Welcome!

CAREWare Quick Starts will walk you through the basics of setting up, managing and using basic CAREWare functions. They're not a replacement for the CAREWare User Manual, which is where you'll need to go to learn about more advanced functions. This material is for non-technical users who just need to get information in and out of CAREWare with no worries.

About This Guide #4:
Customizing Tabs and Fields

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 Ryan White Program Data Report)*
7. *Creating basic custom reports*
8. *Creating more advanced reports*
9. *User and System administration*

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.

Customizing Custom Tabs

CAREWare offers three 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.
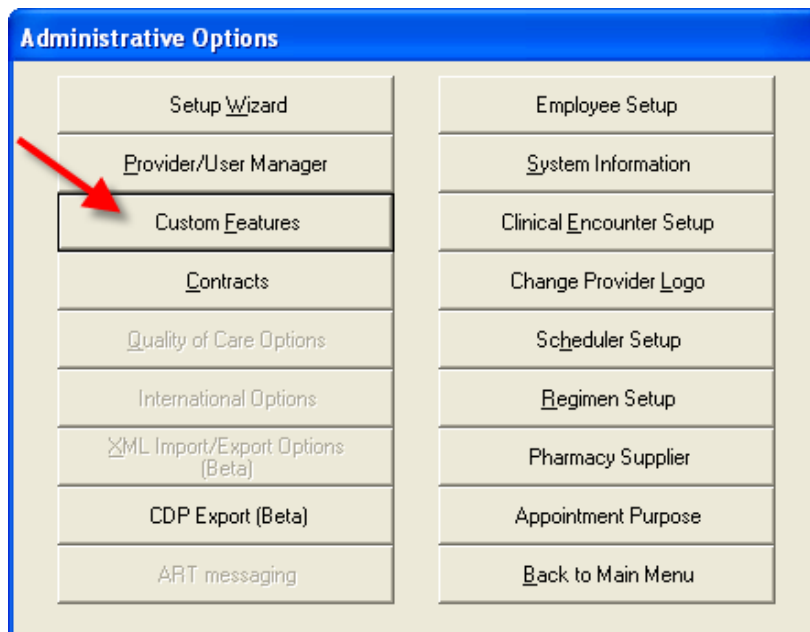
1. Log into CAREWare. If you have administrative privileges and are asked to choose between Central Administration and Provider ("Default" until you change the name), log in as a Provider.
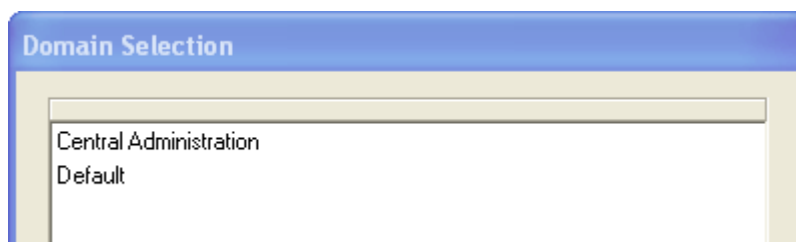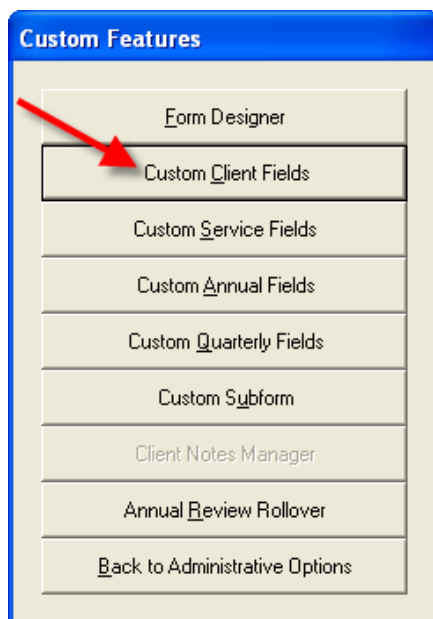

