CAREWare for Healthy Start User Guide

Data Collection Forms

This user guide outlines how to use CAREWare for Healthy Start data collection. This includes how to add participants (clients), add children and complete the required data collection forms for Healthy Start projects in CAREWare.

Contents

CAREWare User Training 101: Basic User Training

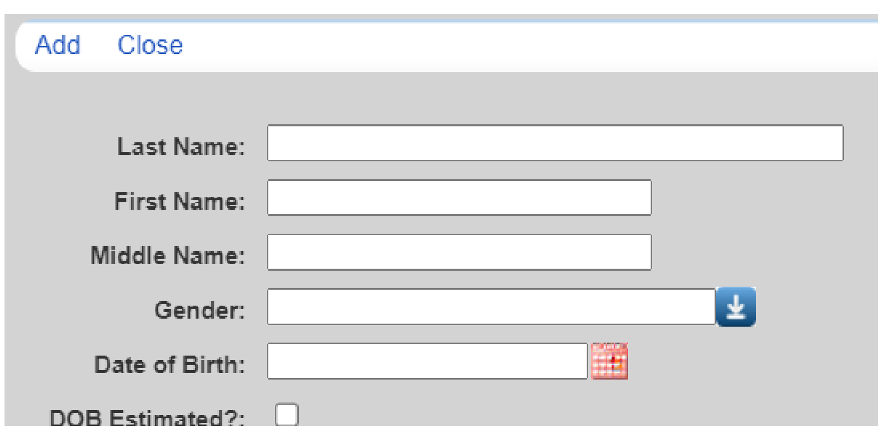
This section goes over how to add participants and children, set relationships, resolve duplicates, find participants. There are 6 lessons in this section.

CW 101:1 Adding a new Participant/Client

We recommend logging into CAREWare to follow along with the steps below.

1. Once logged in, select your Healthy Start Project name.
2. Click on "**Add Client**" in the left side menu.

3. Fill in client data in fields and then click "**Add**".



You have successfully added your new participant/client!

→ Follow these same steps for all Primary and Other Primary Participants. ←

CW 101:2 Resolving Duplicates

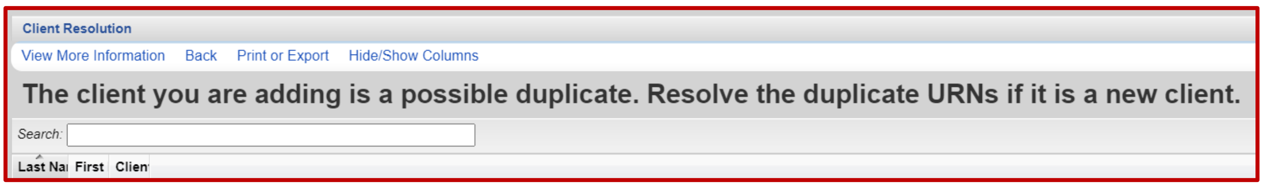
We recommend logging into CAREWare to follow along with the steps below.

1. Once logged in, select your Healthy Start Project name.

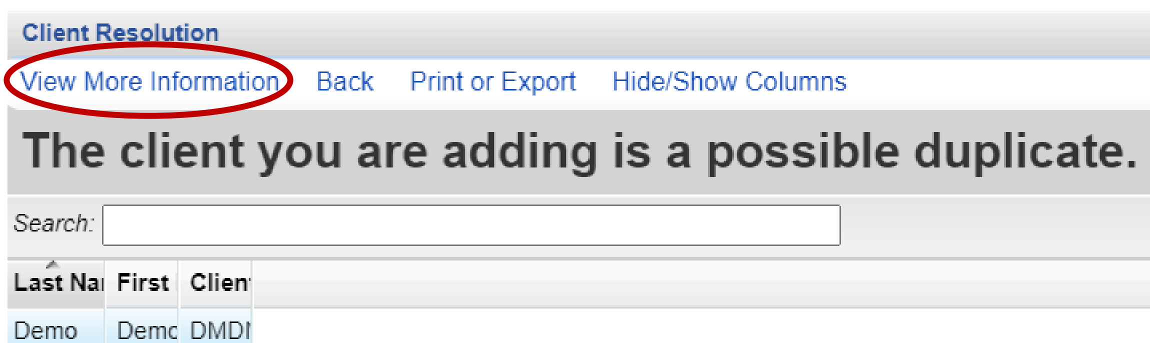
2. Follow the steps to "**CW 101:1 Adding a new Participant/Client**".

3. When the system detects a client name that the same as an existing client, it will notify you. You can then determine if it is duplicated or a truly new participant.

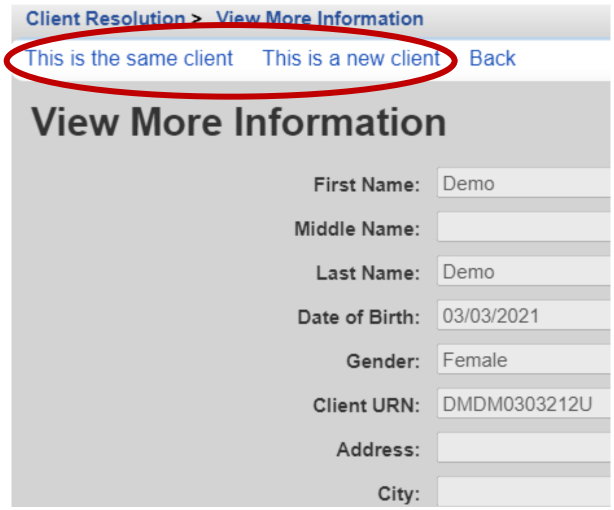
4. When a duplicate record is detected, the message below will appear once you have clicked "**Add**":



5. Highlight the potential duplicate client and select "**View More Information**." (circled in red below)



a. You will be able to view the client details to determine if it is a unique or duplicated client. Click on the correct response, as pictured below:



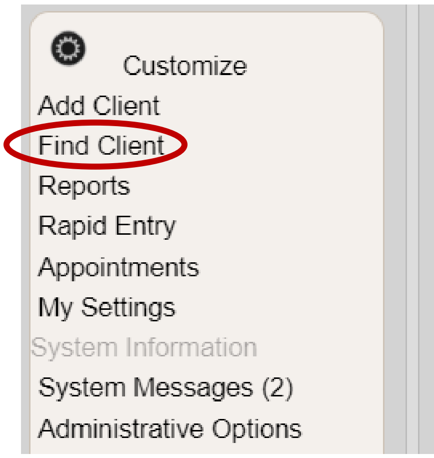
6. If it is a new client, once you select "**This is a new client**", you will be prompted to create the new client with a different "**URN Suffix**". "URN" is the "Unique Resource Name".
   a. The "**URN Suffix**" field has alphabetical options for you to use to identify clients with the same name.

