New Features in CAREWare 5.0-Release June 2010

Feature	Description	Find it on Page
Custom Fields and tabs		
1. Custom File attachments	New custom field type that allows users to upload documents/images and associate them with a specific record in CAREWare (e.g. a particular client or service)	p. 3
2. Custom Hyperlinks	New custom field type that allows users to specify a web url or an application location. When the link is clicked, the default application will open the specified url/application.	p. 4
3. Multiple Custom Subform Tabs	Users can now specify multiple separate tabs on the custom subform.	p. 5
Custom Reports		
4. Search and lookup for custom report fields	Added a mechanism to search for custom report fields and see a brief description.	p. 6
5. Custom Report Templates	Field selection and report filter templates are now available. Templates can be created, saved, and applied as a starting point for creating new reports.	
Form Designer		
6. Custom Grids in the form designer	Encounter Grids can now be created for the form designer. The grid results can be placed anywhere on a form and they will display in a read-only format.	p. 10
7. Custom Report Fields In the Form Designer	Custom reports can now be created for the form designer. Demographic reports will allow the user to add a read-only field anywhere on the form design to display the report result. Other report types will allow the user to add a table that will display the report results. All results will be filtered for the particular client that the form is entered for.	p. 10
Performance Measures		
8. Email Notification System	Allows CAREWare to email users a reminder to check certain performance measures.	P. 9
9. New Performance Measure interface with a filter	New interface for the performance measures with the ability to filter the list.	
Provider/User Manger		
10. Efficient loading for multiple provider (network) setups	Instead of loading all providers at once, user opens each provider node as needed. Speeds up operations in the provider/user manager, especially in large networks setups	p. 12

Feature	Description	Find it on Page
Provider Data Export (PDE) and Store and Forward		
11. PDE exports custom fields.	Central users can create a PDI template including a set of custom fields. They can then send the template to providers who will populate the template database and send it back. The data will then be imported as normal and the custom data will be saved in the custom fields specified at the time the template was created.	
12. S&F Export manager	Allows users to configure the export manager to automatically create exports and upload them to the central location.	
13. S&F Import manager	More robust at importing data. Multiple domains can be scheduled to be imported, and the importing can be configured to happen automatically any time a file is received from a remote site.	
Miscellaneous		
14. HOPWA	Housing for People With AIDS report added. When HOPWA is turned on, a new tab is created on the custom subform for tracking HOPWA data.	
15. Appointment Sharing	New feature that allows users to share appointment data across providers.	
16. Spell Checker and Thesaurus for Case Notes	Users can now utilize a built-in Spell Checker and Thesaurus when entering case notes.	
17. Service entry automation for relations.	Allows users to enter services automatically for a client’s relations.	
18. Medication Definition Merge	Allows users to merge medication definitions i.e. change all records from one drug to another.	
19. Delete HL7 mappings	Allows users to delete any unnecessary HL7 mapping records by selecting the mapping record in the HL7 Lab Test Mapping Tool. It also has the ability to purge all HL7 records by domain ID, test ID, qualitative result, or action result.	
20. New form for About CAREWare	New form crediting new features to the agencies that made them possible.	

