HEALTHY start
TA & SUPPORT CENTER

NICHQ
National Institute for
Children's Health Quality

CAREWare for Healthy Start User Guide
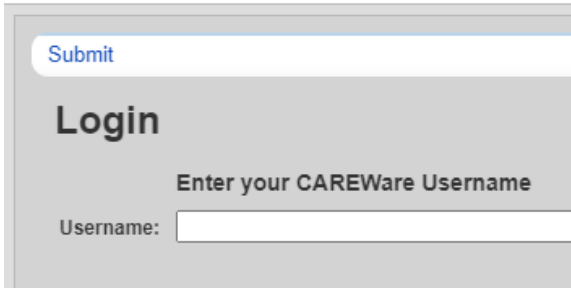
User Management

This user guide walks Provider Administrators through how to manage user accounts in CAREWare. If you are unsure whether you are a Provider Administrator for your Healthy Start project's CAREWare data system, please contact your project director or email CAREWare Support at careware@nichq.org.
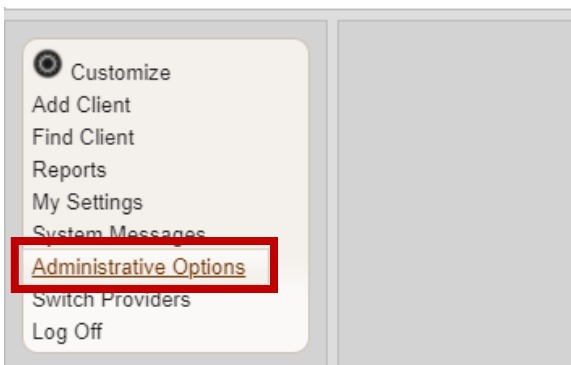
Contents