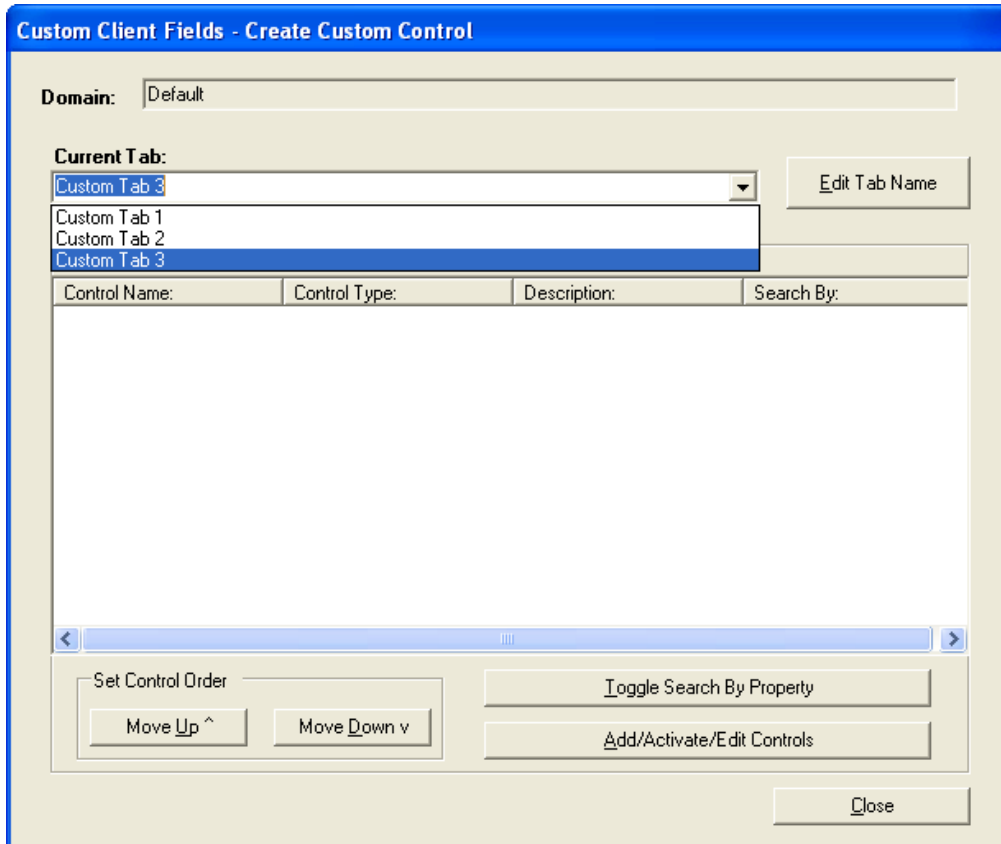2. Select **Administrative Options** from the main menu.
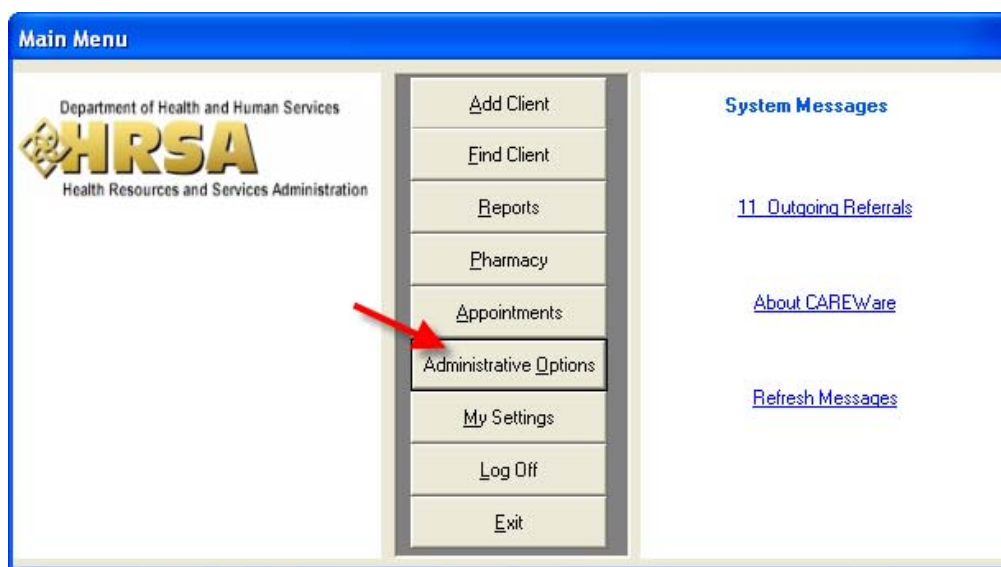
3.   Select **Custom Features** from the Admin Options menu.

