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 #9: User and System Administration



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. 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 <u>cwhelp@jprog.com</u>.

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First Things First What do I need to get started?

You must have the appropriate administrative privileges to add/modify users and their privileges.

Creating new users

CAREWare comes with a single, preinstalled user, **cwtemp**, with the default password **TEMPCW100**. All passwords in CAREWare are **case-sensitive**, meaning that if you create a password like "Connie@01," you can't type "connie@01" when you log in. User **cwtemp** comes with all system privileges, so you can create your real users and their system privileges.



PLEASE NOTE: The Health Insurance Portability and Accountability Act (HIPAA) requires us to take certain steps to protect the privacy and security of our clients' protected health care information. One of these steps includes deactivating the **cwtemp** user after you've set up your real users, as this is a publicly available login ID that anyone could find on the Internet and use to log into your database if you haven't changed it. If you choose to keep the cwtemp user, change the password as soon as possible.

- 1. If you are just setting up CAREWare, log in with the **cwtemp** login. Otherwise, log in with a user ID that already has full administrative privileges. You will see a screen that will give you the option to log in to **Central Administration** or either **Default or Your Provider (Domain) Name**, depending on how far your system has already been configured. Our sample database has already been configured, so its name appears here.
- 2. Choose **Central Administration.** For security reasons, you only have 20 seconds to choose one or the other.

Jonnain			
Central Administration			
Default			

3. The main menu will appear. Select **Administrative Options**.

Main Menu			_
		Add Client	System Messages
Department of Health and Human Services	I	Find Client	
&HRSA	l	Reports	113 Administrative alarms.
Health Resources and Services Administration	I	Drug Inventory System	
	l	Appointments	<u>User Messages</u>
	I	Orders	
	¢	Administrative Options	About CAREWare
	I	My Settings	Petrach Masazara
	I	Rapid Service Entry	<u>ivenesii messages</u>
	l	Log Off	
	l	Exit	

4. The menu will appear. From that menu, select **Provider/User Manager**.

Admir	istrative Options		
\mathbf{C}	Provider/User Manager	\mathbf{D}	Lab Test Mapping Tool
	Setup <u>W</u> izard		Advanced Encryption Options
	<u>C</u> ontracts		Business Tier Diagnostics
	<u>G</u> rantee Setup		Change Log Operations
	Clinical Encounter Setup		<u>B</u> ackup
	Custom Features		System Information
	International Options		Client Matching Setup
	Pharmacy Supplier		Provider Data Import
	Performance Measures		Custom Report Field Setup
	Field Merge		RSR Export
	SF Import Manager		Email Alert Scheduler (Beta)
	HOPWA Setup Wizard (Beta)		Advanced Security Options
	Clear Caches		HL7 Feed Settings
	Back to	<u>M</u> ai	n Menu

5. The **Provider/User Manager** screen will appear.



Users can be set up as either Central Administration users, who can:

Configure other central administrative users and their permissions

Configure provider domains and their permissions

Configure provider users and their permissions

Or as **Provider Domain Users**. With these privileges you can:

Configure provider domains and their permissions

Configure provider users and their permissions.

Even if you are a stand-alone provider, you must use Central Administration to configure your agency's permissions.

6. Click on the + sign next to **Central Administration's Users and Permissions**, then the + sign next to **Users**.



If you are configuring CAREWare for the first time, you'll only see the one user, **cwtemp**.



PLEASE NOTE: All user names appear in CAPS in the Provider/User Manager, but user names are not case-sensitive. Use caution when creating user names; once a user is created, the user name cannot be edited, and the account cannot be deleted (only deactivated).

7. Right click on **Users**, and click on the option presented to **Add User...**

Central Administration
Add User
Store And Forward Import Providers
HL7 Import Providers
🕀 🎡 Provider User Groups
User/Provider Assignment

- 8. You'll see a menu similar to the one you use to enter new clients. You must enter a username (it will appear in all caps), first and last name, and a password of at least 8 characters, with two non-alpha characters i.e., numbers or special characters. Passwords are case-sensitive. **HIPAA compliance** requires you to select a password that:
 - a. Is not easy to guess (e.g. using "password1234")
 - b. Has an alphanumeric combination (i.e., you might want to select a word and replace its vowels with numbers and symbols, i.e., "d1d@ct1c" for "didactic")
 - c. Is changed on a regular basis (every 90 days is typical in many corporate environments; check with your local IT department for company policy and standards if applicable).

Add User			
User Name / Login ID:	First Name:	Last Name:	
KKELP	Kate	Kelp	
Phone:	Email:		
Password Re	neat Password		
11	•		
Add		Cancel	

Phone and email are optional fields.

9. Click Add. You'll see the new Central Administration user.



10. Click the + next to the new user.



Effective Permissions is a read-only list of all the permissions a user has been granted, either through the granting of **Individual Permissions**, or through their addition to a group via **Group Permissions**. Individual Permissions only lists those permissions granted directly to this user, outside the application of group permissions.

You may assign **Individual Permissions** to a user, but with 200 - 300 different permissions available in CAREWare, this can be time consuming and may lead to errors, especially if applied individually for numerous users.

Instead, you can create **Groups** and assign group permissions to users. This allows you to set up roles rather than people – i.e., a Receptionist who can only view basic demographic data, or a Nurse who has access to view and enter clinical results.

We will walk through the steps for creating Group permissions, but if you so choose, the process is the same for applying permissions to an individual user.



PLEASE NOTE: **HIPAA compliance** requires you to set up your users on a "need to know" basis, i.e., with only the privileges they need to do their job. You will need at least one person who has all permissions, which should be the person who will be administering your system, as well as another person who can act in their stead (for instance, you may have an office manager who does the system administration, with your executive director as a backup person).

11. Click on **Groups** for the new user. You'll see a list of all currently created groups. CAREWare comes with no permissions groups by default. Groups which the user is NOT a member of have a red circle with an X.

🚸 Provider/User Manager	
F1: Save Esc: <u>Close</u> Central Administration Central Administration's Users and Permissions Central Administration's Users and Permissions CWTEMP (TEMP, CW) (All Permissions) CWTEMP (Kelp, Kate) CWTEMP (Kelp, Kate) CWTEMP (Kelp, Kate) CWTEMP (Groups Comps Comp Comps Com	Group Name All Permissions Add Group to User

12. Right click on the group and select the **Add Group to User** option.

🕹 Provider/User Manager		
Provider/User Manager F1: Save Esc: Close Central Administration Central Administration's Users and Permissions Central Administration's Users and Permissions CWTEMP (TEMP, CW) (All Permissions) CWTEMP (Kelp, Kate) CWTEMP (↓ Group Name All Permissions	
Groups		

The group now appears with a green circle and a check mark, and this user has been assigned the group permissions in CAREWare.

- 13. Click **F1: Save** (or press the F1 button) to save your changes.
- 14. Repeat this process for your users at the provider levels.