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Boston, Massachusetts 02210

www.healthystartepic.org
www.nichq.org

healthystart@nichq.org
info@nichq.org

CAREWare for Healthy Start User Guide: User Management

Page 1 of 12

How to Create a User Account

1. Log into CAREWare at https://healthystart.jprog.net/careware/rs/index.htm
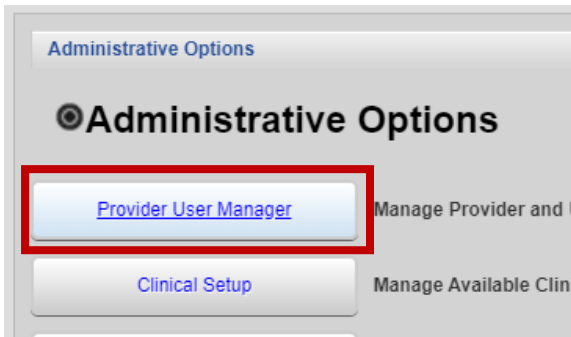

2. Click on **Administrative Options** in the left navigation menu

3. Click on **Provider User Manager**

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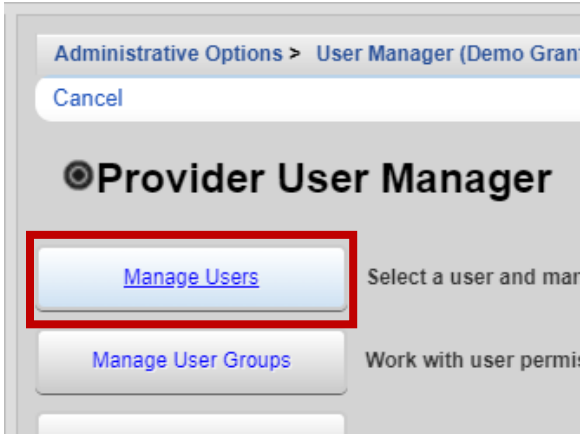
CAREWare for Healthy Start User Guide: User Management   Page 2 of 12
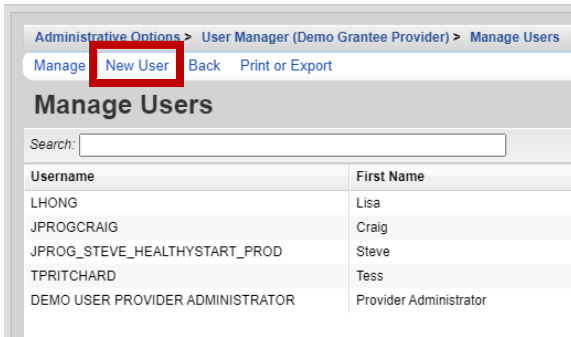
4. Click on **Manage Users**
    - Only Provider Administrators will be able to click on **Manage Users** and complete the following steps
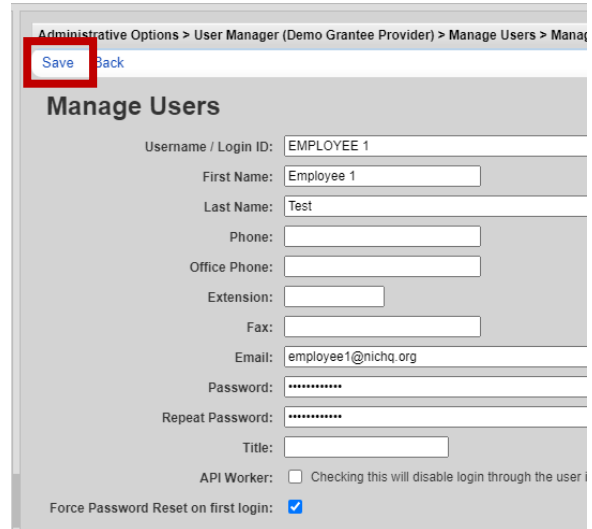


5. Click on **New User**

6. Complete the **Manage Users** form
    - The following fields are required: Username / Login ID; First and Last Names; Email; and Password and Repeat Password
    - Password requirements include: 8 characters minimum and 2 non-alpha characters (which can be a number or special character, such as &$!#)
    - Make sure to select **Force Password Reset on first login** so new user can secure their login information upon successfully logging in for the first time.

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CAREWare for Healthy Start User Guide: User Management   Page 3 of 12
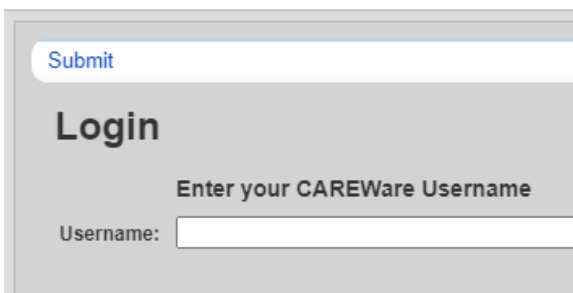
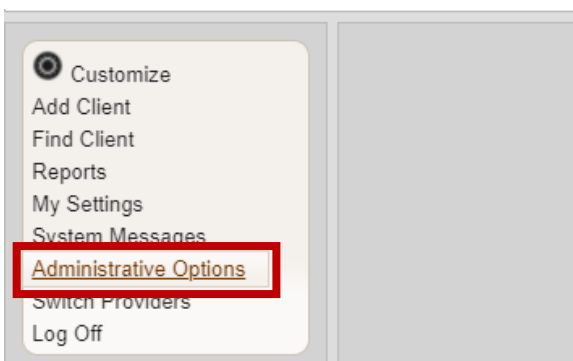7. Click **Save** and the screen will automatically transition to the settings for the new user account
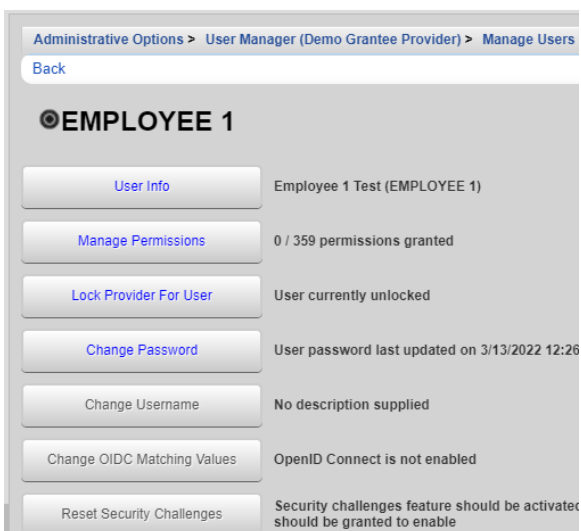
8. To assign user groups and permissions, follow the instructions in **How to Assign and Manage User Groups and Permissions** (starting at Step 6) of this user guide.