7. If it is a duplicated client and "**This is the Same Client**" has been clicked, then it will auto resolve itself.

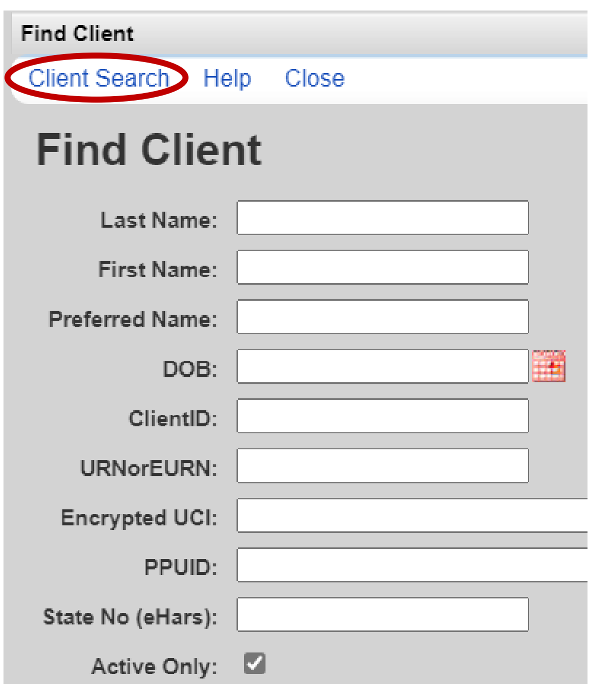
CW 101:3 Find a Participant

We recommend logging into [CAREWare] to follow along with the steps below.

1. Once logged in, select your Healthy Start Project name.
2. Click on "**Find Client**" in the left side menu.



3. You can use various client info and then click "**Client Search**".



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4. Select the individual you want to view and click "**View Details**".

5. From this next screen you can proceed with whatever updates you need to make.

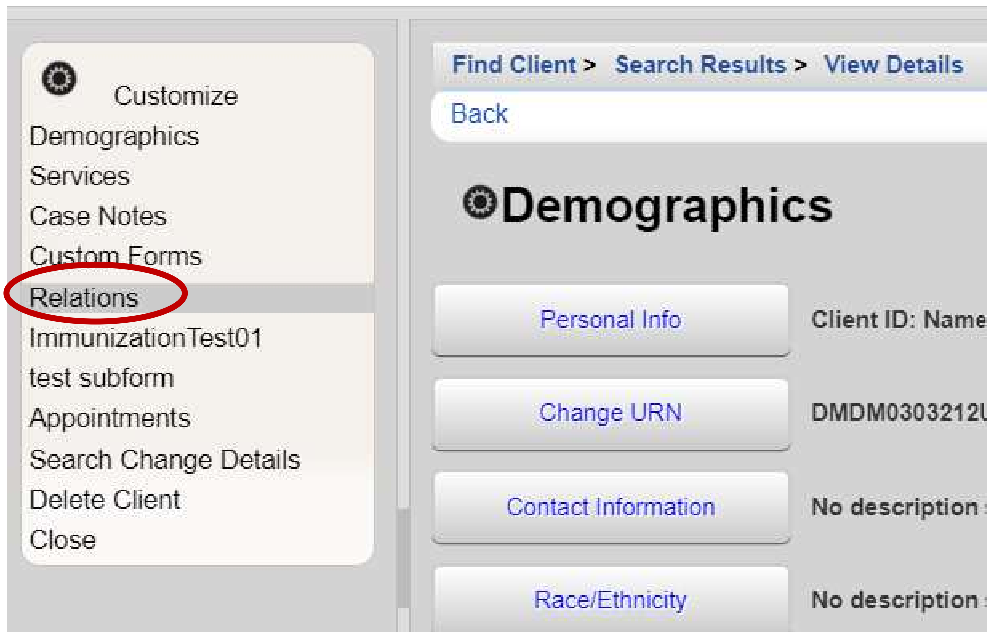
CW101:4 Setting Relationships of Other Primary Participant(s)

We recommend logging into CAREWare to follow along with the steps below.

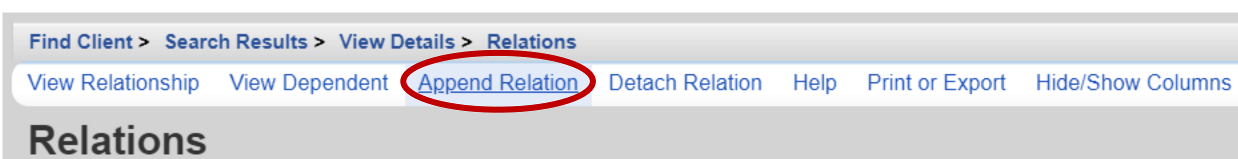
1. Once logged in, select your Healthy Start Project name.

2. Next, we will want to find the Primary Participant in CAREWare. To do this, follow the steps found here: **CW 101:3 Find a Participant**

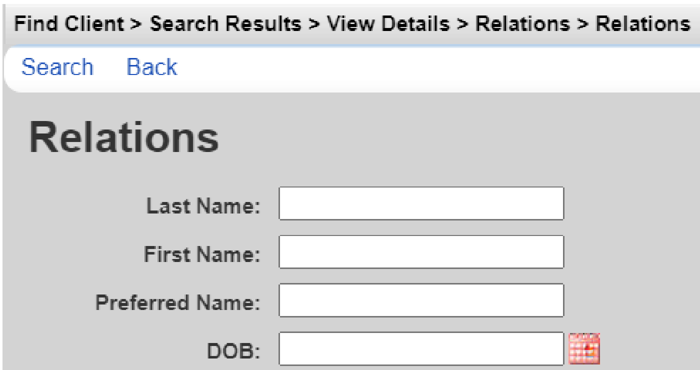
3. Once you have opened the client/participant record, in the side navigation menu, click on "**Relations**".



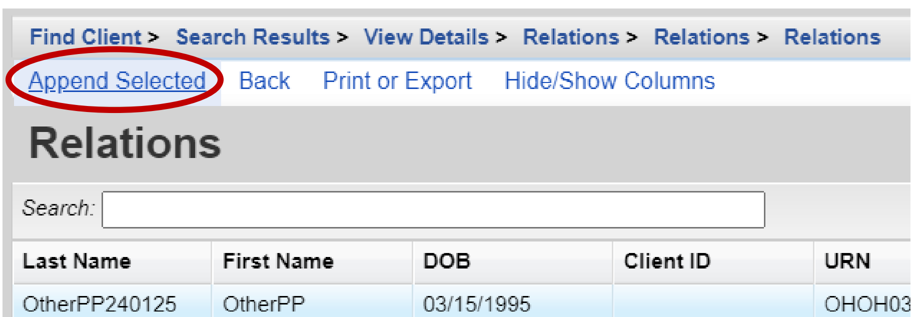
4. On the next screen, to add a new relationship to this primary participant, you will select "**Append Relation**".