User/Provider Assignment

You can add provider domain access to users through the User/Provider Assignment tool. For instance, once you add yourself as a Central Admin user, you'll want to have permissions for all your provider domains to be able to log in, perform quality control, and assist users in identifying any questionable data, etc.

1. From within Central Admin, double click User/Provider Assignment.



2. Expand the user you want to add to another provider. Above, we added "Kate Kelp" as a Central Admin user, so we'll now give her access to all providers as she is our system administrator.

Provider/User Assignment	
Provider/User Assignment CCASE(Caseworker, Connie) (1) CCASE(Caseworker, Caseworker, Caseworker, Caseworker, Caseworker, Caseworker, Caseworker, Caseworker, Caseworker, Caseworker, Ca	
Data saved on the server: Close	

3. Providers marked with a red X and shaded out are providers she cannot access. Right click on the provider to add and select **Grant**. Do this for as many providers as you need to.



4. Access to all providers has now been granted. (Note: user permissions would still need to be configured within each provider domain.)

Provider/User Assignment	
User/Provider Assignment CCASE[Caseworker, Connie) (1) CWTEMP(TEMP, CW) (4) CwTEMP(TEMP, CW) (4) Certral Administration Drugs R Us Panama Hospital del Nino Panama Hospital del Nino StUDENT01(Lab, Student) (1) STUDENT02(Lab, Student) (1) STUDENT03(Lab, Student) (1) STUDENT04(Lab, Student) (1) Inactive Users	
Data saved on the server: The addition of KKELP to Ryan White AIDS Care	

5. When Kate Kelp logged in before this, she would be logged directly into the Central Admin domain. Now she will get the menu you've seen at the beginning of all these manuals, giving her the choice of domain:

Dor	nain Selection
Г	
	Domain
	Central Administration
	Drugs R Us
	Panama Hospital del Nino
	Ryan White AIDS Care

Creating Groups

Groups can be created from either the Central Admin or Provider domain. Since most Central Admin users will have all permissions, we will look at these at a Provider domain level.



PLEASE NOTE: Any group of permissions you assign a user at this group will be subsidiary/dependent to the allowed permissions of the provider. We will discuss provider permissions later. Permissions not available to a provider will show as **Locked** when you work with that provider's user permissions.

Permissions are divided into three **<u>Permission Groups</u>**: Data Access, Reports, and Administration.

- **Data Access** permissions cover viewing and entering all demographic, service, clinical, and other data.
- Reports covers access to prebuilt and custom reports.
- Administration covers user management, modifying contracts, services, custom fields, medications and lab lists, and any other alterations to CAREWare.

Within each Group are <u>**Permission Sections**</u>. For instance, under Data Access, there is a section for Annual Review information.

Permission	Permission Section	Permission Group	
Change Business Tier Password	Advanced Encryption Options	Administration	
Change Encryption Key	Advanced Encryption Options	Administration	=
Show/Hide Encrypted Fields in cw_client	Advanced Encryption Options	Administration	
🗣 Global User	Advanced Security Options	Administration	
Security Question Admin	Advanced Security Options	Administration	
View Annual Custom	Annual	Data Access	
🕏 View annual title III data	Annual	Data Access	
🕏 View HIV Status	Annual	Data Access	
View Insurance/Poverty	Annual	Data Access	
📚 View Quarterly Custom	Annual	Data Access	
😻 View Quarterly Data	Annual	Data Access	
View Appointment/Order	Appointments/Orders	Data Access	
View Client Use/Default Days	Appointments/Orders	Data Access	

1. Double-click on the provider for whom you wish to create a group. In a new setup, this is still named "Default" – see the Setup Wizard later in this manual for information on renaming the provider.

🖃 🕓 Central Administration
🛱 🎡 Central Administration's Users and Permissions
🕀 🥵 Users
🗄 🕵 User Groups
🗄 🍿 User Permissions
Group Permissions
🚊 📲 Real-Time Providers
📲 👷 Drugs R Us
Panama Hospital del Nino
💽 Ryan White AIDS Care
K Inactive Real-Time Providers
Store And Forward Import Providers
🛱 HL7 Import Providers
🗄 👷 Provider User Groups

2. A new window will open for this provider. Click the + sign next to **User Groups** to see the existing groups. Right-click on User Groups and select **Create User Group...**

🚸 Ryan White AIDS Care's Users and Permissions
F1: Save Esc: Close
Ryan White AIDS Care
All Pemis Create User Group
Group Permissions (Read Only) ⊕ ∭ User Permissions
Group Permissions Export Adaptors
E Ryan White AIDS Care Permissions

3. You'll be asked to name the user group. Enter a name that corresponds with the role you're working with and click **Create**.

Create User T	emplate		
User Templa	te Name:	Case Manager	
[Create	Cancel	

4. The user group will populate in the list. If the group is created at the Central Admin domain, (Central Administration) will appear after the name. This group's permissions will be "read only" to Provider users.



5. You'll then need to go to the provider's permissions. Click the + sign next to the provider name, then click on **Groups**.

& Rvan White AIDS Care's Users and Permissions		
Window and a second sec	1	
F1: Save Esc: <u>Close</u>	, , , , , , , , , , , , , , , , , , , ,	
	↓ Group Name	
🖃 🎡 Ryan White AIDS Care	🙁 Case Manager	
🕀 👷 Users	All Permissions	
🗄 👷 User Groups		
⊡ Case Manager (Central Administration)		
🕵 Users		
Group Permissions (Read Only)		
🕀 👔 User Permissions		
Group Permissions		
🗄 🖞 Data Entry		
⊡… 😥 Reports		
⊡…p Administration		
Export Adaptors		
Ryan White AIDS Care Permissions		
Groups		
Provider Permissions		

6. The group needs to be activated for this provider. Double click the Case Manager group name to activate.

↓ Grou	ıp Name	
🕝 Case 🔮 All Pe	e Manager ermissions	

- 7. Now you'll need to return to the Central Admin window. Click **F1 Save** if necessary to leave the provider domain window.
- 8. Expand the **Provider/User Groups** section. Click on Providers to see the providers for whom this permissions group is activated. You can activate it for other providers in this window.