How to Assign and Manage User Groups and Permissions

1. Log into CAREWare at https://healthystart.jprog.net/careware/rs/index.htm

2. Click on **Administrative Options** in the left navigation menu

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CAREWare for Healthy Start User Guide: User Management　　　　　　　　　　Page 4 of 12
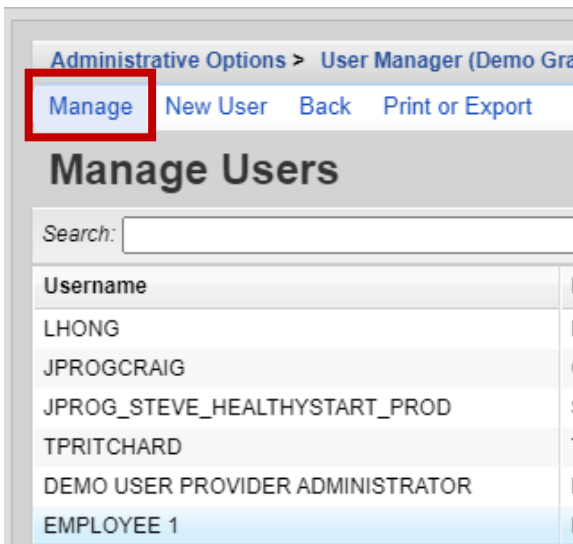
3. Click on **Provider User Manager**
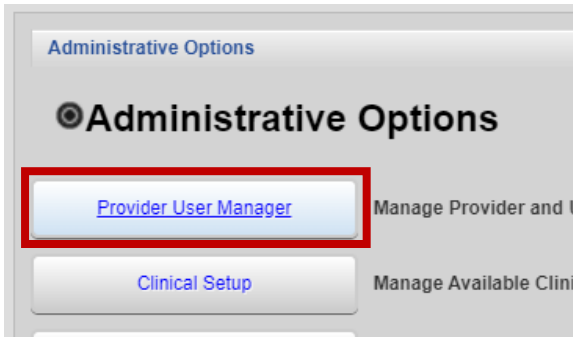
4. Click on **Manage Users**
    - Only Provider Administrators will be able to click on **Manage Users** and complete the following steps
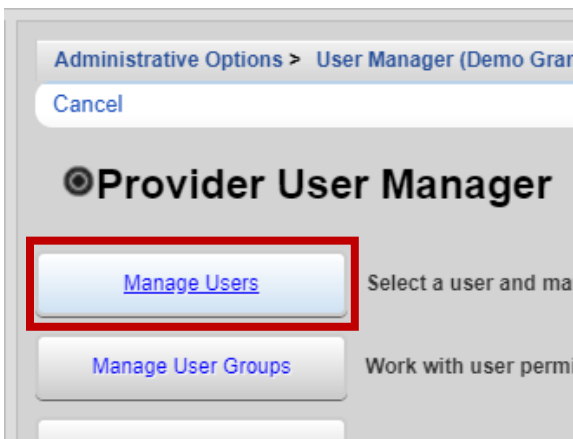
3. Search for the user account for which you are assigning or managing user groups and/or permissions. Double click the user account OR select the user account (it will turn blue) and click on **Manage**.