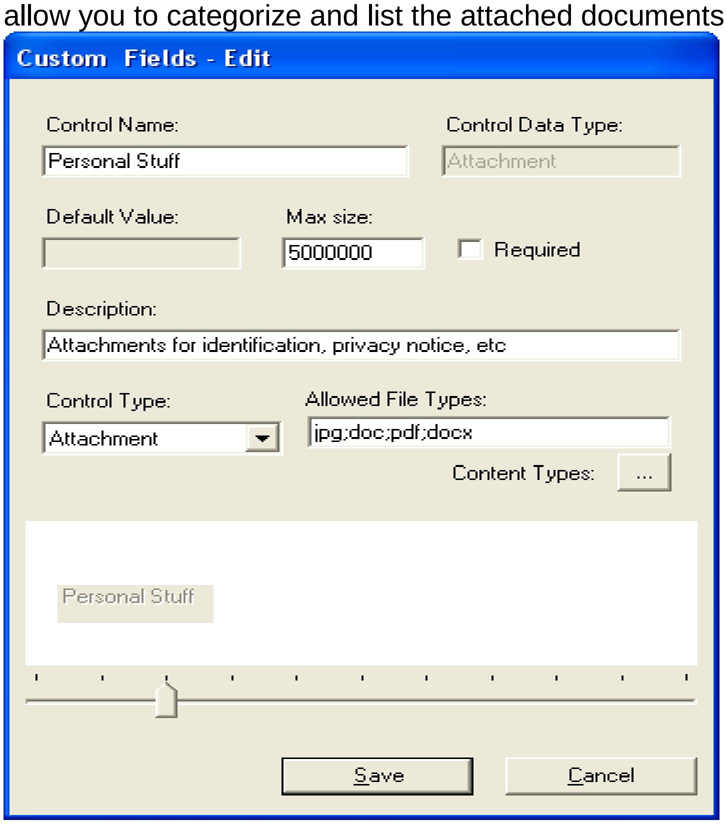
How to create Custom File Attachments

What's it for: Attach specific documents to an individual client record, such as a scanned HIPAA privacy notice or data sharing agreement, or a photograph.

Note: To ensure that the main CAREWare database does not get filled up by attachments, they are stored in a separate database. The typical default folder is *C:\Program Files\Microsoft SQL Server\MSSQL$CAREWARE\Data* and the database is "***CW_attachments.mdf***".

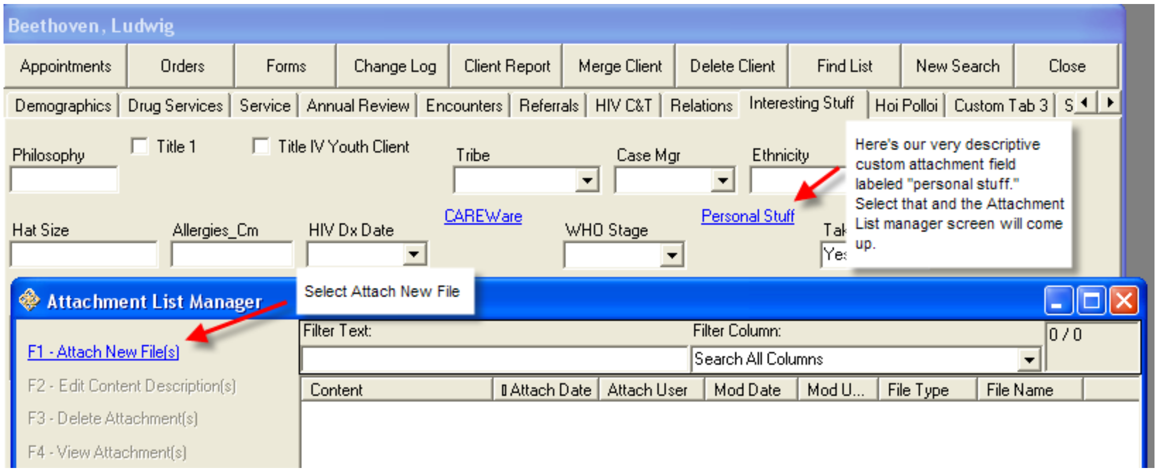
NB: To use this feature, you must have SQL Server 2005 at a minimum! Earlier versions of SQL Server cannot store the attachments in the required format.

1. In Administrative Options, select ***Custom Features*** and then Custom Client Fields (or any other-Service, Annual, etc. location).
2. Select the custom tab where you would like this field to appear.
3. Select ***Add/Activate/Edit controls***
4. Create new control (or edit an existing one)
5. **Name** the control-Here we've called it "Personal Stuff".
6. The Control type should be set to ***"Attachment"***
7. Under "Allowed File Types" enter each type separated by a semi-colon. Here we've entered "**jpg;doc;pdf;docx**"
8. Select the 3-dot ellipsis box labeled "***Content Types***." These content types will allow you to categorize and list the attached documents in a meaningful way.

