further data entry.

Creating a text box for drop down data entry

The parameters for a text box with drop down data entry are slightly different than for a free-form data entry box:



1. The **Max size** box is disabled as the entries will come from preset selections.
2. Select **ComboBox** as the control type.
3. The **Values** button becomes enabled when you select ComboBox. Click the **Values** button to continue.



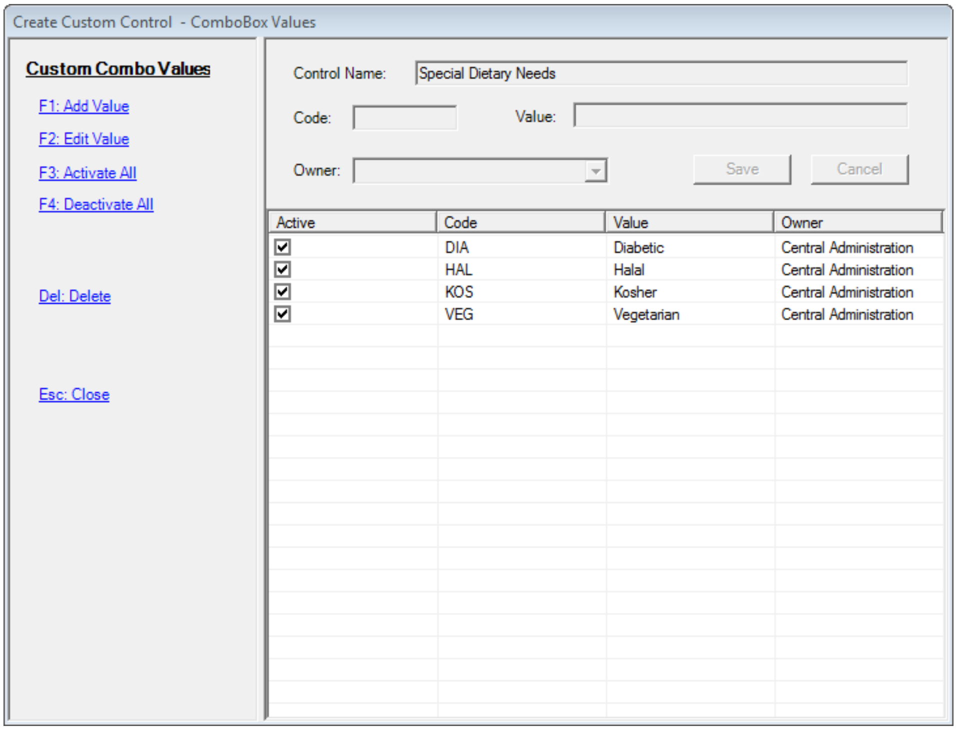
4. Click **F1 Add Value** to enter a new value. Enter a **Code** (this can be a number, the first three letters of the value, etc.) and a **Value**. The Value is what will appear on screen.

5. The **Owner** of this value is the provider who created it. Custom fields can be created in different provider domains, but can only be deleted from the Central Admin domain.

This field allows for the same combo box to be created in different domains, but contain domain specific values. The creation of the field under the Central Administration domain (parent) will ensure standard values appear.

Combo boxes are often used to identify a person such as a case manager for a service provided. Some users have standardized this field for core personnel at the network level, and then allow individual domains to maintain a provider-specific list without being able to edit the 'defaults'.

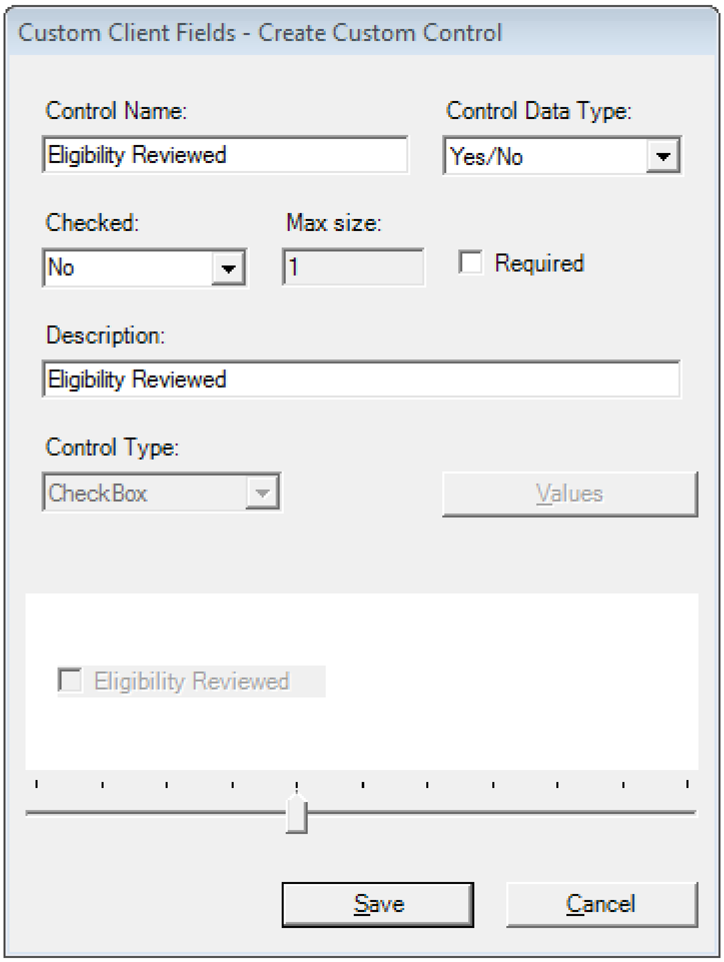
6. Click **Save** when finished. Add additional selections and click **Close** when done. In this case, we've added "Kosher," "Halal," "Diabetic" and "Vegetarian" as special dietary needs. Each control you add is activated by default.


