

The Form Designer allows users to add virtually any field in CAREWare to any location on a form, just as they might create a data entry screen in MS Access. The main impetus for building the Form Designer was that users found it cumbersome to have to click a number of buttons to get to different locations in the application—jumping back and forth between the services screen, for example, and then maybe clinical encounters to enter vital signs or diagnoses, and then case notes, etc. The Form Designer allows users to place critical fields for data entry on one (or more) forms in the order that mirrors paper forms (such as clinical encounter forms).

The Form Designer reduces the amount of time needed to enter data for each encounter and can eliminate the need to first record information on paper forms. This is a decision that should be made within the context of the workflow and demands of the provider.

These instructions for the Form Designer include:

- Creating a Form
- Activating a Form
- Setting up Control Rules
- Adding Custom Reports to Forms
- Adding Form Images
- Adding Encounter Grids

How to Begin

Getting clinical forms set up properly in the Form Designer can take a lot of work. Form maintenance is usually less work, though from time to time administrators will want to go back into a form, change the layout, add or remove fields, and so forth.

Terms to Know

It is important to understand the following terms, which are used throughout this guide.

Page – This is the main document on which the form is created.

Form – This is the actual workspace on which fields and their labels are placed. It is possible to have multiple pages per form.

Record – A record group is a set of fields that must be placed on the form together. For example, to enter services on a form, you must place at least two fields on the form within the same box--the checkbox for the service name itself and the contracts field that identifies the funding source for that specific service. Adding the the service container onto the form generates the service box to add other service controls. The contract field and any other service-related fields such as units and price must be added while the service container box is selected. If the page or any other box on the page is selected, the service controls are unavailable in the list when clicking *Add Control*. Service controls are only available in the service container.

Field – These are simply the data fields in CAREWare (e.g. gender, risk factor, etc.)

Labels – A text field used to label fields added or to replicate data entry spaces from paper forms.

Properties – Formatting for labels and fields such as setting fonts, colors, etc.

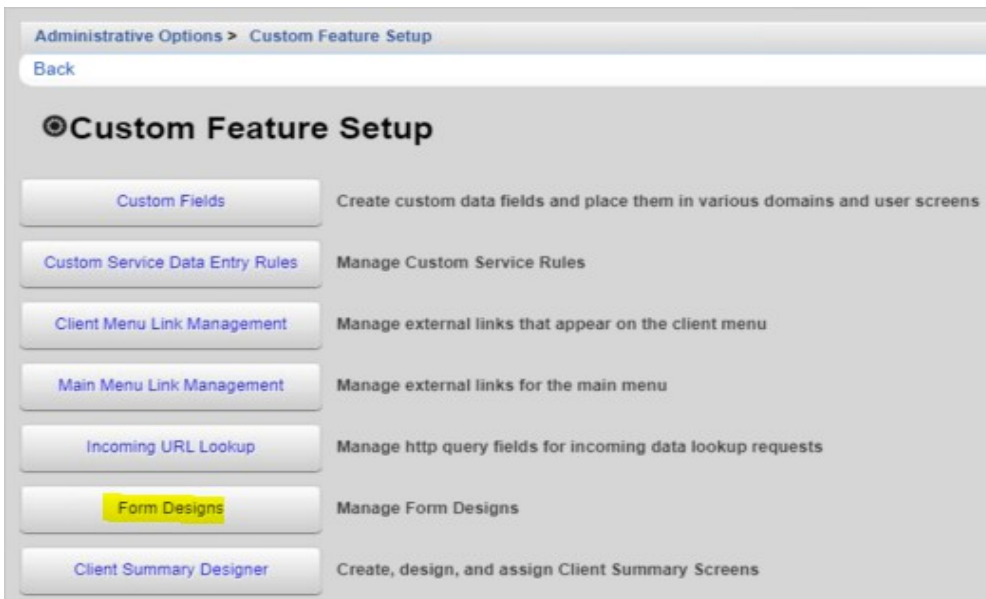
To grant access to the Form Designer, permissions need to be granted by following the instructions [here](#).