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

5.   The **Create Custom Control** menu appears. You can use the ▾ arrow next to the Current Tab drop down menu to see available tabs. In this case, we'll use Custom Tab 3.
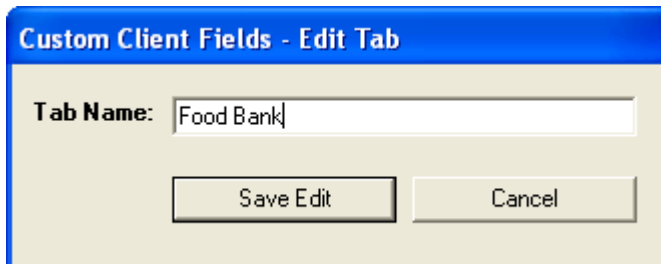
6.   The **Current Tab** lists the tab name. Click **Edit Tab Name** and enter the new tab name (in this case, "Food Bank").

Click **Save Edit** when done.

7.   Now we're ready to add fields to our tab. Fields are also referred to here by their technical/programming name, "controls." Click **Add/Activate/Edit Controls**.
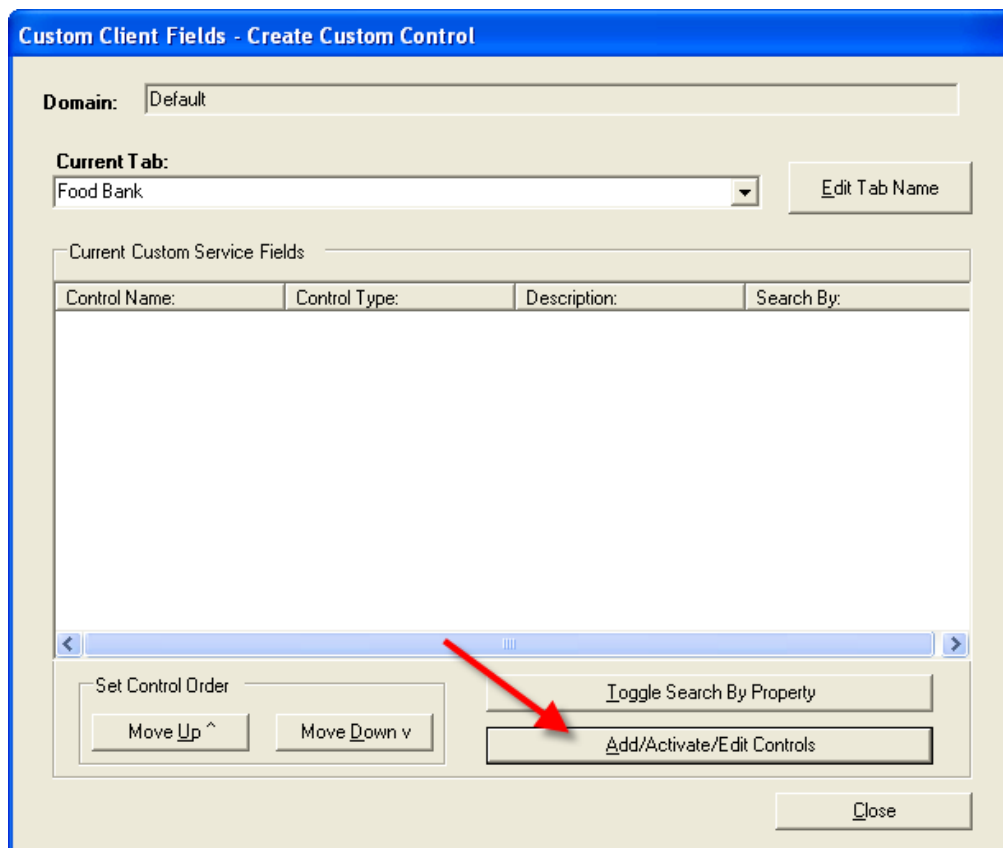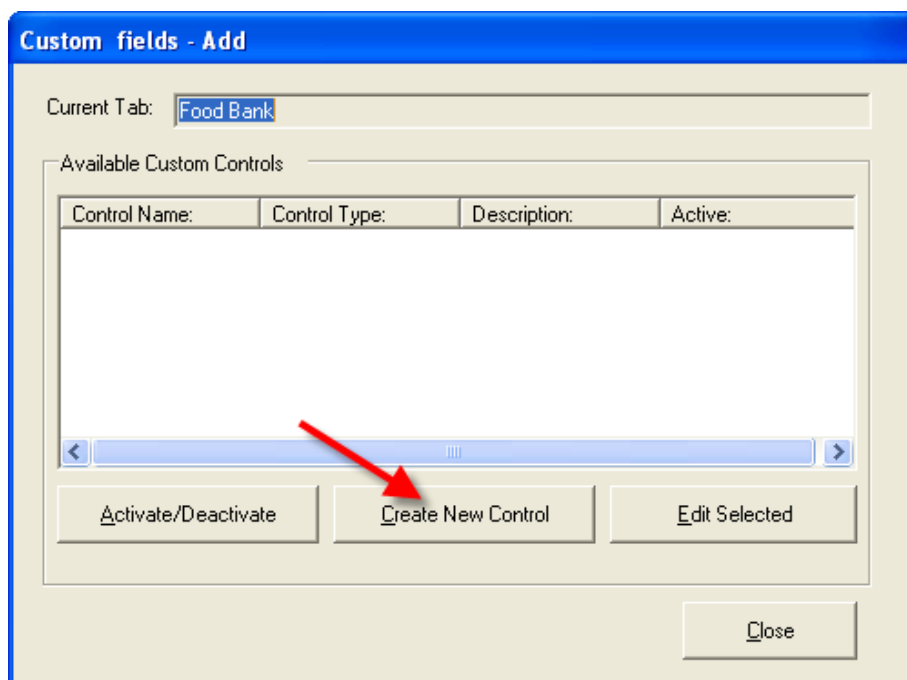

