CAREWare 6

June 2019

Quick Start Guide #4

Customizing Tabs and Fields

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 need to get basic information in and out of CAREWare.

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

First Things First

Getting 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. Note, fields that are longitudinal in nature and updated each visit will need to go on a custom subform.

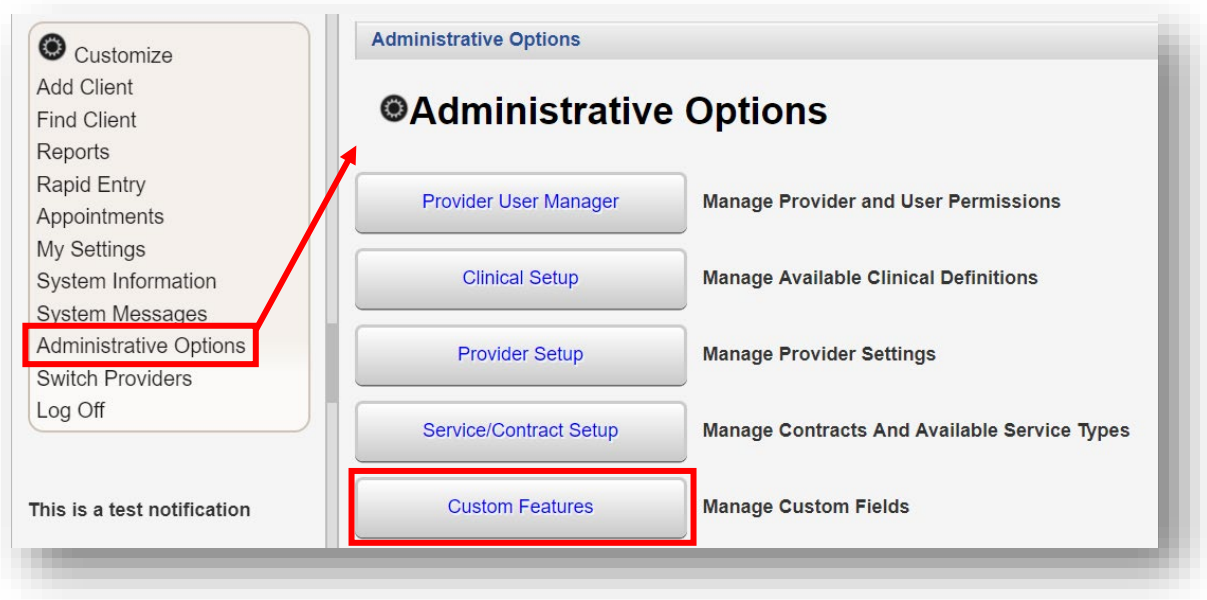
Custom tabs and fields can be made available to multiple providers. For instance, if you create a field where you can specify that a client is diabetic, that information can be made available to all providers who have access to this client's record and activate the relevant field on a custom tab. (This would not apply to a custom service field as service data is provider specific.)

Customizing Custom Tabs

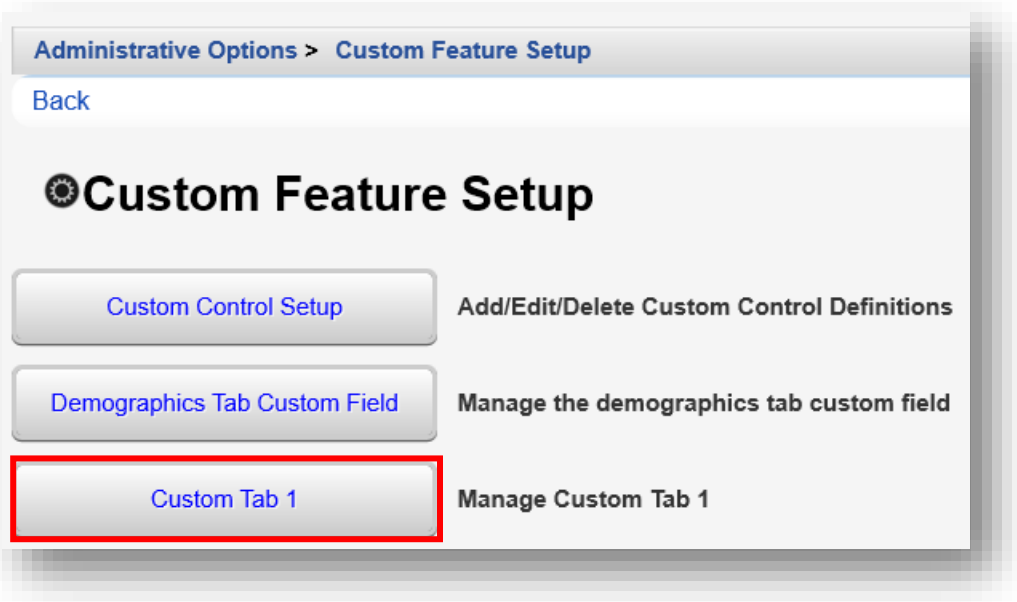
CAREWare offers a variety of custom tabs you can use to expand the range of client data you collect and report. In our examples below, we'll set up a tab to collect information we can use to run a food bank program. All custom fields can be used in custom reports.

1. Log into CAREWare. For more details on how to do so, please refer to **Quick Start Guide #1**. If you have administrative privileges and are asked to choose between Central Administration and Provider ("Default" until you change the name). Log into a Provider domain to complete the following steps.

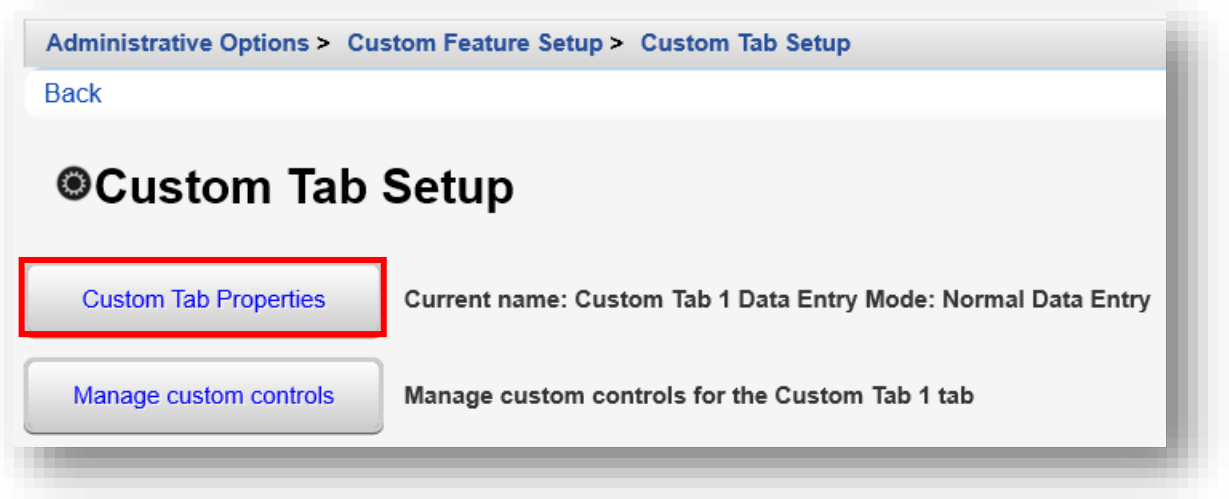
2. Select **Administrative Options** from the **Menu of Links** and then **Custom Features**.



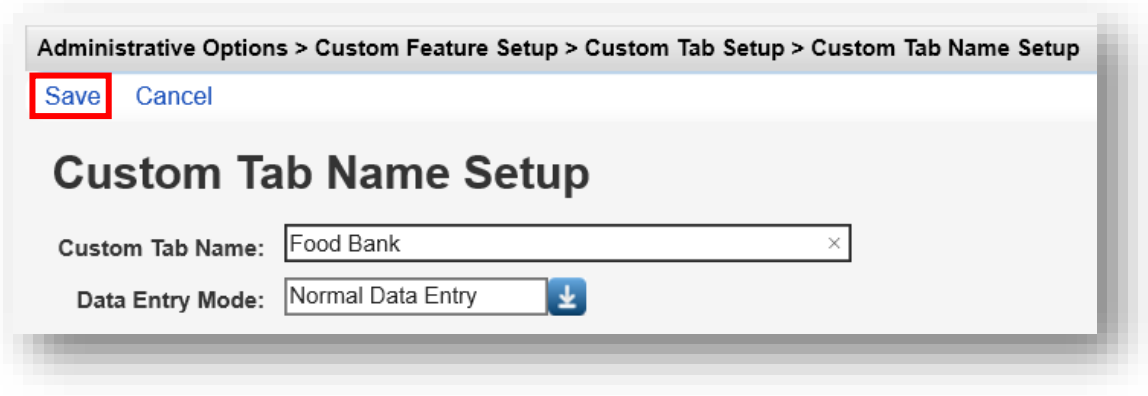
3. The Custom Feature Setup menu will appear. Select **Custom Tab 1**



4. Click **Custom Tab Properties**. From this menu link you can rename the selected custom tab.



5. Rename the tab name from “Custom Tab 1” to your desired tab name. In this example, we are renaming it “Food Bank”. Click **Save**, then click **Back** (will appear after clicking Save).



TIP: In many cases, you’ll want to create “drop down” box selections for data entry. 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 also need to create “free-form” text data entry fields for cases where data entry can vary (e.g., you may not be able to predict all the possible food allergies a person may have, and may need to add them manually). We’ll cover both of these, starting with the free form option.

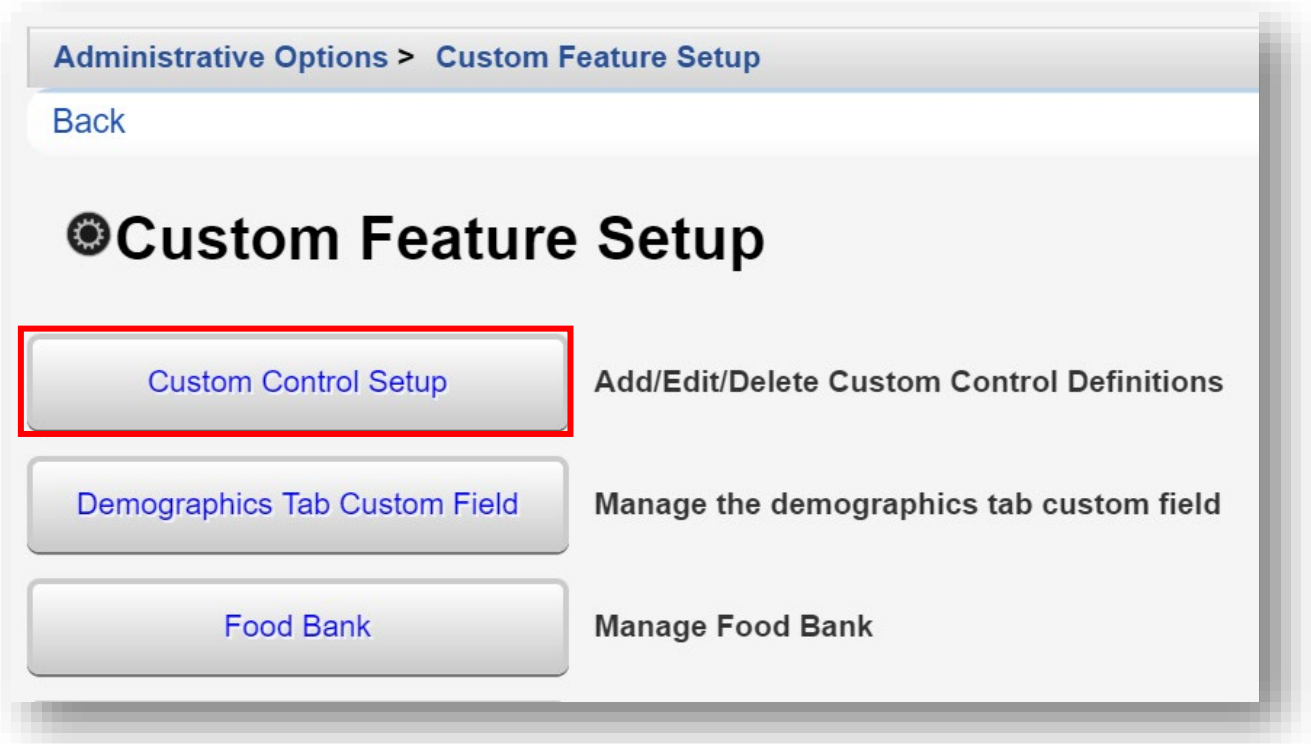
Custom fields have different available parameters, depending on the type of Control that is created. Now we are ready to Add/Edit/Delete Custom Controls, which is the technical name for custom fields.

The following are available **Control Type** options:

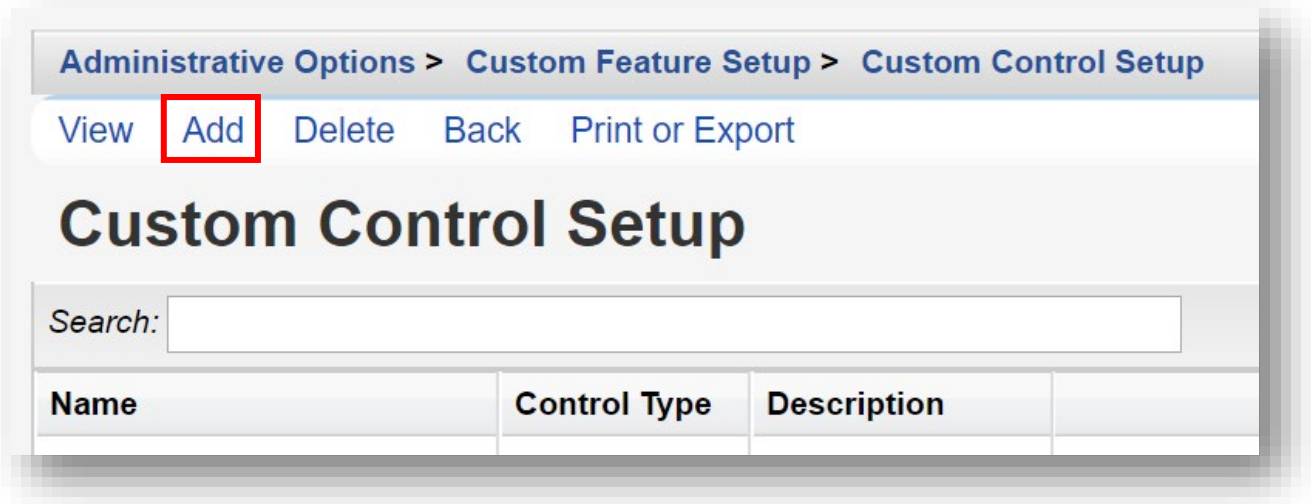
- **TextBox** – allows free-form data entry of any text, up to the configured character length
- **ComboBox** – allows for a drop-down menu of preset selections to be created.
- **CheckBox** – allows for selection of Yes or No.
- **DatePicker** – will limit data entry to a Date only, in the MM/DD/YYYY format.
- **Attachment** – allows documents to be uploaded to client records, (such as copies of intake forms, client eligibility, etc.).
- **Hyperlink** – allows a direct link to a webpage or website, such as, HIV treatment guidelines or the HRSA CAREWare website.
- **Memo** – allows for a large amount of free-form text to be entered

Creating a TextBox Custom Control

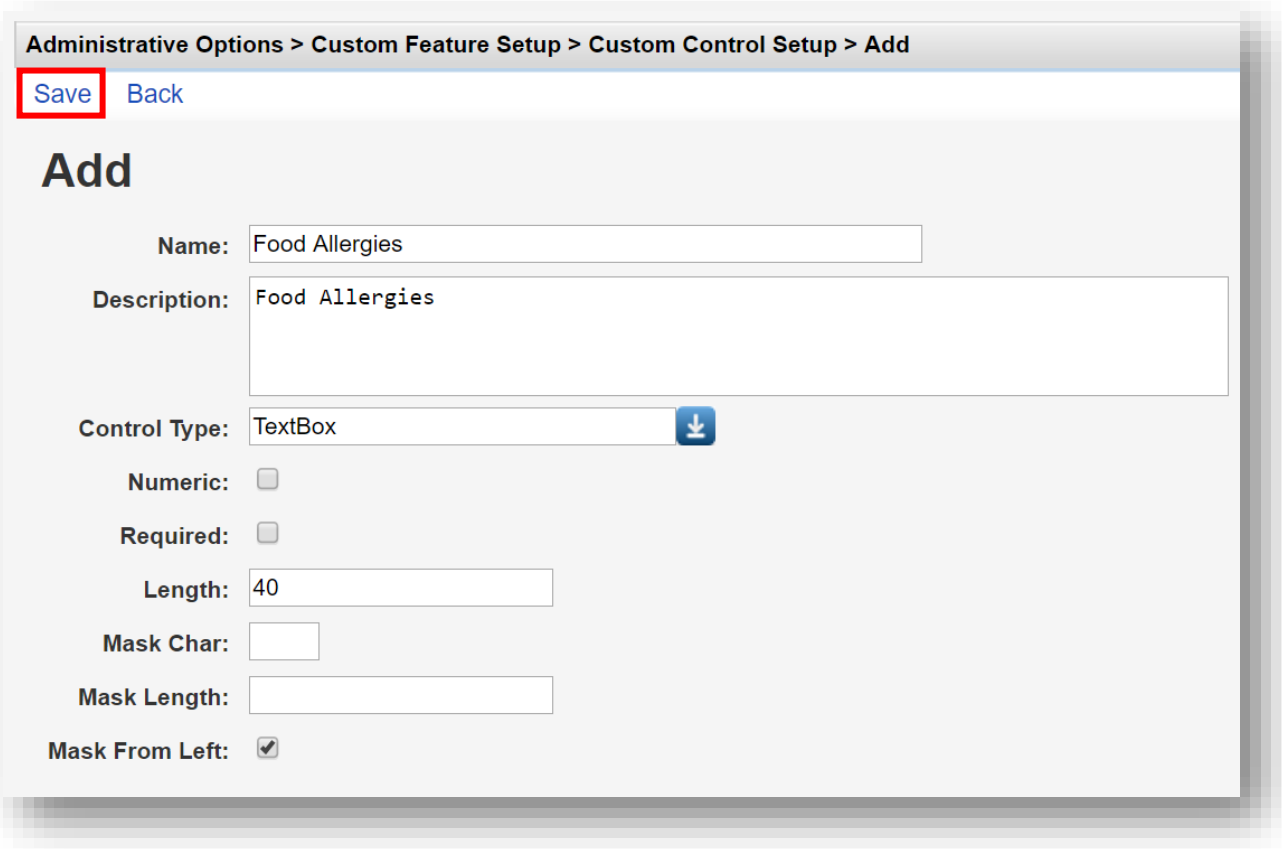
1. From the Custom Feature Setup menu, click **Custom Control Setup**.