5. You can use demographic information to search for the other primary participant you created and want to link to this Primary Participant.

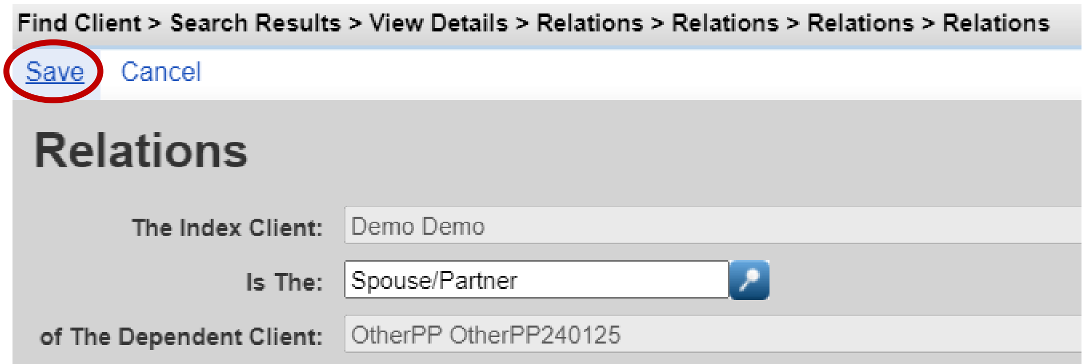


6. Once you have found the other primary participant you were looking for, select them and click on "**Append Selected**".

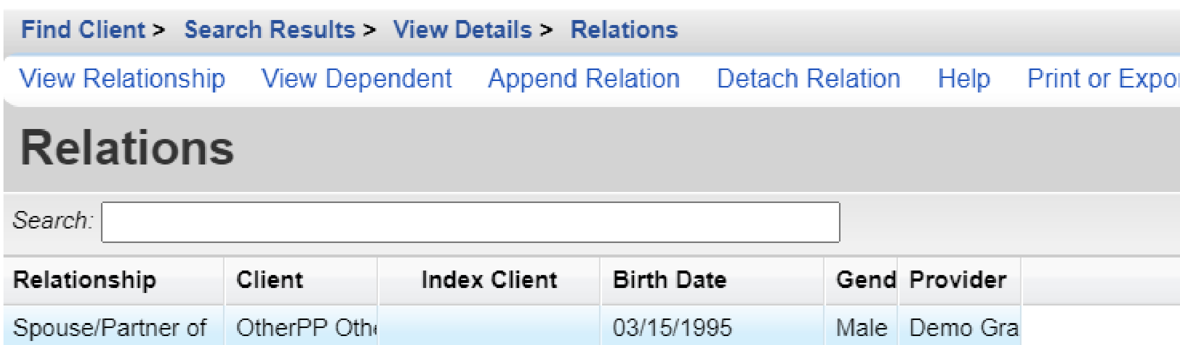


7. Next you will be prompted to identify the relationship of this participant to your primary participant.

8. Once you've selected the appropriate relationship between the two participants, click "**Save**".



9. Now you will see the other primary participant listed and their relationship to the primary participant you are viewing.

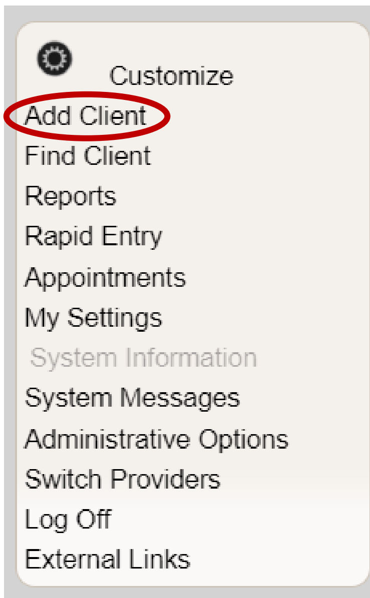


CW101:5 Add a New Child

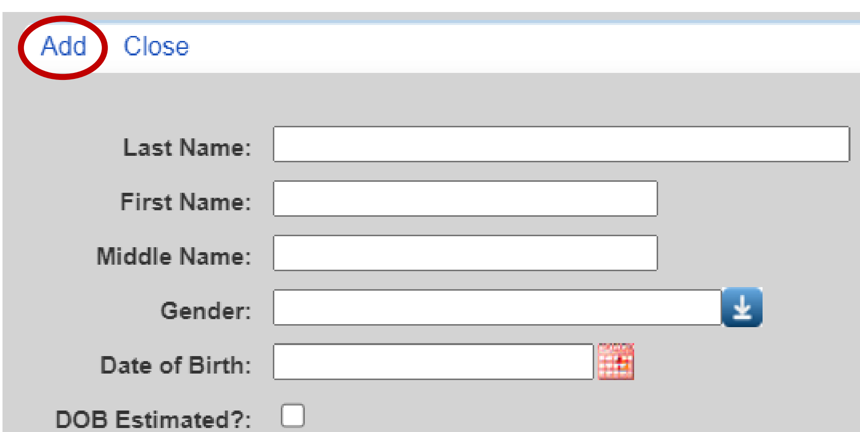
We recommend logging into [CAREWare] to follow along with the steps below.

1. Once logged in, select your Healthy Start Project name.

2. Click on "**Add Client**" from the left menu.
    a. Remember, the child is also a "**client**" within CAREWare.



3. Enter the "**client"** (child) information and then click "**Add**".



4. The birth date will trigger a confirmation box to appear, as pictured below. Click "**Confirm**", to verify that you are adding an infant.