8.   A list of any available fields/controls appears. Click **Create New Control**.

The Create Custom Control window opens.

Creating different types of fields

There are several types of fields we can create. We'll walk through several of them as we create our Food Bank tab.

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.

# Creating a text box for free-form data entry:

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**.

    There is no **Default Value** for a text box because there are no pre-determined entries.

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.

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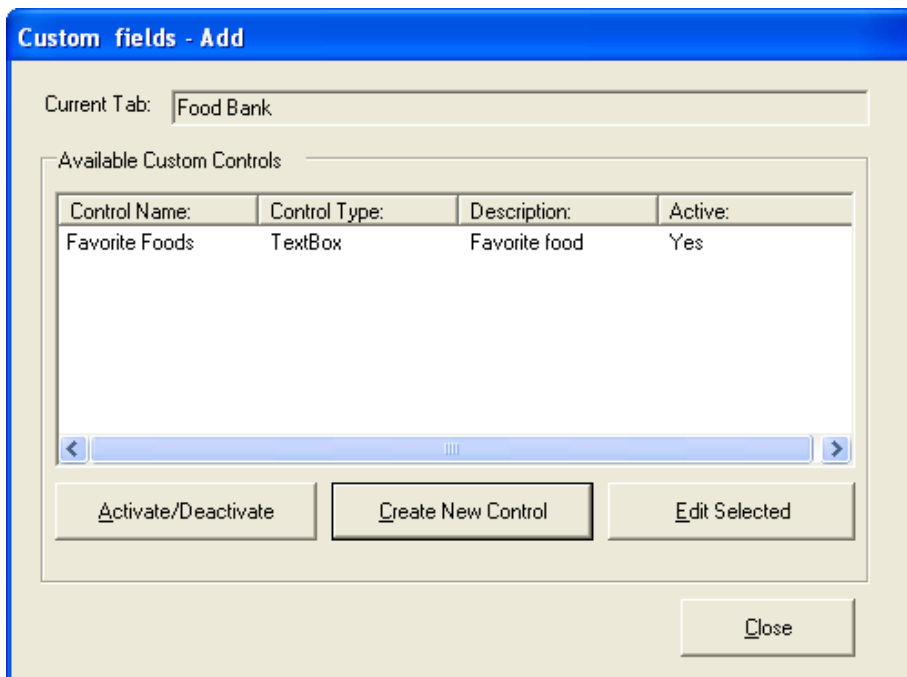
Note that the field is automatically set to **Active** when it's created. This means it will show up on every client's "Food Bank" tab and be available for data entry.

You cannot delete these fields once they're created; however, you can highlight them here and select **Activate/Deactivate** to remove them from the client's "Food Bank" tab and prevent further data entry.

A note for multiple provider networks

Please be aware that custom tabs and fields are shared data. 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.

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 **Add** 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.   Click **Save** when finished. Add additional selections and click **Close** when done. In this case, we've also added "Kosher" and "Vegetarian" as special dietary needs.