9. Click on **Group Permissions** to see the permissions list. All are "Revoked" by default in a new group. The red "closed book" icon indicates revoked permissions.

er/User Manager					- C
ve Esc: Close				3	00/30
	1 Permission	Permission Section	 Permission Group 	Status	
ntral Administration	Activate External Providers	Referral	Data Entry	Revoked	
Central Administration's Users and Permissions	ADAP Drug Services Import	ADAP	Data Entry	Revoked	
Real-Time Providers	Add Adjustments/ Add Edit Adjustment	Store	Data Entry	Revoked	
🙀 Drugs R Us	Add Client	Client	Data Entry	Revoked	
🕵 Panama Hospital del Nino	Add Custom Fields	Custom Fields/Controls	Administration	Revoked	
🙀 Ryan White AIDS Care	Add Edit Order/Order Items/Add Edit Re	Store	Data Entry	Revoked	
י∞ Inactive Real-Time Providers	Add Encounter	Clinical	Data Entry	Revoked	
Store And Forward Import Providers	Add Form Design Records	Custom Data	Data Entry	Revoked	
HL7 Import Providers	Add Templates	User Manager	Administration	Revoked	
Provider User Groups	Add Users	User Manager	Administration	Revoked	
ADAP Template (Central Administration)	Add/Append Case Notes	Clinical	Data Entry	Revoked	
ADAP Template (Central Administration)	Add/Delete ROIs	Client	Data Entry	Revoked	
All Permissions (Central Administration)	Add/Edit allergies and date ART meds	Clinical	Data Entry	Revoked	
All Permissions (Central Administration)	Add/Edit Amount Received	Service	Data Entry	Revoked	
Case Manager (Central Administration)	Add/Edit Appointment/Order	Appointments/Orders	Data Entry	Revoked	
Providers	Add/Edit Case Note Template	Clinical	Data Entry	Revoked	
Group Permissions	Add/Edit Contract Items	Contracts	Administration	Revoked	
User/Provider Assignment	Add/Edit Counseling and Testing	Counseling and Testing	Data Entry	Revoked	
-	Add/Edit Diagnoses	Clinical	Data Entry	Revoked	
	Add/Edt Drug Service Records	ADAP	Data Entry	Revoked	
	Add/Edit External Referrals	Referral	Data Entry	Revoked	
	Add/Edit Filter	Custom Reports	Reports	Revoked	
	Add/Edt Immunizations	Clinical	Data Entry	Revoked	
	Add/Edit Insurance Service Records	ADAP	Data Entry	Revoked	
	Add/Edt Invoice/Dispensed Drug	Phamacy	Data Entry	Revoked	
	Add/Edt Labs	Clinical	Data Entry	Revoked	
	Add/Edit Outgoing Internal Referrals	Beferral	Data Entry	Bevoked	
	Add/Edt Pack Size Type	Store	Data Entry	Bevoked	
	Add/Edit Pharmacy Formulary/Pharmac	Phamacy	Data Entry	Bevoked	
	Add/Edt Phamacy Requisition	Pharmacy	Data Entry	Bevoked	
	Add/Edit Pregnancy Data	Pregnancy History	Data Entry	Bevoked	
	Add/Edit Prescription/Prescribed Drug	Phamacy	Data Entry	Bevoked	
	Add/Edt Benot Definition	Custom Benorts	Beports	Bevoked	
	Add/Edit Screening Labs	Clinical	Data Entry	Bevoked	
	Add/Edit Screenings	Clinical	Data Entry	Bevoked	

10. Permissions are sorted alphabetically by default. Click on the **Permission Section** or **Permission Group** column headers to sort them. Here we have sorted by Section, then again by Group (which alphabetizes sections within groups):

Permission	Permission Section	↑ Permission Group	Status
📚 Edit dispenser list	ADAP	Data Entry	Revoked
🗣 Edit formulary/drug list	ADAP	Data Entry	Revoked
Run ADAP Quarterly Report	ADAP	Data Entry	Revoked
View Drug Service Prices	ADAP	Data Entry	Revoked
View Drug Service Records	ADAP	Data Entry	Revoked
View Insurance Service Prices	ADAP	Data Entry	Revoked
View Insurance Service Records	ADAP	Data Entry	Revoked
🗯 Edit Annual Custom	Annual	Data Entry	Revoked
📚 Edit annual title III data	Annual	Data Entry	Revoked
Edit Insurance/Poverty	Annual	Data Entry	Revoked
Sedit Quarterly Custom	Annual	Data Entry	Revoked
📚 Edit Quarterly Data	Annual	Data Entry	Revoked
📚 View Annual Custom	Annual	Data Entry	Revoked
🗣 View annual title III data	Annual	Data Entry	Revoked
View Insurance/Poverty	Annual	Data Entry	Revoked
View Quarterly Custom	Annual	Data Entry	Revoked
View Quarterly Data	Annual	Data Entry	Revoked
Add/Edit Appointment/Order	Appointments/Orders	Data Entry	Revoked
Delete Appointment/Order	Appointments/Orders	Data Entry	Revoked
🗣 Set Client Use/Default Days	Appointments/Orders	Data Entry	Revoked
View Appointment/Order	Appointments/Orders	Data Entry	Revoked
🗣 View Client Use/Default Days	Appointments/Orders	Data Entry	Revoked

11. To add access to Annual fields, right click on any of the Annual fields listed and select **Grant** for an individual permission, or **Grant Section** for fields in a certain area – i.e., you would not generally grant access to a single demographics field, but to all the fields required. (You would select **Grant Group** to add access to ALL Data Entry fields, which we don't want to do for a case manager.)

View Insurance Service Records	ADAP		Data Entry
Sedit Annual Custom	Annual		Data Entry
📚 Edit annual title III data	Ann	Grant	Data Entry
Edit Insurance/Poverty	Ann	Grant Section	Data Entry
Selit Quarterly Custom	Ann	Revoke Section	Data Entry
📚 Edit Quarterly Data	Ann	Nevoke Section	Data Entry
🛇 View Annual Custom	Ann	Grant Group	Data Entry
🗣 View annual title III data	Ann	Revoke Group	Data Entry
View Insurance/Poverty	Annuat		Data Entry
🗢 View Quarterly Custom	Annual		Data Entry
🛇 View Quarterly Data	Annual		Data Entry
Add/Edit Appointment/Order	Appointr	ments/Orders	Data Entry

12. The "book" icon changes to open/clear to indicated granted status.

View Insurance Service Prices	ADAP	Data Entry	Revoked
≫View Insurance Service Records	ADAP	Data Entry	Revoked
Sedit Annual Custom	Annual	Data Entry	Granted
⇔E <mark>d</mark> it annual title III data	Annual	Data Entry	Granted
Sedit Insurance/Poverty	Annual	Data Entry	Granted
Sedit Quarterly Custom	Annual	Data Entry	Granted
🛇 Edit Quarterly Data	Annual	Data Entry	Granted
≫V <mark>ew Annual Custom</mark>	Annual	Data Entry	Granted
≫V <mark>ew annual title III data</mark>	Annual	Data Entry	Granted
≫V <mark>ew Insurance/Poverty</mark>	Annual	Data Entry	Granted
Sev Quarterly Custom	Annual	Data Entry	Granted
😔 view Quarterly Data	Annual	Data Entry	Granted
Add/Edit Appointment/Order	Appointments/Orders	Data Entry	Revoked

13. Continue to select the permissions you want to grant for this user type. Some permissions will have to be granted individually; for instance, we want a case manager to be able to Find/View a client but not add or delete a client.

