CAREWare User Guide for Healthy Start

Version 1.0

Disclaimer: This User Guide was designed to help Healthy Start Grantees access *CAREWare* and begin familiarizing themselves with the database. This is not a comprehensive training guide. On behalf of and in partnership with the Division of Healthy Start and Perinatal Services (DHSPS), the TA & Support Center will host a *CAREWare for Healthy Start* virtual training on Tuesday, August 18 from 3-4 p.m. EST. This training will be followed by a Q&A session on Tuesday, September 1 from 3-4 p.m. EST. Both the training and Q&A session will be recorded and posted to the Healthy Start EPIC website for future reference.

Section 1: Getting Started

Logging in to *CAREWare*

1. Open your browser and enter the secure webpage address (https://healthystart.jprog.net/careware/rs/index.htm) to connect to your *CAREWare* system. Enter your *CAREWare* username and click **Submit**.
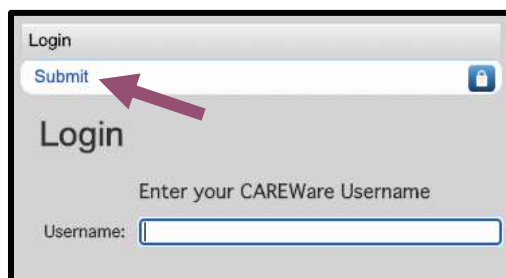
2. Enter your *CAREWare* password, click **Submit**.

3. Depending on your permissions (see *Section 3*, "Assigning User Permissions Groups"), you may be presented with a list of provider options. Select a provider click **Submit**—or double-click on a name.

Navigating the Menu of Links

4. After logging into *CAREWare*, you will see the **Provider Summary** screen (empty at the moment) and the **Main Menu** displayed in the left pane. The **Main Menu** lists common user tasks in *CAREWare*. Upon selecting a particular link, the contents will open in the main pane, or in some instances—like the **Add Client** or **Find Client** options (see *Section 4*)—the system will open a new tab within your browser.

5. If a submenu appears in the main content pane, then a **Link Summary** will appear to the right. In the example below, once **Reports** is selected from the **Main Menu**, a new screen appears with more link items; to the right of each is a **Link Summary**.

Using Breadcrumbs and Link Actions

6. **Breadcrumbs** allow users to keep track of their location within *CAREWare*, and to navigate up the structure as needed. In the following example, **'Customize menu items > Personal Menu Settings'** is considered the **Breadcrumb**.

7. If the items in the **Breadcrumb** are blue, click on the item link to return to that section.

8. **Link Actions** are displayed below the **Breadcrumb** and are actions that can be taken on each screen.
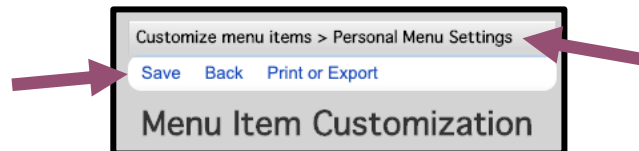
9. If the items in the **Breadcrumb** are black, you must either click **Save** or **Cancel** before you can use the **Back** button to return to the previous section.

Section 2: System Configurations

Updating and Modifying Provider Profile Information

1. Depending on your permissions (see *Section 3*, "Assigning User Permissions Groups"), you may be able to make changes to your grantee's profile information. To do so, select **Administrative Options** from the **Main Menu** in the left pane and then **Provider Setup** in the submenu that appears in the main pane.

2. Select **Agency Information**, and you will see a list of editable fields. To make changes to the fields, click the **Edit** link just below the **Breadcrumb**.

3. Fields with a magnifying-glass icon indicate longer lists that are searchable. And fields with a down-arrow icon will display the complete list for ten or fewer choices.

4. Once your edits are complete, click **Save** at the top.

5. Use the **Back** button to return to the previous screen, and select **Provider Logo** to add or change your agency logo. Select **Browse**/**Choose File** to upload any .BMP, .GIF, .JPG, or .JPEG formatted file (no larger than 320px wide by 90px height). This image will then be displayed in the top pane over on the right side, replacing whatever logo might exist there currently.

Section 3: Managing Users

Creating Users

1. From the **Main Menu**, select **Administrative Options** and then **Provider User Manager**.

2. Select **Manage Users** from the menu options that appear and then the **New User** link action at the top, just below the **Breadcrumb**.

3. In the form that appears, complete the username (e.g., the first part of the individual's email address, before the '@' symbol), first and last name, and password (must be 8 characters in length and include two non-alpha characters) fields. You might find it easiest to pick a generic password (for example: changeme!!) and to check off **Force Password Reset on first login**.

Managing Users

4. From the **Provider User Manager** submenu, select **Manage Users.** Then select the desired user and click **Manage**.

5. You are now in the user's management area. Select a desired option to complete/edit information and configuration for the selected user.

6. Note that a user account cannot be deleted but can be unassigned from the provider. If a user is not assigned to any grantee provider, the user account will automatically change to **User Retired** (and all permissions will be revoked). To activate the user again in the future, you may add them to a provider.

Assigning User Permissions Groups

7. In order to access features of the site (beyond simply logging in), users will need to be assigned to **User Permissions Groups**. The **User Permissions Groups** already available to you include the following:

   - *Provider Administrator*: Project Directors and other designees who need to be able to configure *CAREWare*, its screens, data, and users.