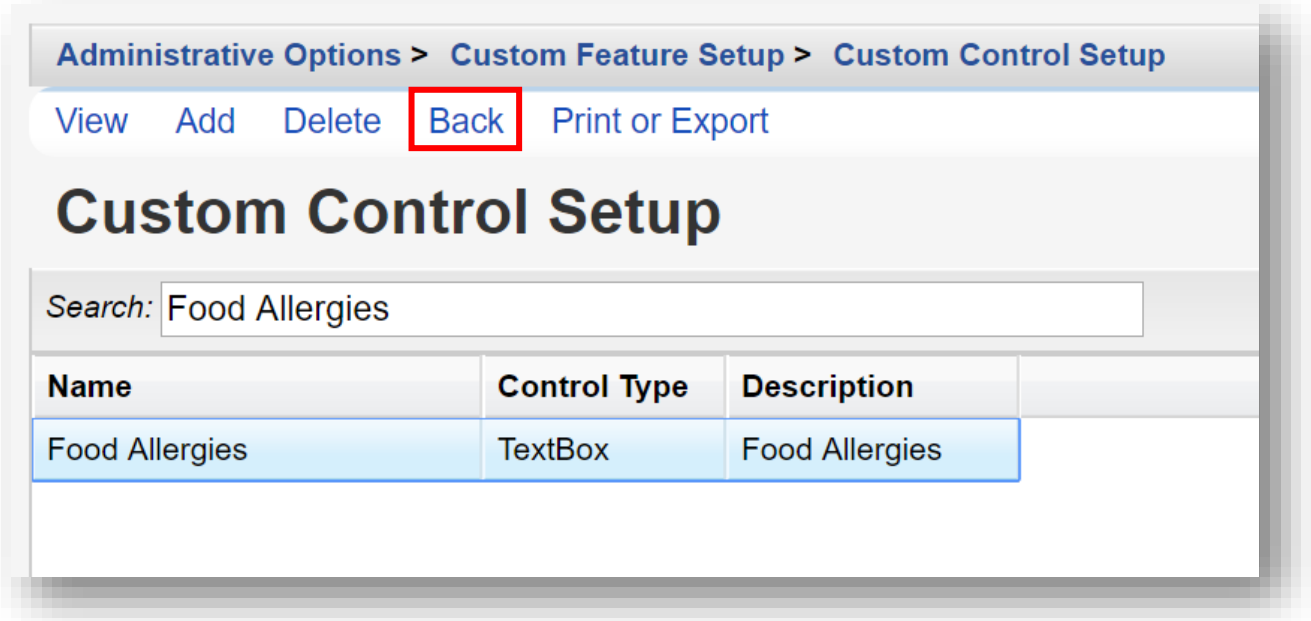
2. Click **Add**.



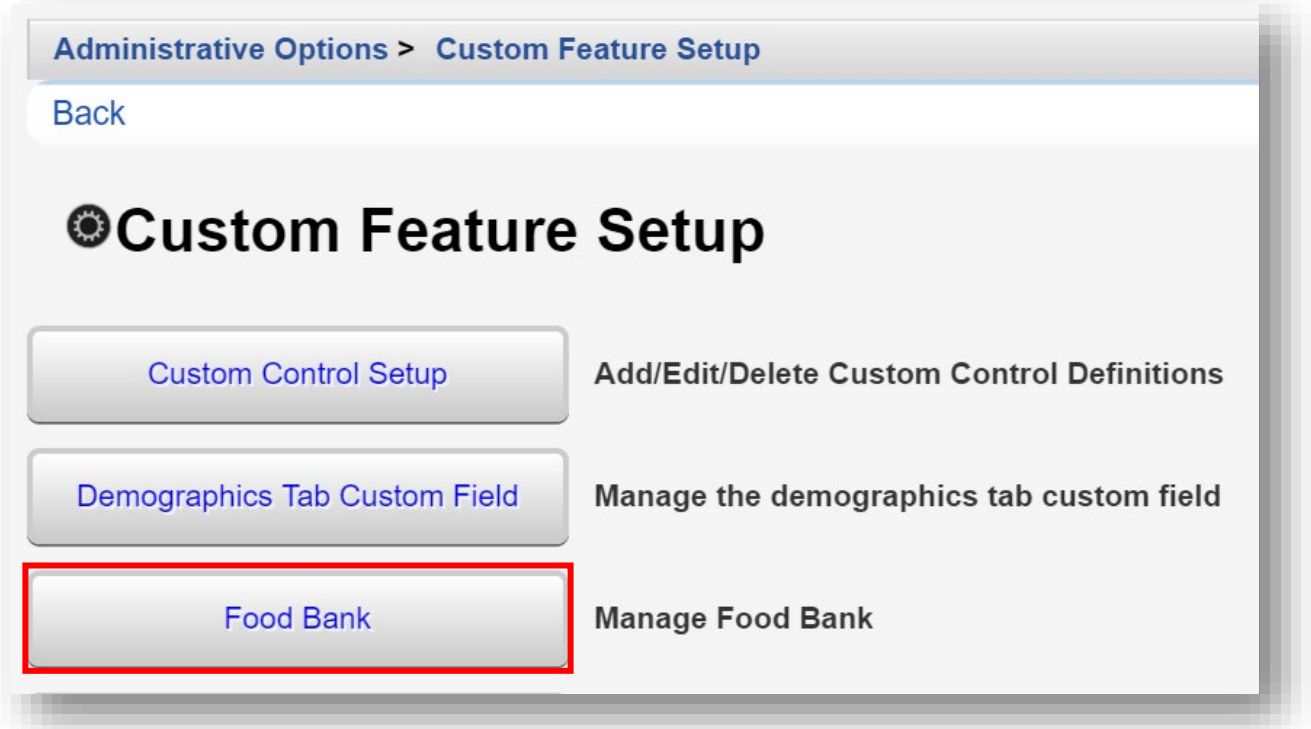
3. Enter in the following information. When complete, click **Save**.
    - **Name** – control name or custom field name
    - **Description**
    - **Control Type** – select TextBox
    - **Numeric** (checkbox) – will limit data-entry to Numbers only
    - **Required** (checkbox) – allows you to specify that, once the user clicks this custom field, a value *must* be entered
    - **Length** – limits the allowable number of field characters
    - **Mask Char** (optional) – the character that will replace masked values
    - **Mask Length** (optional) – the number of characters that will be masked
    - **Mask From Left** (check box) (optional) – the mask direction



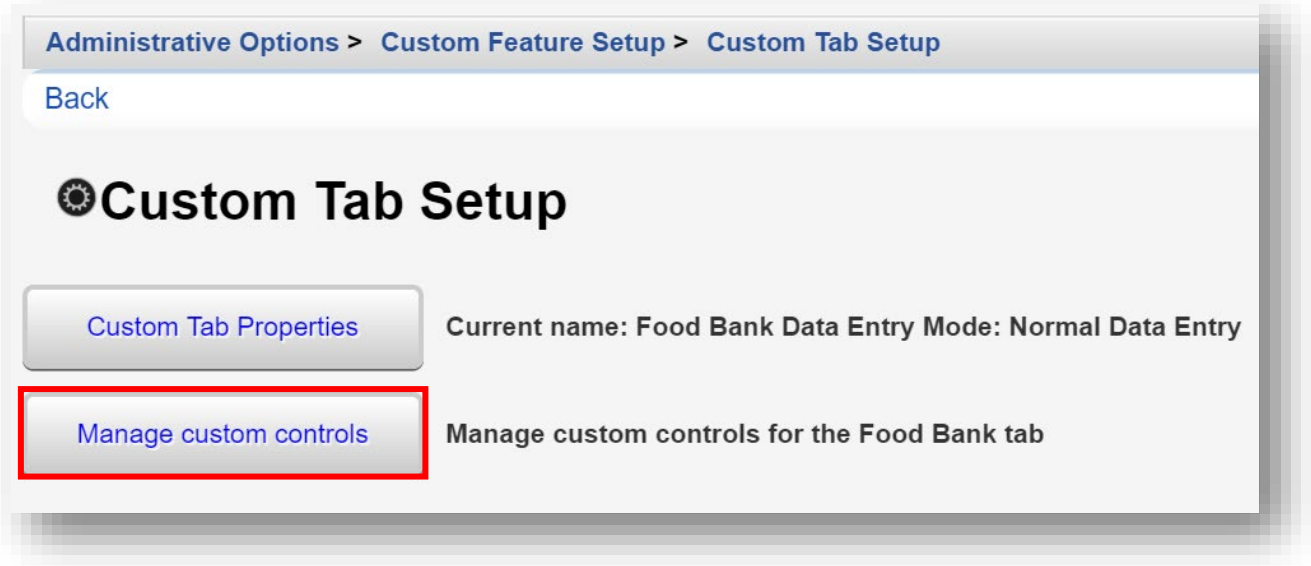
4. A custom field has now been added (in this example, Food Allergies). Click **Back**.



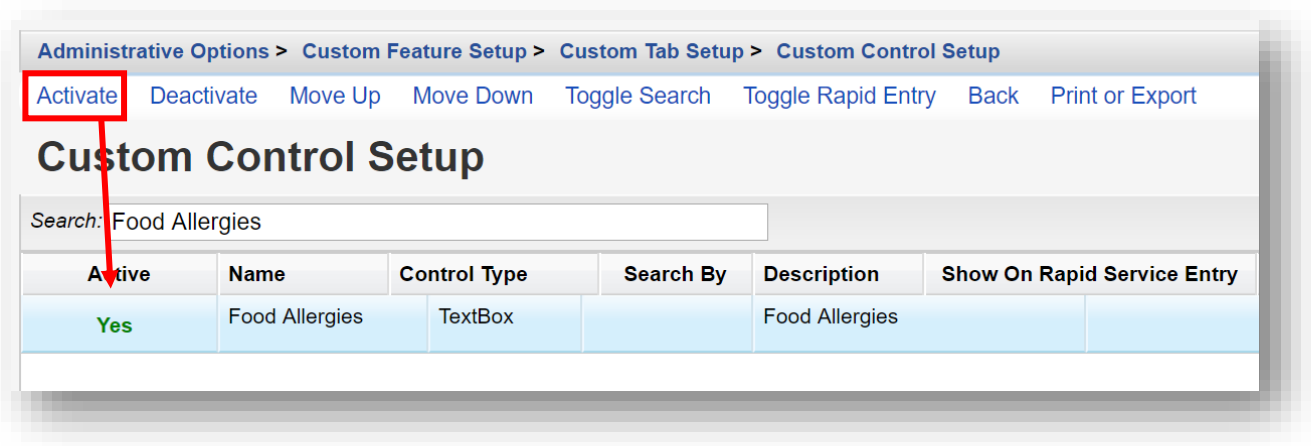
5. Click on **Food Bank** (the tab name changed in the previous section).



6. Click on **Manage custom controls**



7. Notice the newly created Food Allergies TextBox control is not Active (use the *Search* bar to filter). Only controls that are "Active" will show under the custom tab(s). To activate a desired custom control, select it, and click **Activate**. The text "YES" appears in the Active column, indicating that the custom control field will be visible, under the custom tab, Food Bank.

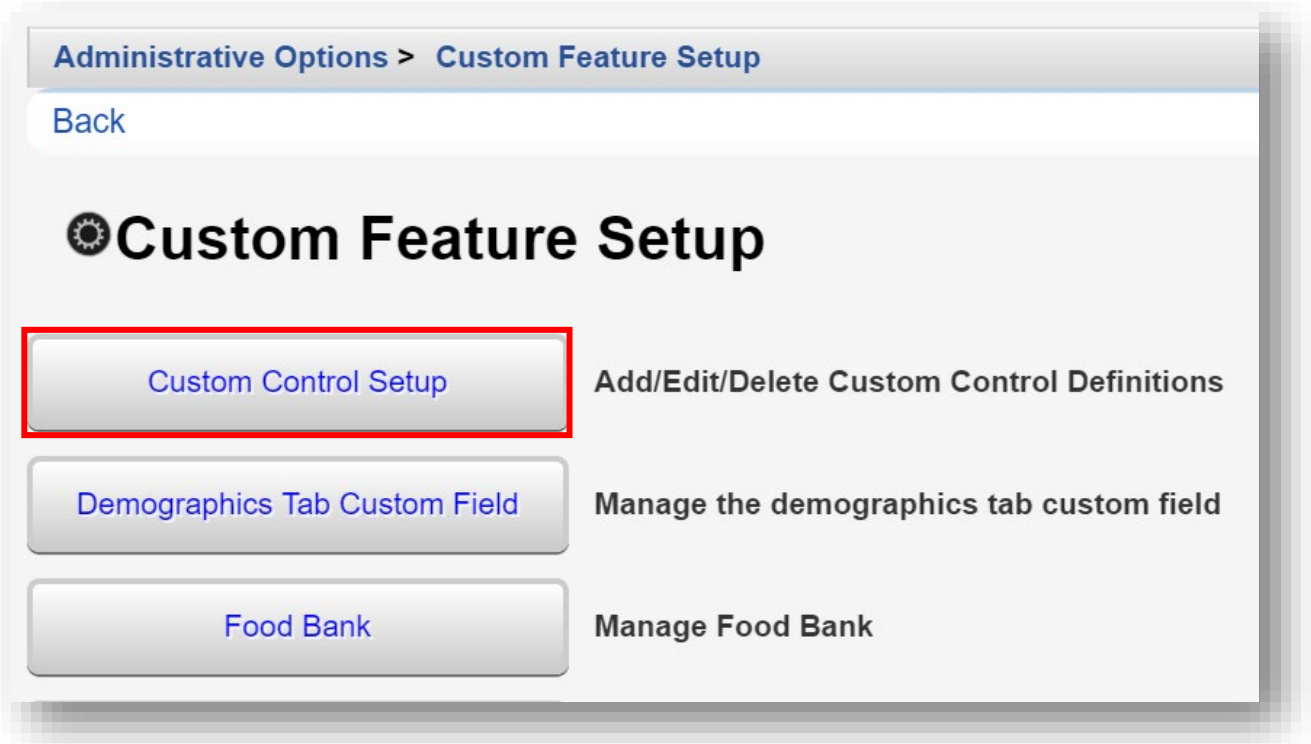


Use the same process to Activate or Deactivate other custom controls, under each custom tab. Deactivating a custom control will not affect previously entered data.