Note: The minimum permission required to add new forms is Create/EditView Form Design in Central Administration. The providers and users need the permission Create/Edit Form Design. Data entry in forms requires the permission Edit Form Design Records.

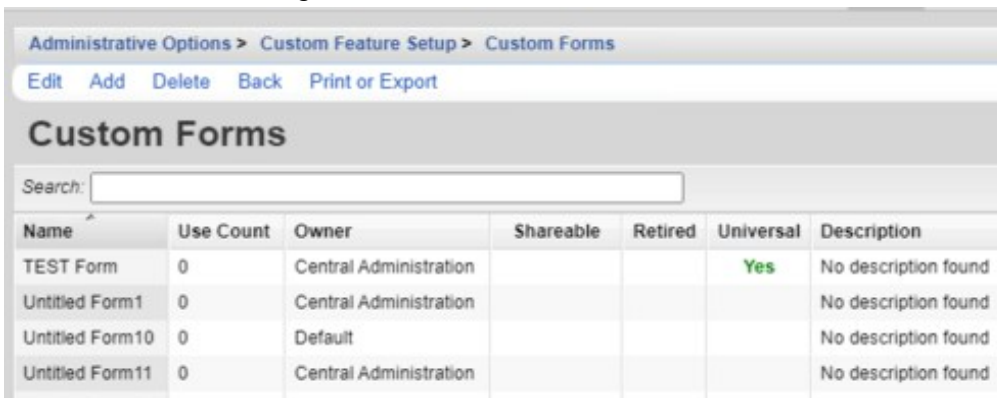
Creating a Form

To create a new form in the Form Designer, follow these instructions:

1. Click *Administrative Options*.
2. Click *Custom Features*.



3. Click *Form Designs*.



4. Click *Add*.

Custom Forms menu descriptions:

Edit – Opens the form for editing.

Add – Starts a new form.

Delete – Deletes the form from the Form Designer.

Back – Navigates back to Custom Feature Setup.

Print or Export – Prints the list of custom forms.

Custom Forms column descriptions:

Name: Name of the form.

Use Count: Number of clients using the form.

Owner: Provider that owns the form.

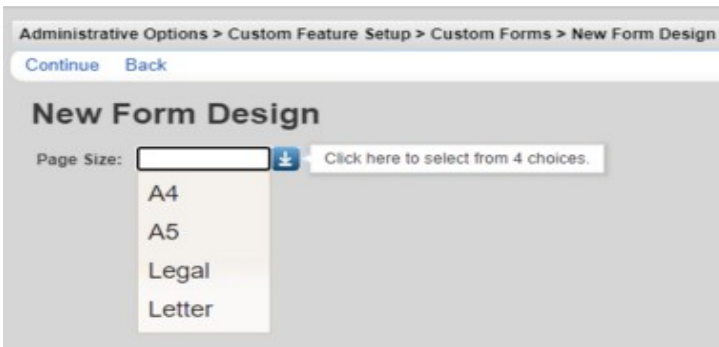
Shareable: Indicates whether the form can be shared with other providers.

Retired: If set to Yes, the form is no longer available for data entry.

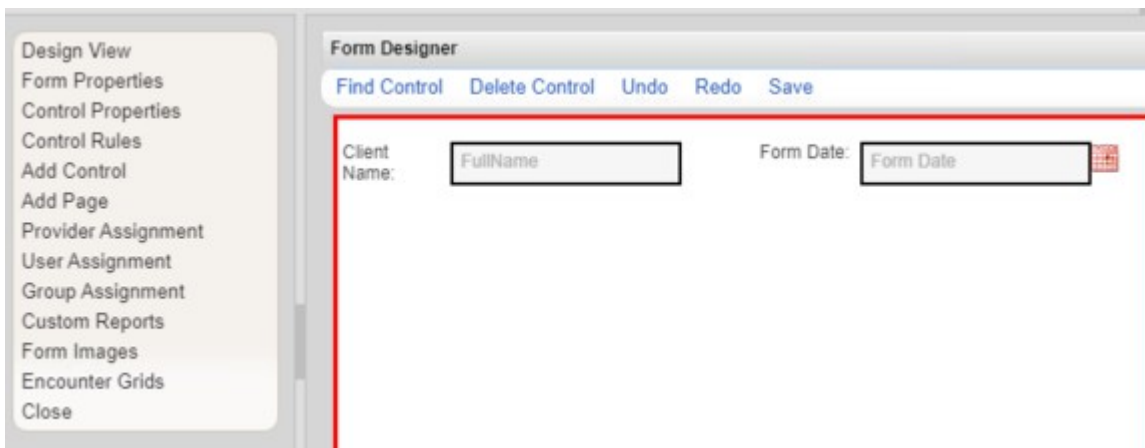
Universal: If set to Yes, all users and providers have access to the form.