Create Custom Control - ComboBox Values

Control Name: Special dietary needs

Code:

Value:

Save

Cancel

Code	Value
1	Diabetic
2	Kosher
3	Vegetarian

Add   Edit   Delete   Close

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 to make sure there's room on screen for the field name.
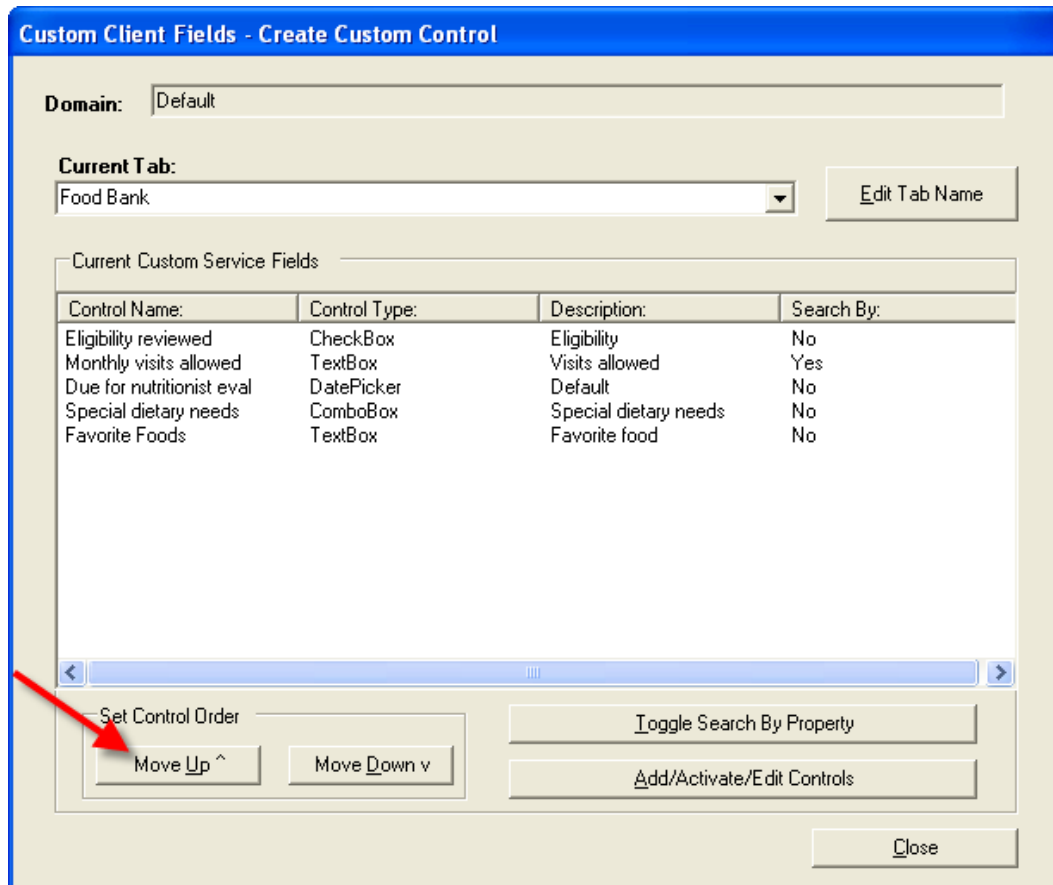
# Setting field order

Let's take a look at a list of fields.

The order of the fields on this screen is the order in which they'll appear horizontally on the data entry screen. You can rearrange them by selecting any field and using the **Move Up** and **Move Down** buttons.
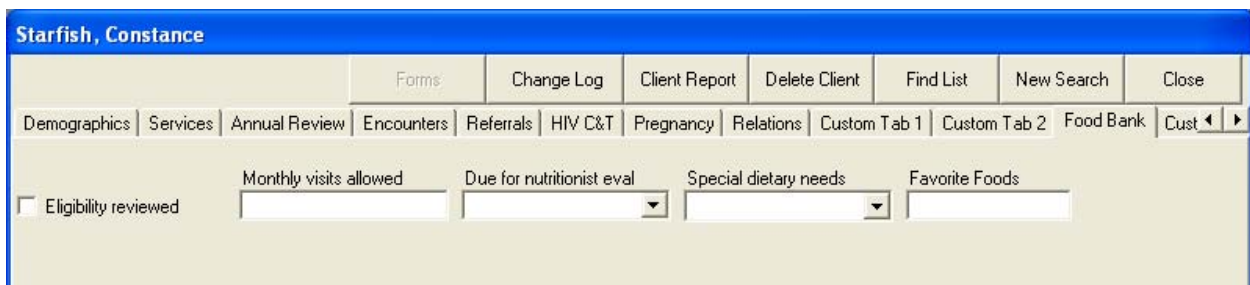
The **Toggle Search By Property** button allows you to include one or more of your custom fields on the **Find Client** screen.