5. After clicking confirm, CAREWare will take you to the view of this new "**client**" (child) record.

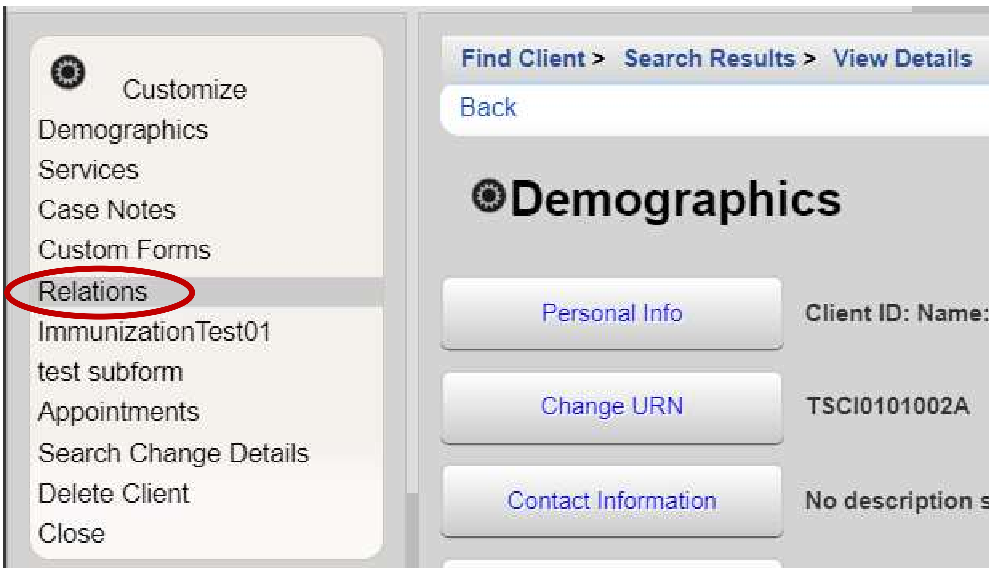
CW101:6 Set Relationship of Child with the Primary Participant

We recommend logging into CAREWare to follow along with the steps below.

1. Once logged in, select your Healthy Start Project name.

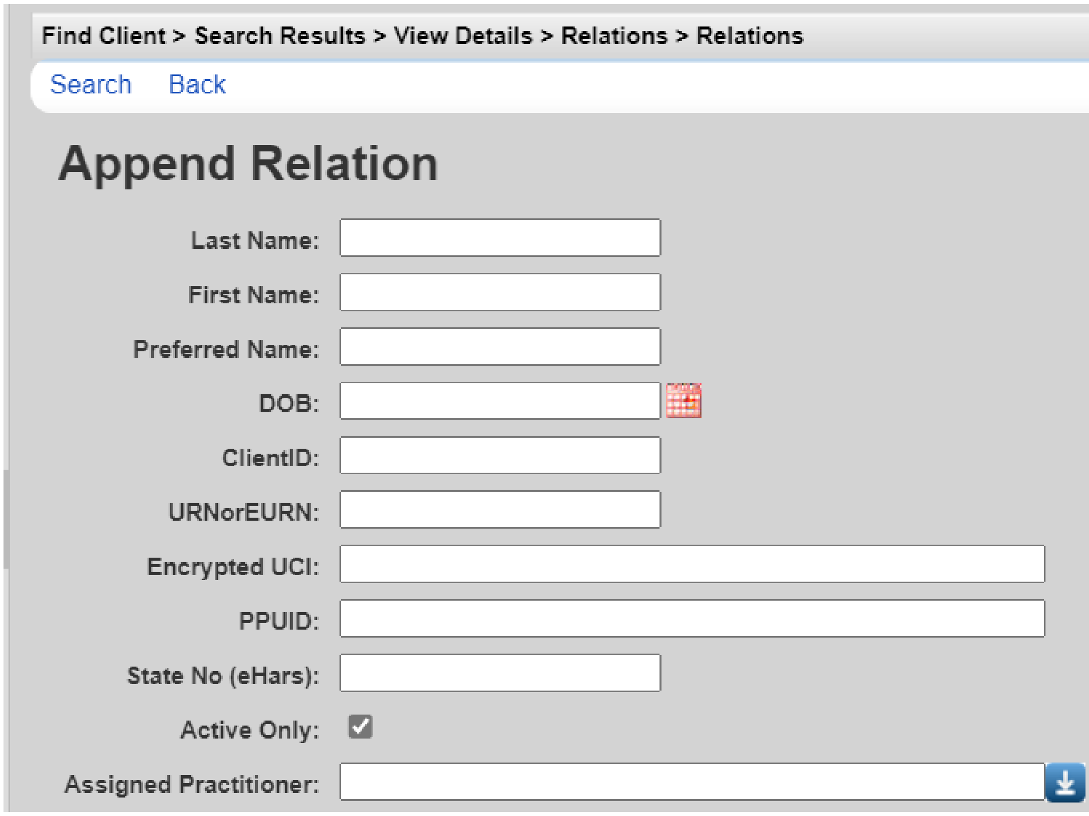
2. To find the Primary Participant you want to link a child to follow the steps found here, **CW 101:3 Find a Participant**.

3. Once you have found the participant/client and have selected "**View Details**". On the screen that opens, click on "**Relations**" in the left navigation menu. (as pictured below)