Add Client	Client	Data Entry	Revoked
Relete Client	Client	Data Entry Data Entry	Revoked
Sind/View Client	Client	Data Entry	Granted
🕏 View Change Log	Client	Data Entry	Revoked
📚 Request Client Clinical Data	Client-by-Client Sharing	Data Entry	Revoked

14. Click **F1: Save** when done.



PLEASE NOTE: Some CAREWare business tier upgrades will include new functionality, which by default will NOT be granted to your users or groups. You will need to update your provider permissions under **Domain Wide Report Fields** permissions to access any additional features.



Assigning Users to Groups

1. Now you can double-click on the provider name under the Real-Time Providers list.



2. You can assign a group to a user by expanding the user info and clicking on **Groups**, then double clicking the **Group Name**...

🚸 Ryan White AIDS Care's Users and Permissions	_
F1: Save Esc: <u>Close</u>	J. Group Name
Ryan White AIDS Care Users CCASE (Caseworker, Connie) Cfrective Permissions Groups CWTEMP (TEMP, CW) (AI Permissions) STUDENT01 (Lab, Student) STUDENT02 (Lab, Student) STUDENT03 (Lab, Student) STUDENT04 (Lab, Student) STUDENT04 (Lab, Student) Goup Permissions (Read Only) User Groups Group Permissions Group Permissions Group Permissions Group Permissions Styper Adaptors Ryan White AIDS Care Permissions	Case Manager

3. ...or assign a user to a group by expanding the group information and clicking on **Users**, then double clicking the **Group** name.

Ryan White AIDS Care's Users and Permissions	
F1: Save Esc: Close	
	↓ User ID
	STUDENT04
🖻 🥵 Users	STUDENT03
CCASE (Caseworker, Connie)	STUDENT02
Effective Permissions	STUDENT01
Groups	Rvan White AIDS Care
Individual Permissions	CWTEMP
E CWTEMP (TEMP, CW) (All Permissions,)	CCASE
🚊 🖳 🔂 STUDENT01 (Lab, Student)	CONDE
🖽 💀 STUDENT02 (Lab, Student)	
🗄 🖳 🔂 STUDENT03 (Lab, Student)	
🗄 🖳 🔂 STUDENT04 (Lab, Student)	
🗄 👷 User Groups	
All Permissions (Ryan White AIDS Care)	
Case Manager (Central Administration)	
Users	
Group Permissions (Read Only)	

4. The Red X will change to Green check and this user will have the permissions assigned to this group.

Configuring Provider Permissions

Once you've set up your Central Administration user, it's time to set up your provider permissions. These will restrict the permissions available to users at the provider domain. For instance, as the central administrator, you may want to control whether or not providers can make changes to contracts. By restricting the provider's permissions, you make it impossible for any user at that provider to change those configurations. These permissions have to be administered at the Central Administration level.

1. Click the + sign next to **Real-time Providers.** If you only see "Default," don't worry; we'll change that later. Double-click the provider for whom you want to set permissions.



2. Click on the + sign to expand the provider's permissions, then double click **Provider Permissions**.



- 3. In this case, we will revoke ADAP permissions as this agency does not provide any ADAP services. Sort the **Permissions Section** by clicking on the column header.
- 4. Right-click one of the ADAP permissions and select **Revoke Section**.

• Permission	Permission	n Section	Permission Group	Status
ADAP Drug Services Import	ADAP		Data Entry	Granted
Add/Edit Drug Service Records	ADAP		Data Entry	Granted
Add/Edit Insurance Service Records	ADAP	Revoke	Data Entry	Granted
🕸 Delete Drug Service Records	ADAP	Grant Section	Data Entry	Granted
Selete Insurance Service Records	ADAP	Revoke Section	Data Entry	Granted
🛇 Edit dispenser list	ADAP	Nevoke Section	Data Entry	Granted
🖘 Edit formulary/drug list	ADAP	Grant Group	Data Entry	Granted
🖘 Run ADAP Quarterly Report	ADAP	Revoke Group	Data Entry	Granted
Service Prices	ADAP		Data Entry	Granted
Service Records	ADAP		Data Entry	Granted
Service Prices	ADAP		Data Entry	Granted
View Insurance Service Records	ADAP		Data Entry	Granted
Sedit Annual Custom	Annual		Data Entry	Granted
🍄 Edit annual title III data	Annual		Data Entry	Granted

- 5. You can now expand the **Users** list, then expand any user (CWTEMP in this case), and double click on **Effective Permissions** or **Individual Permissions**.
- 6. Click the Permission Section column header to alphabetize. You'll see that rather than **Granted** or **Revoked**, this user's permissions for the ADAP section are **Locked**, with a padlock next to the permission.

Permission	Permission Section	Permission Group	Status
ADAP Drug Services Import	ADAP	Data Entry	Locked
Add/Edit Drug Service Records	ADAP	Data Entry	Locked
Add/Edit Insurance Service Records	ADAP	Data Entry	Locked
A Delete Drug Service Records	ADAP	Data Entry	Locked
Belete Insurance Service Records	ADAP	Data Entry	Locked
🖀 Edit dispenser list	ADAP	Data Entry	Locked
🞒 Edit formulary/drug list	ADAP	Data Entry	Locked
🖀 Run ADAP Quarterly Report	ADAP	Data Entry	Locked
Wiew Drug Service Prices	ADAP	Data Entry	Locked
View Drug Service Records	ADAP	Data Entry	Locked
View Insurance Service Prices	ADAP	Data Entry	Locked
Siew Insurance Service Records	ADAP	Data Entry	Locked
Calif Annual Custom	Annual	Data Entry	Granted
🍄 Edit annual title III data	Annual	Data Entry	Granted

7. Click **F1: Save** to save your changes.

Now, regardless of group permissions applied, no user at this agency can access the locked section unless you unlock it from Central Administration.

User Management Permissions at Provider Domains

Depending on your staffing needs, the technical abilities of provider users, and/or HIPAA security requirements, you can elect to allow users at the provider domains to perform user administration for their own staff. The **User Manager** Permission Section under provider permissions will allow/disallow these features.

Ryan White AIDS Care's Users and Permissions				
F1: Save Esc: Close	user			
	Permission	Permission Section	Permission Group	Status
🖃 🕵 Ryan White AIDS Care	Generate System Login/Logout Report	User Login Report	Reports	Granted
🕀 👷 Users	Add Templates	User Manager	Administration	Granted
🕀 🅵 User Groups	Add Users	User Manager	Administration	Granted
User Permissions	Schange Users Password	User Manager	Administration	Granted
Group Permissions	Selete Templates	User Manager	Administration	Granted
Boport Adaptors ⊟ ∰ Ryan White AIDS Care Permissions	Settings	User Manager	Administration	Granted
	Section Edit Templates	User Manager	Administration	Granted
Groups	Grant/Merge/Revoke/Replace Permissi	User Manager	Administration	Granted
Provider Permissions	Seck/Unlock Users	User Manager	Administration	Granted
Domain Wide Report Fields (253 of 253)	Anage User Groups	User Manager	Administration	Granted
	🛇 Open User Manager	User Manager	Administration	Granted
	Semove Users	User Manager	Administration	Granted
	🛛 🍄 View/Clear User Log Alarm	User Manager	Administration	Granted
	View/Edit Settings	User Manager	Administration	Granted

Restriction of PII in Reports

This feature allows administrators to restrict users' access to fields in custom reports on a fieldby-field basis. It also adds the capability to restrict the Personal Identifying Information (PII) that is available in most of CAREWare's built-in reports.