   - *Provider Data Manager*: Those responsible for entering and managing data, but who should not be able to manage users and other settings.

   - *Provider Viewer*: Users who should be able to run reports and view data, but cannot make any changes or add additional data, users, or otherwise.

8. To assign users, from the **Main Menu**, select **Administrative Options** and then **Provider User Manager**. Click the **Manage Users** option, and then select the desired user and click **Manage Permissions**.

9. Click **Assign User Groups**, and then select one or more of the available **User Groups**. Keep in mind that permissions are additive—that is, if a user is assigned to more than one **User Group**, then they will have the permissions of both groups.
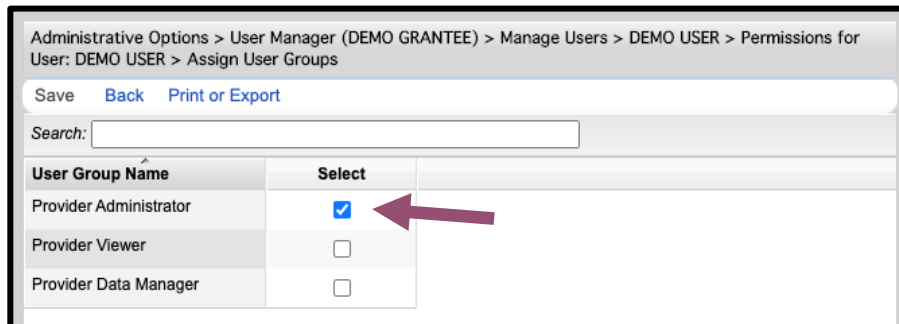
Section 4: Managing Clients

Adding Clients

1. Select **Add Client** from the **Main Menu** and a new tab will open in your browser.

2. Enter the Last Name, First Name, Gender, and Date of Birth (if known) and click **Add**. If there are any invalid field formats, an alert message will appear.

Entering Demographic Information

3. After you have created the client, the main **Demographics** screen will appear. From this screen, you can view and edit various demographic information, such as **Personal Info** and **Race/Ethnicity**.

4. To view/edit any of this information, click the blue link of the category you wish to view/edit. For example, click **Contact Information** to edit that set of fields.

5. Note that the **URN** is a unique identifier and should not be changed. It is simply an internal code that *CAREWare* assigns based on the name and birthdate of the client.

6. The Contact Information screen now appears. Once all relevant information has been entered, click **Save**.

7. Note the difference between **Common Notes**, which can be seen by any other grantee who may provide services to the same client, and **Provider Notes**, which only users of your particular grantee provider can view/edit.

Finding Clients

8. Select **Find Client** from the **Main Menu** and a new tab will open in your browser.

9. Enter any identifying information that you would like to reference in your search and click **Client Search**. If there are any invalid field formats, an alert message will appear.

10. If you want to see all existing clients, enter an asterisk (*) in the "Last Name" field only and click **Client Search**.

# Section 5: Using the Data Collection Forms

Using Data Collection Forms

1. Either create a new client or find an existing client (see *Section 4*) and click the **Custom Forms** link in the **Client Menu** on the left side.

2. Click the name of one of the three *Healthy Start Data Collection Forms (SCREENSHOT TO COME)* in the submenu that appears.

3. If there are any existing completed or in progress forms, you will see them listed. Select one and then click **View**, **Edit**, or **Delete** according to your needs.

4. Click **Add** to complete a new data collection form for the client. Note that the system will allow more than one form to be completed for an individual user.

Section 6: Accessing Reports

Using Monthly Aggregate Report

1. From the **Main Menu**, select **Reports** and the **CAREWare Reports** screen will appear. Then click **Healthy Start Reports** and then **Monthly Aggregate Report**.

    CAREWare Reports > Healthy Start Reports
    Back

    ◉ Healthy Start Reports

    [Monthly Aggregate Report]   Manage/Run Monthly Aggregate Report
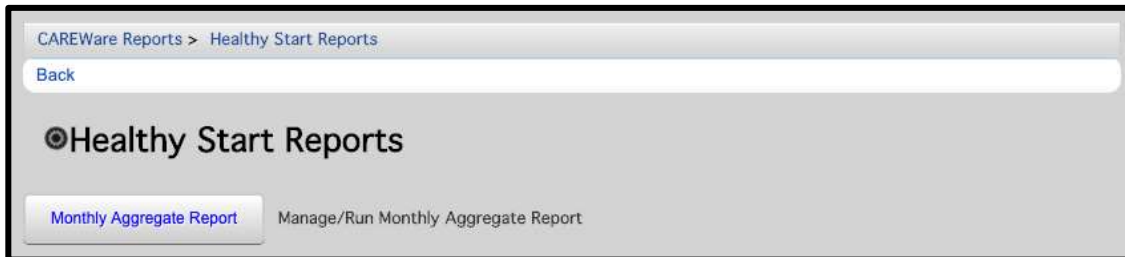
2. If necessary, change the **Report Year**. Once complete, click **Create Excel File**.

3. When complete, a confirmation popup will appear with a link to **Download file** to your local computer as an *XLSX* file.

    Complete
    Download file