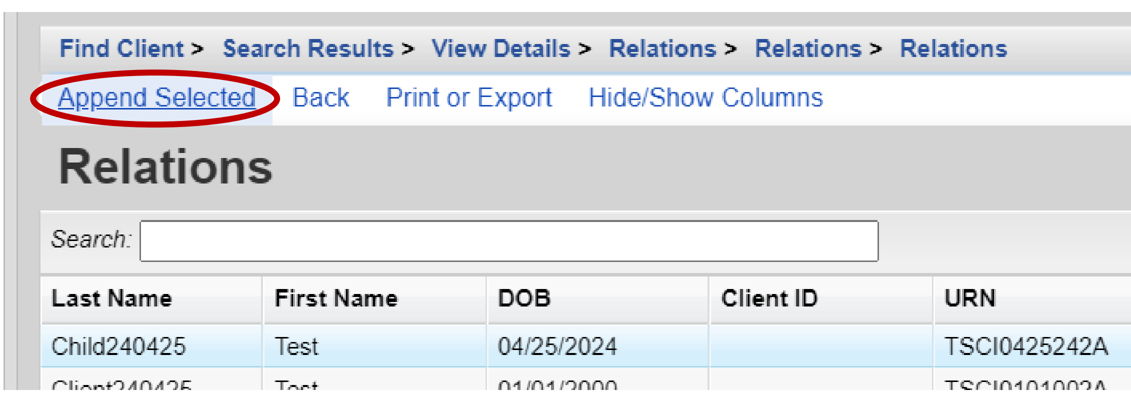


4. Click on "**Append Relation**".

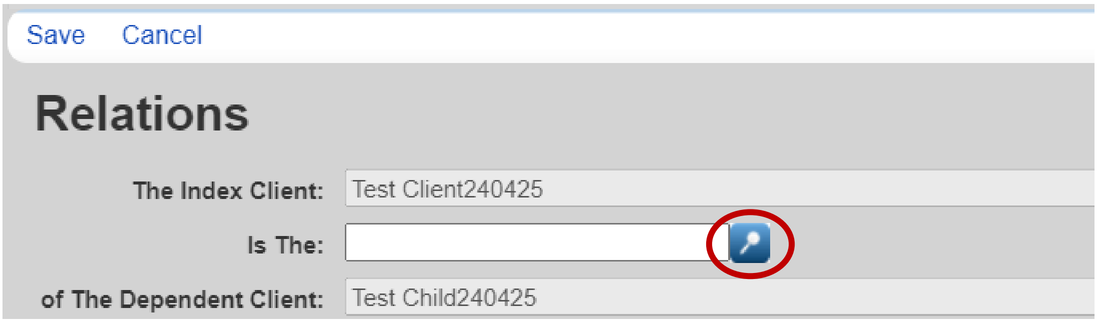
5. On this screen you will search for the **baby** that you have already added to CAREWare and want to connect this Primary Participant to.



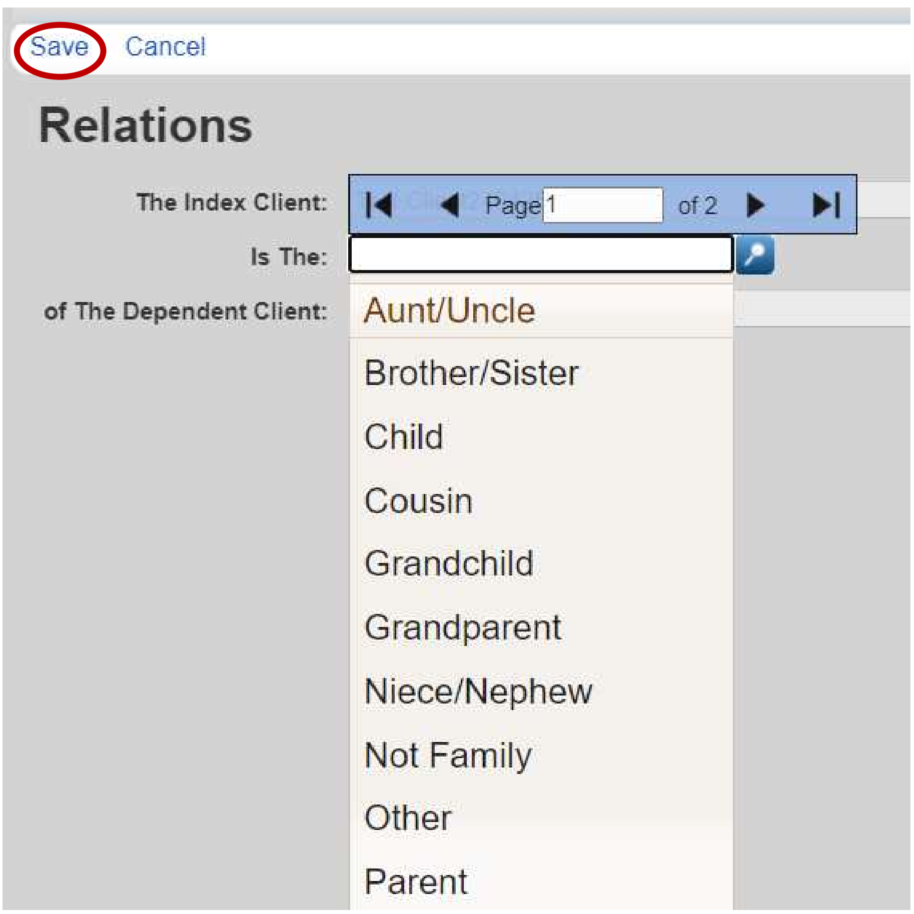
6. When you have found the correct baby, highlight their name click "**Append Selected**".



7. On the next screen, you will define the relationship between the baby and the Primary Participant. Click on the magnifying glass and a dropdown will appear with relationship options.



8. Make the appropriate selection and then click "**Save**".



You have successfully linked the child and primary participant!

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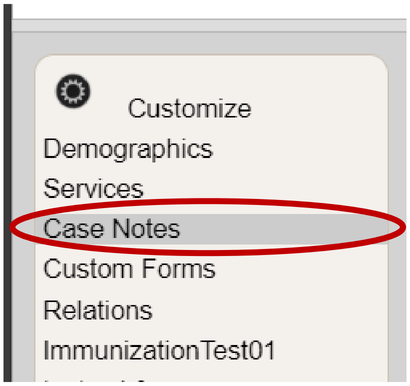
CW 101:7 Case Notes

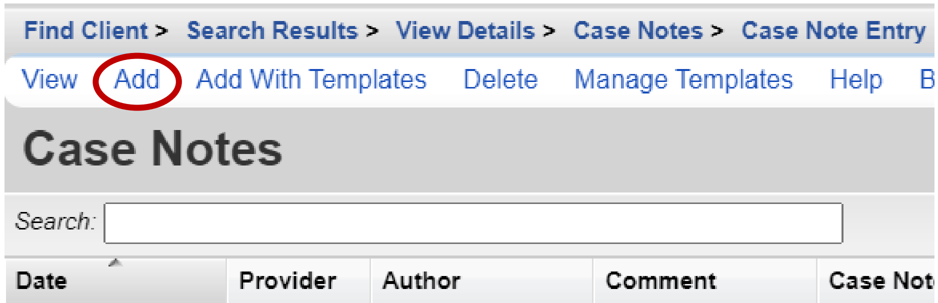
We recommend logging into CAREWare to follow along with the steps presented in this below.

1. Once logged in, select your Healthy Start Project name.
2. Next, we will want to find the Primary Participant in CAREWare. To do this, follow the steps found here: **CW 101:3 Find a Participant**
3. Select “Case Notes” from the left navigation menu.