Report restrictions are managed via permission groups configured via the **Advanced Security Options** menu and the **Provider/User Manager** at the Central Administration domain. They can be applied at the Central Admin domain, or through the **User Manager** button or **Provider/User Manager** at the provider domain level. We will show the Central Administration methods here.

Each prebuilt report that shows PII has a new check box to "Hide Personal Identifying Information":



For users whose access to PII in reports has been restricted by administrators, this check box will be grayed out and cannot be unchecked. Users whose permissions allow PII to show in reports can elect to check this box before running a prebuilt report. When PII is hidden in prebuilt reports, fields that have been designated as PII, such as name or date of birth, will show as asterisks in the report. The encrypted URN will be added to these reports to provide a protected client identifier. Note that administrators define the set of fields that are considered PII for this purpose by modifying the PII Restricted Group as described below.

In custom reports, a user may add restricted PII fields to the field selections in a report. But when the report is run the PII fields will be replaced with asterisks if the user's report group assignment restricts those fields.

1. Choose Advanced Security Options from the Administrative Options menu, and then choose User Group Admin (Reports) from the Advanced Security Options menu.

Administrative Options				
Provider/User Manager	Lab Test Mapping Tool			
Setup <u>W</u> izard	Advanced Encryption Options			
<u>C</u> ontracts	Business Tier Diagnostics			
<u>G</u> rantee Setup	Change Log Operations			
Clinic Advanced Security C	Options			
C	y Questions Admin			
Inte	etup			
Ph User Gro	port			
Perfo	Setup			
	Close			
SF Import Manager Email Alert Scheduler (Beta)				
HOPWA Setup Wizard (Beta) Advanced Security Options				
Clear Caches	HL7 Feed Settings			
Back to <u>M</u> ain Menu				

2. By default, there are two groups, **Default User Group** and **PII Restricted** group.

User Group Admin	
	Group Name
	Default User Group
F1: Add New Group	PII Restricted Group
F2: Edit Group Permissions	
Del: <u>Delete Group</u>	
Esc: <u>Close</u>	

The **Default User Group** is automatically added to any new CAREWare user. This allows a provider to, by default, limit access to report data for all users. If your provider does not want default restrictions, add no fields to this group; no fields are restricted by default.

The **PII Restricted Group** defines what fields are hidden when **Hide PII Fields** is selected for prebuilt reports.

3. Highlight the **PII Restricted Group** and click **F2: Edit Group Permissions**.



The red Group Name indicates that this is a built-in Restriction Group. The Group Name cannot be changed for built-in groups, and the group cannot be deleted, but users are still allowed to define which fields are included in the group.

4. To add a new group, click **F1: Add New Group** from the menu. Name the group and begin selecting fields. Use Ctrl + Click to select more than one at a time.

User Group Restric	tions - Report Fields			
<u>F1 - Save</u>	Esc - Close			
Group Name:	NameRestriction			
Fields in Group:			Available Fields:	
	0/0 📥			508 / 508 📥
↑ Field Name] [↑ Field Name	A
	(Cecc Add to Template Remove >>>	Medicare Part A/B Insurance Medicare Part D Insurance Medicare Part Not Specified Insurance Medications by indication Memo Memo Mental Health Screening Middle Name Wissing CD4 / VL tests for 2011 RSR Missing or Unk RSR Clinical Data 2011 Missing or Unk RSR Clinical Data 2011 Missing RSR Demog data 2011 Missing RSR Info for Pregnant females Name Need Men. Heal. Ref.? No Insurance Non antiretroviral medications Notes (Cn. Custom) Nume prokemos with HIV status Number of ARV active ingredients Number of apopintments by sub. Number of missed appointments in Spar Number of pregnancy outcomes	2011 specific date service

5. Click Add to Template to add the field(s).

1 Field Name	
First Name	
Last Name	
Middle Name	
Name	

- 6. Click F1: Save.
- 7. Go to the **Provider/User Manager** and select the user to whom you want to apply these restrictions. Expand the Real Time Providers record if you need to apply to a provider user.
- 8. Right click the user and select Manage Report Field Restrictions.



9. Select the restriction set to be applied and click F2 - Add Group to User.

Report Field Restrictions -		
F1 - Save		Esc - Close
User: STUDENT01 (Student Lab)		
Current Groups: <u>F3 - Remove Group</u>	Effective Restrictions:	
Group Name		0/0 📥
	↑ Field Name	Group
Available Groups. F2 - Add Group to User		
Default User Group		
PII Restricted Group		
Manierresulcuon		
J		

10. The list of effective restrictions populates on the right. Each group of restrictions added to this user will add to the fields listed.

Report Field Restrictions -				
<u>F1 - Save</u>		Ē	Esc - Close	
User: STUDENT01 (Student Lab)				
Current Groups: F3 - Remove Group	Effective Restrictions:			
Group Name			4/4 📥	
NameRestriction	↑ Field Name	Group		
	cliertName firstName lastName middleName	Name Restriction Name Restriction Name Restriction Name Restriction		
Available Groups: F2 - Add Group to User Group Name				

11. Click F1 – Save to finish.

When this user runs a report, the information you designated will be masked:

Clients who have not had an encounter within last 180 days.

Report Cr	iteria:				
The clie	ent:	has no	ot had an encounter a	at the provider in the last 180 days.	
Or the	client:	t: has not had an encounter at the provider. Iment is active or unknown		at the provider.	
Client e status:	enrollment				
HIV Sta	HIV Status:		Not equal to Negative or Unknown		
Name:	URN:		Encounter Date:	Provider Name:	
*	JHAP01	10471U			
*	ALBR0	614501U	4/27/2010	Ryan White AIDS Care	
*	GRBRO	923741U			
*	BRBA1	119771U	4/27/2010	Ryan White AIDS Care	
*	RLBA0	607631U			
*	RGBC0	328671U			
.)	WNBLO	319632U	7/4/2007	Ryan White AIDS Care	
. /	IEBI 12	1661111	4/20/2002	Rvan White AIDS Care	

Other User Management Options

Right click on any user to access other user management options:

🧇 Ryan White AIDS Care's Use	ers and Permissions
F1: Save Esc: Close	
Image: Second system Image: Second system Image: Second	ter, Connie) (CW) (All Permissions,) e) (Student) (Student) (Student)
Ser Groups User Permissions Group Permissions Group Permissions Group Adaptors Ryan White AIDS Car	Edit User Info Remove User Replace User Permissions With Group Permissions Add Group Permissions to User Change Password For User Reset Security Challenges For User Manage Report Field Restrictions Lockout User

Edit User Info: Change the name or contact information for a user. (Caution: you cannot change a User Name / Login ID after it is has been added.)