Create Custom Control - ComboBox Values
Custom Combo Values
F1: Add Value
F2: Edit Value
F3: Activate All
F4: Deactivate All
Del: Delete
Esc: Close
Control Name:
Special Dietary Needs
Code:
Value:
Owner:
Save
Cancel
Active
Code
Value
Owner
DIA
Diabetic
Central Administration
HAL
Halal
Central Administration
KOS
Kosher
Central Administration
VEG
Vegetarian
Central Administration

Creating Number, Currency, Date Picker and Yes/No boxes

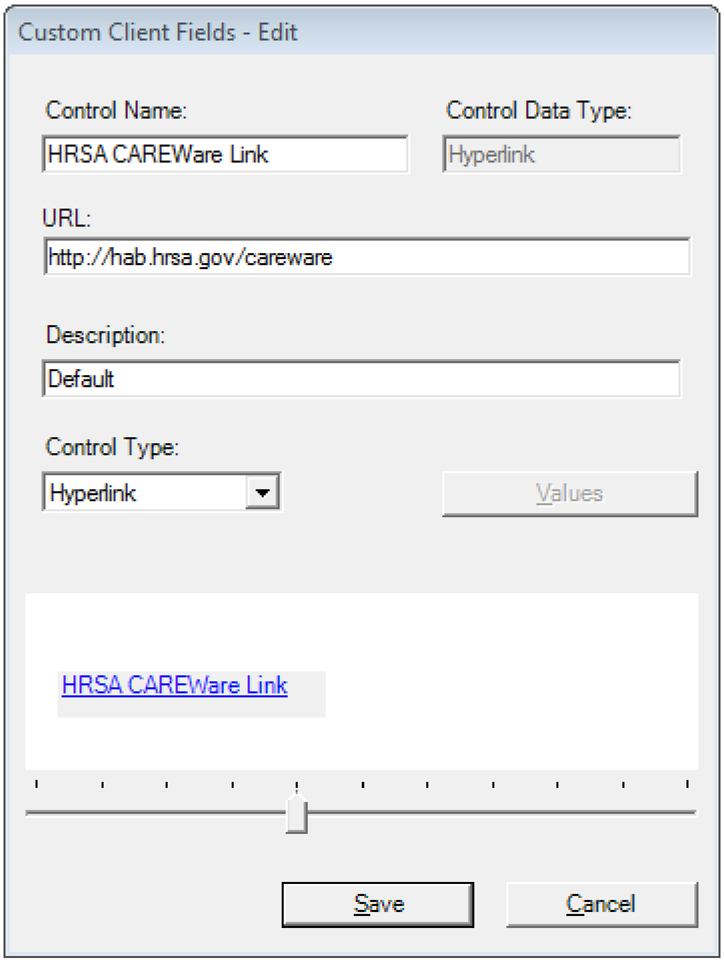
The procedure for creating these types is similar to the procedure for creating text fields. Selecting **Date** automatically sets the control type to DatePicker, which allows you to either enter a date or select one from the drop down calendar.

Selecting **Yes/No** type allows you to choose whether or not the box is **Checked (Yes)** by default. Remember to use the slider Remember to use the slider to ensure the complete field name is visible.



Creating Hyperlinks

You can also create custom hyperlinks which take you directly to sites you refer to often, such as CAREWare. Select control data type **Hyperlink** and type in the URL.



Creating custom attachments

You can create custom attachments in a variety of formats (Word, PDF, jpg, etc).

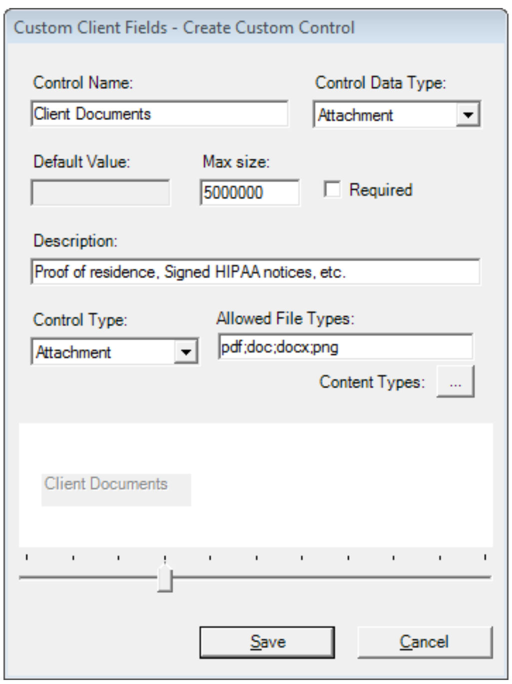
What's it for: Attach specific documents to an individual client record, such as a scanned HIPAA privacy notice or data sharing agreement, or a photograph, or an enrollment form.

Note: To ensure that the main CAREWare database does not get filled up with attachments, they are stored in a separate database. The typical default folder is *C:\Program Files\Microsoft SQL Server\MSSQL$CAREWARE\Data* and the database is "***CW_ATTACHMENTS.mdf***".

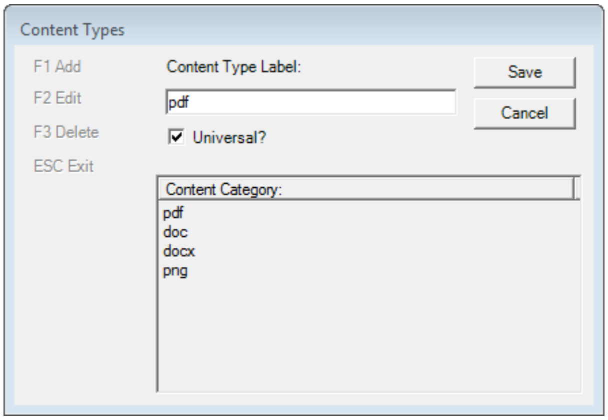
PLEASE NOTE: To use this feature, you must have SQL Server 2005 at a minimum! Earlier versions of SQL Server cannot store the attachments in the required format.

1. Follow the above instructions for creating a new custom field.

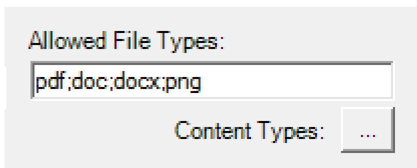
2. The Control type should be set to "Attachment."



3. Click **Content Types** to create all allowed file types for your system. If you click **Universal**, as long as two (or more) providers share a client AND have the same content type, they can all see the attachments. Click **Save** as you add each type.



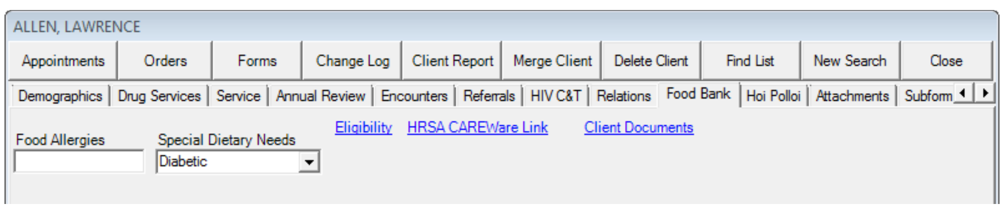
4. Under **Allowed File Types** for this particular link, enter each type separated by a semicolon. Just type the letters, i.e. “png” and not “.png” for that type.