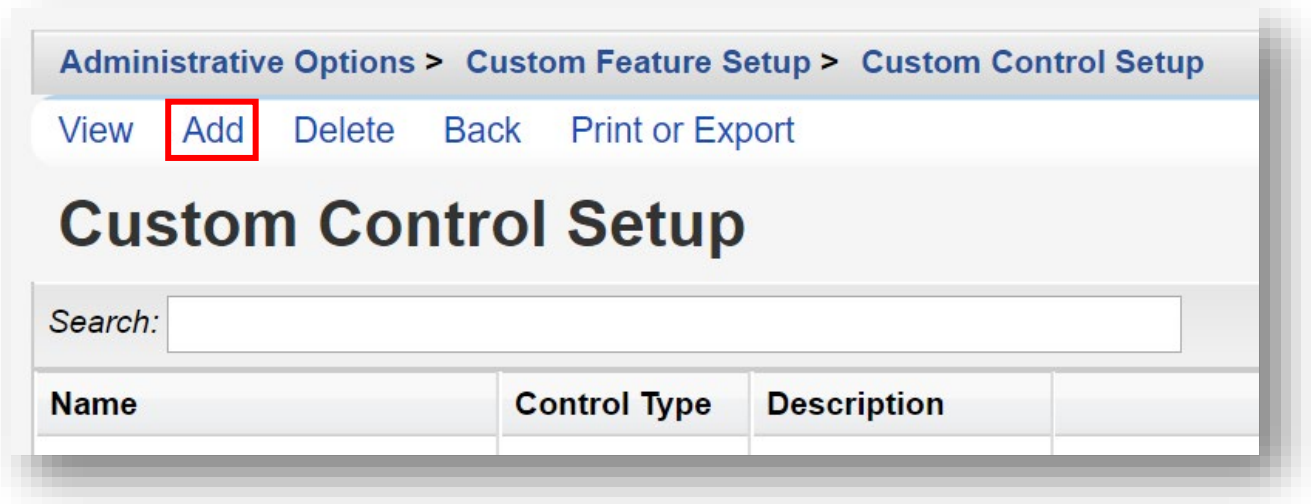
WARNING: Deleting a custom control will also delete ALL data previously entered in the control field, so it should be used with extreme caution.

Creating a Combo Box Custom Control

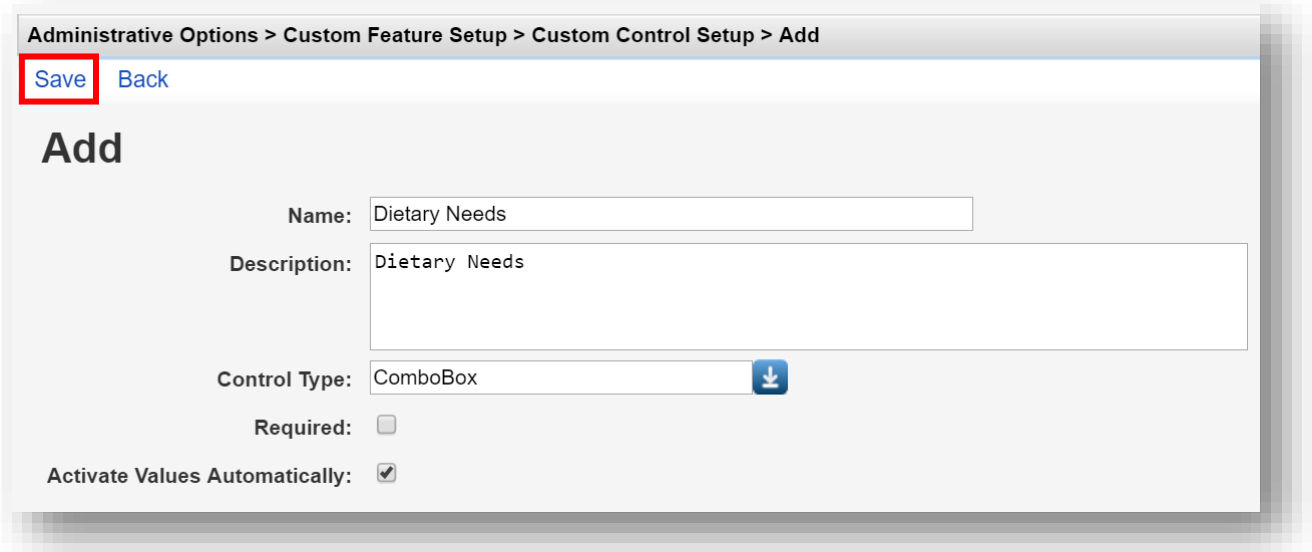
1. From the Custom Feature Setup menu, click **Custom Control Setup**.



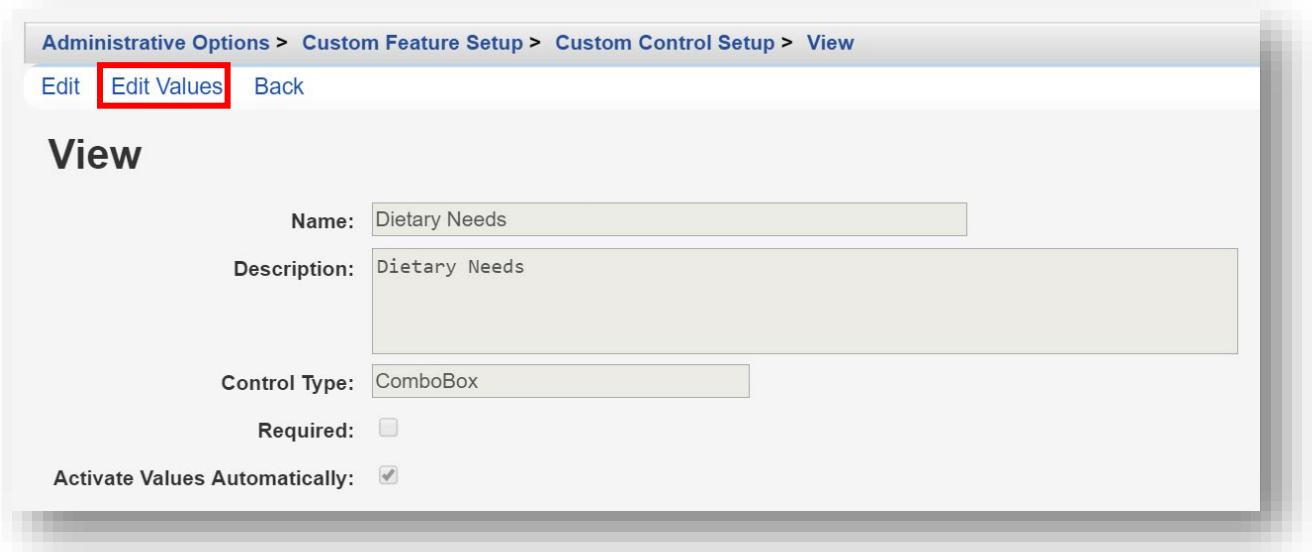
2. Click **Add**.



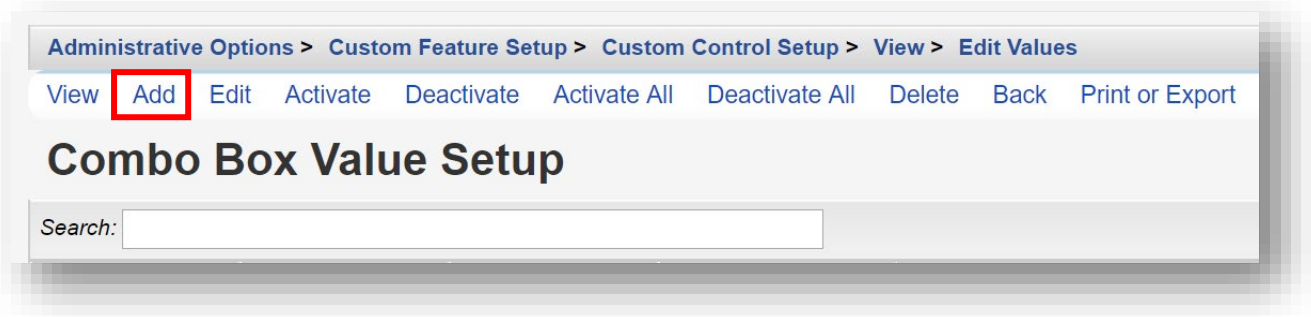
3. Enter in the following information (in this example, we are creating a custom control name, "Dietary Needs"). When complete, click **Save**.
   - **Name** – control name or custom field name
   - **Description**
   - **Control Type** – select ComboBox
   - **Required** (checkbox) – allows you to specify that, once the user clicks this custom field, a value *must* be entered
   - **Activate Values Automatically** (checkbox) – leave checked (default value)



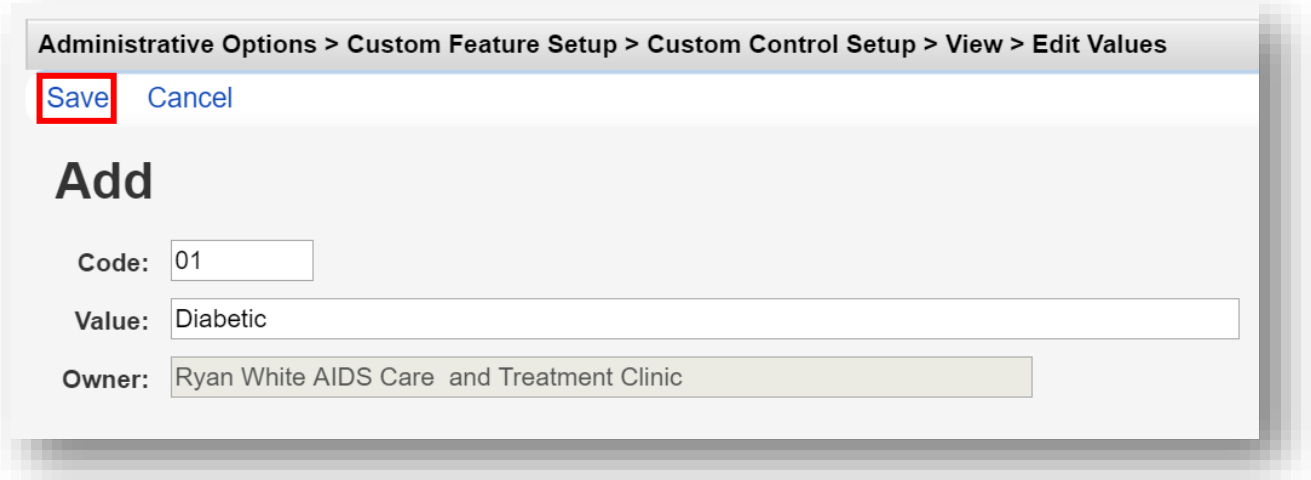
4. Select **Edit Values**.



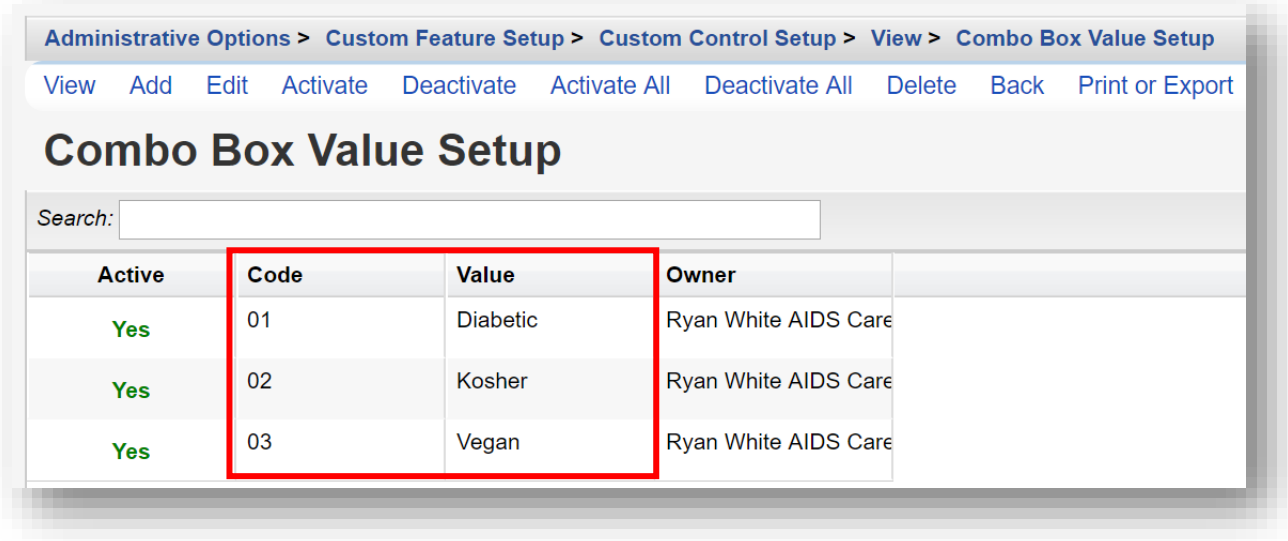
5. Click **Add**.



6. Enter in the following information (in this example, we are creating a value name, "Diabetic"). When complete, click **Save**.
   - **Code** (required)
   - **Value** (required)

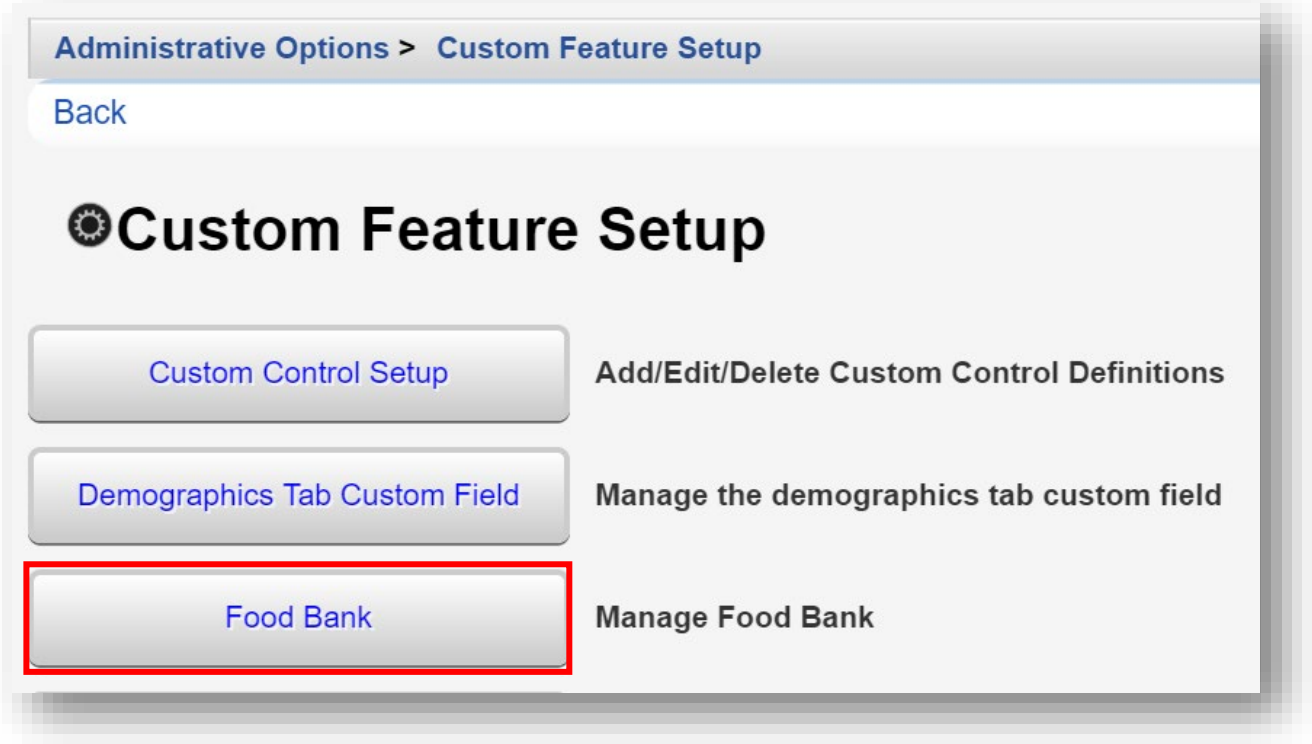


7. Repeat steps 5 and 6, as necessary. When complete, the Combo Box Value Setup menu will display all added values.

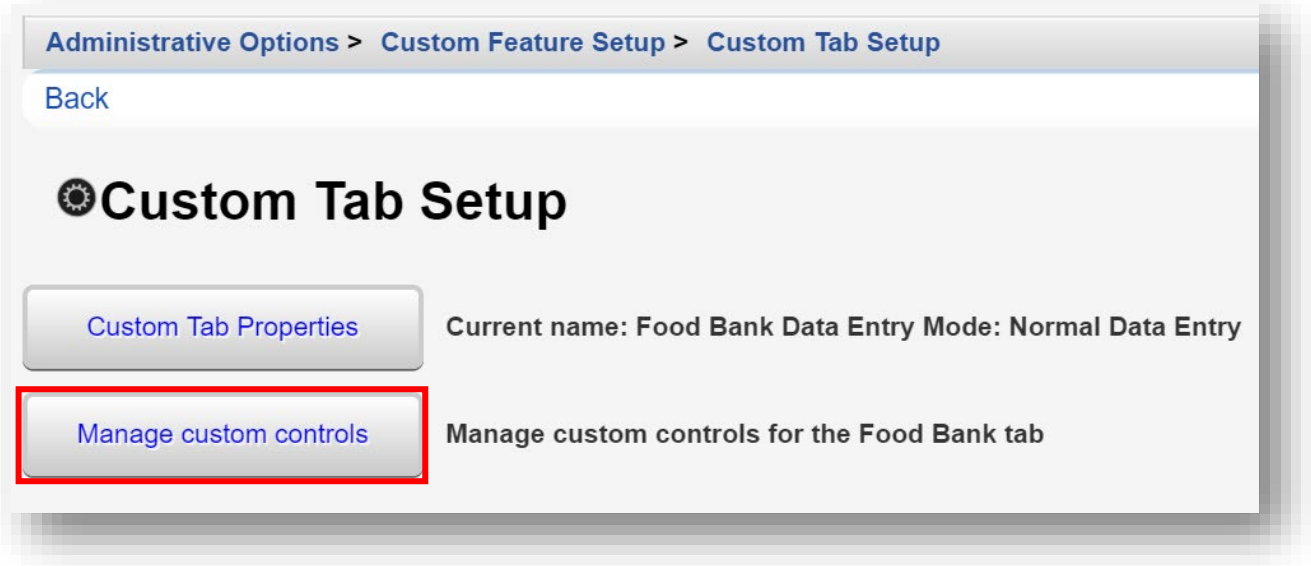


8. Return to the Custom Feature Setup menu by clicking **Custom Feature Setup** within the breadcrumb links (see previous screenshot). The menu is also accessible by clicking **Back** multiple times.