Remove User: Remove a user's access to the database. This user's record is still available under "User/Provider Assignment / Inactive Users" for reactivation. For **HIPAA compliance**, you should immediately remove terminated employees' access. You may also wish to remove users while on extended leave. User permissions will need to be reassigned after reactivation.

Replace User Permissions with Group Permissions: This can be used to standardize users in the same role, or change the permissions of a user who transitions to a new role.

Replace User Permissions with Template Permissions		
User: Template:	Lab, Student Case Manager	
Grant all permissions held by the selected template to Lab, Student. Revoke any privileges currently held by Lab, Student that the selected template does not have.		
	ReplaceCancel	

Change Password for User: Change a user's password.

Reset Security Challenges for User: For users who have been locked out and unlocked (see below), resetting the security challenge questions will require them to create new challenge questions when they log in again.

Manage Report Field Restrictions: Use this tool to apply Report Field restrictions (see above) to a user.

Lockout User/Unlock User: Mostly you will use Unlock Users; users who enter their password incorrectly more than twice will be locked out of CAREWare until unlocked.

Setting up Security Questions

The (optional) Security Questions feature adds another layer of security to the CAREWare system. When a user's account has been unlocked and the password reset, the first login after the password reset will prompt the user to answer one (or more) of the Security Questions before access is restored. Failure to answer the questions correctly will relock the account.

The Central Administrator sets up the pool of questions users can choose from, and sets the number of questions that must be answered correctly before login after a password reset is completed. The Central Administrator also sets the maximum number of attempts a user gets to answer a question correctly (1 or more).

Users are responsible for choosing which of the security questions they will use and for setting an answer to each. Each user must choose three security questions and give three answers.

Administrative Options				
Provider/User Manager	Lab Test Mapping Tool			
Setup <u>W</u> izard	Advanced Encryption Options			
<u>C</u> ontracts	Business Tier Diagnostics			
Grantee Setup	Change Log Operations			
Clinical Encounter Setup	Backup			
Custom <u>F</u> eatures	System Information			
International Options	Client Matching Setup			
Pharmacy Supplier	Provider Data Import			
Performance Measures	Custom Report Field Setup			
Field Merge	RSR Export			
SF Import Manager	Email Alert Scheduler (Beta)			
HOPWA Setup Wizard (Beta)	Advanced Security Options			
Clear Caches	HL7 Feed Settings			
Back	Back to <u>M</u> ain Menu			

1. Choose Advanced Security Options from the Administrative Options menu.

2. Click the Security Questions Admin button.

Advanced Security Options	
Security Questions Admin	
User Group Admin (Reports)	
Close	

3. Click **F1: Add New Question** and type in the question. Standard security questions are seen here.

Security Question Administration				
Security Admin	Question: What city was your first elementary school in?			
F1: <u>Add New Question</u> F2: <u>Edit Question</u> F3: <u>Settings</u> Del: <u>Delete Question</u> Esc: <u>Close</u>	Save Cancel Questions			

- 4. Click **Save** after each question.
- 5. Click **F3: Settings.** Set the number of questions users must answer (0 disables the security questions feature) and the number of times a question can be answered incorrectly before the user's account is locked again.

Security Question Admin - Settings
of questions users are required to answer (0 to disable): 0 Max failed attempts before lockout 3
Save Cancel

6. Save and Close.

After the Security Question feature has been activated by the Central Administrator, on their next login, users will be prompted to select Security Questions and enter answers.

All Main Menu buttons except **My Settings, Log Off** and **Exit** will be grayed out (inactive). There will be a warning icon next to the **My Settings** button. Hovering over the icon will bring up a message box that says "Your account requires security questions to be set up."

r			
Main Menu		_	
	Add Client	System Messages	
Department of Health and Human Services	Find Client		
&HRSA	Reports	5 Outgoing Referrals	
Health Resources and Services Administration	Drug Inventory System	2 outgoing share requests.	
	Appointments		
101	Orders	<u>User Messages</u>	
	Administrative Options	About CAREWare	
	My Settings	1	
	Rapid Service Entry	Your account requires Security Challenges to	be set up
	Log Off		
	Exit		

7. Click on the My Settings button to proceed, then click Security Questions.



8. Select questions from the drop down menu, fill in the answers, and click **F1 - Save**.

My Security	Questions
F1 - Save	Esc - Close/Cancel
Question 1	
Who wa	as your first employer?
Answer	
Reno	
Question 2	
What ci	ty were you born in?
Answer	
Reno	
Question 3	
What ci	ty was your first elementary school in?
Answer	
Reno	

9. Users will only be asked to answer these questions after a lockout/reset.

Using the Setup Wizard

Use the Setup Wizard to enter your agency's data for the RSR Provider Report. This is also where you would rename a new provider from "Default" to your agency's name.

1. From Central Admin, you can set up all providers; or providers can set up or update their information individually (if granted the permissions). In either instance, from the **Administrative Options** screen, click the **Setup Wizard**.

Administrative Options			
Provider/User Manager	Lab Test Mapping Tool		
Setup <u>W</u> izard	Advanced Encryption Options		
Contracts	Business Tier Diagnostics		
<u>G</u> rantee Setup	Change Log Operations		
Clinical Encounter Setup	Backup		
Custom <u>F</u> eatures	System Information		
International Options	Client Matching Setup		
Pharmacy Supplier	Provider Data Import		
Performance Measures	Custom Report Field Setup		
Field Merge	RSR Export		
SF Import Manager	Email Alert Scheduler (Beta)		
HOPWA Setup Wizard (Beta)	Advanced Security Options		
Clear Caches	HL7 Feed Settings		
Back to <u>M</u> ain Menu			

2. If you are doing this from the Central Admin domain, you'll be asked to pick a provider to set up.

Provider Selection	
Select a Domain	
Provider's Name	
Drugs R Us Panama Hospital del Nino	
Ryan White AIDS Care	
· · · · · · · · · · · · · · · · · · ·	+
	Satura Classa
	<u>Setup</u> <u>Close</u>

3. Click **Next** at the welcome screen.

Setup Wizard - Ryan White AIDS Care			
	Welcome to the RW CAREWare 5.0 Setup Wizard		
	This wizard will guide you through the process of settingup provider-related information.		
	To continue, click Next.		
	< Back Next > Cancel		

4. Check the Ryan White funding streams your agency receives.

Setur Wizard - Rvan White AIDS Care
CARE ACL program(s)
Please indicate the CARE Act program(s) for which you will be collecting client-level information.
🔽 Part A
Part B
Part C
🔽 Part D
I Health Insurance Program (HIP)
< Back Qancel

5. Click **Next** and select your data sharing options. If you are a stand-alone provider, this is not applicable; click "No, I will keep my data sharing settings." For a complete discussion of multi-provider data sharing options, please see the complete user manual.