The End Product

Let's take a look at our custom tab with additions. When we open a client record now, the tab has been renamed.
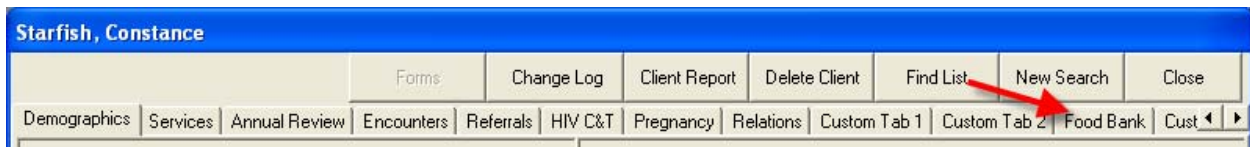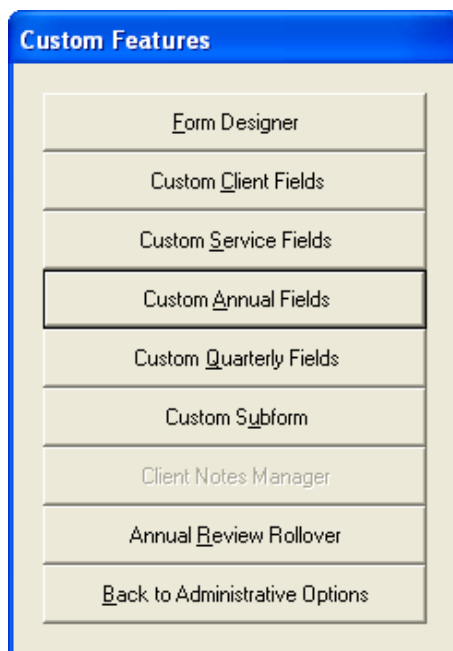

When we click on that tab, we see the results of our work:

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.
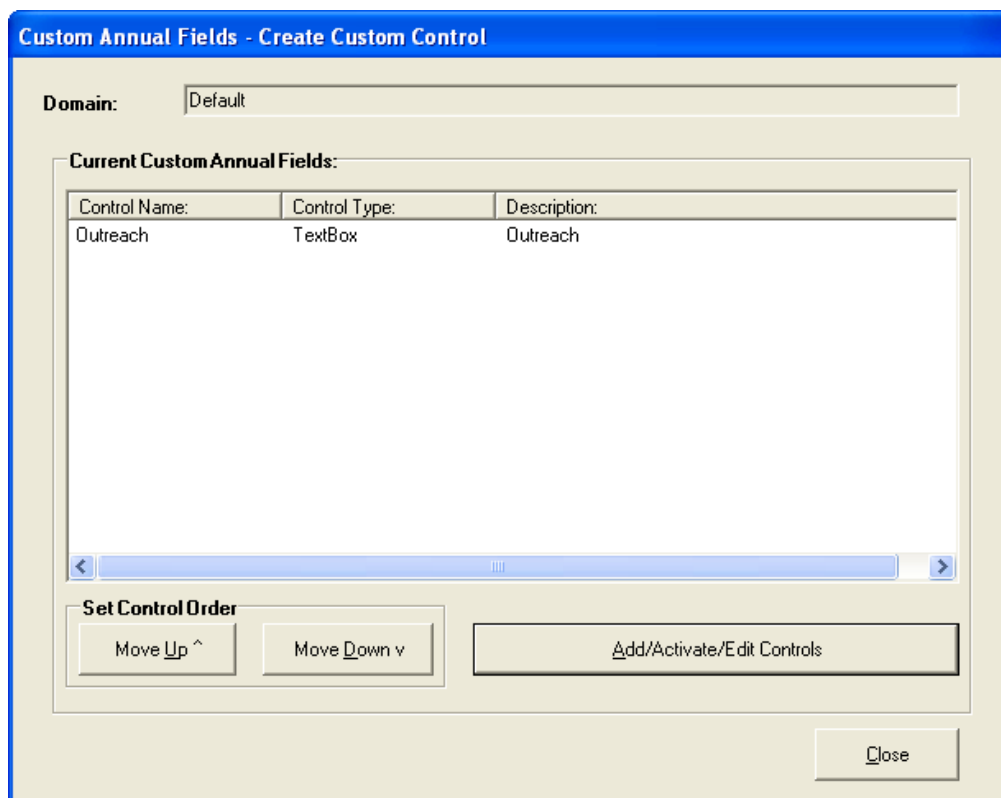
Creating Custom Service Fields

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.