Description: Notes explaining the form for users.

5. Select a *Page Size*.



6. Click *Continue*.



Form Designer vertical menu descriptions

Design View – Navigates back to the design page.

Form Properties – Properties for the form including Active, Owner, and Universal used for granting access or retiring a form. Click [here](#) for Form Properties.

Control Properties – Properties for the selected control. Click [here](#) for Control Properties.

Control Rules – Established rules that trigger error messages or warnings, or disable or hide the control.

Add Control – Produces the list of options for controls based on whether or not the page or a container is selected. Click [here](#) for Controls.

Add Page – Adds another page to the form.

Provider Assignment – Grants access to the form for a provider.

User Assignment – Grants access to the form for a user.

Group Assignment – Grants access to the form for a user group.

Custom Reports – Creates a control for adding a container with the results of a custom report selected from the [custom reports](#) list.

Form Images – Creates a control for adding an image to be displayed in the form.

Encounter Grids – Creates a control for adding a grid using encounter fields.

Close – Closes the form.

Form Designer horizontal menu descriptions

Find Control – Creates a searchable list of controls currently added to the form so user's can locate them.

Delete Control – Deletes the selected control.

Undo – Reverts back prior to the last action.

Redo – Recreates an action that was undone.

Save – Saves the form.

Note: Forms can be edited within the provider that is the owner of the form or in Central Administration. Data entry can only be done in the provider.

Note: The highlighted red box is the current selection space for controls and properties.

The following example is for adding a service to a form.

1. Click the page to highlight it.
2. Click *Add Control*.
3. Type *Service* in the *Search* field.
4. Click *Longitudinal Container (Service)*.

Form Designer

Add Back Print or Export

Add Controls

Search:

Name	Type	Read Only	Node	Description
Change/View Eligibility	Link	Yes	Demographics	Follow this link to
Eligibility Status	Text Box	Yes	Demographics	The current status
Longitudinal Container (Service)	Longitudinal Container		Services	A service record c

5. Select the *Longitudinal Container Definition* (This is the Subservice).

Form Designer

Add Back

Add Controls

Longitudinal Container Type:

Longitudinal Container Definition:

Design View

- Form Properties
- Control Properties
- Control Rules
- Add Control
- Add Page
- Provider Assignment
- User Assignment
- Group Assignment
- Custom Reports
- Form Images
- Encounter Grids
- Close