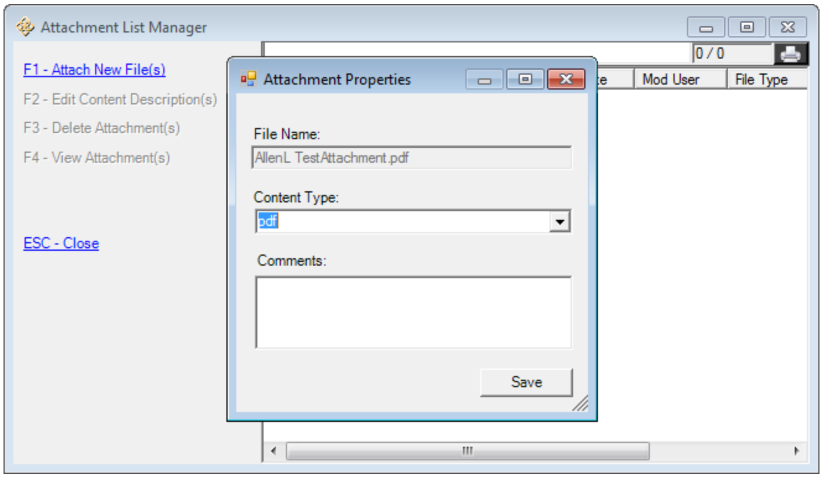
5. Click **Save**.

6. Now we’re ready to go to a specific client and attach documents to their record. Open a client record.

7. Click on the “Food Bank” tab we created.

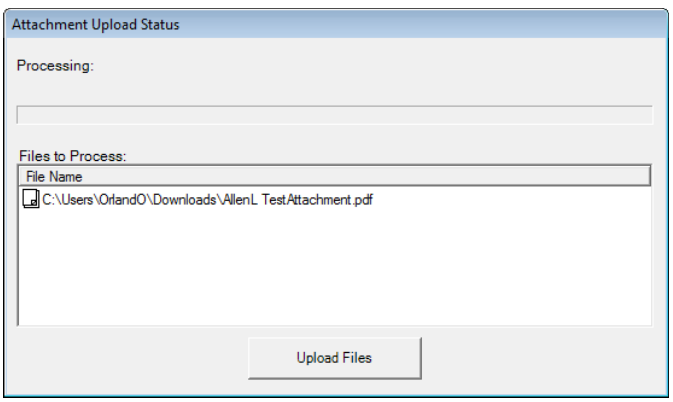


8. Click on the **Client Documents** link you created. Click **F1 Attach New File(s)**, and browse to the file you want to upload and select it.



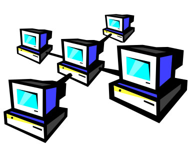
9. Verify the content type from the list of types you created. Enter any Comments, and click **Save**.

10. Click **Upload Files** to upload the document.



11. Click on the **Client Documents** hyperlink to see a list of uploaded files.

12. Click **F4 View Attachment** to open the file in the appropriate program.



A note for multiple provider networks:

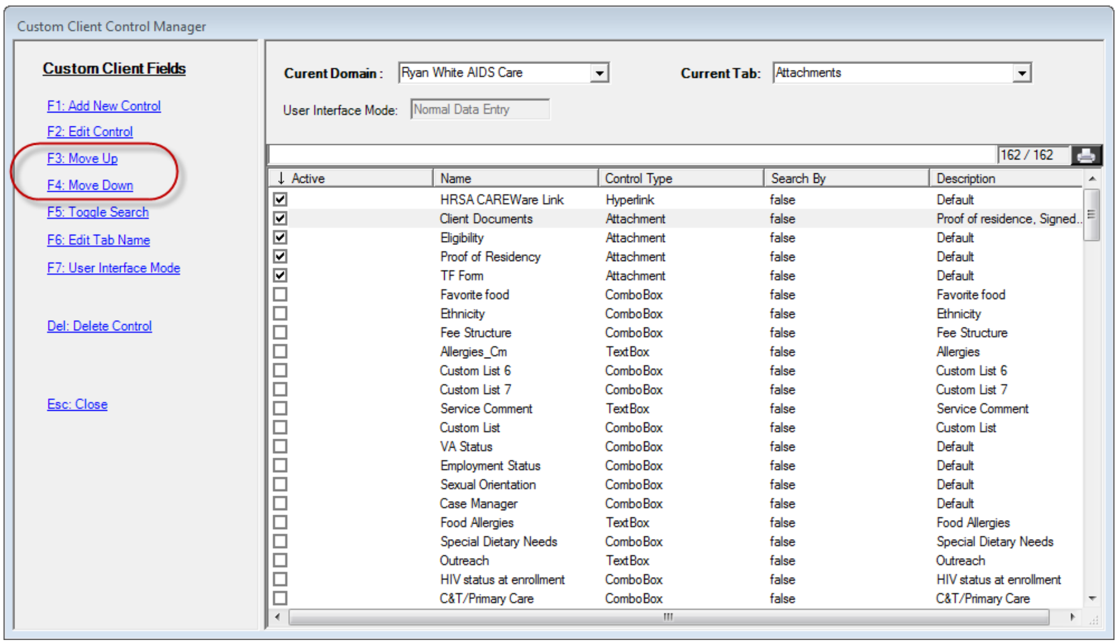
Any user with the proper permission is able to delete any document for a shared client, regardless of whether or not they uploaded the original document. Configure your permissions accordingly.

While you can view attachments from the Central Admin domain, you can only upload/delete documents from within your provider domain.