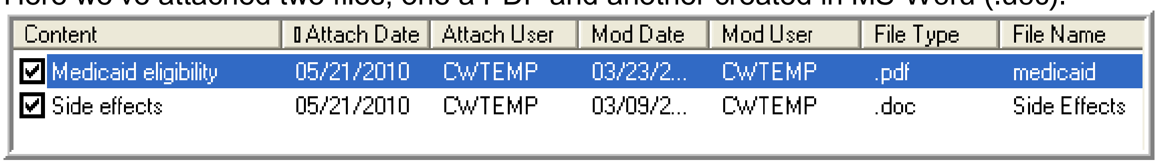


Now we're ready to go to a specific client and attach documents to their record.

In the client record, we've jumped to their custom tab labeled "Interesting Stuff."   That's where we'll find the new custom attachment field we created.



Here we've attached two files, one a PDF and another created in MS-Word (.doc).



Content	Attach Date	Attach User	Mod Date	Mod User	File Type	File Name
☑ Medicaid eligibility	05/21/2010	CWTEMP	03/23/2...	CWTEMP	.pdf	medicaid
☑ Side effects	05/21/2010	CWTEMP	03/09/2...	CWTEMP	.doc	Side Effects

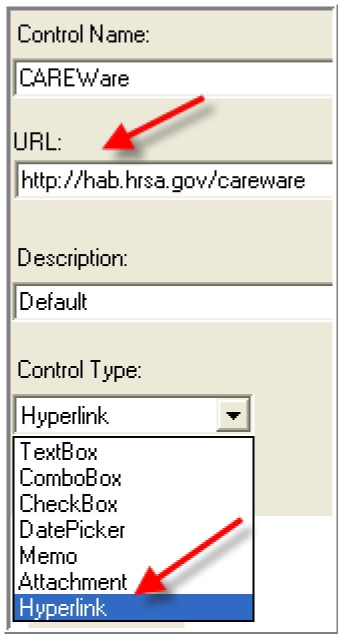
- This screen shows the attachment content (per the categories you created earlier); and other important info including the file type and file name in the last two columns.

- Select which document you would like to view (or delete) in the check box on the left. To view, select F4 or click your mouse on that hyperlink .

Custom hyperlinks

What's it for: to provide an easy link to a URL/website of interest.

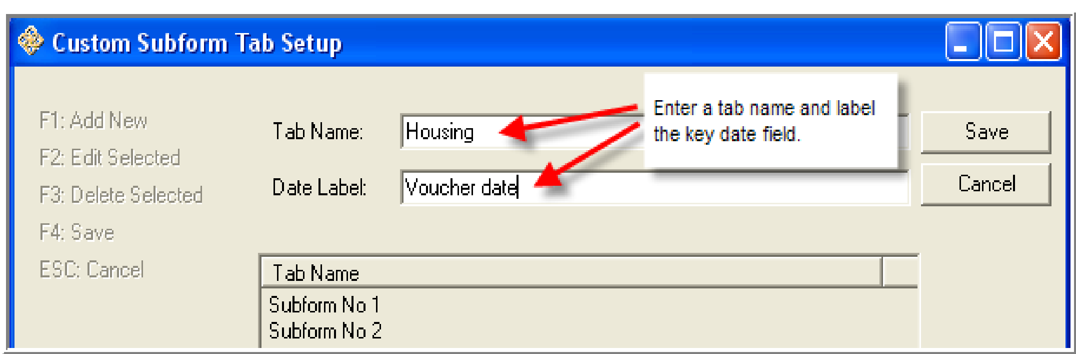
1. In administrative options, select ***custom features*** and then custom client, service or annual fields
2. Select ***Add/edit/Activate Controls***
3. Select control type as ***Hyperlink***
4. Add URL in space provided***.***



Multiple Custom subforms:

What's it for: Expand capacity to create custom subforms.   In previous versions you were limited to one custom subform. Unlike the regular client screens, a subform allows you to enter multiple values, like the service screen where there is a key date (in that case the date of service) associated with each entry.