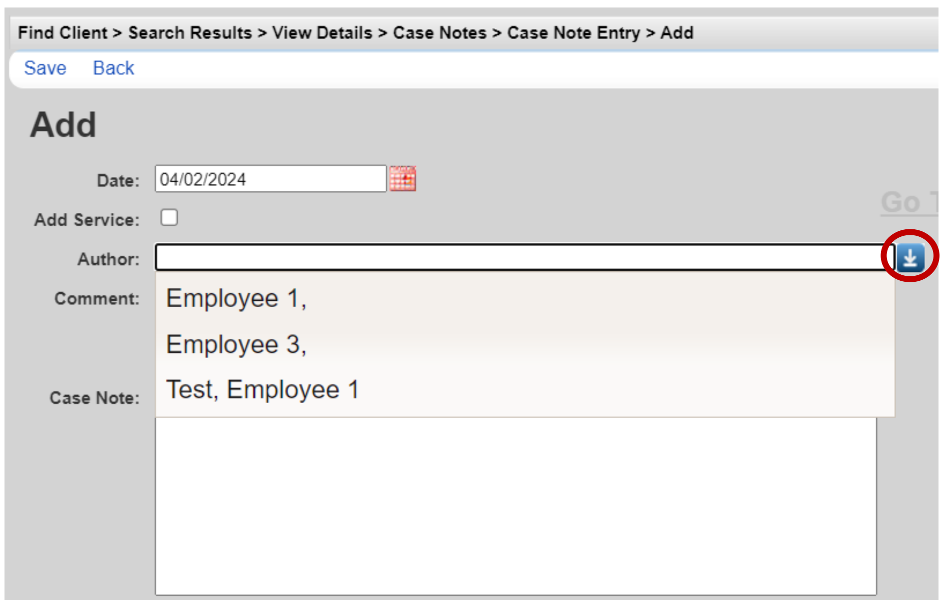


   a. To add a new case note, select "Case Note Entry”.

b. Then select "Add” on the next screen.

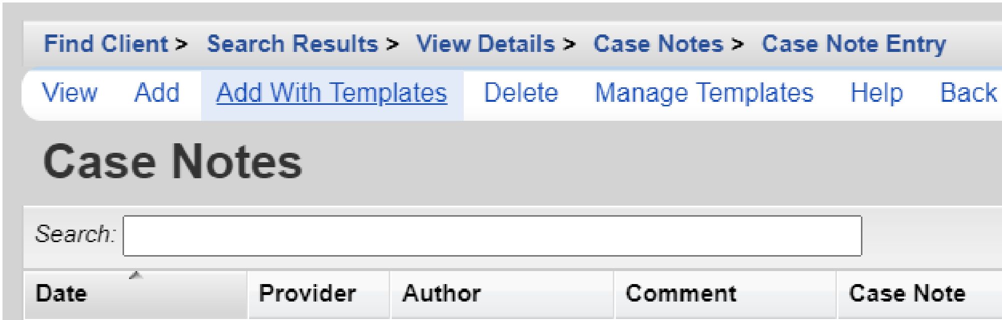


c. On the next screen, you can select the date. To select the author, use the blue dropdown arrow.

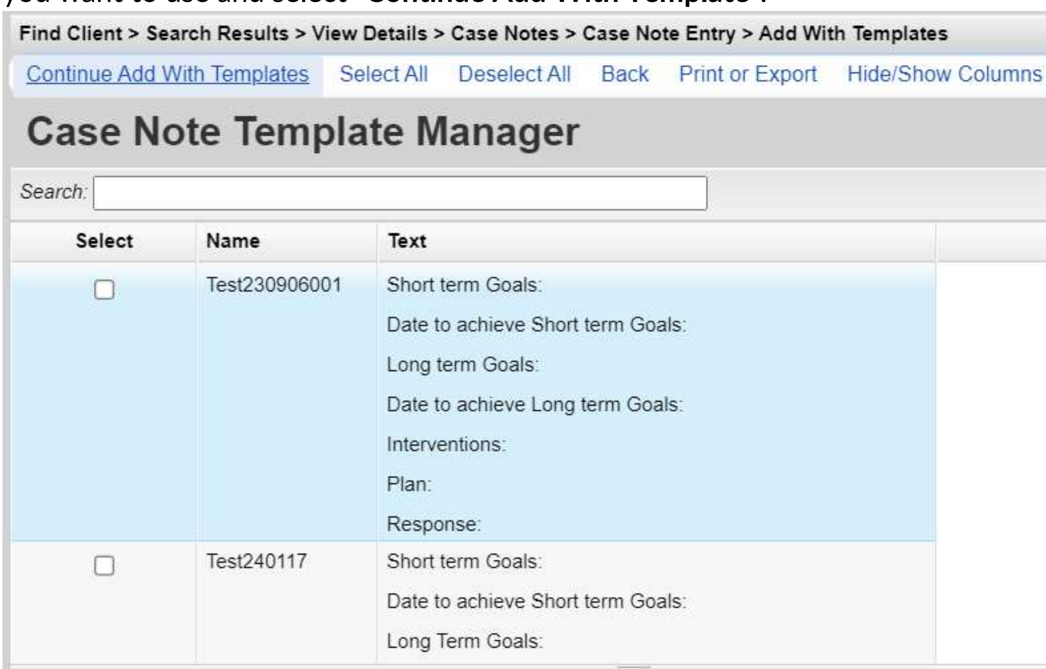


i. You can then enter the Case Notes and any additional Comments, and then select “**Save**”.

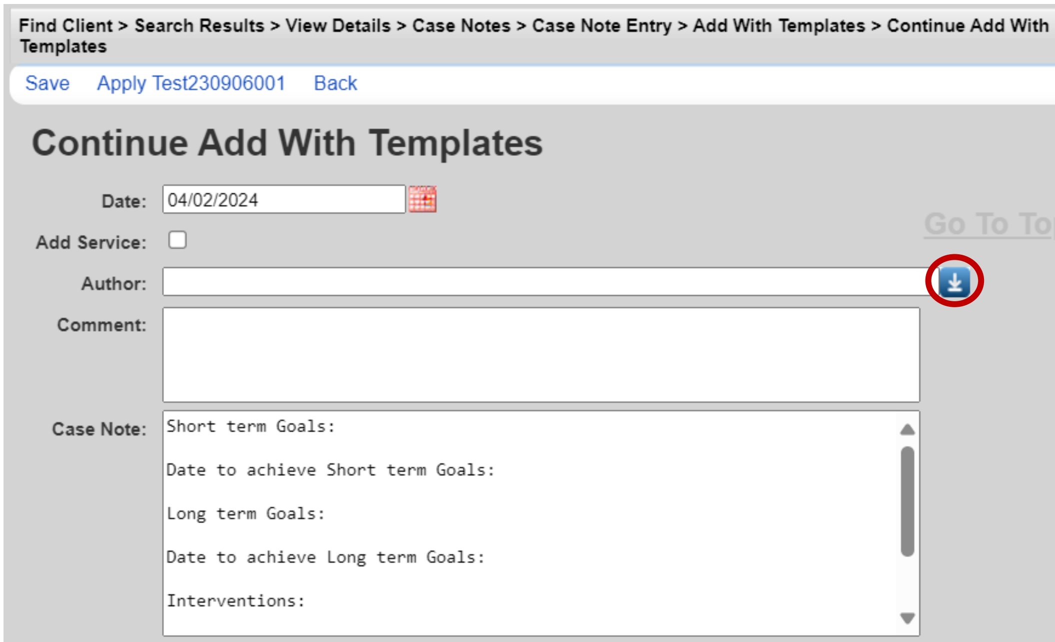
4. Now that you're back on the main Case Notes page, we will look at how you can add Case Notes using a template. You will select "**Add With Templates**".