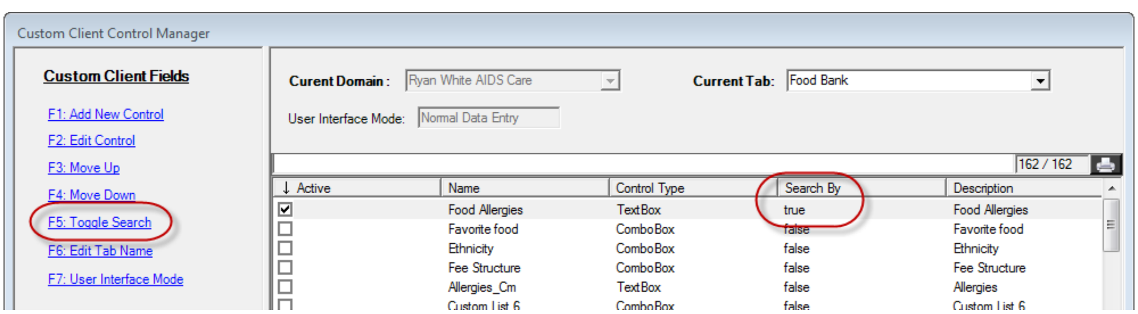
Setting field order

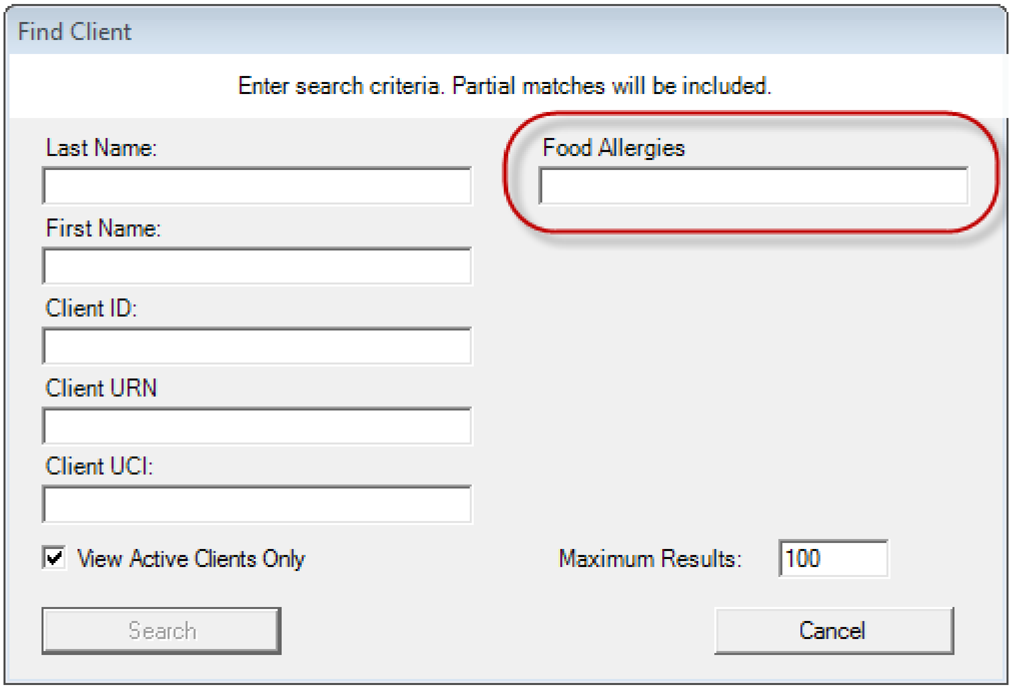
The order of the fields in the Control Manager is the order in which they'll appear horizontally on the data entry screen. You can move fields around on the custom tab using the Field Order functions.

1. Click on a field to highlight it and then select either **F3 Move Up** or **F4 Move Down** to rearrange. Click the Move Up or Move Down command multiple times to keep moving the field.



2. The Toggle Search property allows you to add one or more of your custom fields on the Find Client screen:

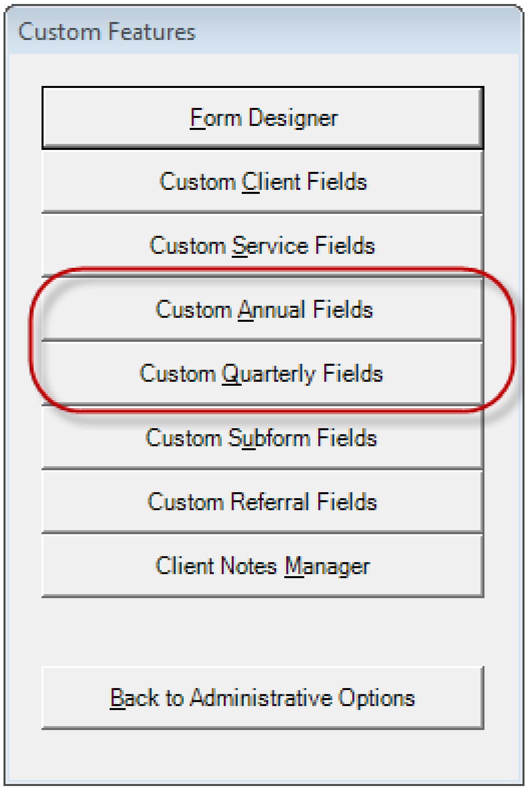



Find Client
Enter search criteria. Partial matches will be included.
Last Name:
Food Allergies
First Name:
Client ID:
Client URN
Client UCI:
View Active Clients Only
Maximum Results:
100
Search
Cancel

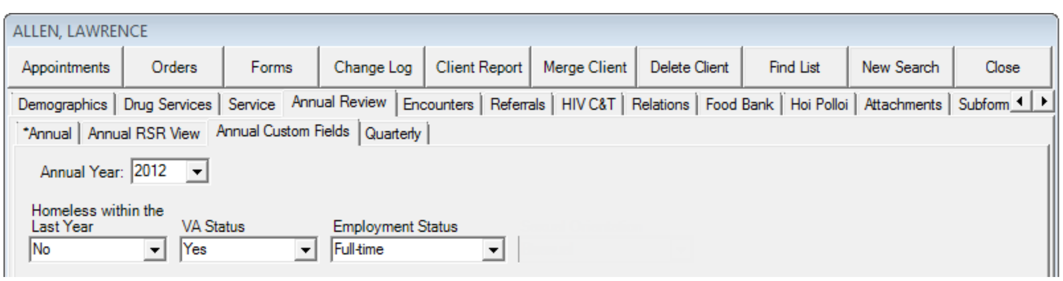
Custom fields on Annual and Quarterly tabs

The process for adding custom fields to your Annual Review or Quarterly tabs is nearly the same as it is for adding them to your custom tabs.

1. From the Custom Features menu, select **Custom Annual** or **Custom Quarterly** fields.



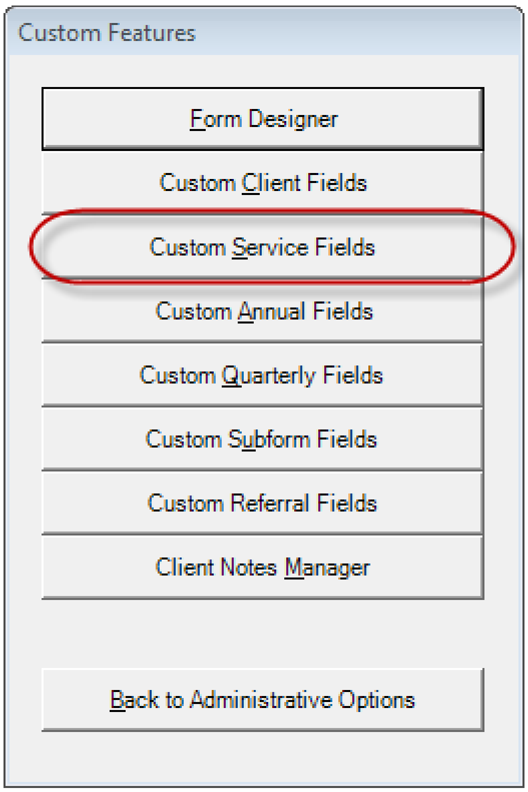
2. Follow the steps above for custom tabs to add, activate/deactivate or edit custom fields for the annual review or quarterly tabs.