Custom Features

Form Designer

Custom Client Fields

Custom Service Fields
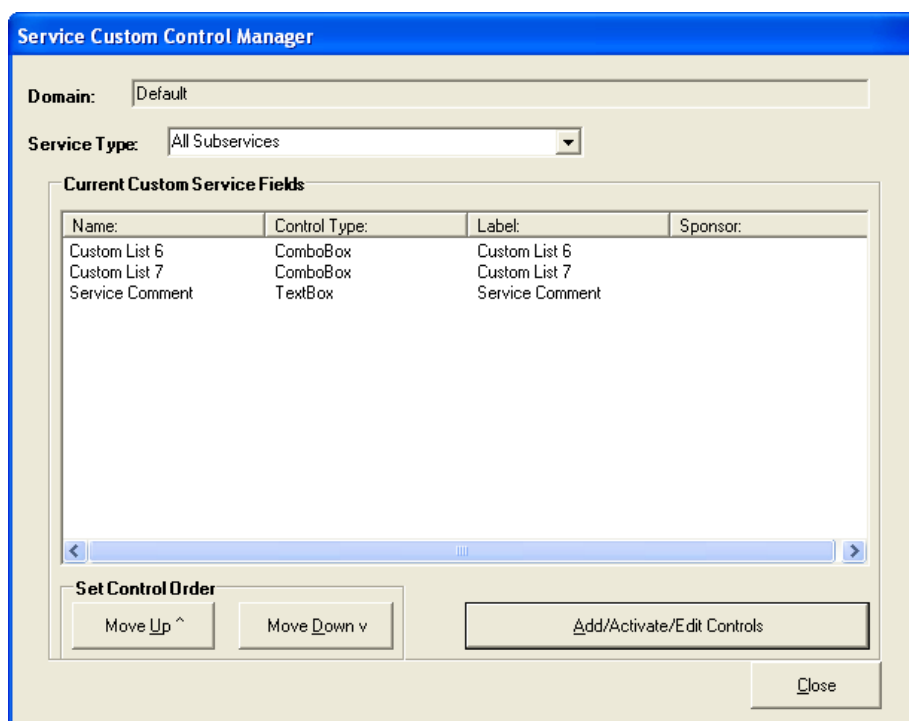
Custom Annual Fields

Custom Quarterly Fields

Custom Subform

Client Notes Manager

Annual Review Rollover

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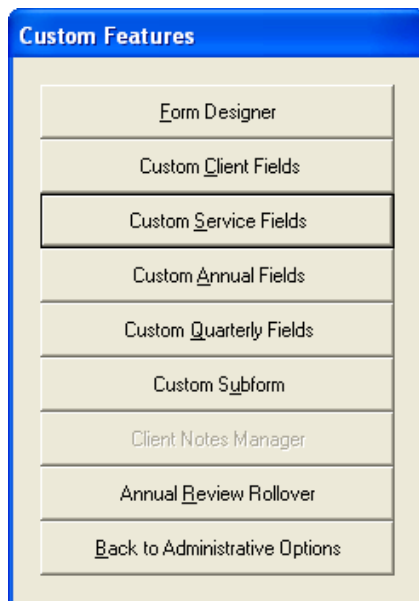
2.   Custom service fields can be added to or removed from any or all subservices. The initial screen will display custom service fields that will appear for **all** subservices.

Service Custom Control Manager

Domain: Default

Service Type: All Subservices

Current Custom Service Fields

Name:	Control Type:	Label:	Sponsor:
Custom List 6	ComboBox	Custom List 6	
Custom List 7	ComboBox	Custom List 7	
Service Comment	TextBox	Service Comment	