Form Designer

Find Control Delete Control Undo Redo Save

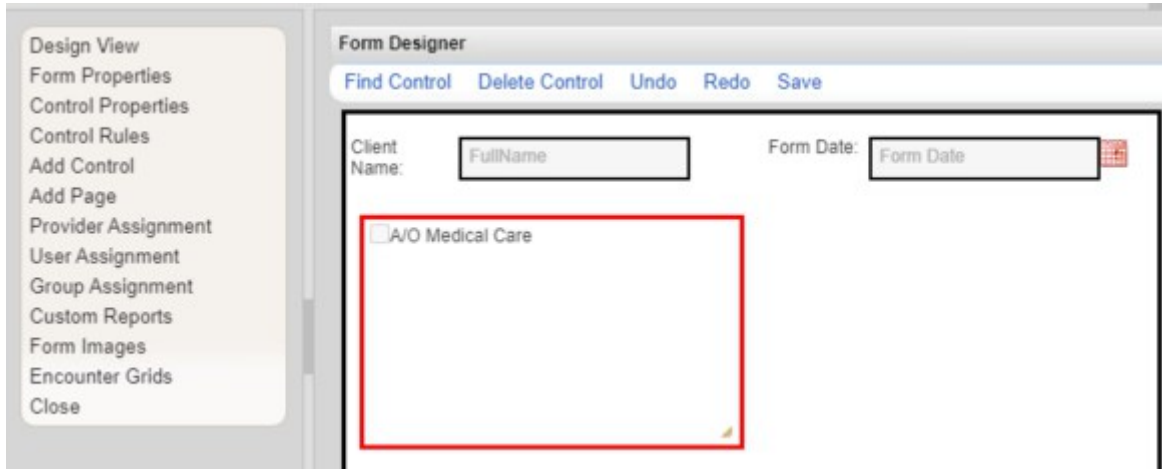
A/O Medical Care

Client Name:

Form Date:

6. Click *Add*.

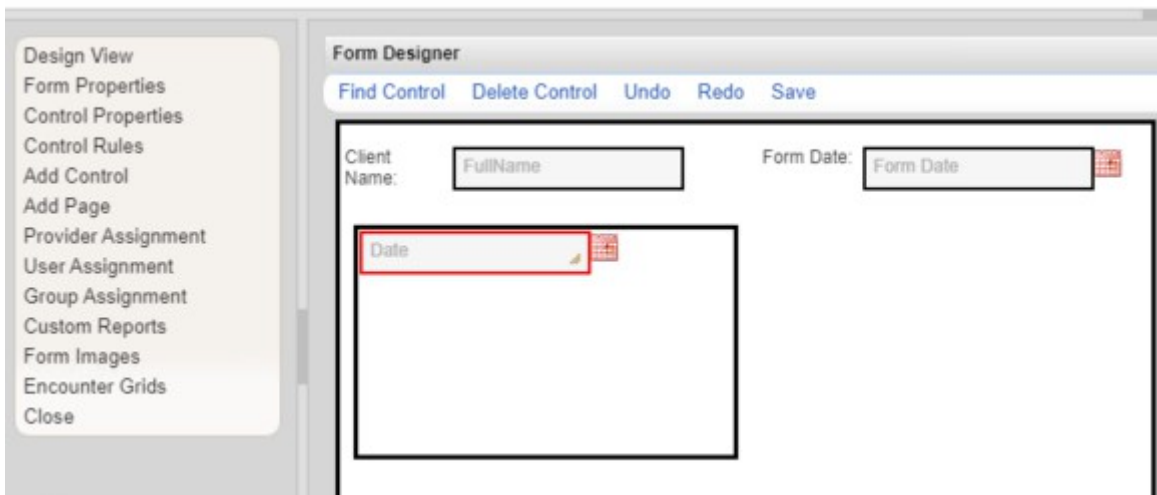
7. While the new service container is highlighted in red, drag the box to the location desired.