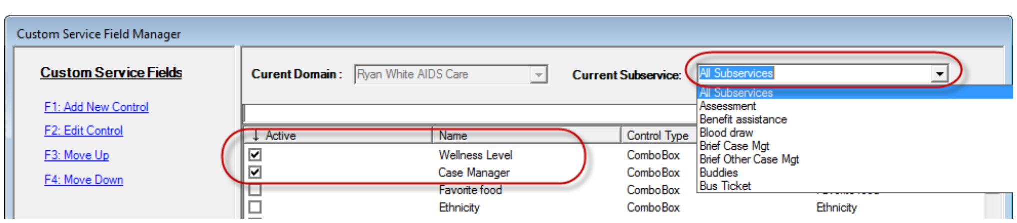
Creating Custom Service Fields

You can extend the range of information you capture for each service visit using custom service fields. This may include listing the case manager or employee who saw the client, procedures your agency may require on a certain type of service, comments that can function as mini case notes, or anything else you wish to add.

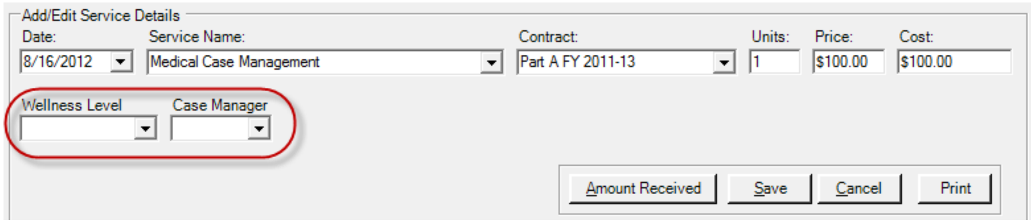
1. Select **Custom Service Fields** from the Custom Features menu.



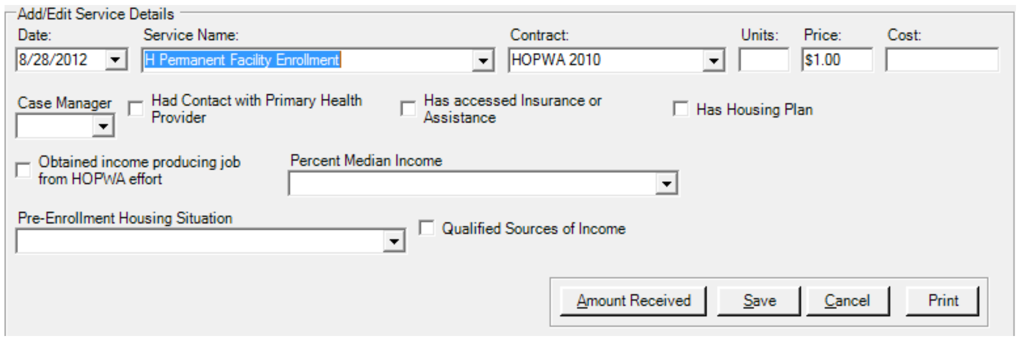
2. Custom service fields can be added to or removed from any or all subservices. The initial screen will display custom service fields that will appear for **all** subservices.



Different subservices can have the same custom fields, or different ones, or a combination thereof. Here is an example of a Medical Case Management field, which has been set up with Wellness Level and Case Manager custom fields.



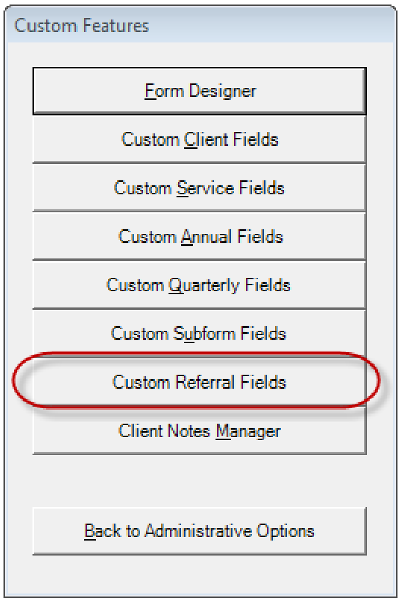
And here is an example of a HOPWA service, which includes the Case Manager field, but also those fields relevant to this service:



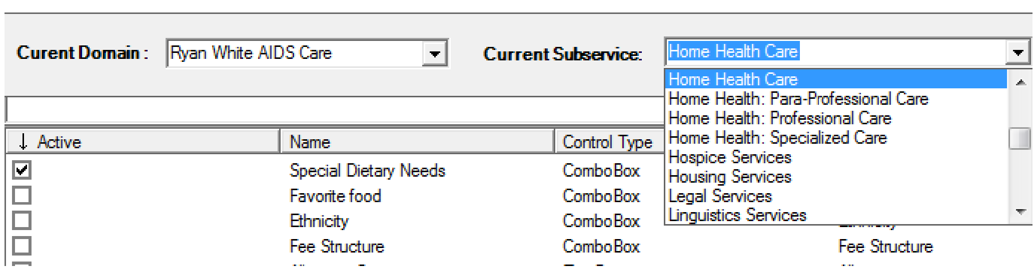
Creating Custom Referral Fields

If you use the Referrals feature in CAREWare, you can add custom fields to your referral information.