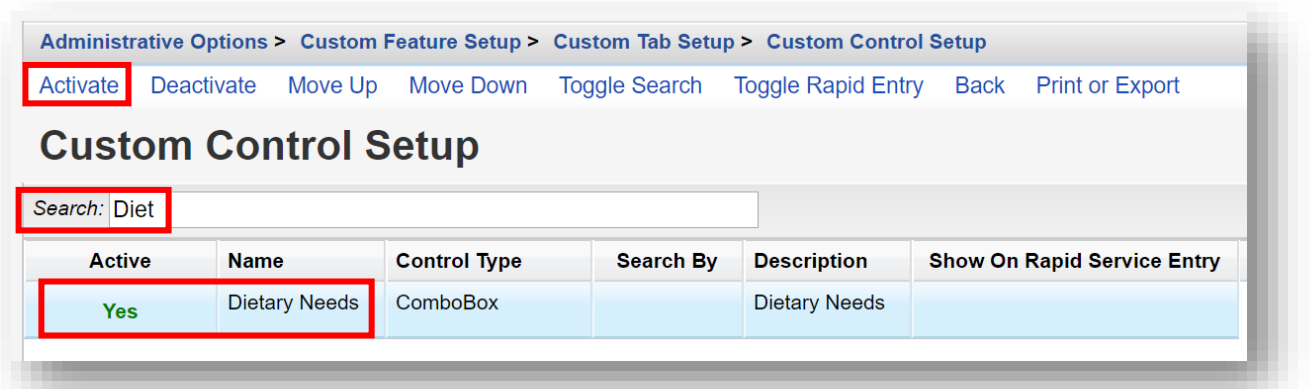
9. Click **Food Bank**.



10. Click **Manage custom controls**.



11. Use the *Search* box to filter the custom control list. Select the desired custom control. Click **Activate**. A "Yes" appears in the Active column, indicating that this custom control field will be visible, under the custom tab.



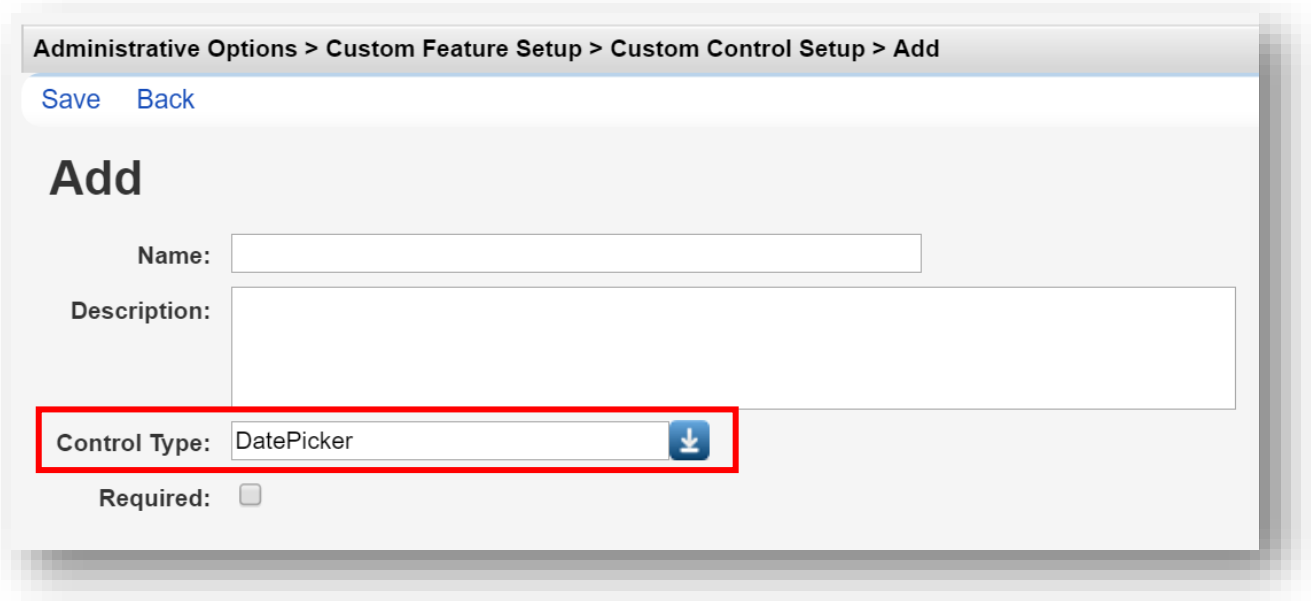
When made "Active," custom control fields are ready for data-entry into client records.

TIP: Combo boxes can also be used to identify staff, such as a case manager, for a service provided. Combo box values can be customized to list agency staff and would be provider-specific.

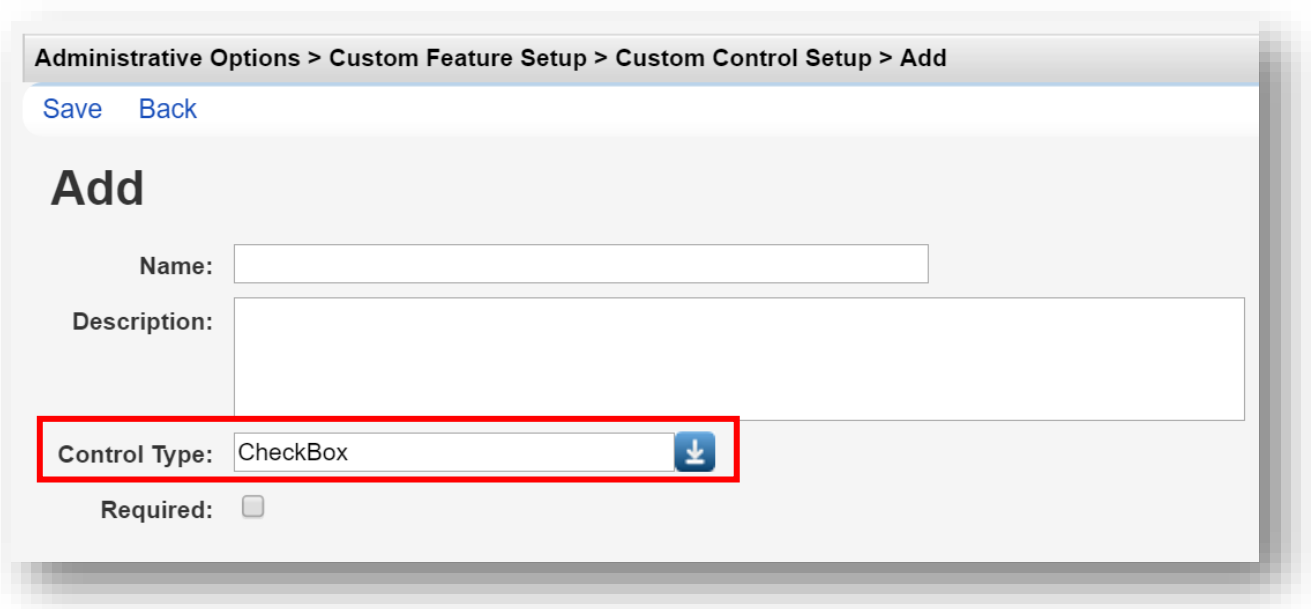
Creating a Date Picker and Yes/No Box Custom Controls

The procedure for creating these types is similar to the procedure for creating custom TextBox and ComboBox fields.

Selecting control type, **DatePicker,** will allow manual entry of a date or selection of one from the drop-down calendar.

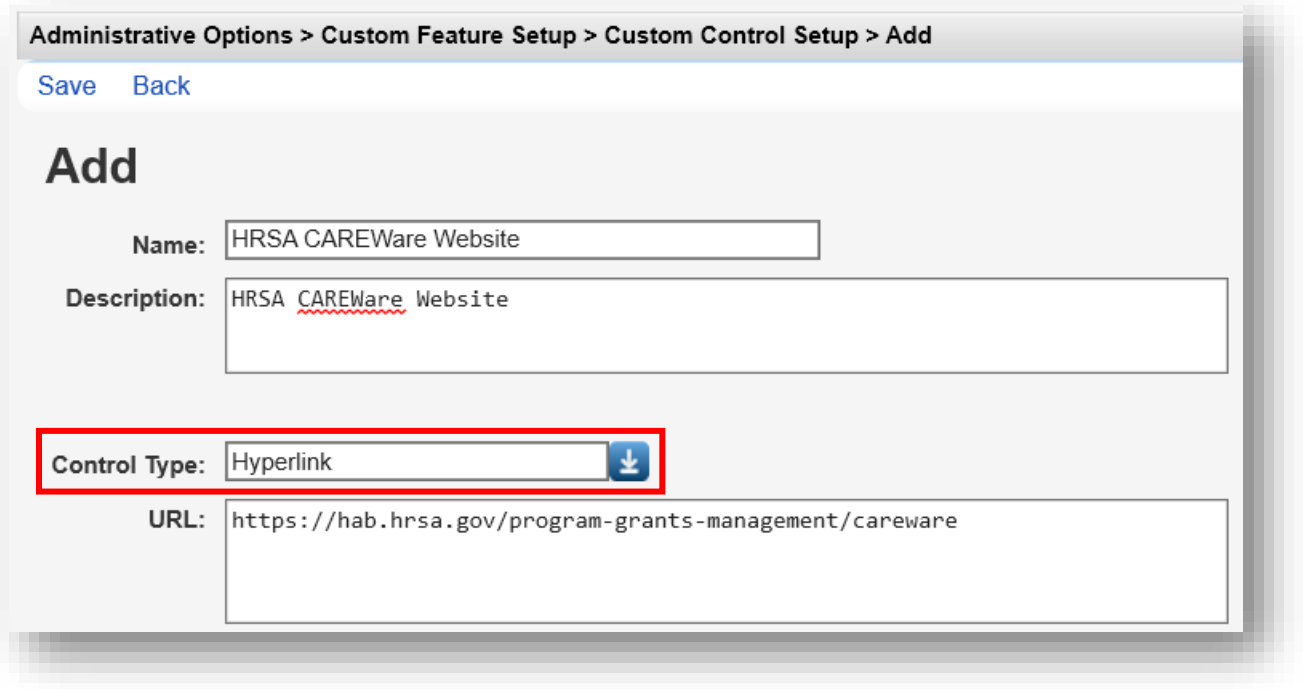


When selecting control type, selecting **CheckBox,** will allow selection of whether the box is **Checked (Yes)** by default.



Creating Hyperlink Custom Controls

You can also create custom hyperlinks to link directly to websites you refer to often, such as CAREWare.

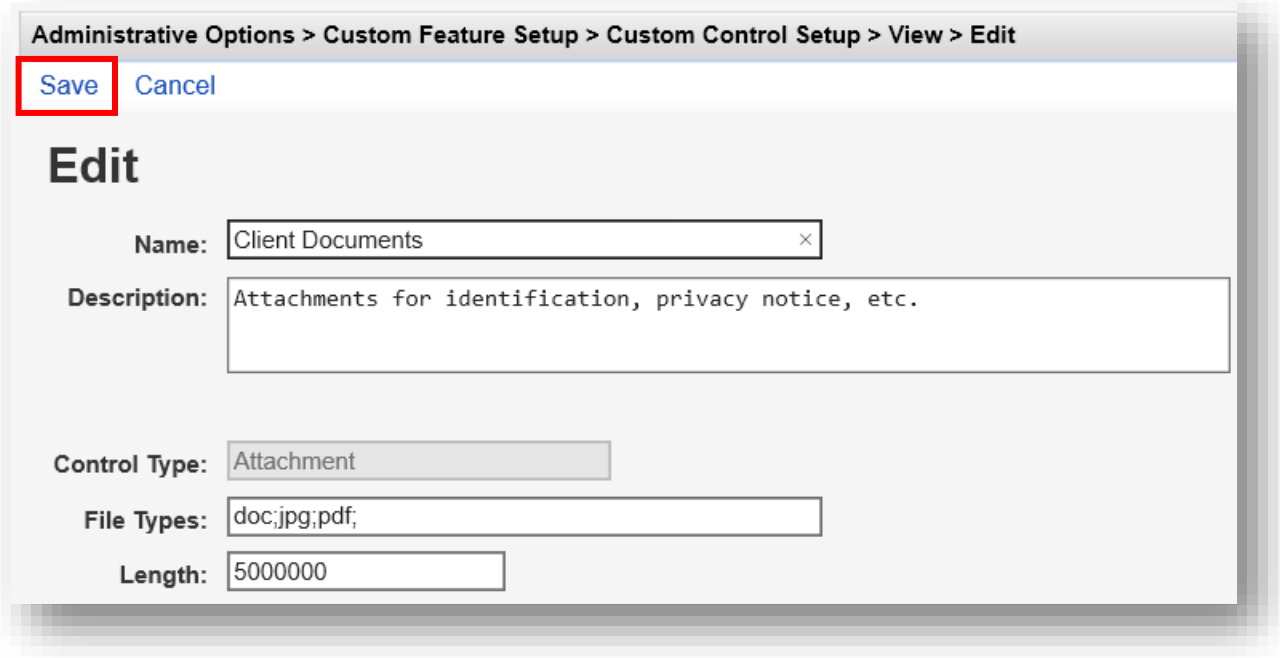


Creating Attachment Custom Controls

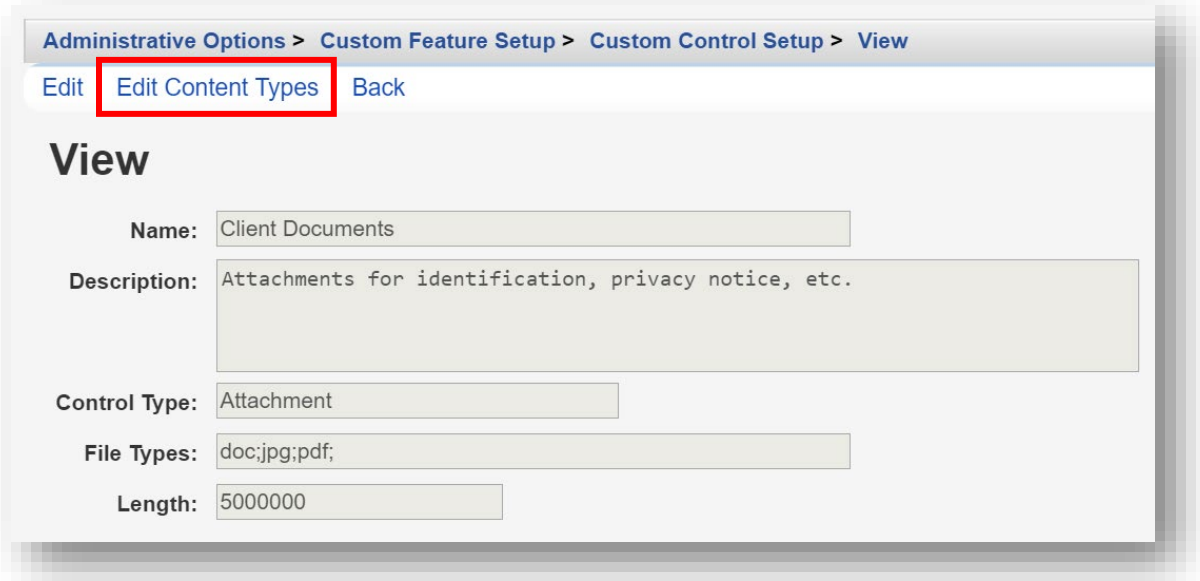
You can create attachment custom controls for a variety of file formats (Word, PDF, JPG, etc). By doing so, it will be possible to attach specific documents to an individual client record, such as a scanned HIPAA privacy notice, client ID, or an enrollment form.