5. You will see a list of templates created for use with your HS project. Choose the template you want to use and select "**Continue Add With Template**".

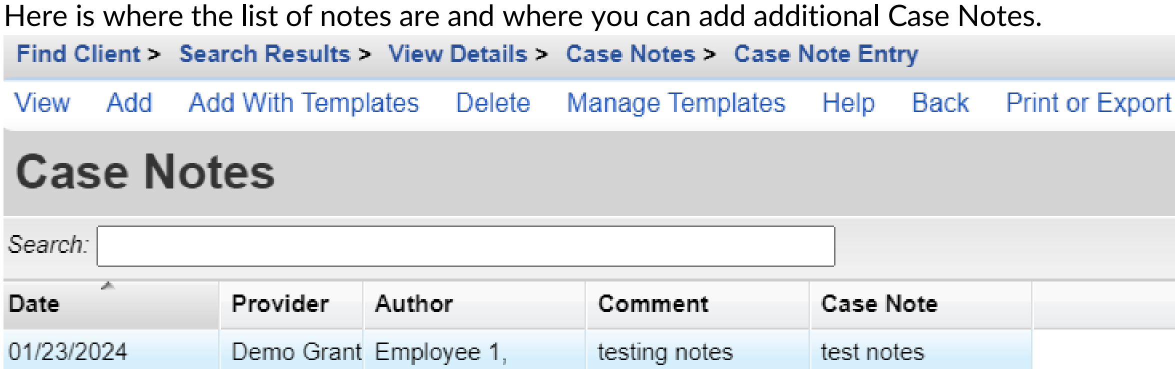


a. The template will open for you to complete and add the date, author, and any additional comments.



i. Just as before, you can use the blue arrow to select the note author's name.

b. After saving the note, you will be brought back to the main Case Notes page. Here is where the list of notes are and where you can add additional Case Notes.



CAREWare User Training 102: Demographic Form

This section goes over how to complete the required HS Demographic Form. To complete the demographic form in CAREWare, follow the steps below. In some cases, the steps will refer to previous lessons.

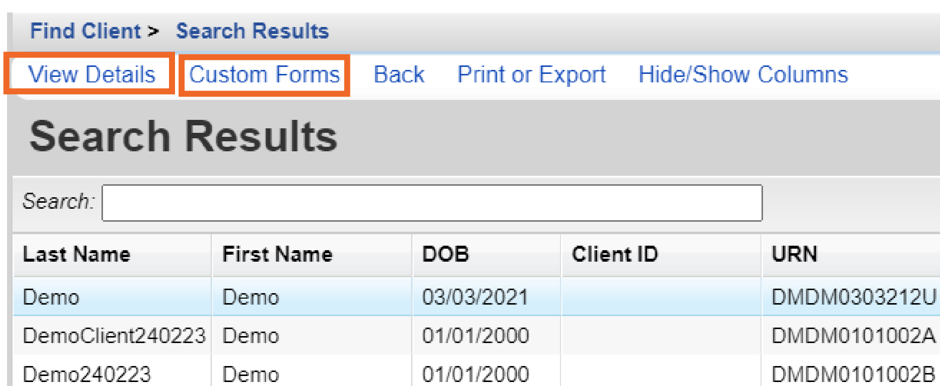
1. First you will either add a new participant or find a participant you have already added. Both were covered in CW Training 101, refer to these lessons using the links below:
    - **a.** **CW 101:1 Adding a New Participant/Client**
        - **i.** If needed, **CW 101:2 Resolving Duplicates**
    - **b.** **CW 101:3 Find a Participant**
2. Next you will navigate to the "***Custom Forms***" section of CAREWare.

CW 102:1 Navigating to Custom Forms

We recommend logging into CAREWare to follow along with the steps below.

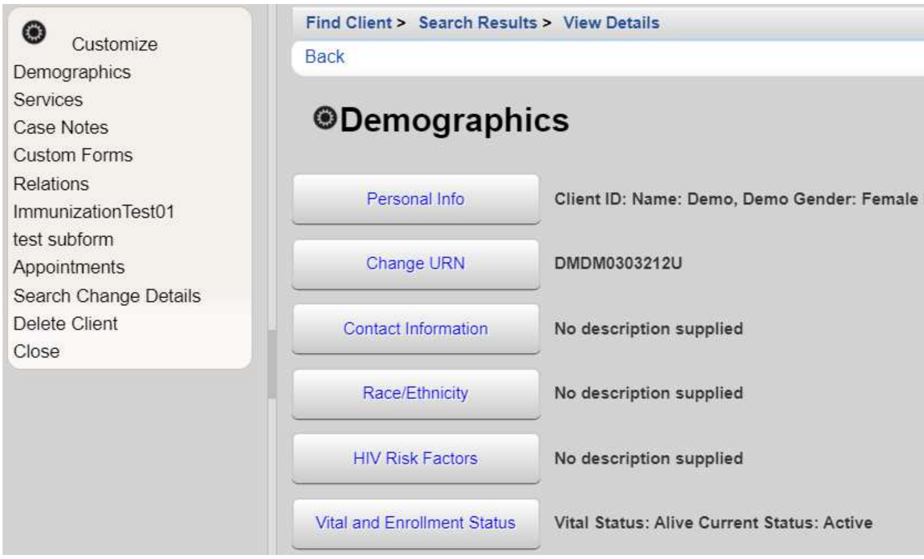
Navigating to the "**Custom Forms**" can be done in two ways.

1. The first way is by selecting "**Custom Forms**" directly from the client search (see below).
    - a. When you are viewing your client search results (from instructions found **at** CW 101:3 Find a Participant), you have two options as your next steps, to either "**View Details**" or select "**Custom Forms**".



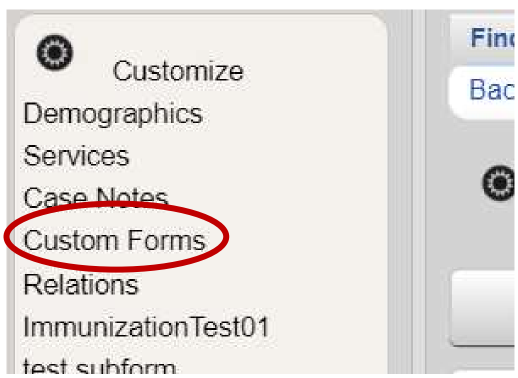
        - i. "**View Details**" will allow you to review the client's (participant) information.
        - ii. "**Custom Forms**" will take you directly to where you can complete any of the required forms.