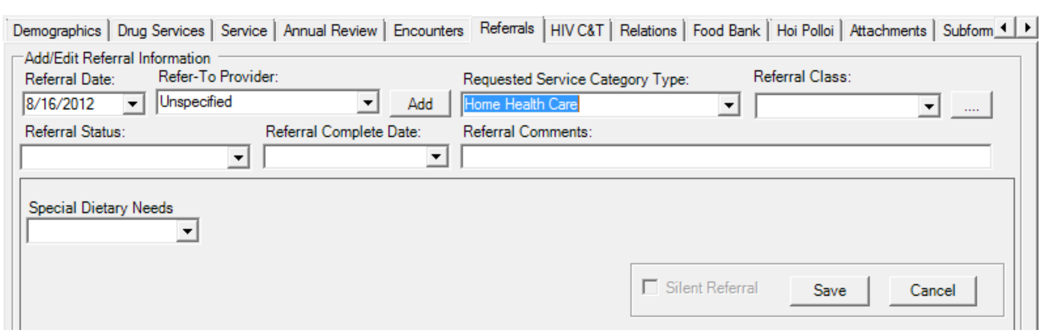
1. Select **Custom Referral Fields** from the Custom Features menu.



2. The process is similar to those above. Select the **Domain, Referral Type**, and click **Active** on any field you wish to add.

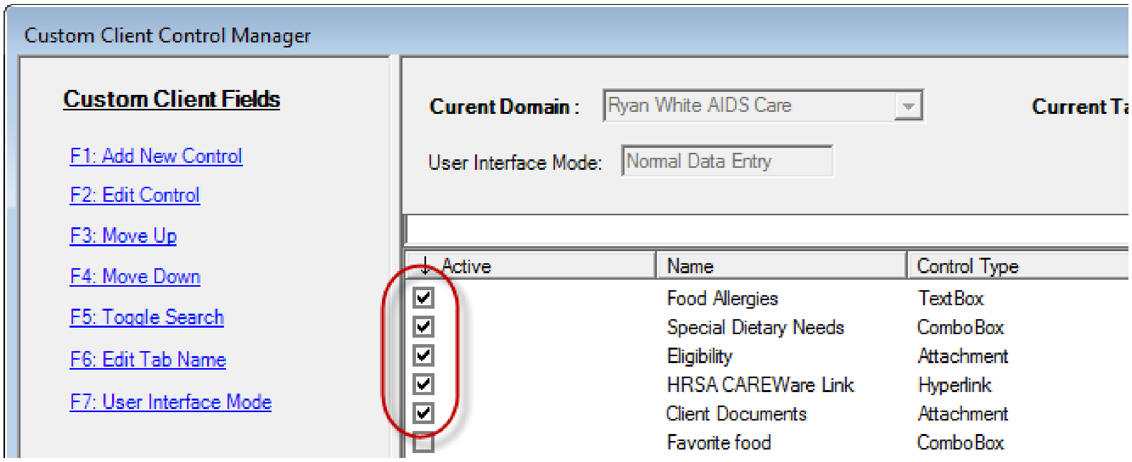


3. Special Dietary Needs is part of the Home Health Care referral now.



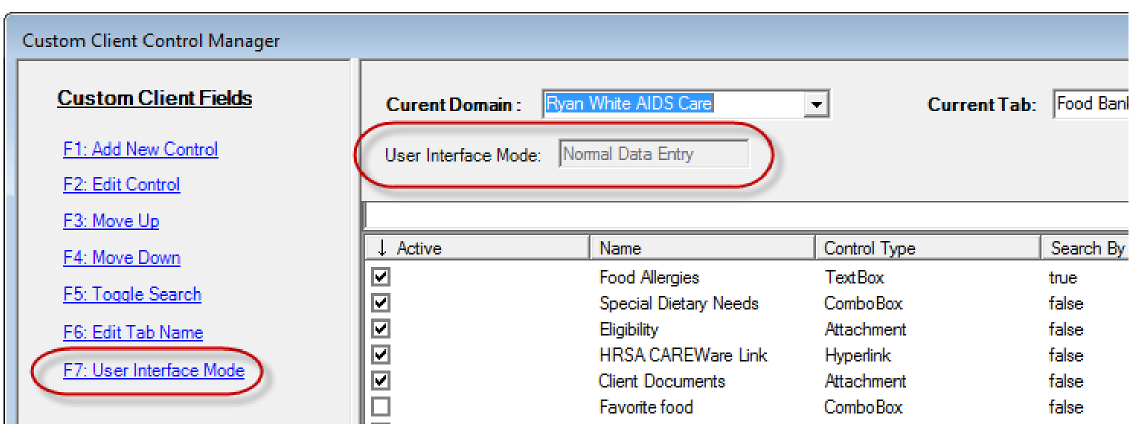
Deactivating Fields

To deactivate a field you don't wish to appear on all subservices, uncheck the Active box next to the field. The data previously entered will remain in the system, but no additional data can be entered unless the field is rechecked/reactivated.

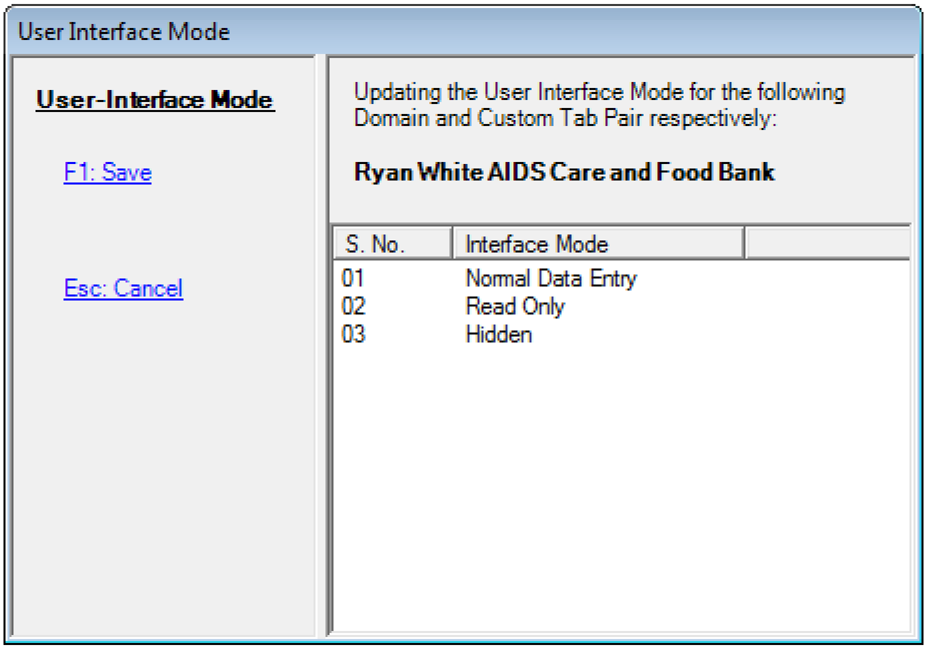


User Interface Mode

In Central Admin, you have access to the User Interface Mode. The user interface mode allows CAREWare administrators to disable or allow data entry for a specific custom tab, or hide it completely from a specific provider.