TIP: To prevent the CAREWare database from becoming overloaded with client record attachments, they can be stored in a separate system folder. Storage of "attachments" should be managed by your CAREWare system administrator.

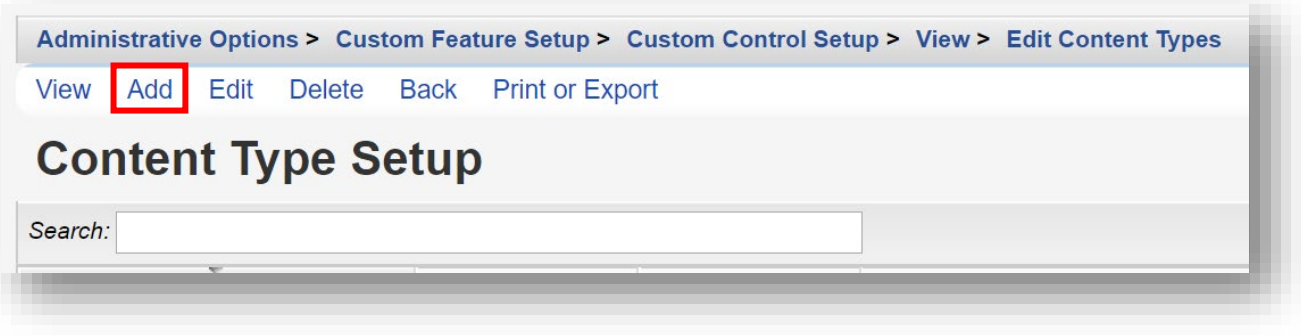
1. Enter in the following information. When complete, click **Save**.
   - **Name** (required)
   - **Description** (required)
   - **File Types** – allow upload of specific file format(s). Separate file formats with a semicolon.
   - **Length** – automatically set (5000000 default value), refers to maximum size of upload file. This value should be managed by your CAREWare system administrator.



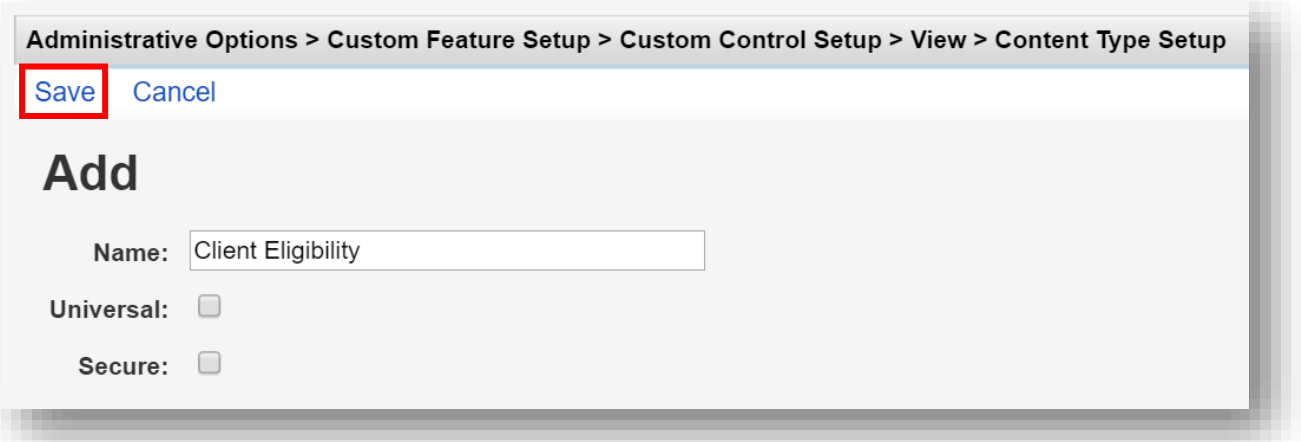
2. Select **Edit Content Types**.



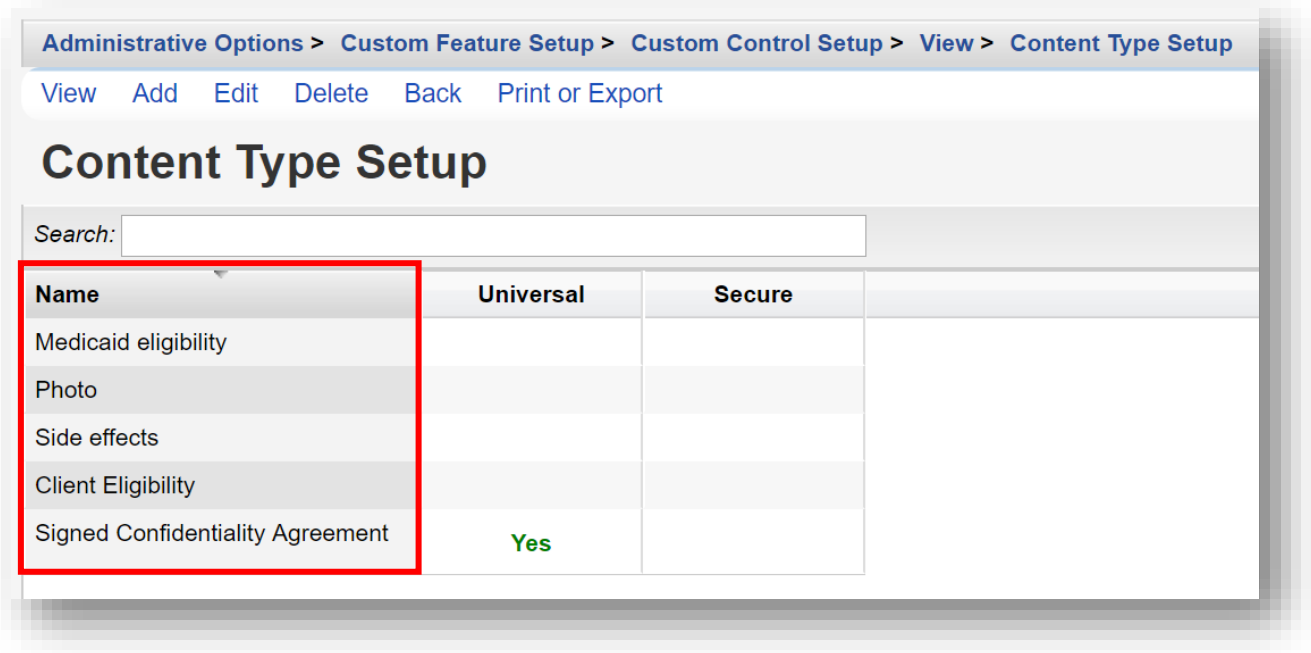
3. Click **Add**.



4. Enter in the following information. When complete, click **Save**.
   - **Name** (required)
   - **Universal** (optional) – checking this option makes content type available to all providers within the same CW system.
   - **Secure** (optional) – checking this option will require an extra user permission be granted for users to view certain uploaded files.

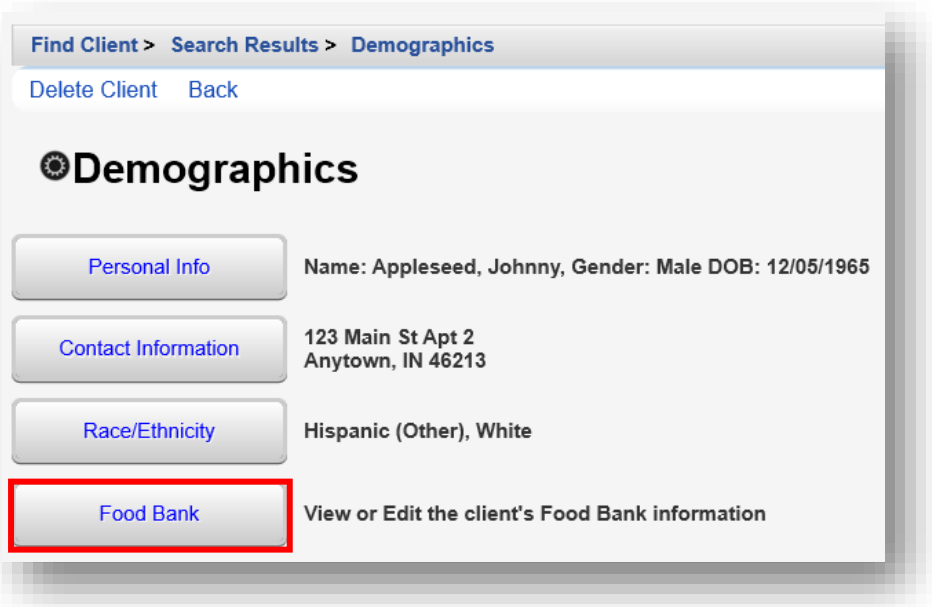


5. Repeat steps 3 and 4, as necessary. When complete, the Content Type Setup menu will display all added values.



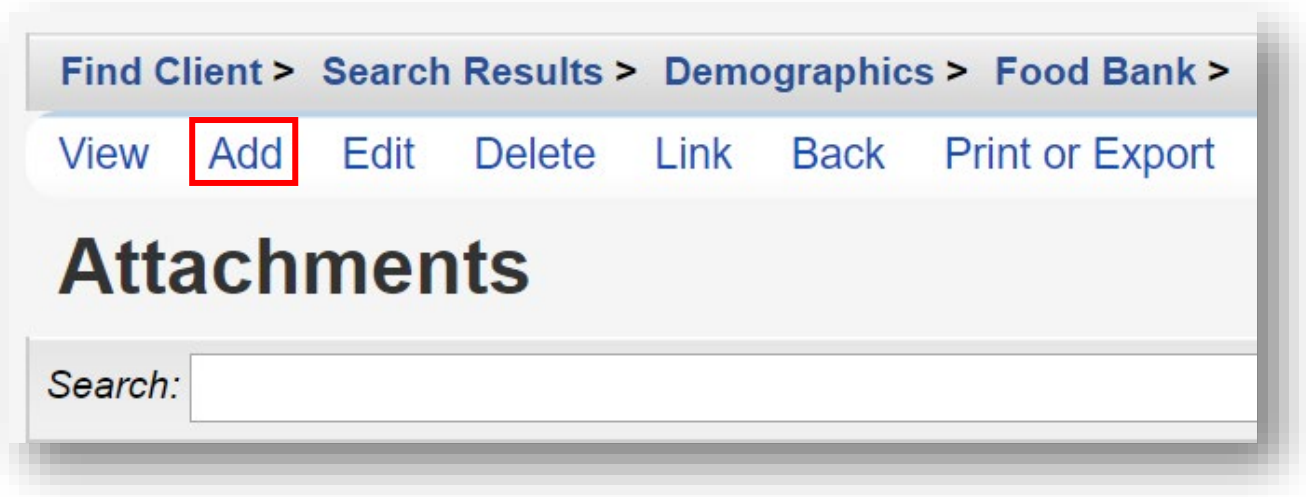
Now we're ready to go to a specific client and attach documents to their record. For more details on how to find and open client records, please refer to *Quick Start Guide #3: Adding Clients, Demographics, Services, and Annual Review Data*.

6. **Find** and **Select** an existing client record. Click on the "Food Bank" tab created previously.

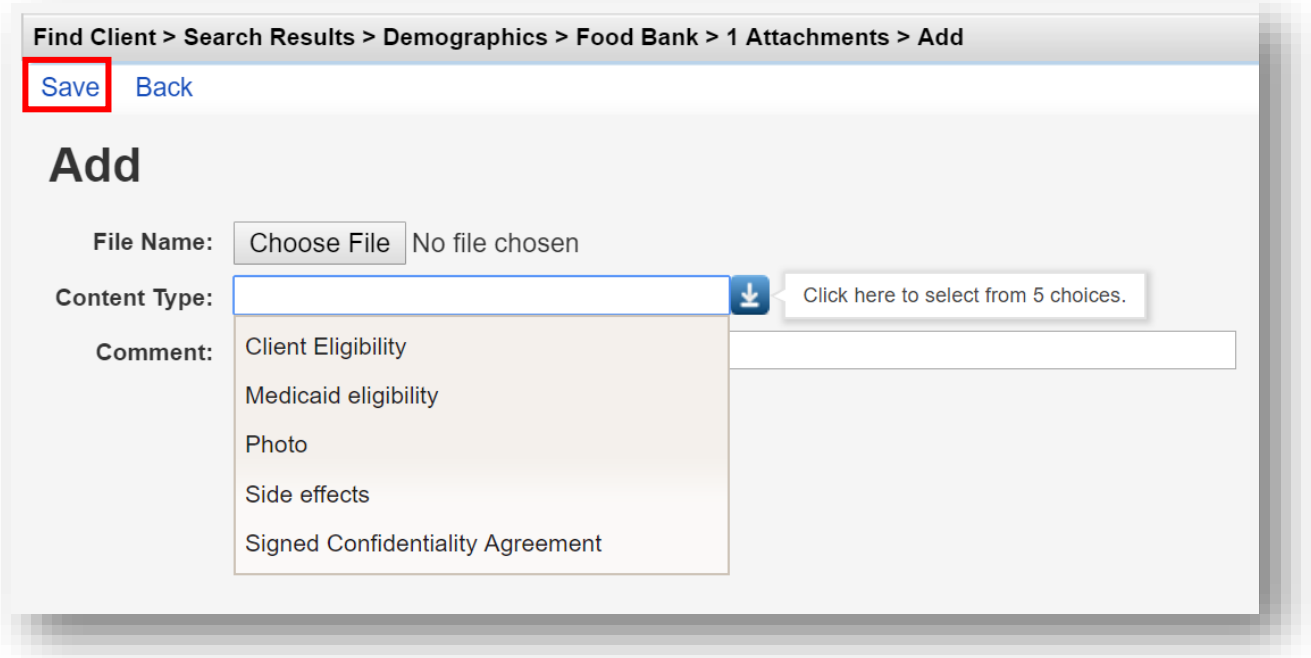


7. Select the **0 Attachments** link.

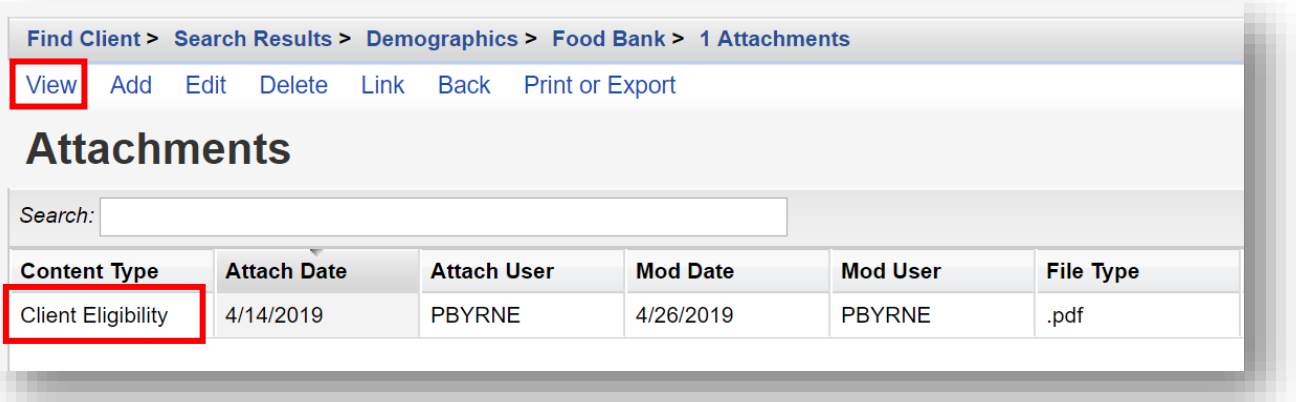
8. Click **Add**.



9. Enter in the following information. When complete, click **Save**.
   - **File Name –** browse to the client document to be uploaded.
   - **Content Type** – choose from the drop-down menu
   - **Comment** (optional)



10. The file has been successfully uploaded to the client record as an Attachment. To view the uploaded document, select the desired File Name and click **View**.