Setup Wizzed Du	an White AIDS Care
Setup Wizard - Ky	an white ALD'S Care
Data Sharing	
Are there othe client-level data?	ar providers sharing this network with whom you would like to share
	C Yes, I would like to review/change my data sharing options.
	 No, I will keep my data sharing settings as they are currently set.
	< <u>B</u> ack <u>N</u> ext > <u>C</u> ancel

6. Click **Next** to go to the Contracts menu. You can add your contracts at this point, or go through the Administrative Options/Contracts menu later. For information on contracts, please see the guide, "Setting up contracts and services." (This will be blank on a new install.)

Setup Wizard - Ryan White AIDS Care				
Contracts				
Use this page	to create, edit, v	iew, import, and	delete contracts	. At least one
Contract must	exist before seri	vice entry can be	agin.	
News	Start Date:	Stee Date:	Eurodines	Cantal2
Name.	Statt Date.	j stop Date.	Funding.	Central?.
Title 2 Services	1/1/2004	12/31/2008		Yes
Private Donat	1/1/2010	12/31/2010		No
Primary Care	3/1/1999	4/30/2010		No
Part D 2010	8/1/2010	7/31/2011		No
Part C 2012	1/1/2012	12/31/2012		Yes
Part C 2010-11	7/1/2010	6/30/2011		No
Part A FY 20	3/1/2011	2/28/2013		Yes
Part A 2010-11	3/1/2010	2/28/2011		Yes
HOPWA 2010	1/1/2010	12/31/2012		Yee
	1/1/2007	12/21/2002		No
CDC GAR Se	1/1/2007	12/31/2000		Yee
CDC GAF SE	1/1/2000			Tes
Add	View/	Edit	Import	Delete
		< Back	Next >	Cancel
			_	

7. Click **Next** to enter your provider information (this is the information that will replace "Default" on your provider list in Provider/User Administration).

Setup Wizard - Ryan White AID	S Care		
Agency and Contact Informat	ion		
Provider information			
Name:			
Ryan White AIDS Care			
Street Address:			
100 Anywhere Rd			
, ,			1
City:		State:	
Fairbanks		Alaska	▼
Zip Code:			
48000			
J			
	< <u>B</u> ack	<u>N</u> ext >	<u>Cancel</u>

8. Click **Next** to enter additional provider information on the next two screens.

Setup Wizard - Ryan White AIDS Care	Setup Wizard - Ryan White AIDS Care
Agency and Contact Information	Agency and Contact Information
Other provider information	Other provider information
Provider/Grantee ID(s)	- Contrast Information
Part A: Part B: Taxpayer ID: 9099 8888 382221222	Contact Name: Title: Phone: Fax:
Grantee A: Grantee B: Grantee C: Grantee D: 9924 2600 1234P4444444 1234P4444444	Email: doe@xx.com
Receives 330 Funding: Receives MAI Funding No Image: Comparison of the section of the	Total Paid HIV Staff in FTEs: 11 Total volunteer HIV staff in FTEs: 23
Ownership Status: Private, Non-profit (n	< <u>B</u> ack <u>N</u> ext > <u>C</u> ancel

9. Click **Next** to change your provider logo. Click on **Change your logo** to select any bitmap, JPEG or GIF file. This file will then show up on the left hand side of your main menu.



10. Click **Next** to complete your provider information.

Setup Wizard - Ryan White AIDS Care		
Agency and Contact Information		
Other provider information		
An agency in which racial/ethnic minority group members make up greater than 50% of the agency's board members.		
□ Racial/ethnic minority group members make up greater than 50% of the agency's professional staff members in HIV direct services.		
Solo or group private health care practice in which greater than 50% of the clinicians are racial/ethnic minority group members.		
Other "traditional" provider that has historically served racial/ethnic minority patients/clients but does not meet the criteria above.		
✓ Other type of agency or facility.		
< <u>Back</u> <u>Einish</u> <u>Cancel</u>		

11. Click **Finish** to complete setup. (Note: you must click finish to save any changes.)

System Information

System information will give you information on your current business and client tier versions, the number of users currently online, the ability to view a user's permissions, disconnect a user, and the number of clients in the database.

You can also publish a "bulletin message" that will appear on all users' screens, such as "System will be down for maintenance Sunday."

(
System Information	
RW CAREWare Business Version: ADAP2 RW CAREWare Client Version: ADAP2 SSL Encryption Algorithm: RIJNDAEL	Data Tier Setup Microsoft® SQL Server Express Edition 10.0.5500.0(SP3)
Users Currently on Line	Connectivity
User Name Domain CWTEMP Central Administration SYSTEM Central Administration	Data Tier Address: Server=OVOCW2\CAREWare;databas e=CW_Data;user id=cwbt;password=CWtemp100%;Pooli ng=False
	Client Information Total Number of Clients in Database: 233
III >	User Inactivity Timeout Timeout in Minutes: 15
Disconnect User View Permissions Bulletin Message	Database Last Reindexed: 5/7/2010 Reindex Now
	Update Message
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Administrative Alarms

When you are logged into CAREWare as Central Administrator, you'll see a notice about "Administrative Alarms" on the right hand side of the screen. Click on this link to see the administrative alarms.

Main Menu		_	
	<u>A</u> dd Client	System Messages	
Department of Health and Human Services	<u>Find</u> Client		
& R54	<u>R</u> eports	122 Administrative alarms.	
Health Resources and Services Administration	Drug Inventory System		
1PN	Appointments	User Messages	
	Or <u>d</u> ers		
	Administrative Options	About CAREWare	
a h	<u>M</u> y Settings	Refresh Messages	
	Rapid Service E <u>n</u> try		
	<u>L</u> og Off		
	Exit		

Administrative alarms are usually password-related – a user is overdue for a password change, or has been locked out for incorrectly entering a password too many times.

Administrative Alarm								
Unacknowledged Alarms	: 122			_	- Activity Macaza	Create Adminis	trative Alarms <u>R</u> epo	orts
Activity Name		Date	Ackn	A	Activity Message		CWTEMD/	
attempted permission viol	ation	9/5/2012 6:22:4	No		by user CWTEM	P with the IP addre	r CWTEMP(created ss - 192.168.0.10).	^
account un-locked by us	er	9/5/2012 6:20:1	No	Ξ				
Notification account locked by user		9/5/2012 6:20:0 9/5/2012 6:19:5	No					
attempted permission viol	ation	9/5/2012 6:16:3	No					
Notification	ation	9/5/2012 6:15:3	No					
Notification	word	9/5/2012 5:18:5	No	_				
unchanged expired pass	word	9/3/2012 5:37:4	No					
unchanged expired pass unchanged expired pass	word word	9/3/2012 5:3/:4 9/3/2012 5:37:4	No	-				
unchanged expired pass	word	9/3/2012 5:37:4	No					Ŧ
unchanged expired pass	word	9/3/2012 5:37:4	No		Ac	knowledge/Unack	nowledge	
unchanged expired pass	word	9/3/2012 5:37:4	No	•				
<< Prev 50	<u>A</u> cknowle	dge All	<u>Next 50</u>	>>	2	<u>S</u> ave	Close	

- 1. Click Acknowledge All to clear the alarms. You can click Create Administrative Alarms Reports to create paper trails if necessary.
- 2. Click **Close**. On the main screen, click **Refresh Messages** to update your display.