Enabling one of the options for a custom tab will cause the tab to activate that action for all users; i.e. if you highlight Read Only and save it, users at the provider selected from the drop down on the previous screen are only able to read the values provided.


User Interface Mode
User-Interface Mode
F1: Save
Esc: Cancel
Updating the User Interface Mode for the following Domain and Custom Tab Pair respectively:
Ryan White AIDS Care and Food Bank
S. No.
Interface Mode
01
Normal Data Entry
02
Read Only
03
Hidden

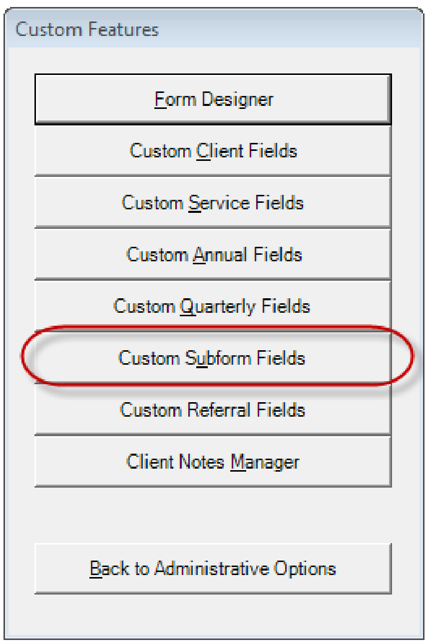
Using Custom Subforms

Custom subforms allow you to information that may not fit elsewhere in CAREWare, such as a treatment adherence study or a Section 8 or SSI/SSDI application's progress. Like service visit data, information on the custom subform will have a date associated with each record.

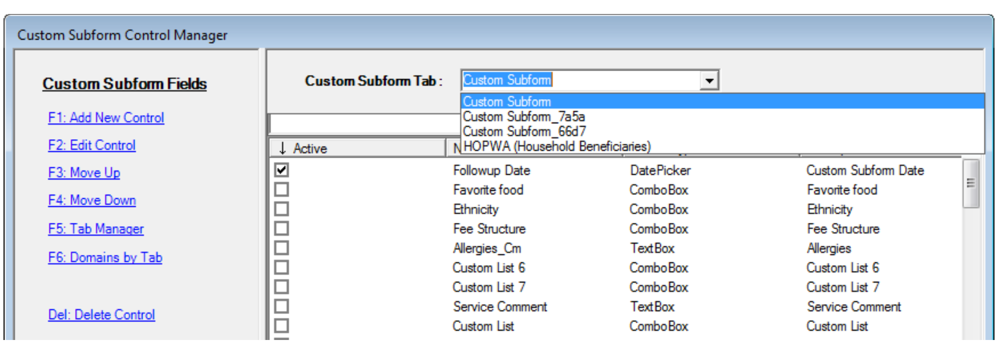
Remember, this form does not record or count services that will be reflected on your Ryan White Services Report or other service reports.

Custom subforms can be created at the Provider domain. Access across providers to the same subform are controlled at the Central Admin domain for privacy/security purposes. Here we'll show you what this process looks like at the Central Admin domain.

1. Select **Custom Subform Fields** from the Custom Features menu.

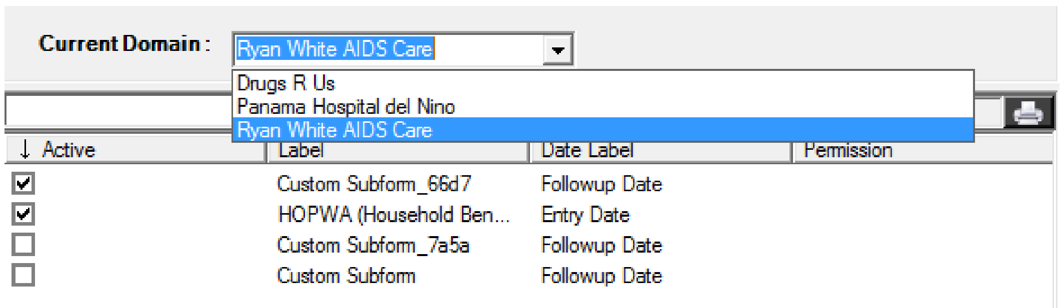


2. All existing tabs can be seen from the drop down menu when you are in Central Admin. At the Provider domain, you'll only see those tabs for which you've been authorized – we'll take a look at that in a minute.



Any custom field you create can be added to the custom subform, but generally they will be fields you created specifically for this form. Check the **Active** box next to the field to add it to the subform.

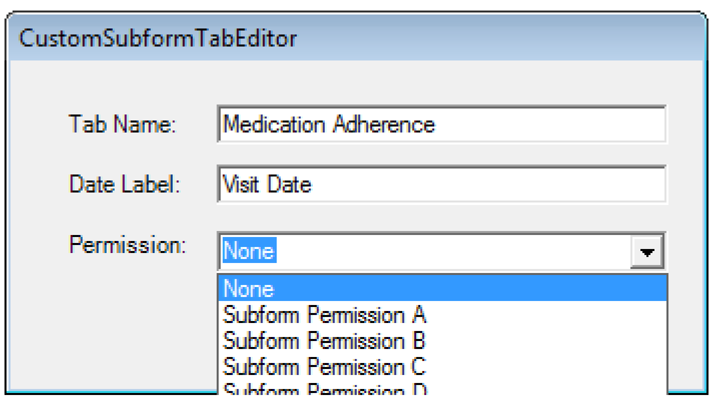
3. Click **F5 Tab Manager** to add or edit tabs. Seen here is a dropdown list of Provider domains, with check boxes next to each subform to which they have access. Click the **Active** box next to any subform to make it available to one or more providers. In this case, Ryan White AIDS Care can see two of the available subforms.



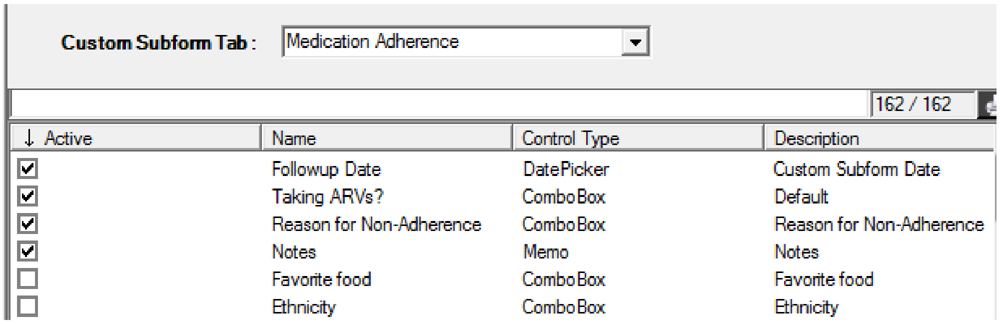
You can also use **F6 Domains by Tab** to perform the inverse operation (a drop down list of tabs with check boxes for Providers).