4. Once in the settings of the selected user account, click on **Manage Permissions**
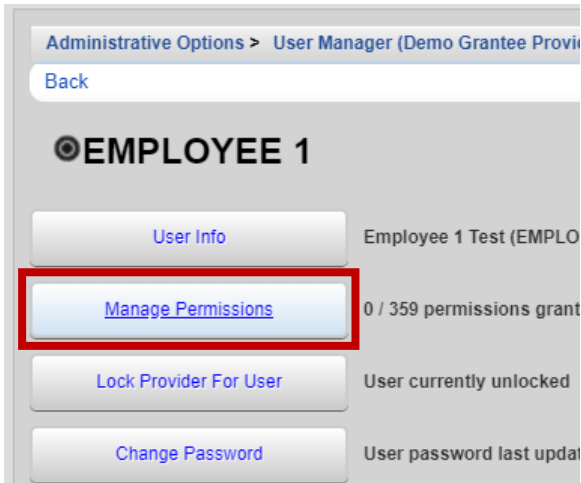
5. Click on **Assign User** groups
   - Each user group has a unique set of permissions curated to fulfill particular staff roles. Below is a brief description of the user groups and examples of applicable staff roles.
     - Provider Administrator — Project Directors
     - Provider Data Manager — Supervisors and Data Managers
     - Forms Entry — Case Managers, Community Health Workers, Coordinators
     - Provider Viewer — Other members of the care team who need access to client's case management
     - The following remaining staff roles **should not be used by Healthy Start projects.**
       - Test User Group
       - jProg All Permissions
       - Group uno
       - All Permissions
       - Provider Data Manager II
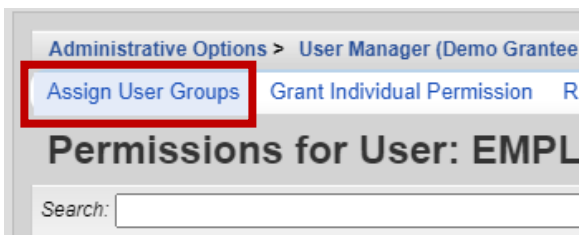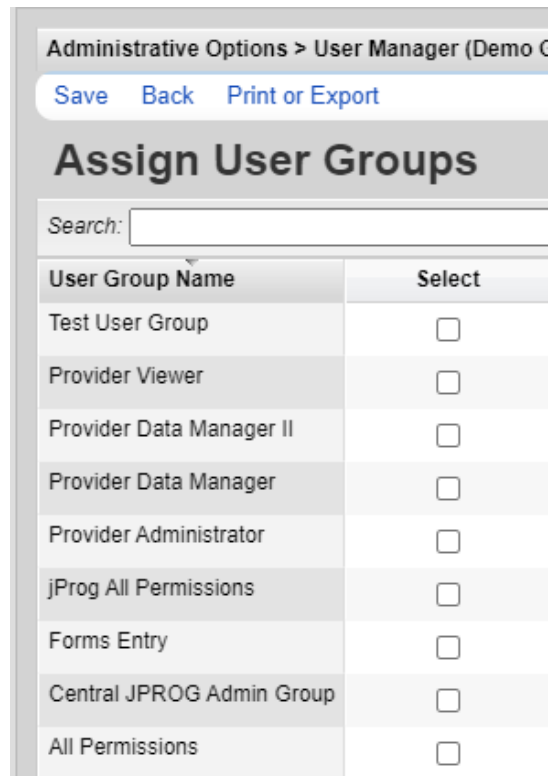
How to Unlock and/or Change the Password for a User Account

A user account will be locked after three failed login attempts for security purposes. Even if the user inputs the correct username and password after three fail login attempts. The user will see the following message ">> Invalid username or password supplied (username: *USERNAME*) <<" after a failed login attempt, even if their account is locked. So, advise users to contact their Provider Administrator or email careware@nichq.org if they are having trouble accessing their user account and may need their account unlocked.

1. Log into CAREWare at https://healthystart.jprog.net/careware/rs/index.htm
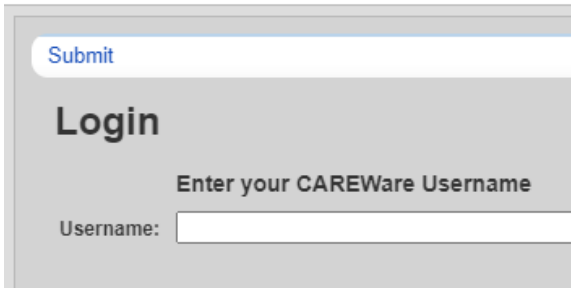
2. Click on **Administrative Options** in the left navigation menu

3. Click on **Provider User Manager**

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CAREWare for Healthy Start User Guide: User Management   Page 7 of 12

4. Click on **Manager Users**
    - Only Provider Administrators will be able to click on **Manage Users** and complete the following steps

5. Search for the user account for which you are assigning or managing user groups and/or permissions. Double click the user account OR select the user account (it will turn blue) and click on **Manage**.