Set Control Order

Move Up ^   Move Down v   Add/Activate/Edit Controls

Close

3.   To deactivate a field you don't wish to appear on all subservices, use the **Add/Activate Edit Controls** button. (Remember that "control" is the tech term for what we see on the end as fields.)
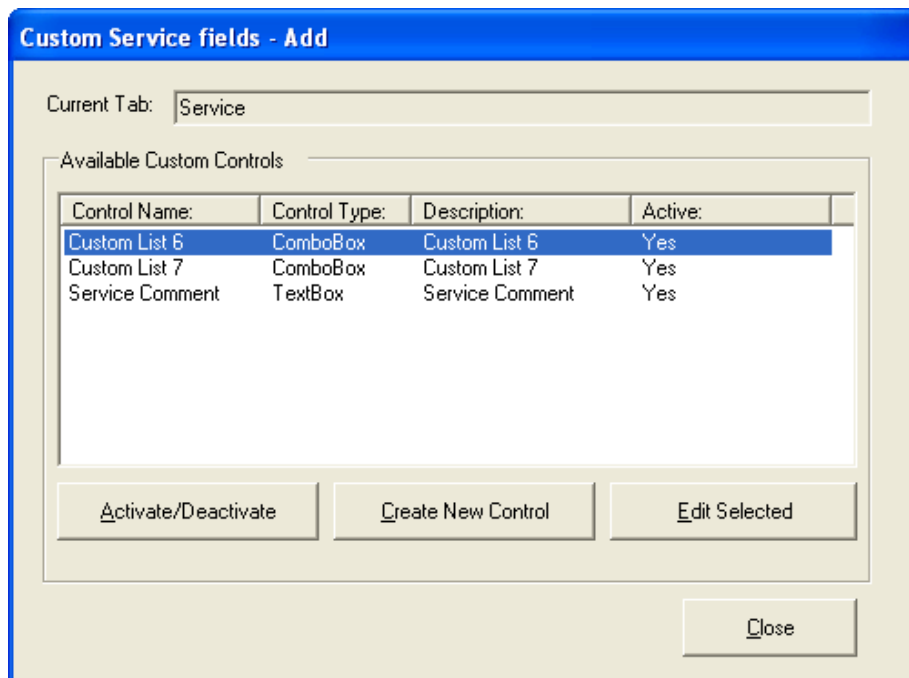
4. Select the field you wish to deactivate, then click **Activate/Deactivate**, then **Close**.

5. To add or remove a custom service field from a **specific** subservice, use the drop down menu to select the subservice.
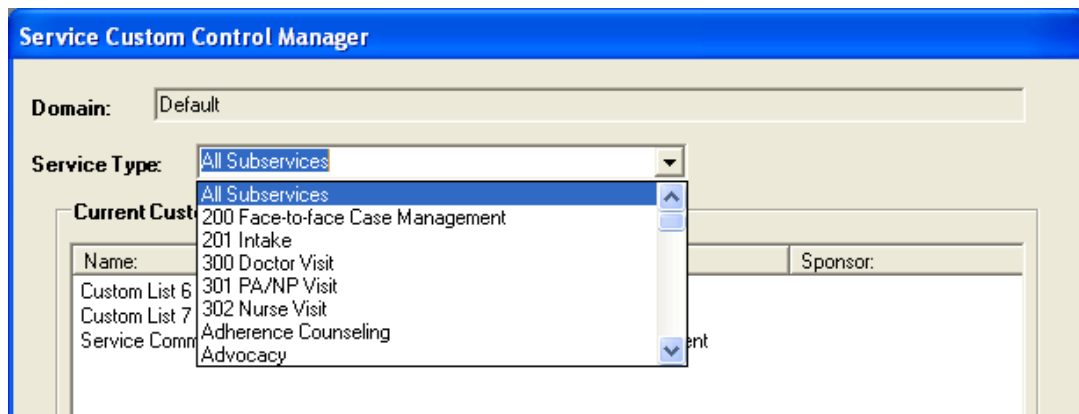
6. Use the steps listed above for custom tabs to create your custom service fields.

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 Program Data Report or other service reports.

Here is an example of a custom subform for tracking treatment adherence visits.

This information then translates into this custom subform:

Custom Subform Date	Ple	Rx Adhere Q1
4/1/2005	Sob	Ziagen, Zerit, Reyataz

Rx Adhere Q2
Empty stomach in am, w/dinner

Rx Adhere Q3
1

Save   Cancel

Custom Subform Date	Default	List all meds client is taking,...	How is the client taking these meds?	# of missed doses, past we
3/1/2005	Qbi	Ziagen, Zerit, Kaletra	Empty stomach in the AM (doesn't eat breakfast), and w/dinner	2
4/1/2005	Sob	Ziagen, Zerit, Reyataz	Empty stomach in am, w/dinner	1

Add   Edit   Delete