# 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.

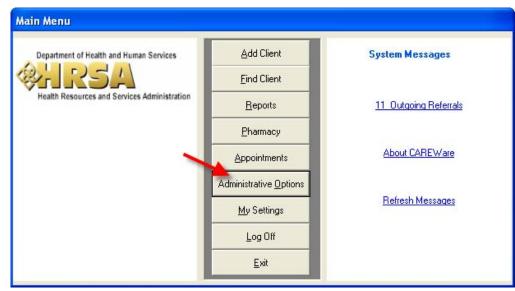
# **Customizing Custom Tabs**

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.

Domain Selection				
	Central Administration Default			

2. Select Administrative Options from the main menu.



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

Administrative Options					
Setup	<u>W</u> izard		Employee Setup		
Provider/U	ser Manager		System Information		
Custom	<u>F</u> eatures		Clinical <u>E</u> ncounter Setup		
<u></u> on	<u>C</u> ontracts	Change Provider <u>L</u> ogo			
<u>Q</u> uality of 0	Quality of Care Options		Sc <u>h</u> eduler Setup		
Internatio	nal Options		<u>R</u> egimen Setup		
	Export Options eta)		Pharmacy Supplier		
CDP Ex	port (Beta)		Appointment Purpose		
ART m	essaging		<u>B</u> ack to Main Menu		

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



5. The **Create Custom Control** menu appears. You can use the **I** arrow next to the Current Tab drop down menu to see available tabs. In this case, we'll use Custom Tab 3.

Custom Client Fields - Crea	ate Custom Control		
Domain: Default			
Current Tab: Custom Tab 3 Custom Tab 1 Custom Tab 2 Custom Tab 3		<u>.</u>	Edit Tab Name
Control Name:	Control Type:	Description:	Search By:
<			
Set Control Order		<u>T</u> oggle Search By	Property
Move Up ^	Move <u>D</u> own v	<u>A</u> dd/Activate/Edi	
			Close

6. The **Current Tab** lists the tab name. Click **Edit Tab Name** and enter the new tab name (in this case, "Food Bank").

Custom Client Fields - Edit Tab						
Tab Name:	Food Bank					
	Save Edit	Cancel				

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.

ustom Client Fields - Cre	ate Custom Control		
Domain: Default			
Current Tab:			_
Food Bank			Edit Tab Name
Current Custom Service Fie	lds		
Control Name:	Control Type:	Description:	Search By:
Set Control Order	Move <u>D</u> own v	<u>I</u> oggle Search By <u>A</u> dd/Activate/Edi	
			Close

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

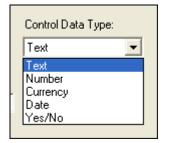
Custom fields - Add							
Current Tab: Food Bank							
,							
Available Custom Contr	rols						
Control Name:	Control Type:	Description:	Active:				
<			>				
<u>A</u> ctivate/Deactiva	ite <u>C</u> reate N	ew Control	Edit Selected				
			<u>C</u> lose				

Custom Fields - Create Custom Control					
Control Name:		Control Data Type:			
		Text			
Default Value:	Max size:	☐ Required			
Description:					
Default					
Control Type:	7				
TextBox	<u>.</u>	⊻alues			
<u> </u>					
	<u>S</u> ave	<u>C</u> ancel			

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:

Custom Fields - Create Custom Control					
Control Name: 1 Favorite Foods		Control Data Type:			
Default Value:	Max size: 3 20	4 Required			
Description:					
5 Favorite foods					
Control Type:					
6 TextBox	•	⊻alues			
Favorite Foods					
, in the second se					
	7	· · · · · ·			
	<u>S</u> ave	<u>C</u> ancel			

- 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.

Custom fields - Add								
I	Current Tab: Food Bank							
Г	-Available Custom Contr	rols						
	Control Name:	Control Type:	Description:	Active:				
	Favorite Foods	TextBox	Favorite food	Yes				
	<			>				
	<u>A</u> ctivate/Deactiva	ite <u>C</u> reate N	ew Control	Edit Selected				
				Close				

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.

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## 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:

Custom Fields - Create Custom Control					
Control Name: Special dietary needs	Control Data Type:				
Default Value: Max size:           1	E Required				
Description: Special dietary needs					
Control Type:					
2 ComboBox 🔹 3	<u>V</u> alues				
Special dietary needs					
· · · · · · · ·	· · · · ·				
<u>S</u> ave	<u>C</u> ancel				

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

Create Custom Control - ComboBox Values						
Control Name:	Specia	al dietary ne	eds			
Code:			_			Save
Value:						Cancel
Code		Value				
<						>
Add		Edit		Delete	1 [	Close
1						

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.

Create Custom Control - ComboBox Values					
Control Name:	Special dietary needs				
Code:	1	Save			
Value:	Diabetic	Cancel			
Code	Value				
<		>			
Add	Edit Delete	Close			

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.

Cre	ate Custom Co	ontrol	- ComboB	ox Valı	ies	
С	ontrol Name:	Specia	al dietary need	s		
С	iode:					Save
v	alue:					Cancel
	Code		Value			 
	1		Diabetic 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.