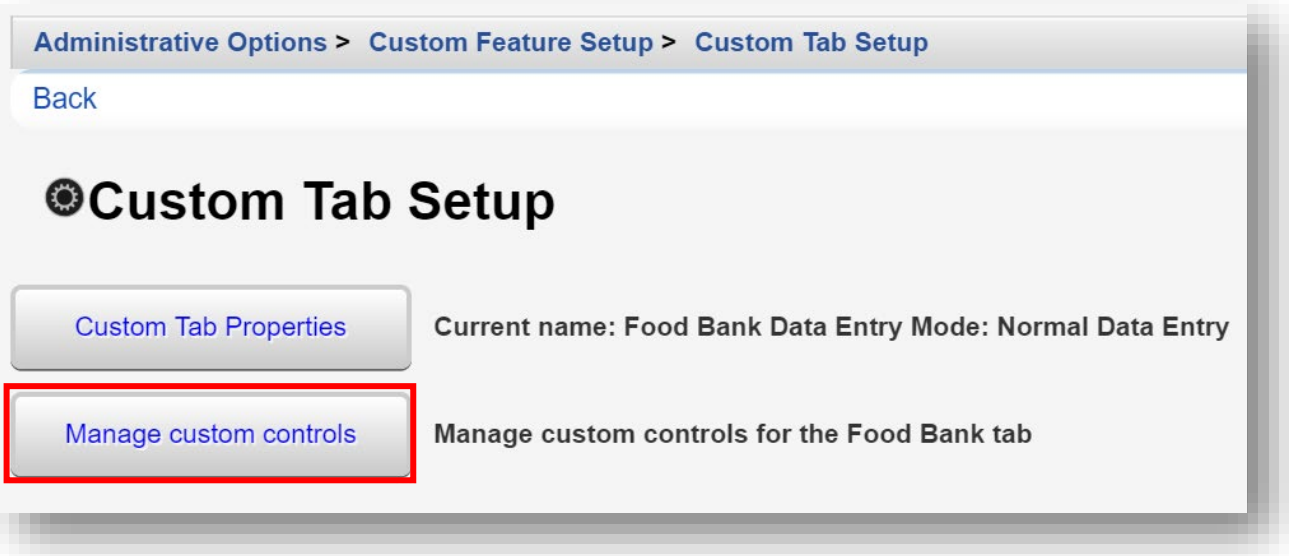


TIP: For multiple provider CAREWare networks - it is recommended to configure "attachment" permissions to allow users to delete ONLY documents they have uploaded. While being able to View other attachments uploaded for their clients.

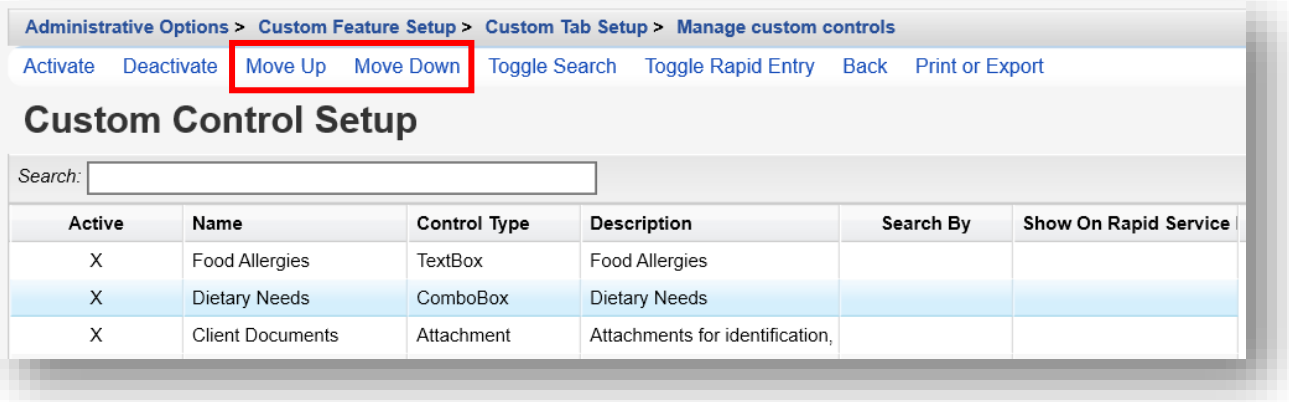
Setting Custom Field Order

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.

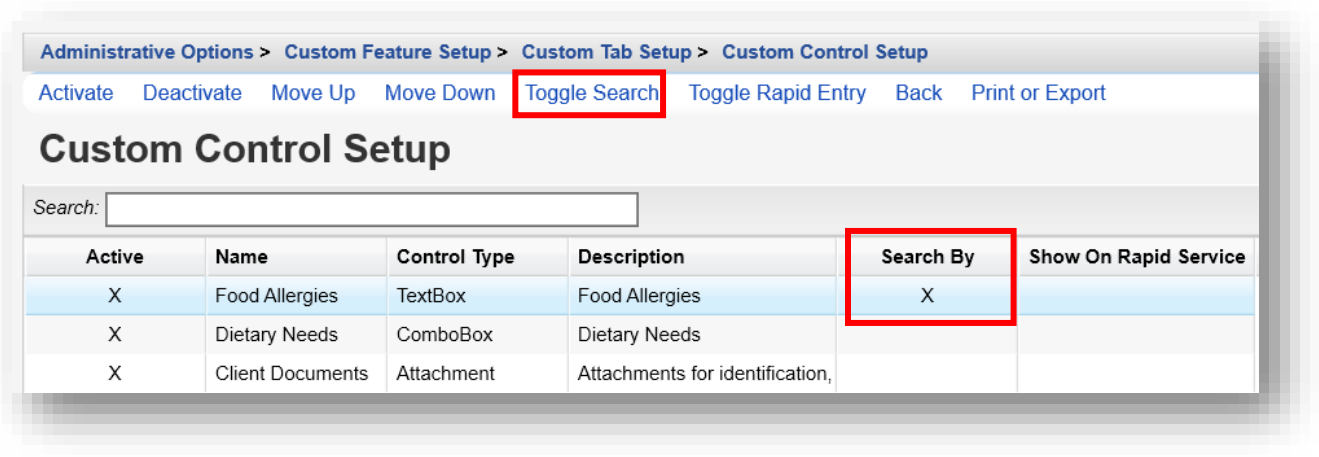
1. From the Custom Tab Setup menu, select **Manage custom controls**.



2. Select a custom control under the Name column. Click **Move Up** or **Move Down**. This will change the order of the custom control in the list. Note: a custom control must be "Active" to change the field order.



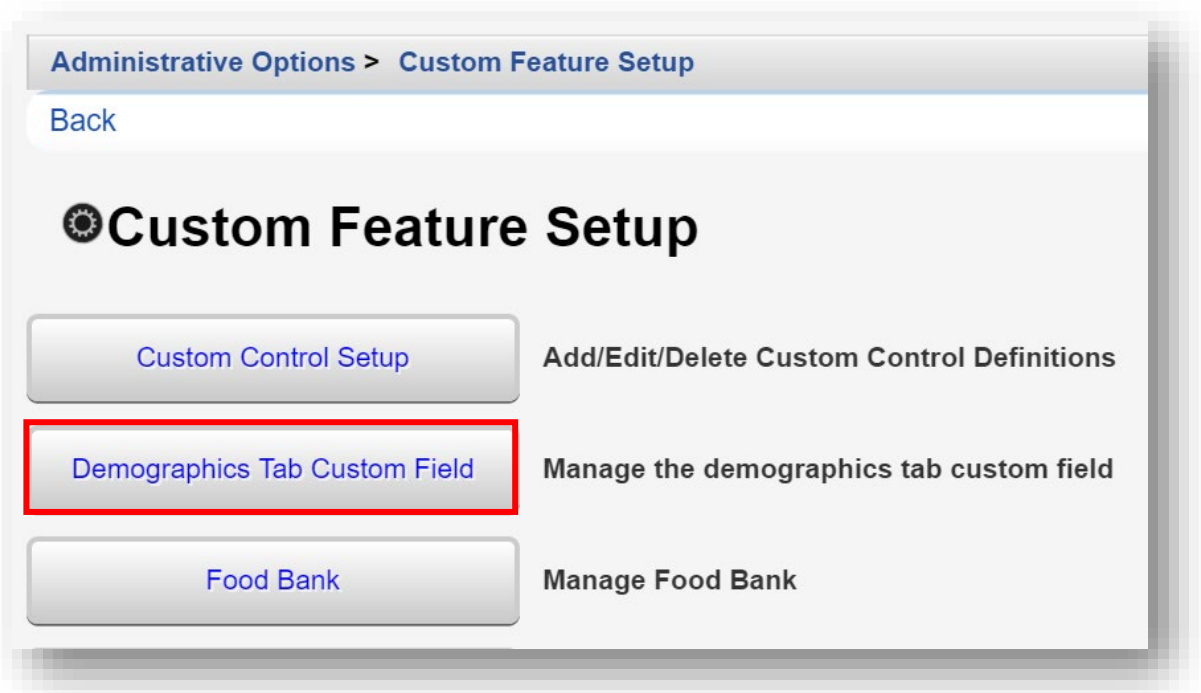
3. The **Toggle Search** property allows you to add one or more of your custom fields on the Find Client screen, making the custom control values "searchable" when finding an existing client record. To do so, select the desired custom control and select **Toggle Search**. An "X" appears under the **Search By** column. This indicates that this custom control field will show on the **Find Client** screen.



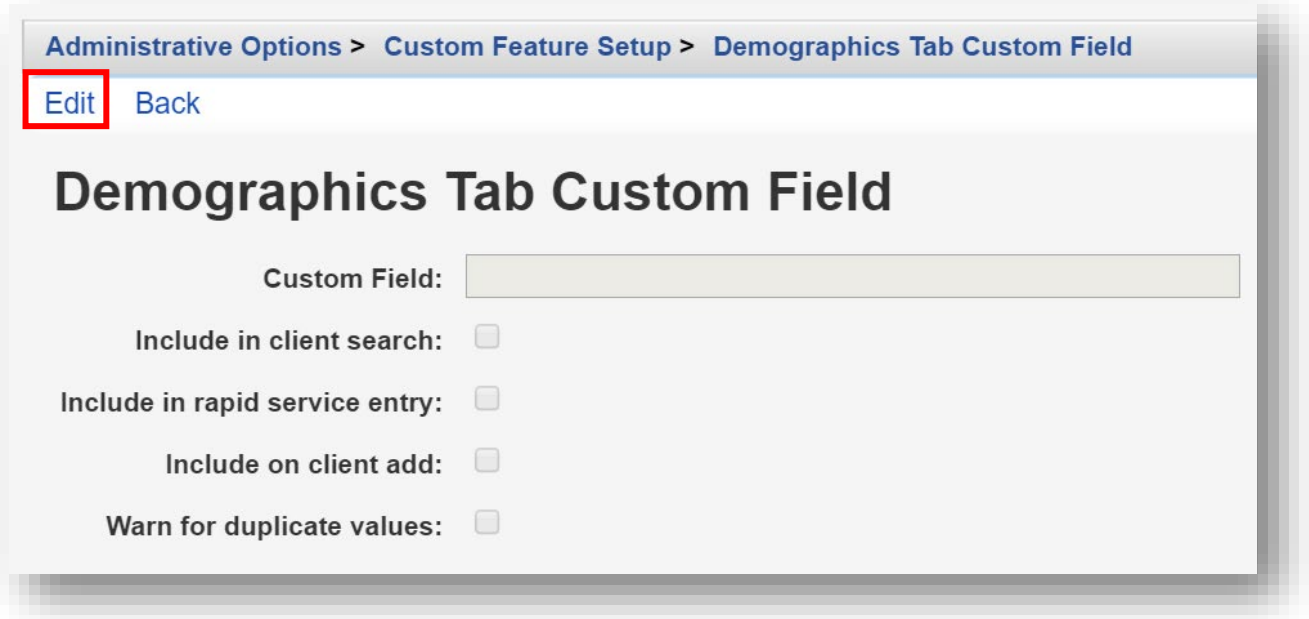
Creating Demographics Tab Custom Field

You may select a custom control field for use in the **Personal Info** section of the client **Demographics** menu link. Note: only "ComboBox" or "TextBox" control types are allowed on the **Demographics Tab Custom Field**.

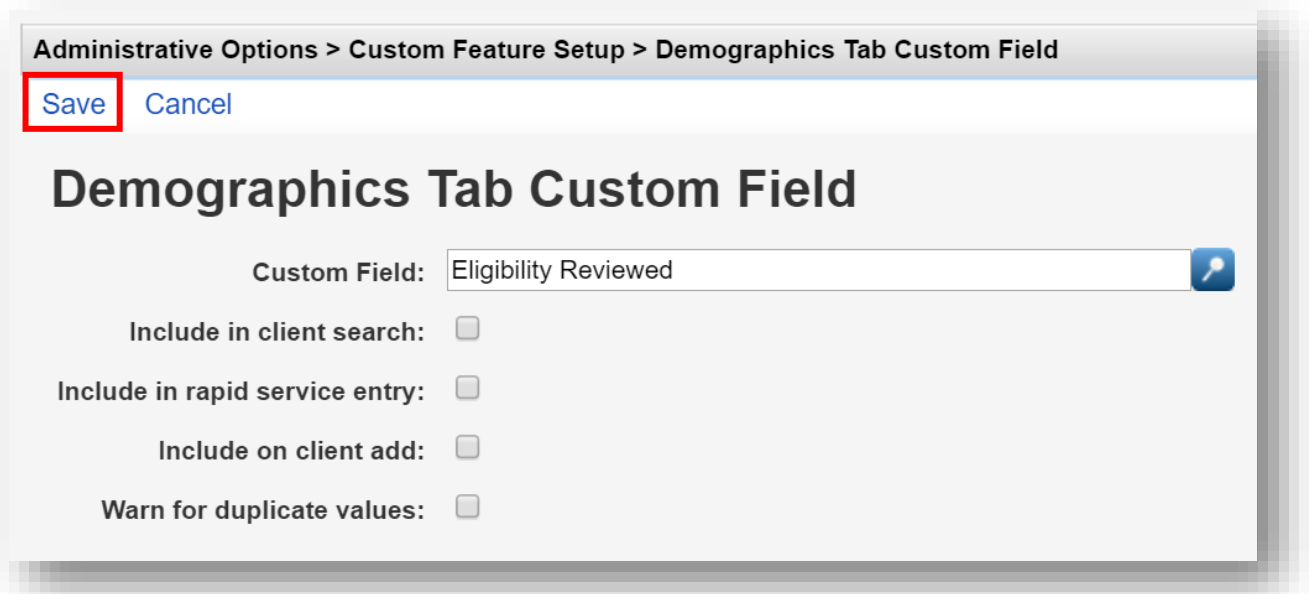
1. From the Custom Features Setup menu, select **Demographics Tab Custom Field**.



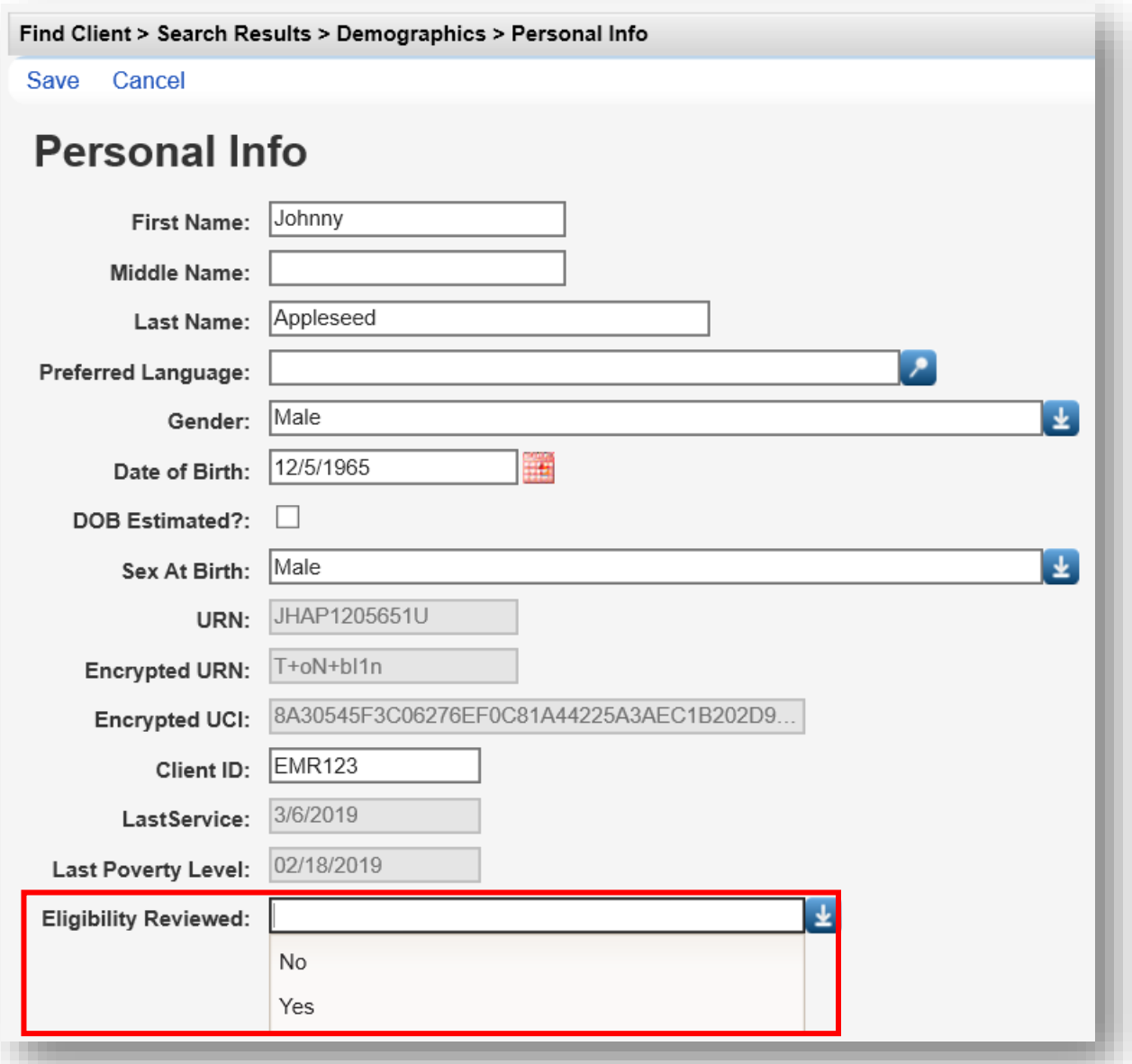
2. Select **Edit**.