1. Under Custom Features, select ***custom subform***.
2. Select Tab Setup
3. On the setup screen (shown here) select ***Add New*** (F1).



- Name the Tab and provide a label for the key Date Field.
- You can change the position of the tabs by selecting the up and down arrows on right (not shown).

Custom Reports and Performance Measures Module

What's new:

There are three major design changes to custom reports and the PMM:

1. Search for fields and find a description.

The number of fields available in custom reports, and what exactly each produces, has always been something of a mystery to users. Starting with version 5.0 you can search for fields based on any string or keyword—for example, entering the word "Service" will result in all fields that have that in their name, or "lab," or whatever.

2. More efficient field and filter selections and retrieval

Previously, each set of field selection and filter had to be named and saved. This became tedious and resulted in an abundance of saved selections that often had little meaning to the user.

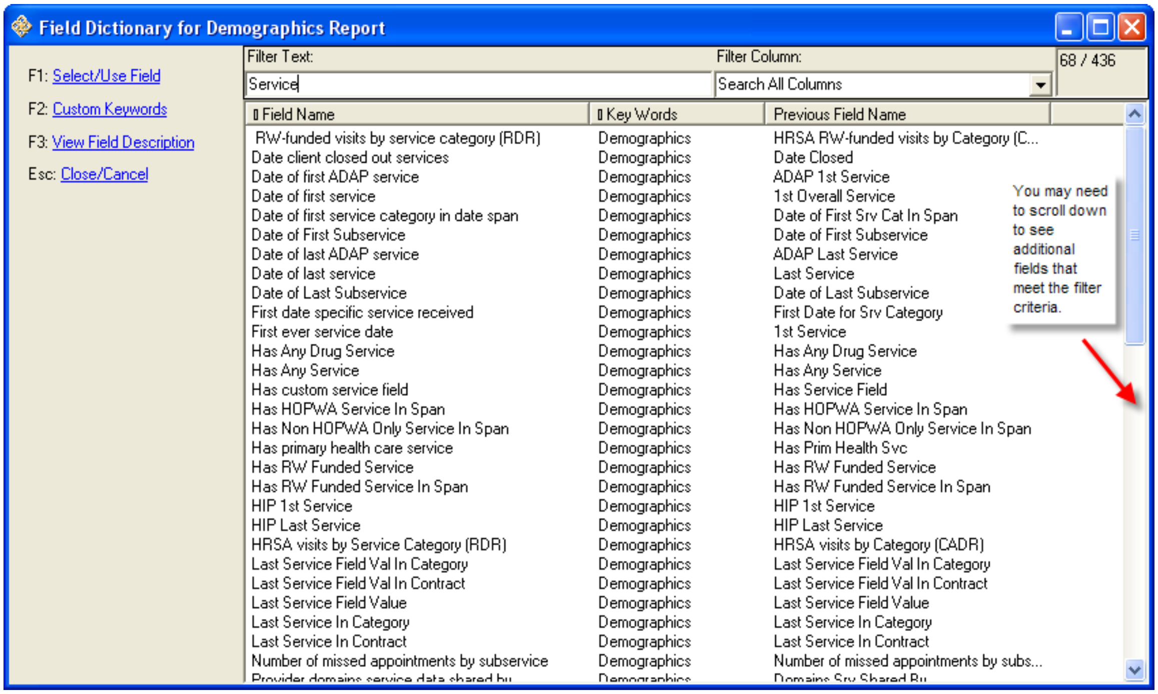
In version 5.0, while you can save field selections and filters in ***templates*** for those that are most often used and recalled, CAREware now does not require this, and simply stores and uses the latest selections without having to name and save each one!

3. You can now set the font type and size of the report title and of each column/field header.

Searching for fields

Let's create a new report. Click on ***Field Selection***. At first a list of all fields will be shown alphabetically.

1. To select a field, highlight the field and then click **Select/Use Field (F1).**
2. To see a description of a field (not there yet for all fields!), select the field of interest and click "**View Field Description" (F3).**
3. Now let's say you wanted a list of all fields that had the word ***Service*** in them. Type in the word **Service** in the filter text box on the top and the CAREWare would return the list in the following screen.