8. While the container is still highlighted, click *Add Control*. (Now the control list only shows service controls)

9. Select *Service Date*.

10. Click *Add*.



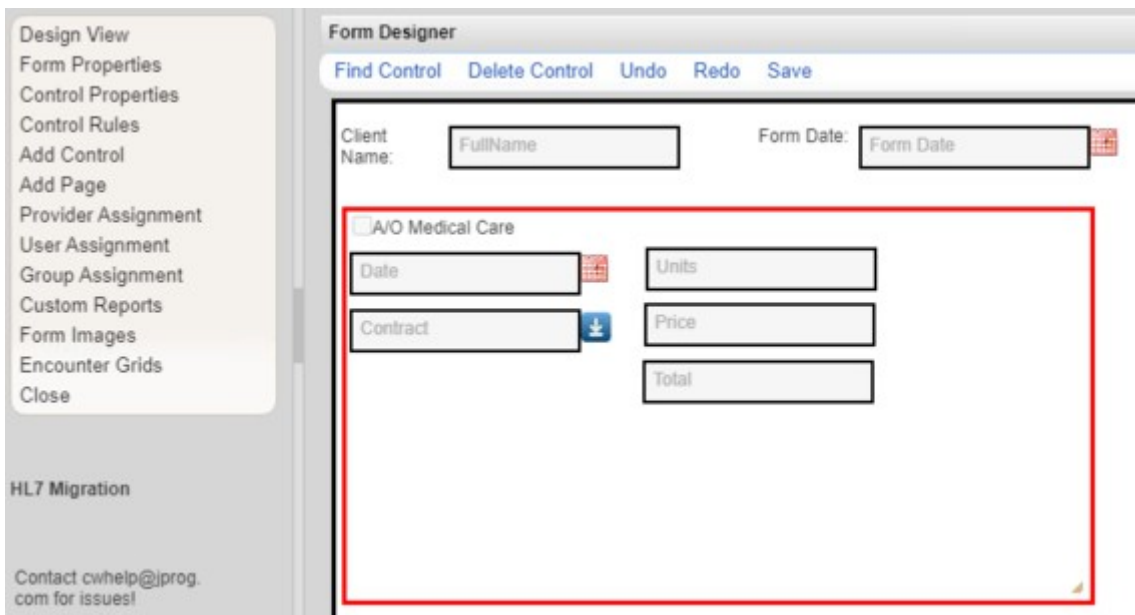
11. Drag the *Service Date* to the desired location within the *Service Container*.



12. Click the *Service Container* again to add another service control.

13. Repeat the process of adding service controls for *Service Contract*, *Service Units*, *Service Price*, and *Service Total*.

A data entry field has been created for an A/O Medical Service in the form.



Activating a Form

A form is activated by granting access to the form for a provider, for a user, or for a user group, and adding the form to a client.

Note: Setting a form as universal grants access to all providers and users.

Open custom forms to begin the following instructions.

Name	Use Count	Owner	Shareable	Retired	Universal	Description
TEST Form	0	Central Administration			Yes	No description found
Untitled Form1	0	Central Administration				No description found
Untitled Form10	0	Default				No description found
Untitled Form11	0	Central Administration				No description found

Follow these instructions to activate a form for a provider:

1. Select a form.
2. Click *Edit*.
3. Click *Provider Assignment*.
4. Click the *Checkbox* to select a *Provider*.
5. Click *Save*.

Note: Making a form provider-wide grants access to all users in that provider to the form.

Follow these instructions to activate a form for a user:

1. Click User Assignment.
2. Click the *Checkbox* to select a *User*.
3. Click *Save*.

Note: Users are only available in the list after a form is activated for at least one provider.

Follow these instructions to activate a form for a group:

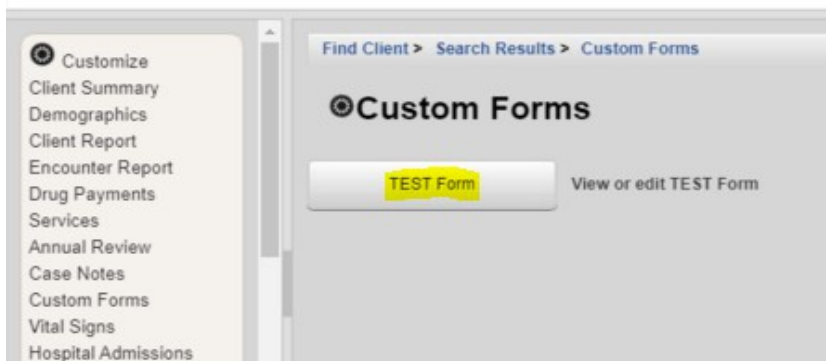
1. Click Group Assignment.
2. Click the *Checkbox* to select a *Group*.
3. Click *Save*.

Note: Groups in forms are user groups created by following the instructions [here](#).

Once the form is active for a provider and a user, that user can log into that provider to add the form to a client and begin entering data.