4. Click **F1 Add Tab** to create a new subform tab. Name the tab, label the Date field to mirror the purpose of the subform.

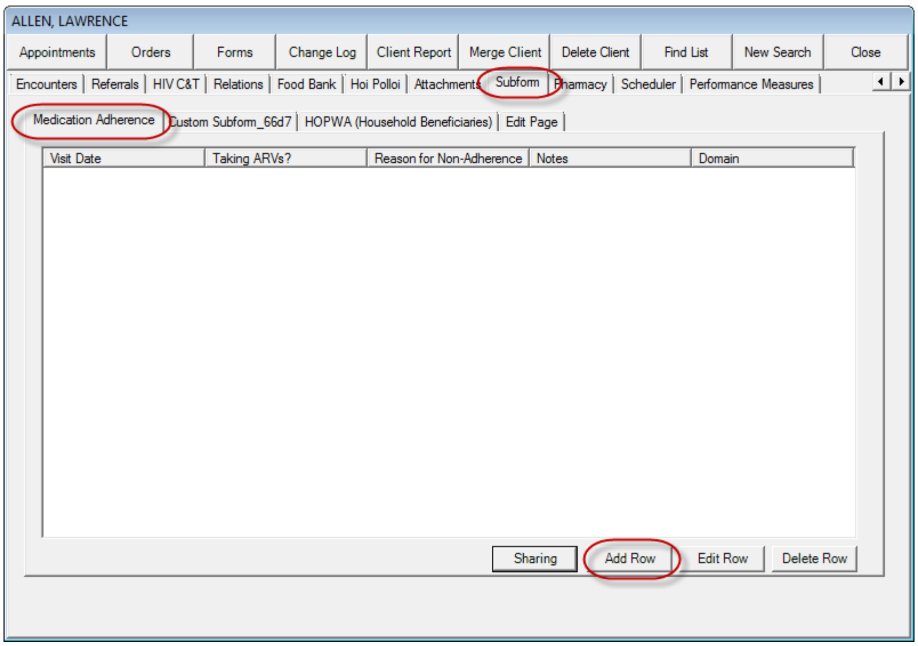
5. Use the Permission drop down to assign individual users access to specific custom subform tabs. This allows groups of users to access individual custom fields, allowing a provider to limit data viewed to the users with the proper access. Please see Guide #9 for information on setting this up in the Provider/User Manager.



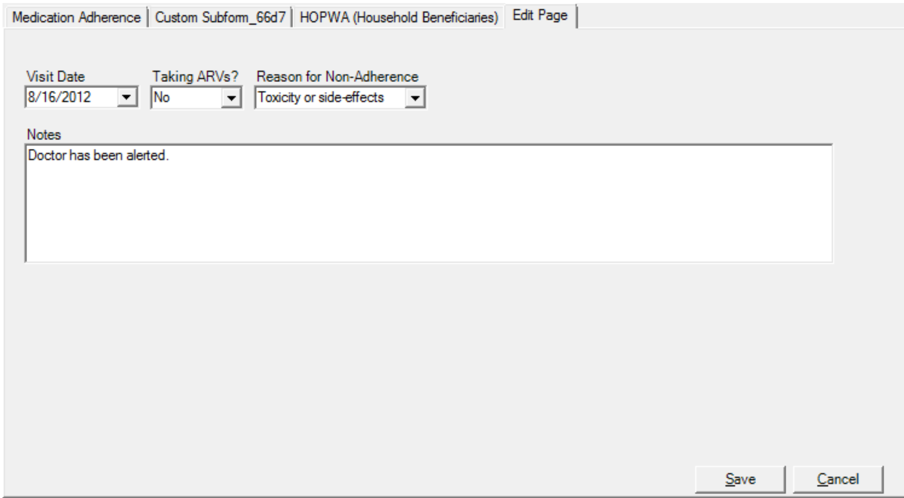
6. Then select the Custom Subform from the drop down menu (in this case Medication Adherence) and click each field you wish to add to the subform. Note that if you have a long list of fields as seen here, each item you click on the list “disappears” as it’s moved to the top of the list of active fields. Here is what the final setup looks like:



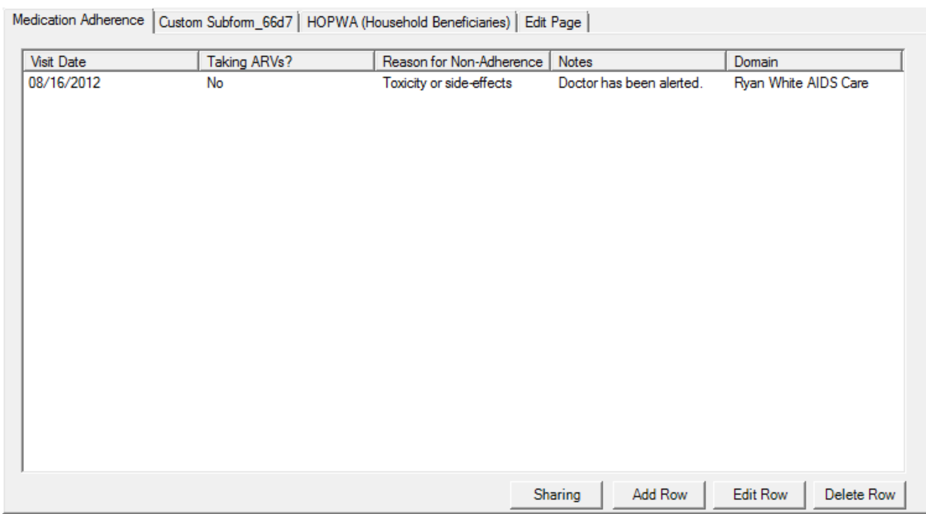
7. You can then close out and go to the Provider domain and open a client record. Click on the **Subform** tab and then the new **Medication Adherence** tab. Then click **Add Row** to create a new record.



8. The fields will appear as they've been created in the Custom Field manager.



9. Save the record. Each date's record will show on the tab.



10. Use the **Sharing** button to request data sharing with another provider. Please see guide #9 for more information on data sharing.