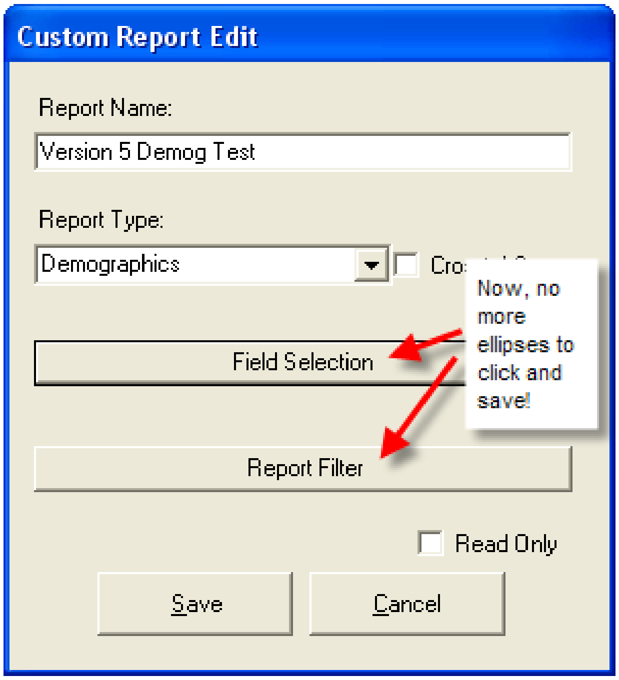
Field Name	Key Words	Previous Field Name
RW-funded visits by service category (RDR)	Demographics	HRSA RW-funded visits by Category (C...
Date client closed out services	Demographics	Date Closed
Date of first ADAP service	Demographics	ADAP 1st Service
Date of first service	Demographics	1st Overall Service
Date of first service category in date span	Demographics	Date of First Srv Cat In Span
Date of First Subservice	Demographics	Date of First Subservice
Date of last ADAP service	Demographics	ADAP Last Service
Date of last service	Demographics	Last Service
Date of Last Subservice	Demographics	Date of Last Subservice
First date specific service received	Demographics	First Date for Srv Category
First ever service date	Demographics	1st Service
Has Any Drug Service	Demographics	Has Any Drug Service
Has Any Service	Demographics	Has Any Service
Has custom service field	Demographics	Has Service Field
Has HOPWA Service In Span	Demographics	Has HOPWA Service In Span
Has Non HOPWA Only Service In Span	Demographics	Has Non HOPWA Only Service In Span
Has primary health care service	Demographics	Has Prim Health Svc
Has RW Funded Service	Demographics	Has RW Funded Service
Has RW Funded Service In Span	Demographics	Has RW Funded Service In Span
HIP 1st Service	Demographics	HIP 1st Service
HIP Last Service	Demographics	HIP Last Service
HRSA visits by Service Category (RDR)	Demographics	HRSA visits by Category (CADR)
Last Service Field Val In Category	Demographics	Last Service Field Val In Category
Last Service Field Val In Contract	Demographics	Last Service Field Val In Contract
Last Service Field Value	Demographics	Last Service Field Value
Last Service In Category	Demographics	Last Service In Category
Last Service In Contract	Demographics	Last Service In Contract
Number of missed appointments by subservice	Demographics	Number of missed appointments by subs...
Provider domains service data shared by	Demographics	Domains Srv Shared By

Entering the word **lab** in the filter text results in this (shorter) list of fields:

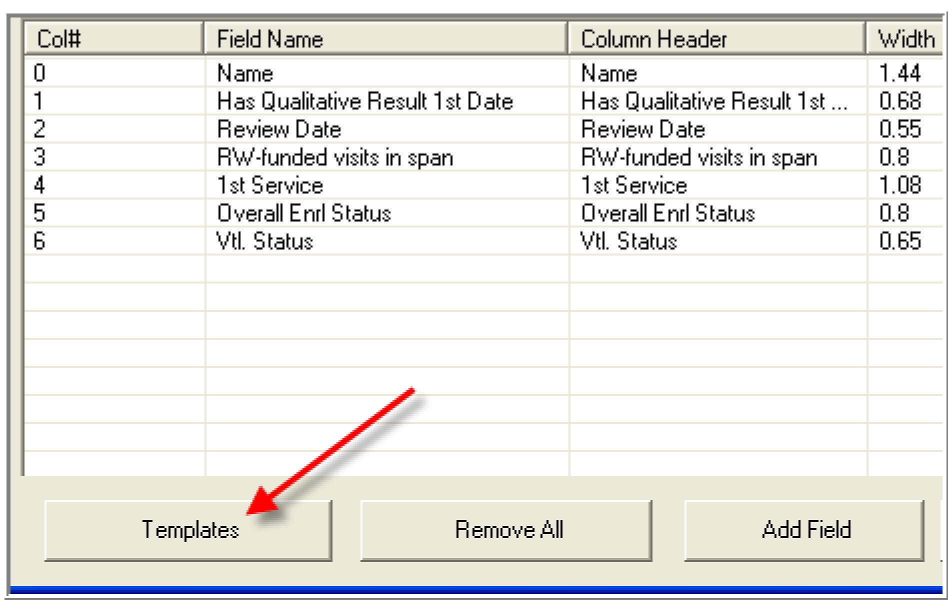
Field Name	Key Words	Previous Field Name
First Qualitative Lab Date	Demographics	First Qualitative Lab Date
First Qualitative Lab Value	Demographics	First Qualitative Lab Value
First Quantitative Lab Date	Demographics	First Quantitative Lab Date
First Quantitative Lab Value	Demographics	First Quantitative Lab Value
Has Quantitative Lab Value Maintaining Threshold		Has Quantitative Lab Value Maintaining...
Highest Quantitative Lab Date	Demographics	Highest Quantitative Lab Date
Highest Quantitative Lab Value	Demographics	Highest Quantitative Lab Value
Lab interval count	Demographics	Lab Interval Count
Last Qualitative Lab Date	Demographics	Last Qualitative Lab Date
Last Qualitative Lab Value	Demographics	Last Qualitative Lab Value
Last Quantitative Lab Date	Demographics	Last Quantitative Lab Date
Last Quantitative Lab Value	Demographics	Last Quantitative Lab Value
Low Quantitative Lab Date	Demographics	Low Quantitative Lab Date
Lowest Quantitative Lab Value	Demographics	Lowest Quantitative Lab Value
No lab test after diagnosis		No lab test after diagnosis
Previous Qualitative Lab Date	Demographics	Previous Qualitative Lab Date
Previous Qualitative Lab Value	Demographics	Previous Qualitative Lab Value
Previous Quantitative Lab Date	Demographics	Previous Quantitative Lab Date
Previous Quantitative Lab Value	Demographics	Previous Quantitative Lab Value
Quantitative Lab Amount Change	Demographics	Quantitative Lab Amount Change
Quantitative Lab Log Change	Demographics	Quantitative Lab Log Change
Quantitative Lab Percent Change	Demographics	Quantitative Lab Percent Change
Received Lab or Screening	Demographics	Received Lab or Screening

- Again, to use or see a description of a field, you first must select that field with your mouse.

Report setup no longer requires saving field and filter selections.



After selecting fields for the report or the filter, we could save that group by storing them in a Template and naming it for future retrieval (like the old version).