3. Enter in the following information. When complete, click **Save**.
   - **Custom Field –** search by clicking the Magnifying-Glass icon.
   - **Include in client search** (checkbox)
   - **Include in rapid service entry** (checkbox)
   - **Include on client add** (checkbox)
   - **Warn for duplicate values** (checkbox)



4. In this example. the custom control field, “Eligibility Reviewed” (ComboBox), now appears on the **Personal Info** link within client demographics and is available for use.



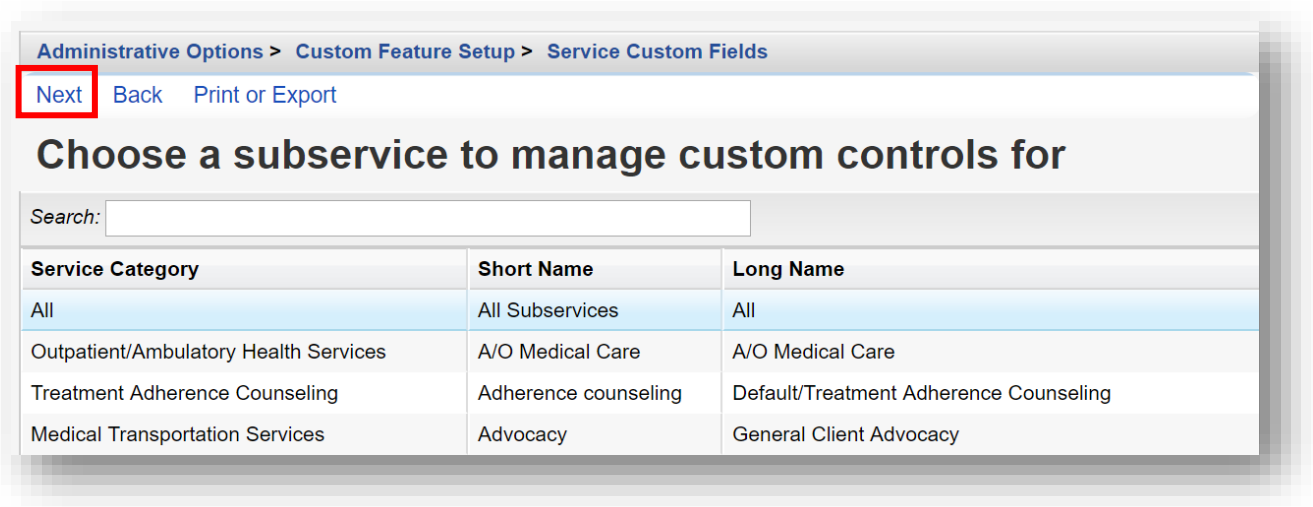
TIP: In the same manner, custom controls can be designated for use in other links in CAREWare, including Service Custom Fields, Annual Custom Fields, Eligibility Custom Fields, etc.

Creating Service Custom Controls

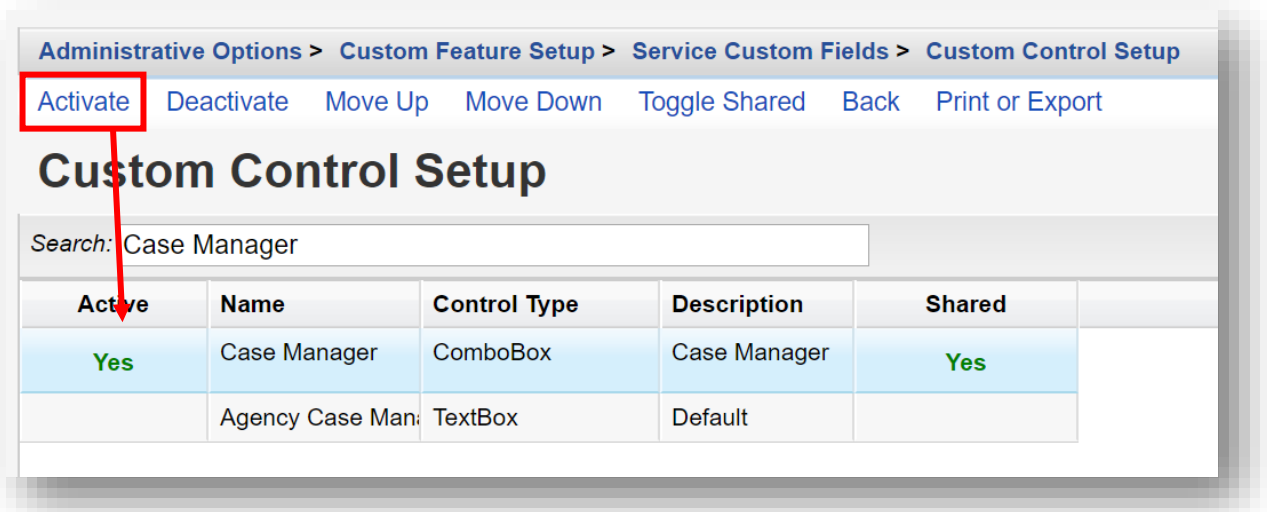
You can extend the range of information you capture for each service visit using service custom control fields. This may include listing the case manager or employee who saw the client or procedures your agency may require on a certain type of service.

1. Select **Service Custom Fields** from the Custom Feature Setup menu.

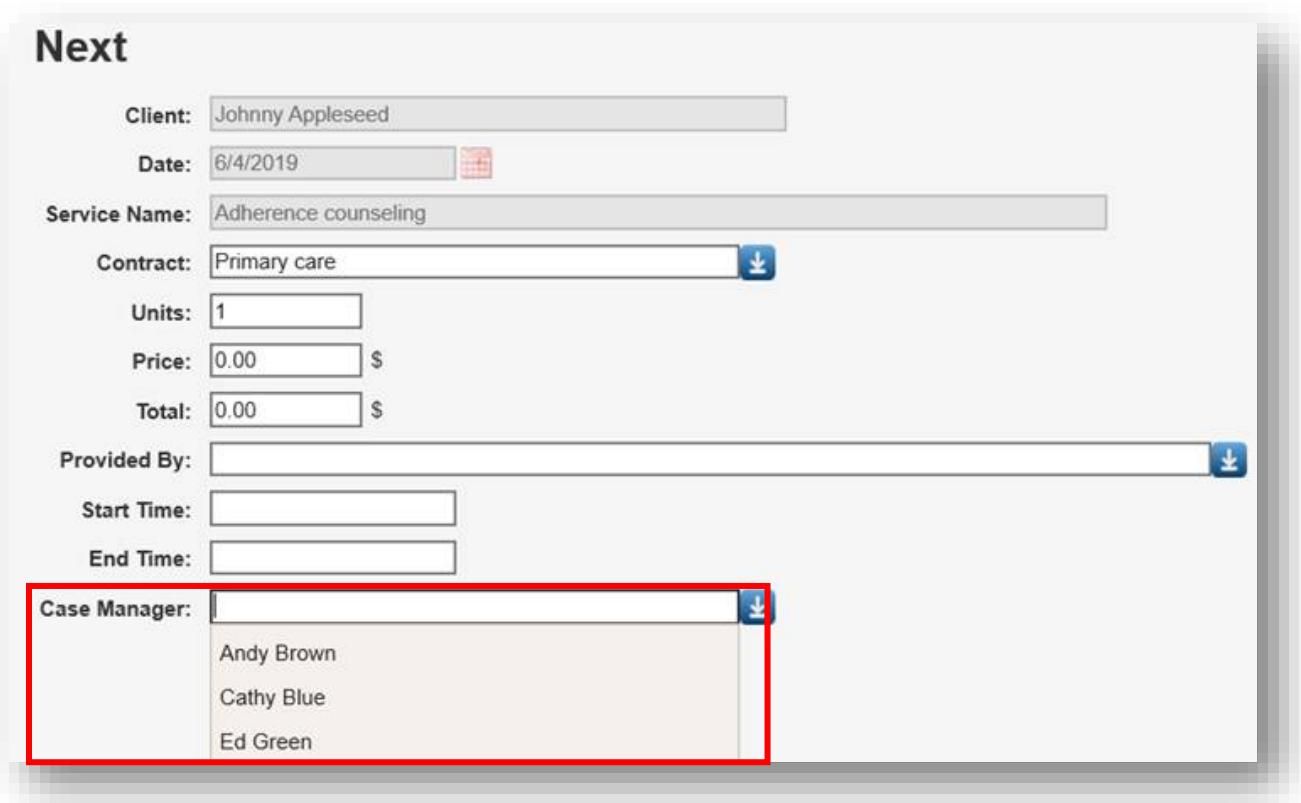
2. Choose a subservice to manage custom controls. In this example we have selected “All”. This will allow the service custom control we choose to be used when any client service is entered. Click **Next**.



3. Choose a custom control field. In this example, we have selected “Case Manager”. Click **Activate** (the custom control must be “Active” to use when adding client services).

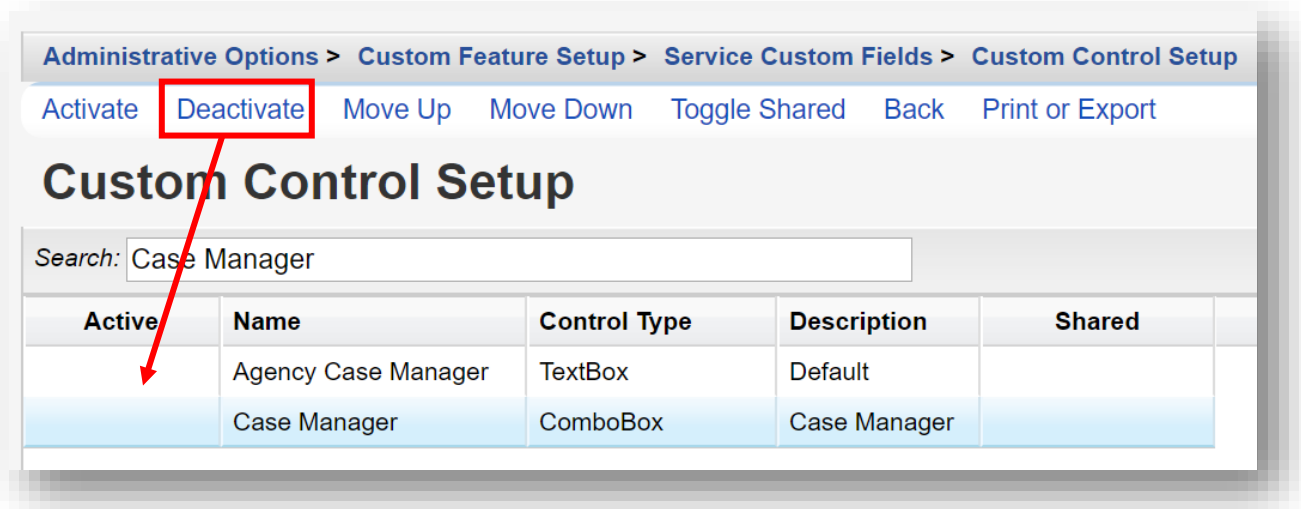


4. The custom control field, “Case Manager” (ComboBox), now appears on the **Add Service** link and is available for use.



Deactivating Fields

To deactivate a custom control field(s) you don’t wish to appear on a link, select the custom control field(s) and select **Deactivate**. The data previously entered will remain in the system, but no additional data can be entered unless the field is reactivated.



WARNING: Deleting a custom control will also delete ALL data previously entered in the control field, so it should be used with extreme caution.

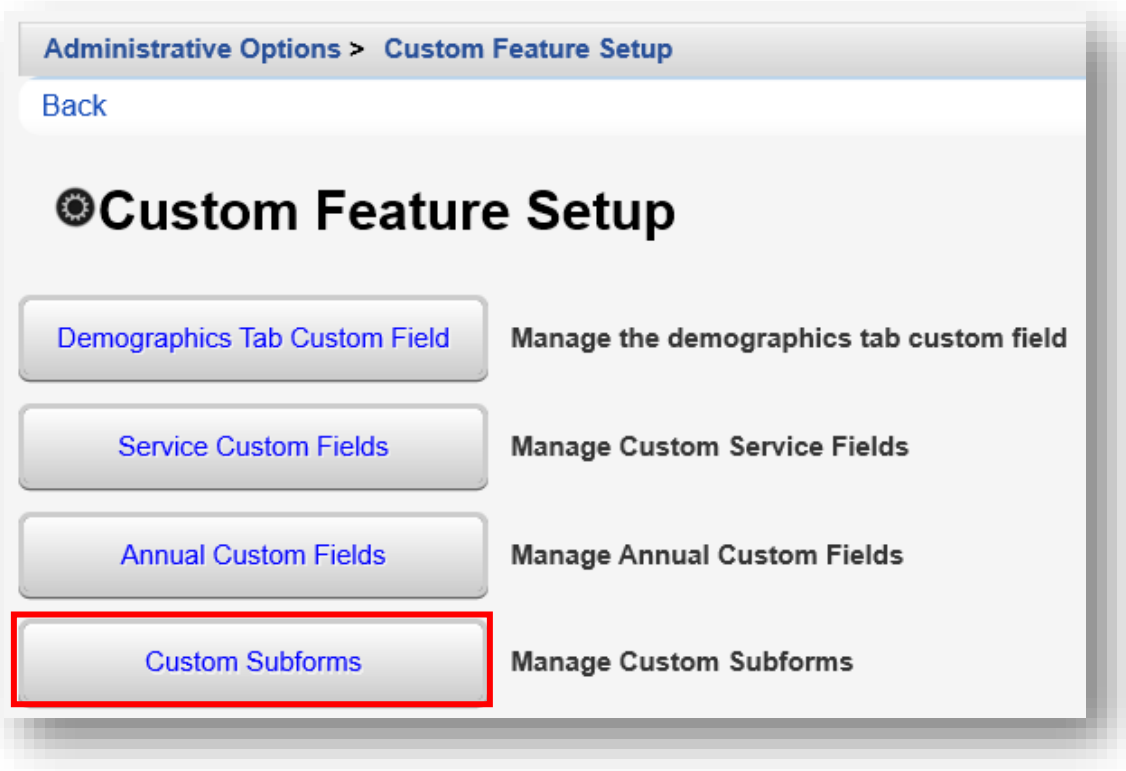
Using Custom Subforms

Custom subforms allow collection of information that may not be reported elsewhere in CAREWare, such as treatment adherence or client progress. Like service visit data, information on the custom subform will have a date associated with each record.

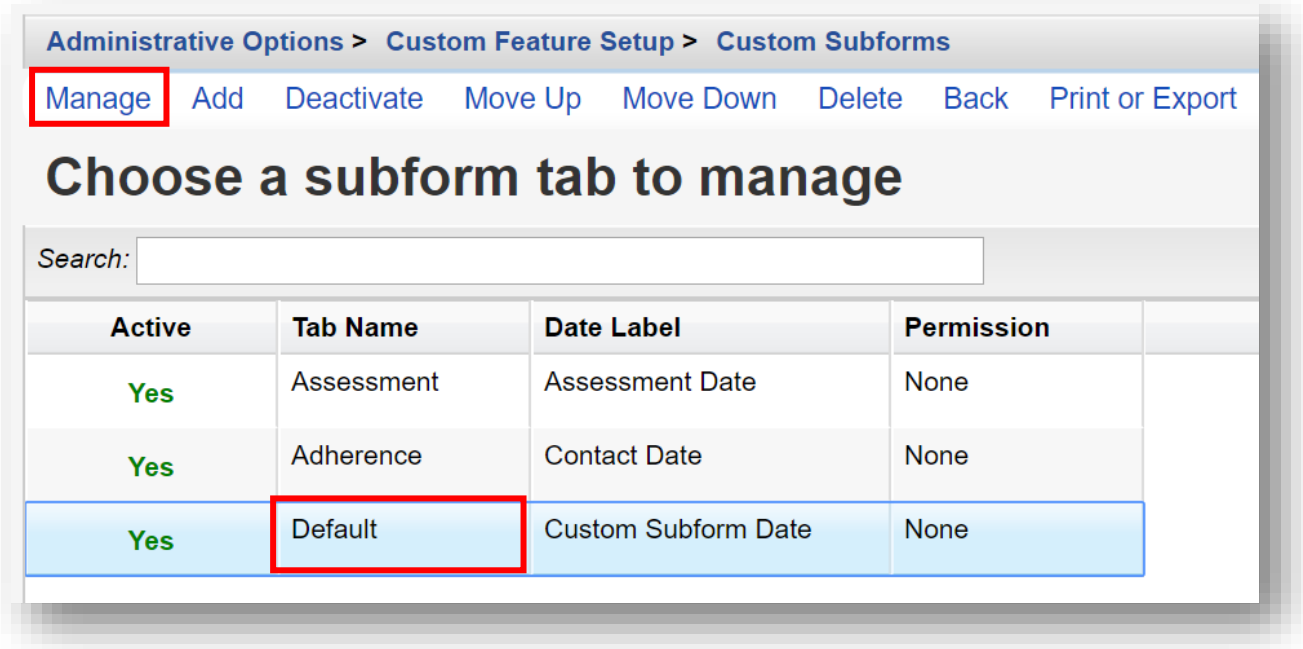
Be aware, that data entered in Custom Subforms are not reflected or counted on the RSR or other service reports in CAREWare.