Main Menu		
	Add Client	System Messages
Department of Health and Human Services	Find Client	
Health Resources and Services Administration	Reports	Liner Menoran
	Drug Inventory System	<u>User messages</u>
	Appointments	
R	Orders	About CAREWare
	Administrative Options	
	My Settings	Refresh Messages
	Rapid Service Entry	
	Log Off	
	Exit	

Backup and Restore

CAREWare has its own backup and restore function.

1. From the Administrative Options menu, click Backup.

Administrative Options	5				
<u>P</u> rovider/Use	Provider/User Manager		<u>L</u> ab Test Mapp	oing Tool	
Setup <u>W</u>	<u>(izard</u>		Advanced Encrypt	tion <u>O</u> ptions	
<u>C</u> ontra	icts		Business Tier D	liagnostics	
<u>G</u> rantee	Setup		Change Log O	perations	
Clinical E <u>n</u> cou	unter Setup	(<u>B</u> acku	р)
Custor Later Date	Custor Easture Data Backup and Re Interna Phan Perform Park to Ada			Setup hport d Setup	
Fi					
SF Import I	SF Import Manager		Email Alert Scher	duler (Beta)	
HOPWA Setup Wizard (Beta)			Advanced Secur	ity Options	
Clear Ca	Clear Caches HL7 Feed Settings			ettings	
	Back to <u>M</u> ain Menu				

2. For backup, select View Data Backup Options.

Back up RW CAREWare
<u>C</u> reate Backup Now
Scheduled Backup Intervals:
Backup File Name: cw_bu_9_6_12.cwb
Back up every: 0 days
Back up time: 11 💌 🔺 AM 💌
Backup all change logs C Backup only the last change logs.
Save Settings Close

You can specify how many days between backups, or create a backup immediately (0 days). We recommend that you select **Backup all change logs** to retain

complete audit trails. If you prefer, you can set **Backup only the last [number of]** change logs.

If you create a backup immediately, check your Administrative Alarms to see when it's completed.



REMEMBER: Backing up from within CAREWare is only the first step to ensuring you have access to your data in event of a problem. You must also copy the associated backup files to a disk or other media.

By default, CAREWare is NOT configured to make any backups. A daily backup is recommended.

By default on a stand-alone system, CAREWare backs up to C:\Program Files\Microsoft SQL Server\MSSQL\$CAREWARE\Data. For network users, it will default to the folder where your CW_Data.MDF file resides.

3. For restore, choose **View Data Restore Options**. You will need to enter the SA (System Administrator) password chosen when you first installed CAREWare. If you used a blank SA password, click **Continue**.

System Administ	rator Password
In order to view o	r perform data backup or restoration history or options
SA Password:	
	Continue Cancel

4. Select the date of the backup to be restored; generally the latest but if you've encounter data corruption issues it may be an earlier one.

Restore From Backup	
Restore Backup Copy:	
Enter the name of the file you wish to restore the database from. The located in the directory: on the server where the database is running.	file must be
cw_bu_7_31_12(pjtest).cwb Restore Database	;
	Close

5. Click **Restore Database** to complete the restore process.

Using SQL Management Studio Express for Restore



PLEASE NOTE: In order to **restore** a CAREWare backup (.cwb) file larger than a size of 1.5 GB, a user will need to **restore** the individual databases required for CAREWare using a SQL Manager such as Management Studio Express 2008. Please refer to the jProg website for more information.

System Optimization

RW CAREWare: Performance Checklist

Though most RW CAREWare users run the program without experiencing problems, some have reported that parts of the program respond slowly, particularly if configured in a network environment. Here are some TIPS to help those users improve the overall performance of their installation. It is not intended to replace or amend the system requirements to use RW CAREWare.

RW CAREWare Configuration:

There are several configuration changes that can be made to RW CAREWare that can improve performance.

- If the server is running a full version of SQL Server 2008 / R2 be sure to have the latest Service Packs installed. These contain many optimizations that will have a dramatic effect on the performance of RW CAREWare, particularly when running reports.
- Install a dedicated server if the server is running several applications, then SQL server resources will be split up among these and will usually decrease performance.
- Separate Business Tier and Data Tier having the Business Tier and Data Tier on separate computers can have a big effect on performance in situations where there is a lot of user activity on the system. Note that both computers need to be on a very high speed connection (i.e. a LAN) and should not be separated by a firewall, which can severely degrade performance.
- Turn off service sharing if you don't need to share services between providers, turning this feature off can significantly improve performance with all service-related processes.
- Turn off data encryption this can boost performance in some installations, particularly on lower-end computers.

 Turn off change log audits – these logs contain all changes made to the database by users within the Client Tier. However, over time change log files can take up significant drive space and add to the overall size of CAREWare database and backup file(s).

System Hardware:

The recommended system requirements listed in the Sys-Admin document are taken from Microsoft's recommendations for the platforms on which RW CAREWare is run. Real world use has shown that using those recommendations will work, but may result in poor performance. For best performance, we recommend the following hardware specifications:

At least 2 GB of RAM, 30gb Hard-drive and a 2.00 GHz processor (Pentium 4).

General Computer Health:

The general health of the computers running RW CAREWare can have a huge impact on performance. For optimal performance, ensure that all computers:

- Have the latest version of RW CAREWare
- Are free from Spyware and viruses
- Have the latest Windows Updates

SQL Server Version(s):

RW CAREWare is an enterprise level application built on MS SQL Server using the VB.Net development language. Thus, hardware configurations that can perform well with those applications should perform well with RW CAREWare.

How do I know what version of SQL Server I have?

The System Information link under Administrative Options will show your version of SQL Server on the top right, as indicated here:

System Information		
RW CAREWare Business Version:	ADAP2	Data Tier Setup
RW CAREWare Client Version:	ADAP2	Microsoft® SQL Server Express Edition
SSL Encryption Algorithm:	RIJNDAEL	10.0.5500.0(SP3)

Any number that begins with 8 is SQL Server 2000.

Any Number that begins with 9 is SQL Server 2005.

Any Number that begins with 10 is SQL Server 2008.



PLEASE NOTE: The free version of SQL 2008 'Express Edition' is distributed with the full version of CAREWare 5.0 and should be sufficient unless you experience lag due to heavy traffic or if your CW_Data.MDF file has exceeded or is pushing the maximum size of 4GB, in which case you should get the full version of SQL Server 2008.