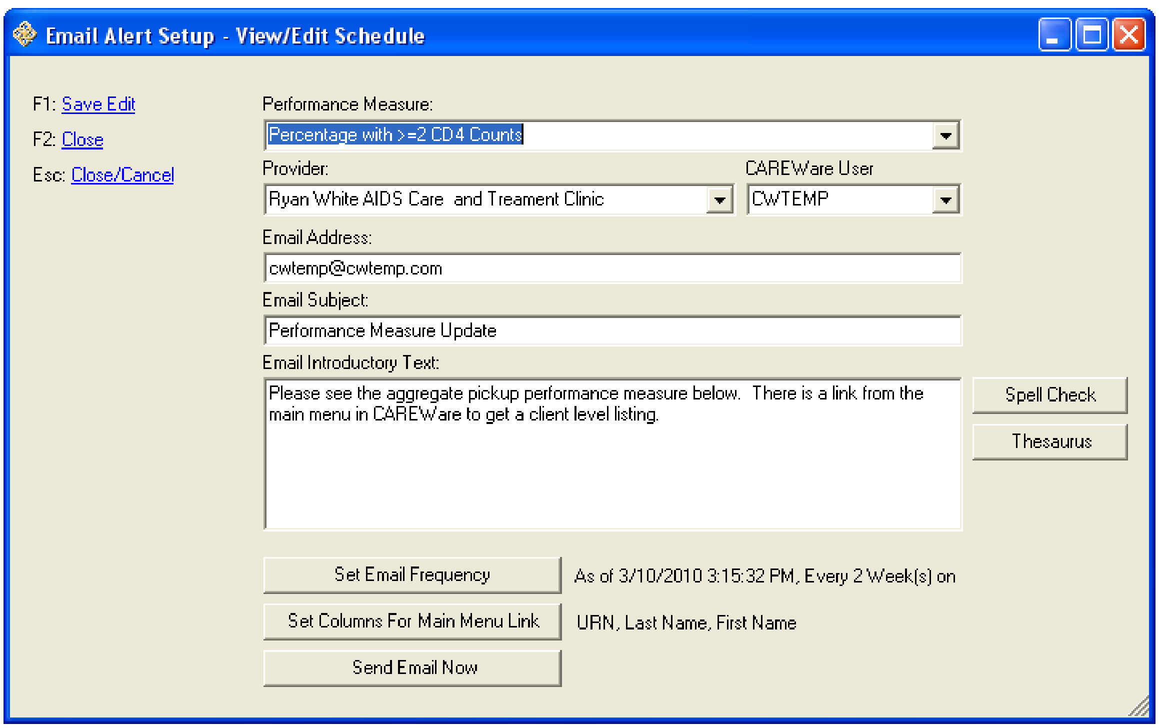


Performance Measure Email Notification

What's it for: Have emails automatically sent to specific users on a regular basis so that they will be reminded of which clients are still not meeting performance measures and may require follow-up.

Set up:

1. Log into Central Administration domain. Goto Administrative Options. Select "***Email Alert Scheduler***" on the bottom right.
2. Select Add(F1) or Edit(F2) Schedule
3. On the setup screen here, indicate the
   - Performance measure of interest
   - Provider (if multi-domain)
   - CAREWare user
   - Email address of the recipient
   - Email subject and text
   - The Email frequency



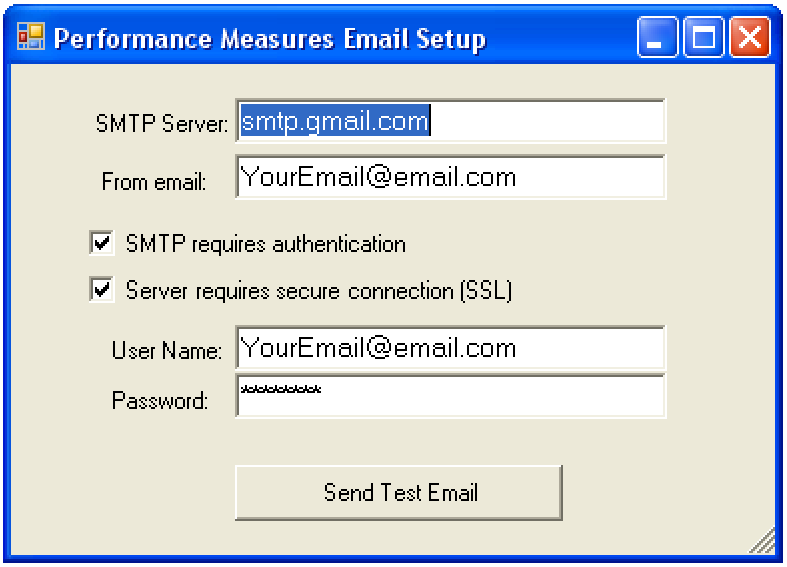
You'll also need to provide CAREWare with other essential details so that emails can be sent to the proper location.