Note: The **Custom Subform Tab** is listed on the **Menu of Links,** same as the **Demographics**, **Services**, and **Annual Review** sections of CAREWare.

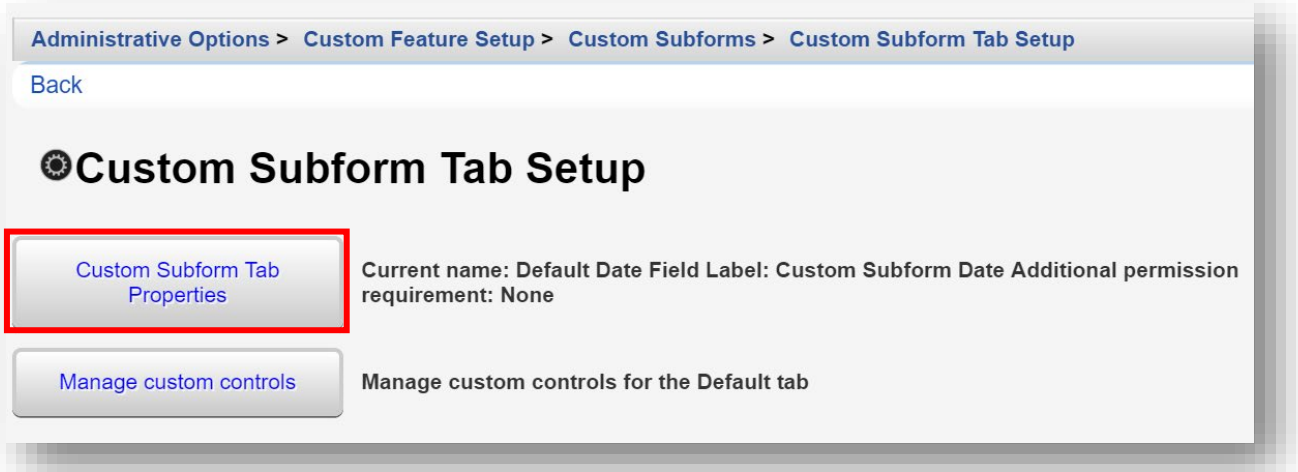
1. Select **Custom Subforms** from the Custom Feature Setup menu.



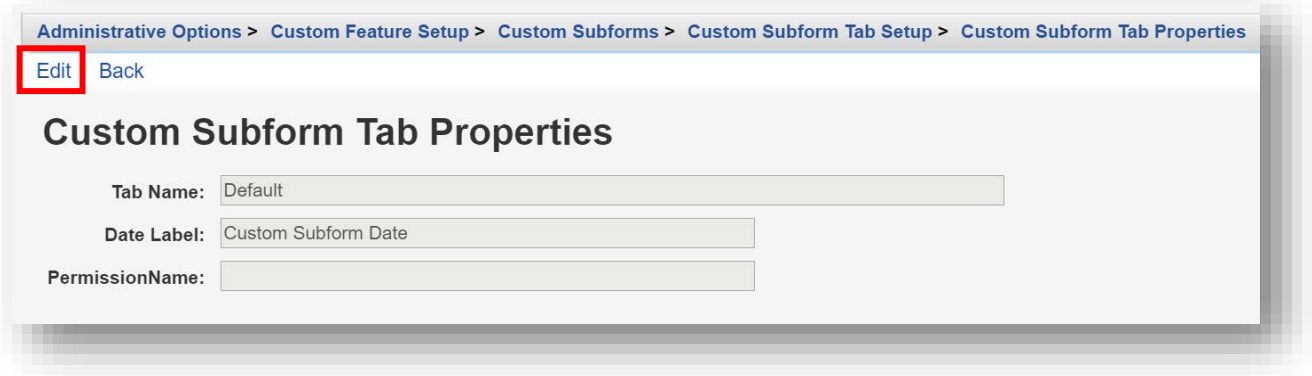
2. Select the desired **Tab Name**. Click **Manage.**



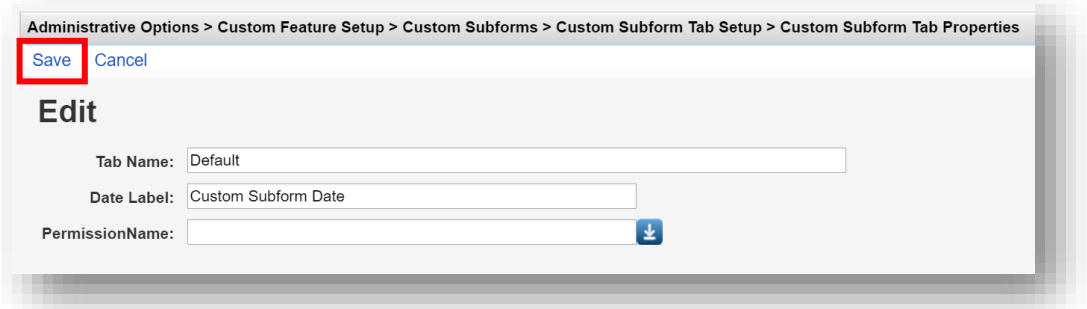
3. Select **Custom Subform Tab Properties.**



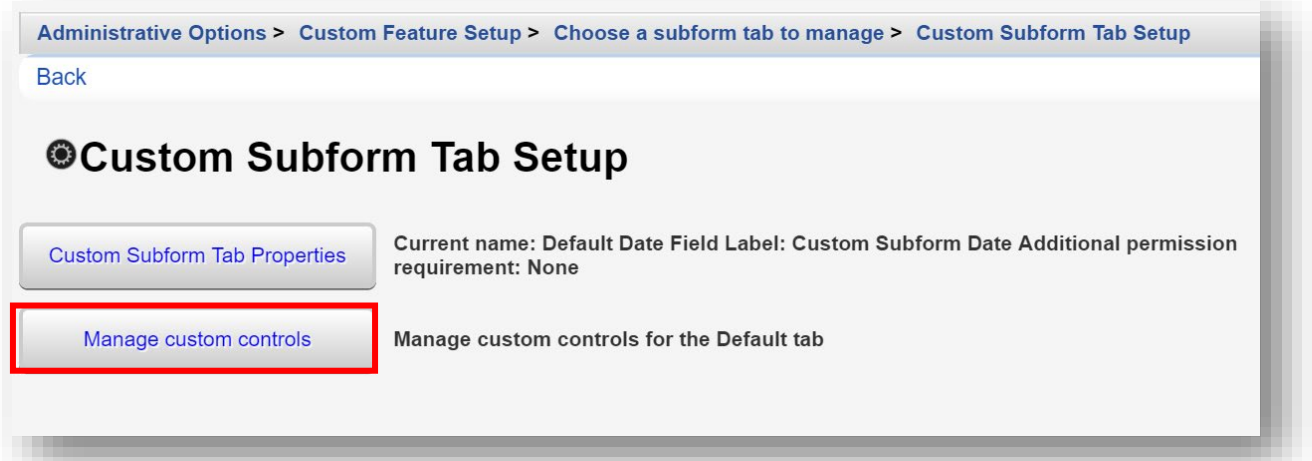
4. Click **Edit.**



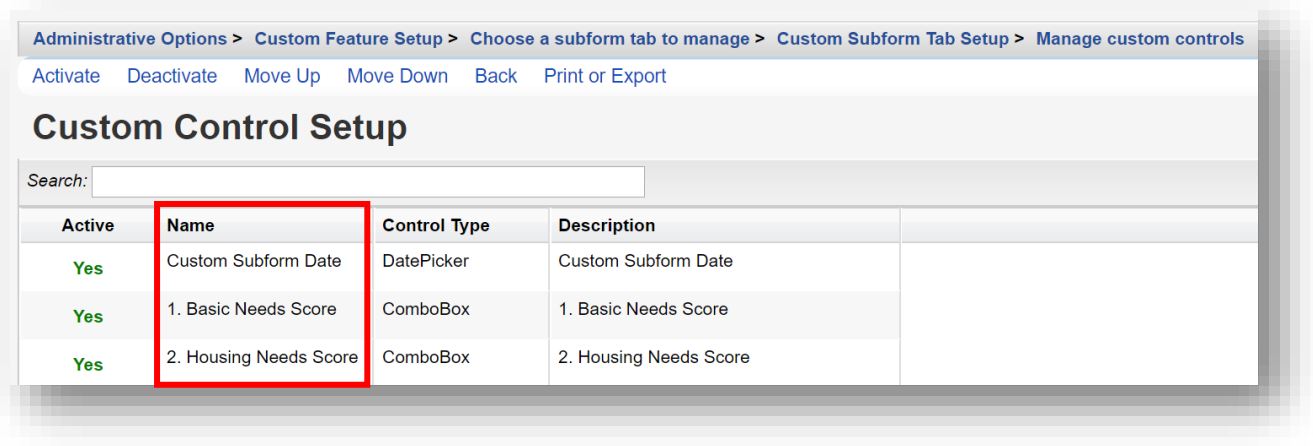
5. Enter in the following information. When complete, click **Save**.
   - Tab Name
   - Date Label
   - PermissionName (drop-down)



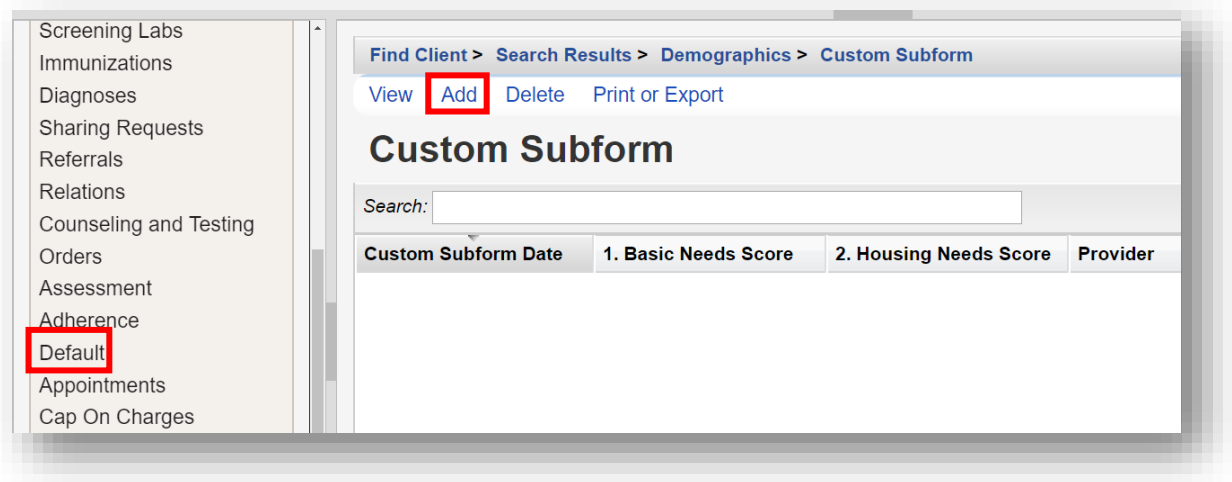
6. From the Custom Subform Tab Setup menu (return to this menu by clicking Back or using the breadcrumb links) select **Manage custom controls**.



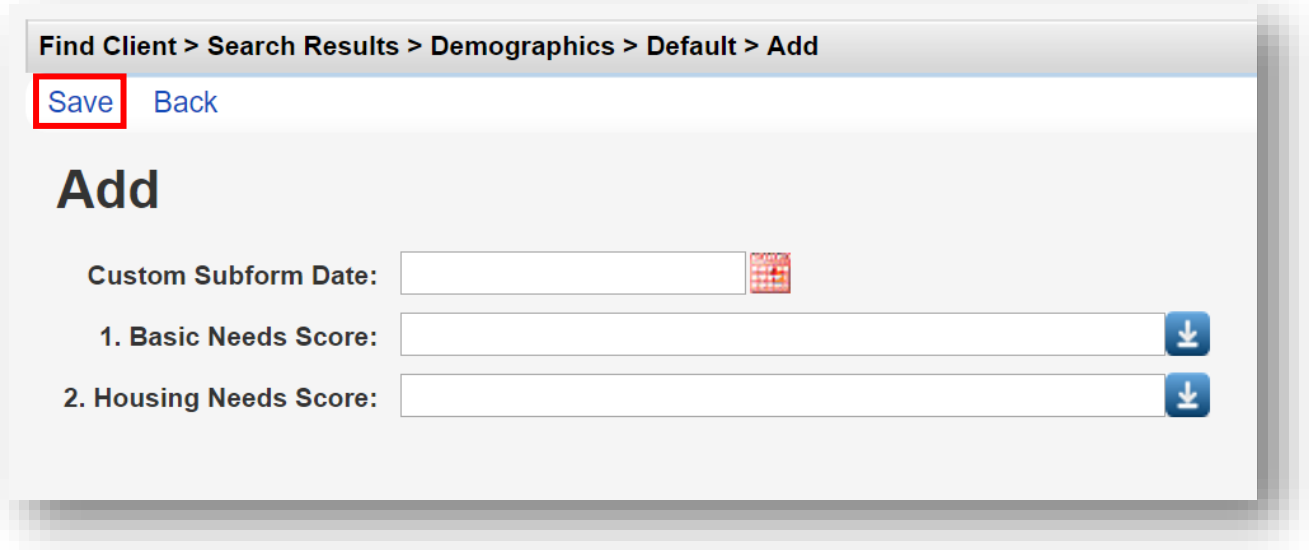
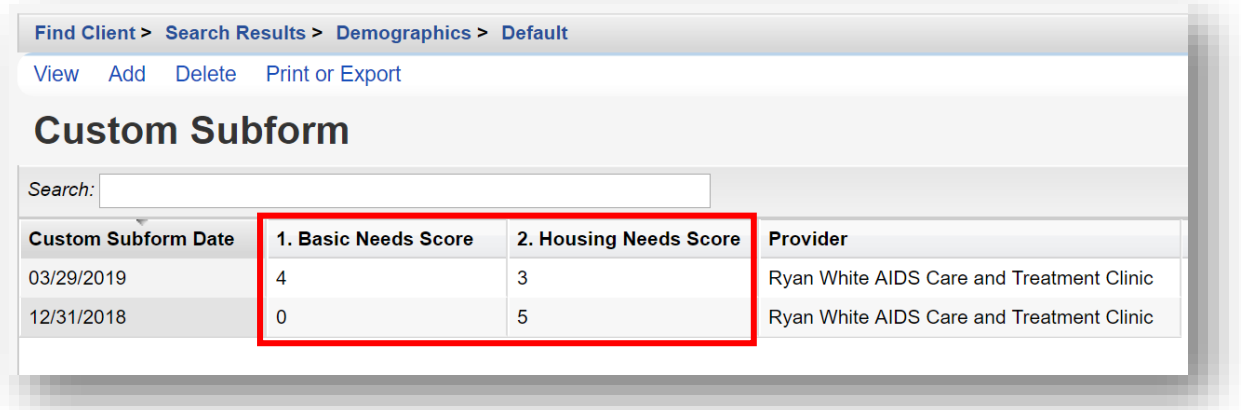
As an example, the following custom control fields have been created and activated for the **Custom Subform Tab**, named "Default": Custom Subform Date, 1. Basic Needs Score, and 2. Housing Needs Score.



7. **Find** and **Select** an existing client record (for more details on how to find and open client records, please refer to *Quick Start Guide #3: Adding Clients, Demographics, Services, and Annual Review Data*). Click the menu link **Default** and then click **Add**.



8. Upon completion of data entry for the custom subform, click **Save**.



9. Previous custom subform values will be listed by **Custom Subform Date** for easy viewing and comparison.