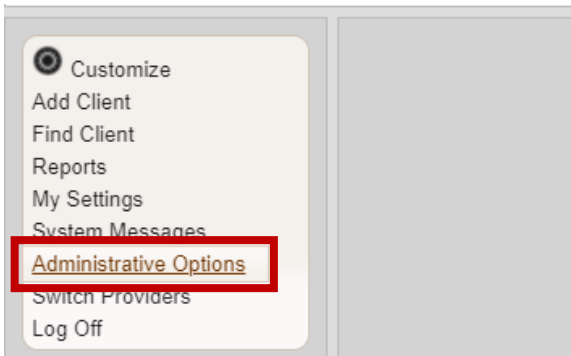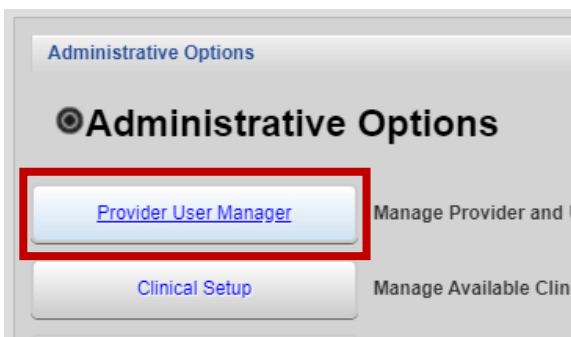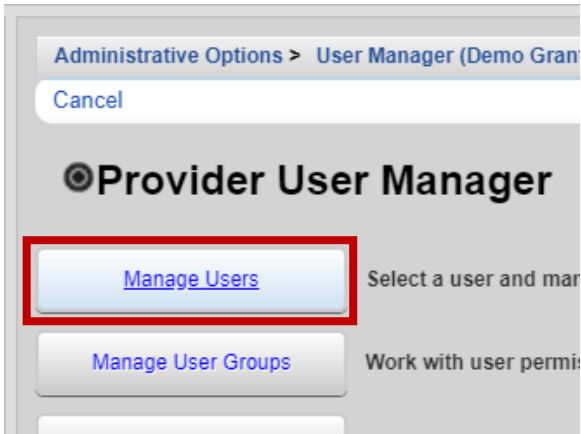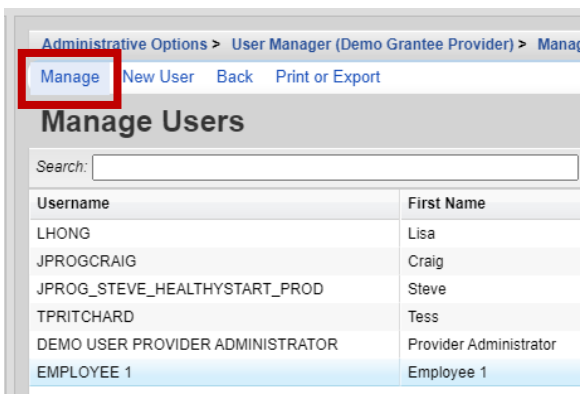6. Once in the settings of the selected user account, click on **Undo Password Lockout** to unlock a user account.
    - If the user account is not unlocked, the user will not be able to access their account even if they enter the correct password.
    - If the user remembers their password, there is no need to reset the password.
    - If the user does not remember their password, follow the instructions below for resetting the password to a user account.