Select SMTP Setup(F4) on the main email setup screen. The screen below will appear.

Provide the following on this screen:

- The Simple Mail Transfer Protocol or SMTP server name: You may have to speak with you IT staff to obtain this.
- The email address from which this will be sent
- Authentication required?
- SSL required?
- User Name and Password

Click Send Test Email to see if your settings are working.



<u>New Form Designer Features</u>

What's it for: Add custom report fields and grids to forms

Setup:

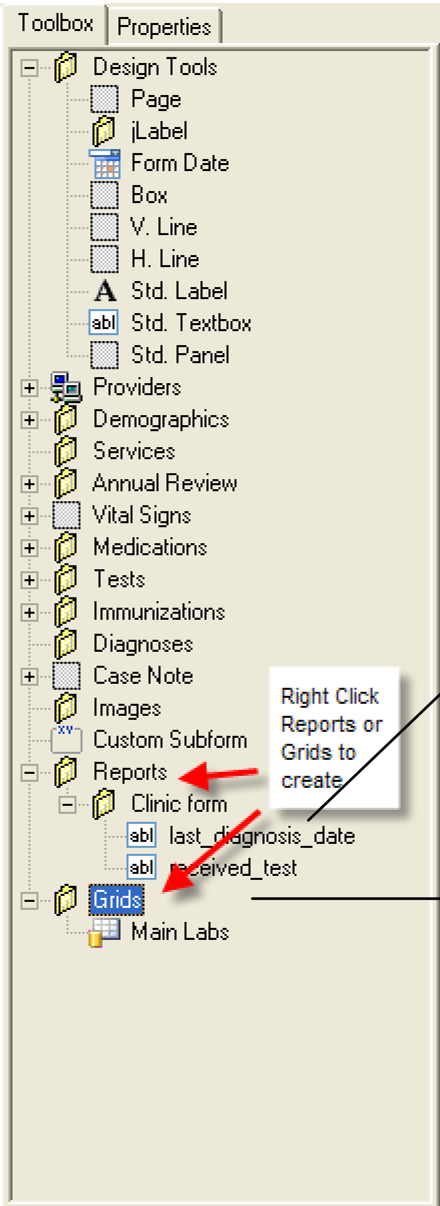
1. Log into Central Admin, goto to Custom Features, then Form Designer

2. Add or edit an existing form

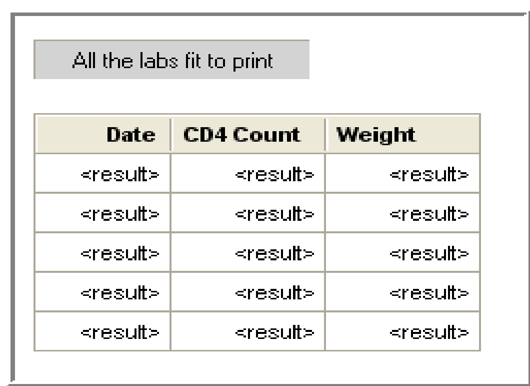
3. To add custom report fields to your form, under the Toolbox tab, look for **Reports** near the bottom of the list. Right click and Add Report.

4. Setup the report and add fields as you would in regular custom reports

5. Drag and drop the custom report fields onto your form in the desired location. See examples below.



- Here we dragged and dropped two custom report fields on to our form and labeled each.
- And below we dragged and dropped a grid onto the form, including the CD4 counts and body weights for the last year.



Provider/User Manager

What's new: In installations with multiple provider domains and users in each, the Provider/User manager previously took a long time to load due to the large number of user rights, etc. that needed to be retrieved. Instead of loading all domains upon entry, users now must activate the specific provider that they would like to work in.