Custom Fields - Create Custom C	ontrol
Control Name: Eligibility reviewed	Control Data Type: Yes/No
Checked: Max size:	🦳 Required
Description:	
Eligibility	
Control Type:	
CheckBox 💌	⊻alues
Eligibility reviewed	
<u> </u>	1 1 1 1
<u>S</u> ave	<u>C</u> ancel

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## Setting field order

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

ustom Client Fields - Cre	ate Custom Control		
Domain: Default			
Current Tab:			
Food Bank			<u> <u> </u> </u>
Current Custom Service Fie	elds		
Control Name:	Control Type:	Description:	Search By:
Eligibility reviewed Monthly visits allowed Due for nutritionist eval Special dietary needs Favorite Foods	CheckBox TextBox DatePicker ComboBox TextBox	Eligibility Visits allowed Default Special dietary needs Favorite food	No Yes No No No
<			) >
Set Control Order			n By Property
Move Up ^	Move <u>D</u> own v	<u>A</u> dd/Activate/	Edit Controls
			<u>C</u> lose

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.

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## 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.

Starfish, Con	stance								
			Forms	Change Log	Client Report	Delete Client	Find List	New Search	Close
Demographics	Services	Annual Review	Encounters   R	eferrals   HIV C&T	Pregnancy Re	elations Custom	Tab 1 Custom	Tab 2   Food Ba	nk   Cust 💶 🕨

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

Starfish, Constance								
		Forms	Change Log	Client Report	Delete Client	Find List	New Search	Close
Demographics Services	Annual Review	Encounters	Referrals HIV C&T	Pregnancy R	elations Custom	Tab 1 Custor	m Tab 2 Food Ba	ank Cust 🚺 🕨
	Monthly visits a	allowed	Due for nutritionist ev	al Special	dietary needs	Favorite Fo	ods	
Eligibility reviewed	1			-	1	-		

## 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.

Custom Features
<u>F</u> orm Designer
Custom <u>C</u> lient Fields
Custom <u>S</u> ervice Fields
Custom <u>A</u> nnual Fields
Custom <u>Q</u> uarterly Fields
Custom S <u>u</u> bform
Client Notes Manager
Annual <u>R</u> eview Rollover
Back to Administrative Options

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

Cust	om Annual F	ields - Cr	eate Custom Cont	rol					
D	omain:	Default							
Γ	Current Custo	om Annual I	Fields:						
	Control Name:		Control Type:		Description:				
	Outreach		TextBox		Outreach				
	<								>
	-Set Control	Order							
	Move <u>U</u> p	^	Move <u>D</u> own v			<u>A</u> dd/Activate/F	Edit Control:	\$	
								<u>C</u> lose	

## **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.

C	istom Features	
	<u>F</u> orm Designer	
	Custom <u>C</u> lient Fields	
	Custom <u>S</u> ervice Fields	
	Custom <u>A</u> nnual Fields	
	Custom <u>Q</u> uarterly Fields	
	Custom S <u>u</u> bform	
	Client Notes Manager	
	Annual <u>R</u> eview Rollover	
	<u>B</u> ack 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 Ma	nager			
Domain: Default				
Service Type: All Subservice	es	-		
Current Custom Service	ields			
Name:	Control Type:	Label:	Sponsor:	
Custom List 6 Custom List 7 Service Comment	ComboBox ComboBox TextBox	Custom List 6 Custom List 7 Service Comment		
<				>
Set Control Order	(			
Move <u>Up</u> ^	Move <u>D</u> own v	<u>A</u> dd/Activate	/Edit Controls	
				<u>C</u> lose

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.)

Custom Service fields	- Add			
Current Tab: Service	ols			
Control Name:	Control Type:	Description:	Active:	
Custom List 6	ComboBox	Custom List 6	Yes	
Custom List 7	ComboBox	Custom List 7	Yes	
Service Comment	TextBox	Service Comment	Yes	
<u>A</u> ctivate/Deactiva	te <u>C</u> re	ate New Control	<u>E</u> dit Selected	
			<u>C</u> lose	

- 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.

Service Custom	Control Manager	
Domain: Def.	ault	
Current Cust	All Subservices All Subservices 200 Face-to-face Case Management 201 Intake 300 Doctor Visit 301 PA/NP Visit 302 Nurse Visit Adherence Counseling Advocacy	Sponsor:

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.

tom Client Fields - C	reate Custom Contro	ol	
Domain: Arkansas Dep	artment of Health		
Domain. Jr interfeet b op			
Current Tab:			
Custom Subform	Fields	<u>·</u>	Edit Tab Name
	Fields	Description:	Edit Tab Name
Current Custom Service		Description:	
Current Custom Service	Control Type:		Search By:
Current Custom Service Control Name: Custom Subform Date	Control Type: DatePicker	Custom Subform Date	Search By:
Current Custom Service Control Name: Custom Subform Date Ple	Control Type: DatePicker ComboBox	Custom Subform Date Default	Search By: No No

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

This information then translates into this custom subform:

Custom Subform Date 4/1/2005	Ple Sot		Rx Adhere Q1 Ziagen, Zerit, Re	yataz	_		
Rx Adhere Q2				Rx Adhere Q3			
Empty stomach in am, w/dinner							
					Sav	e	Cancel
Custom Subform Date	Default	List all med	s client is taking,	How is the client taking these meds?		# of mi	ssed doses, past w
3/1/2005 4/1/2005	Qbi Sob	Ziagen, Ze Ziagen, Ze		Empty stomach in the AM (doesn't eat bro Empty stomach in am, w/dinner	eakfast), and w/dinner	2 1	
<							>
					Add	Edit	Delete