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CAREWare for Healthy Start User Guide: User Management   Page 8 of 12
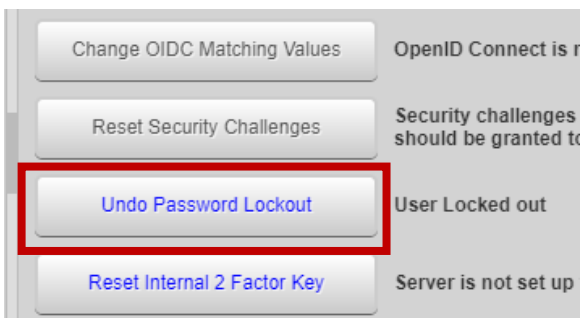
7. Click on **Change Password**

8. Enter a temporary password for the user account.
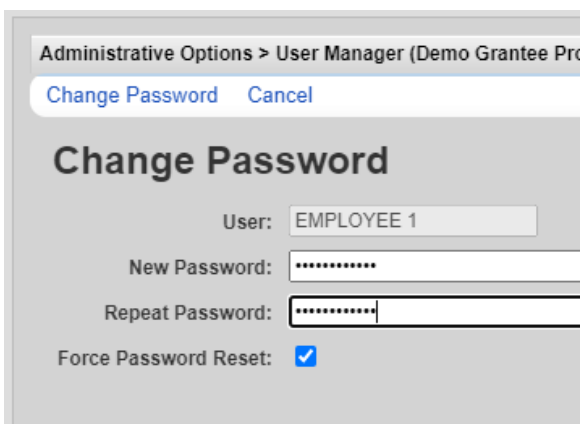   - Make sure to check **Force Password Reset** so the user will need to reset their password upon successfully logging into CAREWare with the temporary password to secure their login information.

9. Send the user their username and the temporary password
    - Consider sending the username and the temporary password in separate emails (if unencrypted) or via different communication mediums to prevent interception by an unauthorized user.

How to Change a Username

Please email careware@nichq.org to request a username be changed (due to a legal name change, for example) and include the user account's current username, desired username, and email address for verification purposes.

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CAREWare for Healthy Start User Guide: User Management   Page 9 of 12

How to Update Employee Setup

Employee Setup is used for various functions in CAREWare, including authoring Case Notes and being an option in the Interviewer field of the data collection forms. After a User Account is created, the staff person will automatically be added to and activated in Employee Setup. When a User Account is deactivated for a Healthy Start project, the employee will automatically be deactivated in Employee Setup. When a User Account is reactivated for a Healthy Start project, the employee will automatically be reactivated in Employee Setup. Below are the instructions for accessing Employee Setup and making any changes to Employees.