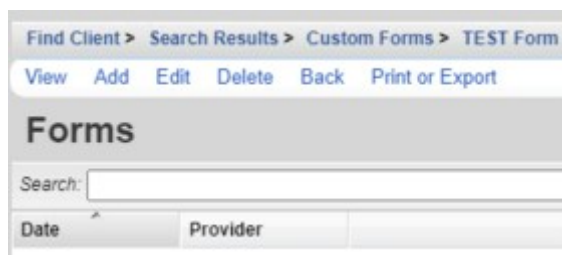
Follow these instructions to edit data on a client using a form:

1. Log into the provider for which the form was activated.
2. Click *Find Client*.
3. Enter search criteria.
4. Click Client Search.
5. Select a client.
6. Click *Custom Forms*.
7. Click the button for the Form.



Note: There is also a custom forms button in the client menu if *View Details* is clicked instead.

8. Click *Add*.



9. Select a *Form Date*.

10. Complete other fields in the form.

Search Results > Search Results > Custom Forms > TEST Form

Save Back Print

Client Name: Form Date:

Eligibility Status:

A/O Medical Care (will add new)

First Contract

11. Click Save.

Find Client > Search Results > Custom Forms > TEST Form

View Add Edit Delete Back Print or Export

Forms

Search:

Date	Provider
05/01/2021	Default

Note: Data saved in *Custom Forms* appears in the client's record. In this case, a service was added.

Find Client > Search Results > View Details > Services

View Add Delete Receipts Help Print or Export

Services

Search:

Date	Subservice	Contract	Units
05/01/2021	A/O Medical Care	First Contract	1
04/23/2021	Taxi	Boring	1
04/23/2020	Taxi	Boring	1
12/31/2014	Lab Visit	Pos Impact	1

Note: When a form is in view mode, data controls are grayed out and cannot be changed. There is an option to click *Edit* here to switch to the edit mode and change client data.

Custom Forms > TEST Form > **View**

Edit Back Print

Client Name: Test, Test Form Date: 05/01/2021

1000 Testing Way Tested 74343

555-555-5555

Eligibility Status: Not Eligible for Ryan White

A/O Medical Care 05/25/2021

First Contract

0.00

0.00

Once *Edit* has been clicked, the client's record can be changed.

Custom Forms > TEST Form > View > Edit

Save And Continue Save And Exit Print Cancel

Client Name: Test, Test Form Date: 05/01/2021

1000 Testing Way Tested 74343

555-555-5555

Eligibility Status: Not Eligible for Ryan White

A/O Medical Care 05/25/2021

First Contract

0.00

0.00

Save and Continue – Saves and leaves the form open to continue editing.

Save and Exit – Saves and closes the form.

Print – Opens print options to print the client's form.

Cancel – Closes the record without saving the changes made after the last save.

Fields changed in the form are directly linked to the same field in the client's record in CAREWare. For example, if the client's phone number is changed here, it is also changed in contact information under demographics.

Demographics

Back

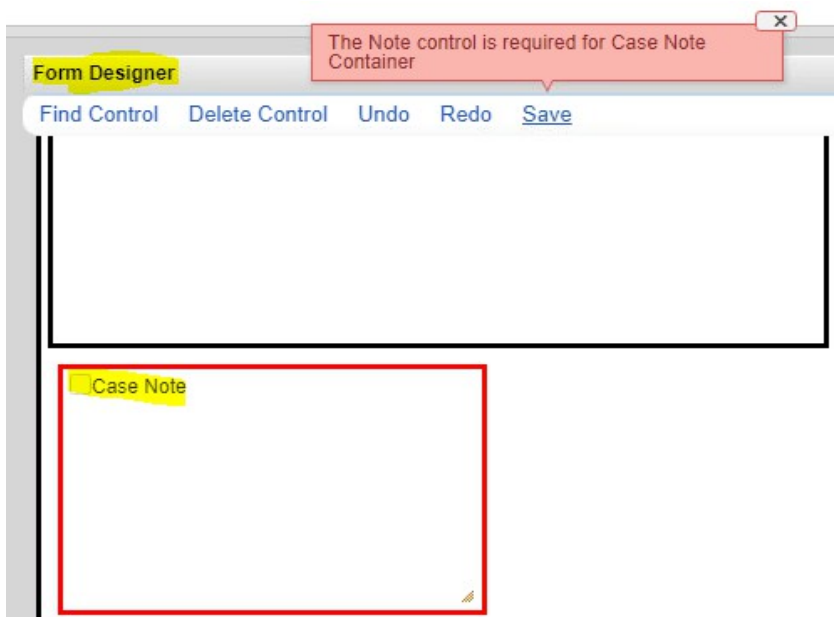
Demographics

Personal Info Client ID: Name: Test, Test Gender: Male DOB: 04/01/1980

Change URN TSTS0401801U

Contact Information 1000 Testing Way Tested, 74343 555-555-5555

Note: When adding a case note to a form, a content field must be added. If a user tries to save without it, this error appears:



To add the required Case Note Container follow these instructions:

1. Click the *Case Note* box.
2. Click *Add Control*.
3. Click *Note*.
4. Click *Add*.

Form Designer

Add Back Print or Export

Add Controls

Search:

Name	Type	Read Only	Node	Description
Note	Text Box		Case Notes	The text of the case note
Author	Combo Box		Case Notes	The employee that entered the case note
Date	Date Picker		Case Notes	The date of the case note
Vertical Line	Vertical Line	Yes	Design Tools	Used to place a vertical line on a form
Label	Label	Yes	Design Tools	Used to label other controls
Horizontal Line	Horizontal Line	Yes	Design Tools	Used to place a horizontal line on a form

Once the note control is added, the case note can be saved without error.

Form Designer

Find Control Delete Control Undo Redo Save

Case Note

Author Note Date

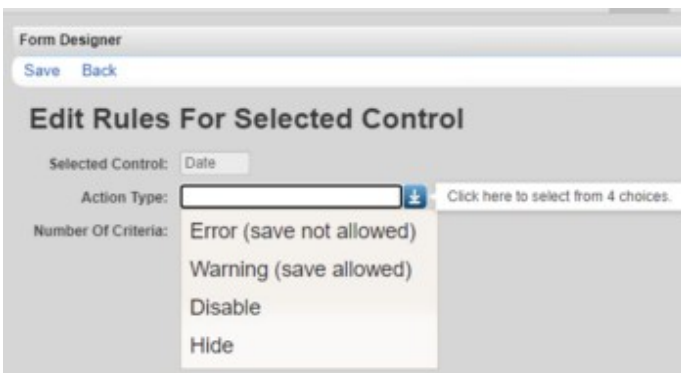
Note

Setting up Control Rules

Data rules and restrictions can be set up for fields placed on the form in order to ensure data entry quality. For example, data quality can be improved by setting date ranges for service entry, reminding users to enter services within a month.

To add a Control Rule, follow these instructions:

1. Click a *Control* within a container. (Example: *Service Date* in the *A/O Medical Service* container)
2. Click *Control Rules*.
3. Click *Add*.
4. Select an *Action Type*.



5. Enter a *Message* to the user.
6. Click *Save*.
7. Click the *Control*.
8. Click *View*.
9. Click *Edit Criteria*.



10. Click *Add*.



11. Select values for the *Criteria*.
12. Click *Save*.

Adding Custom Reports to Forms

1. Click *Custom Reports*.
2. Click *Add*.
3. Select a *Report Name*. (If a new report needs to be added, follow the instructions [here](#).)
4. Click *Add*.

Form Designer

Add Back Print or Export

Custom Reports Not Mapped To This Form Design

Search:

Report Name	Report Type
Address	Demographics
Test Cross	Demographics
date diff	Demographics
abc	Demographics
Lab Source	Lab

Note: The custom report has been added as a new control for the page.

5. Click *Back*.
6. Click *Add Control*.
7. Type the name of the report in the search field.
8. Click the *Custom Report*.
9. Click *Add*.
10. Drag the *Custom Report* to the desired location on the page.