1. Log into CAREWare at https://healthystart.jprog.net/careware/rs/index.htm
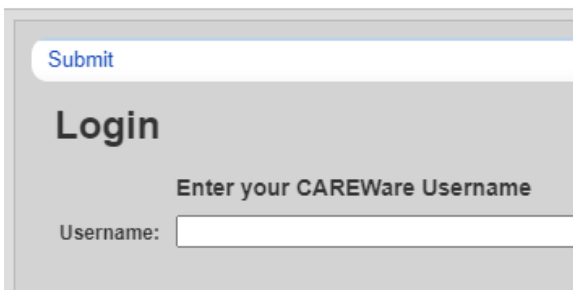
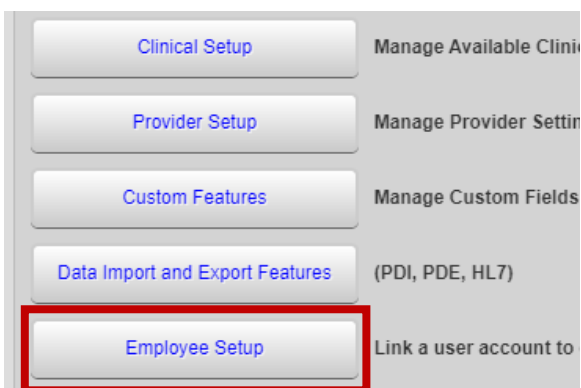2. Click on **Administrative Options** in the left navigation menu
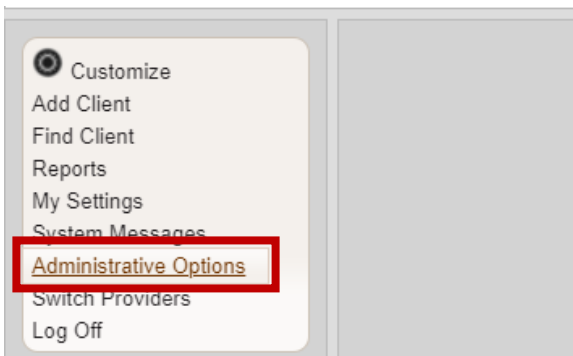
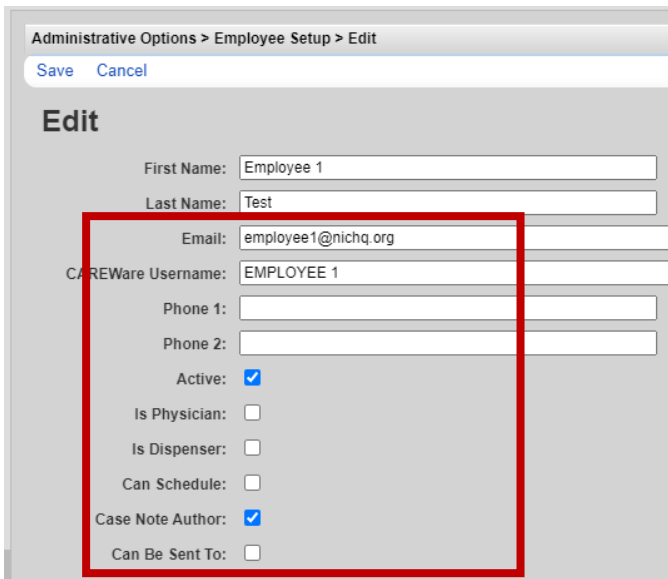
3. Click on **Employee Setup**
   - Only Provider Administrators will see **Employee Setup** under Administrative Options.

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CAREWare for Healthy Start User Guide: User Management   Page 10 of 12

4. Double click on the Employee that needs to be updated OR select the Employee (the row will turn blue) and click **Edit**.
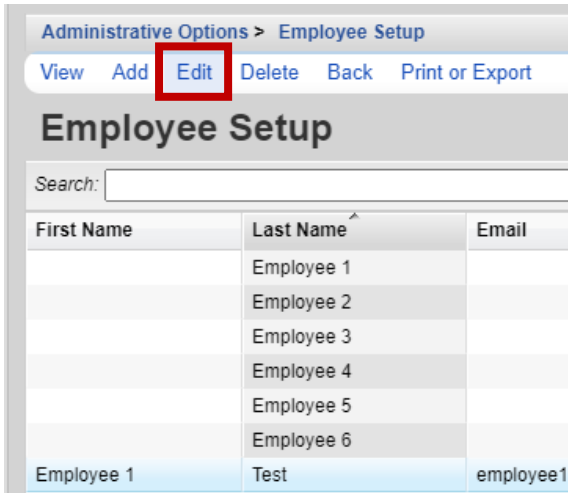
5. Update the settings for the Employee as needed
   - To include Employee in the Interview field for the data collection forms, make sure **Active** is checked.
   - To include Employee in the Case Note Author field for the Case Notes feature, make sure **Case Note Author** is checked.
   - Make sure the Employee's CAREWare Username and email address are provided and there are no leading or trailing spaces.

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CAREWare for Healthy Start User Guide: User Management   Page 11 of 12

How to Deactivate a User Account

Follow the instructions below if a user is no longer working for Healthy Start.

1. Use the user's username and attempt to login to the user account four times with an incorrect or no password. This will lock the user's account, preventing them to access their account after termination.
2. Email careware@nichq.org to request the user account be deactivated. Make sure to provide the user's username and email address for verification purposes.

How to Reactivate a Retired or Deactivated User Account

To reactivate a retired or deactivated user account, please email careware@nichq.org and include the user account's retired username and email address for verification purposes.

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CAREWare for Healthy Start User Guide: User Management   Page 12 of 12