Form Designer

Find Control Delete Control Undo Redo Save

HIV Status of Newborn

Pregnancy Outcome

Delivery Date

Pap Smear

Test Date

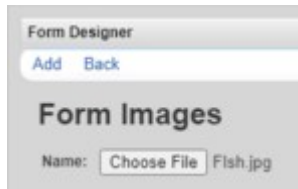
Result

Test Comments

Name	Lab Test	Lab Date	Lab Data Source
Design view	Design view	Design view	Design view
Design view	Design view	Design view	Design view
Design view	Design view	Design view	Design view
Design view	Design view	Design view	Design view
Design view	Design view	Design view	Design view

Adding Form Images

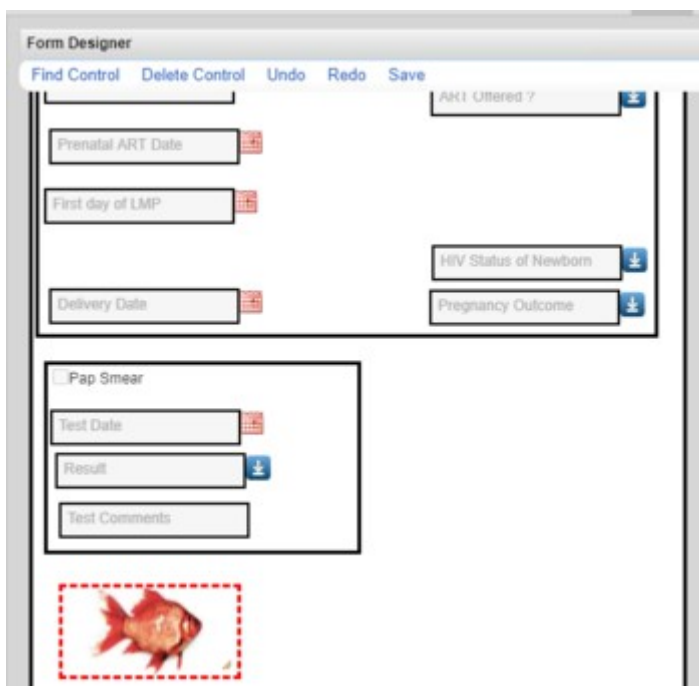
1. Click *Form Images*.
2. Click *Add*.
3. Click *Choose File*.
4. Select an image file.
5. Click *Open*.



Note: The added image is now a new control for the page.

6. Click *Back*.
7. Click *Add Control*.
8. Type the name of the image file.
9. Click *Add*.
10. Drag the image to the desired location on the page.

Note: Large images need to be resized to fit the page.



Adding Encounter Grids

Follow these instructions to add an Encounter Grid to a Custom Form:

1. Click *Encounter Grids*.
2. Click *Add*.
3. Enter a *Days in Span*. (Number of days prior to the form date.)
4. Enter a Title.

Form Designer
Add Back

Encounter Grids

Days In Span:

Title:

Column Count:

5. Click the *Grid Name*.
6. Click *Manage Columns*.
7. Click *Add*.
8. Select an *Encounter Column*.

Form Designer
Add Back

Encounter Grid Columns

Encounter Column: cd4 Count

Column Justify: CD4 Count
CD4 Percent

Header Font:

Header Font Style:

Header Font Size:

Header Font Color:

Data Column Font

Column Font:

Column Font Style:

Column Font Size:

Column Font Color:

9. Click *Add*.

Form Designer
View Add Move Up Move Down Delete Back Print or Export

Encounter Grid Columns

Search:

Column Name	Position
CD4 Count	1
Viral Load	2

Note: The Encounter Grid is now a new control for the page.

10. Click Back.
11. Click Add Control.
12. Type in the *Title* of the *Encounter Grid*.
13. Click *Add*.
14. Drag the *Encounter Grid* to the desired location on the page.

The screenshot shows a 'Form Designer' window with a menu bar containing 'Find Control', 'Delete Control', 'Undo', 'Redo', and 'Save'. The form layout includes:

- A 'Delivery Date' text box with a red 'X' icon.
- An 'HIV Status of Newborn' dropdown menu.
- A 'Pregnancy Outcome' dropdown menu.
- A 'Pap Smear' section containing:
 - A 'Test Date' text box with a red 'X' icon.
 - A 'Result' dropdown menu.
 - A 'Test Comments' text box.
- An 'Encounter Grid' table with a red border, containing three columns: 'Date', 'CD4 Count', and 'Viral Load'. The table has five empty rows.