2. The other way you can navigate to "***Custom Forms***" is if you are viewing the client information first, you will see a screen similar to the one pictured below.



*From this screen you can update their information by clicking on "**Personal Info**" or "**Contact Information**"*

a. From here, to navigate to the "***Custom Forms***", you can select this option in the left menu, as pictured below.



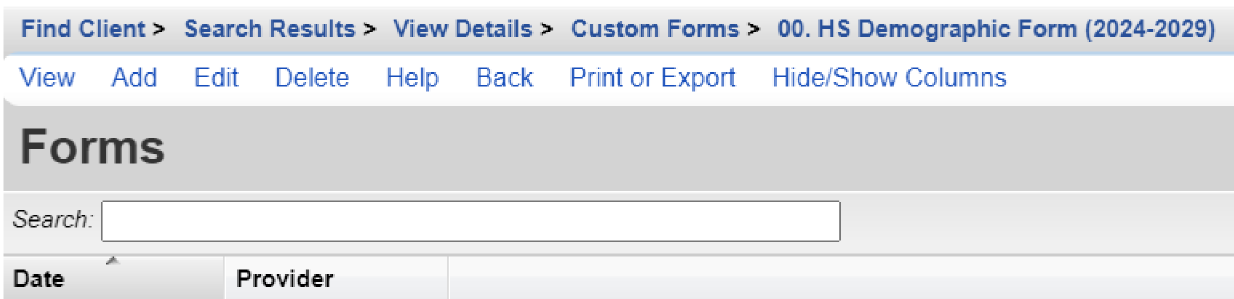
b. The next screen will show you a list of custom forms, and you can select which one you would like to add or edit

3. Next, select the "***00. HS Demographic Form (2024-2029)***".

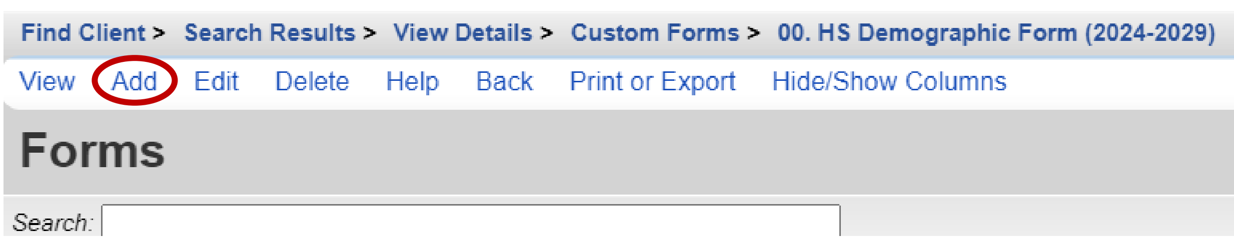
CW 102:2 Adding the Demographic Form

We recommend logging into [CAREWare] to follow along with the steps below.

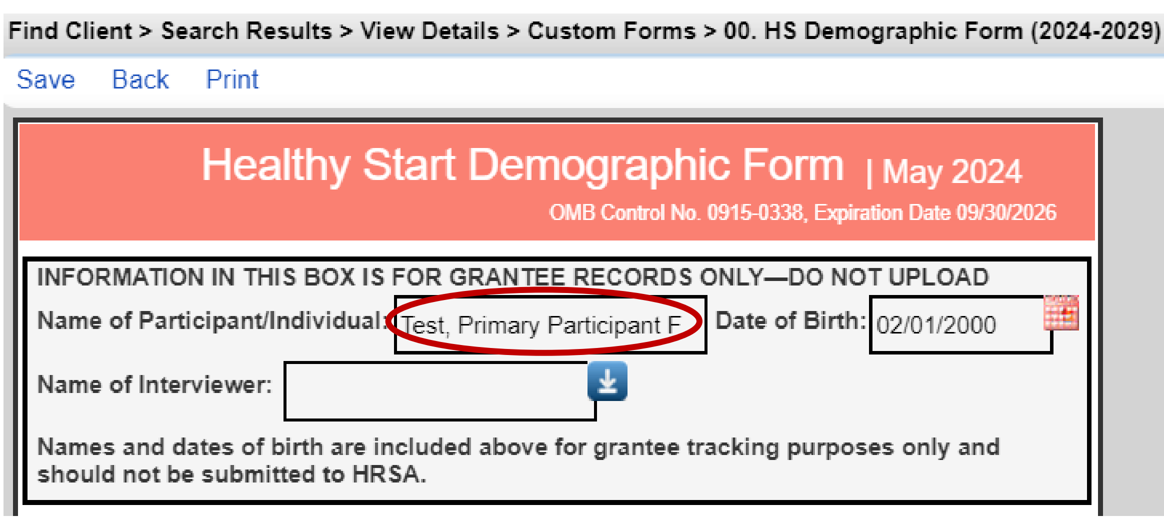
1. After you have selected the "**00. HS Demographic Form (2024-2029)**", the next screen should look as pictured below:



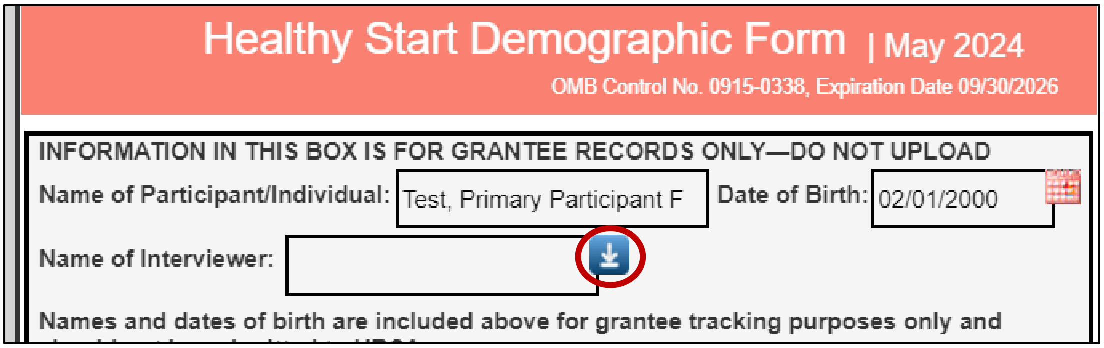
2. To add a new form, click "**Add**".

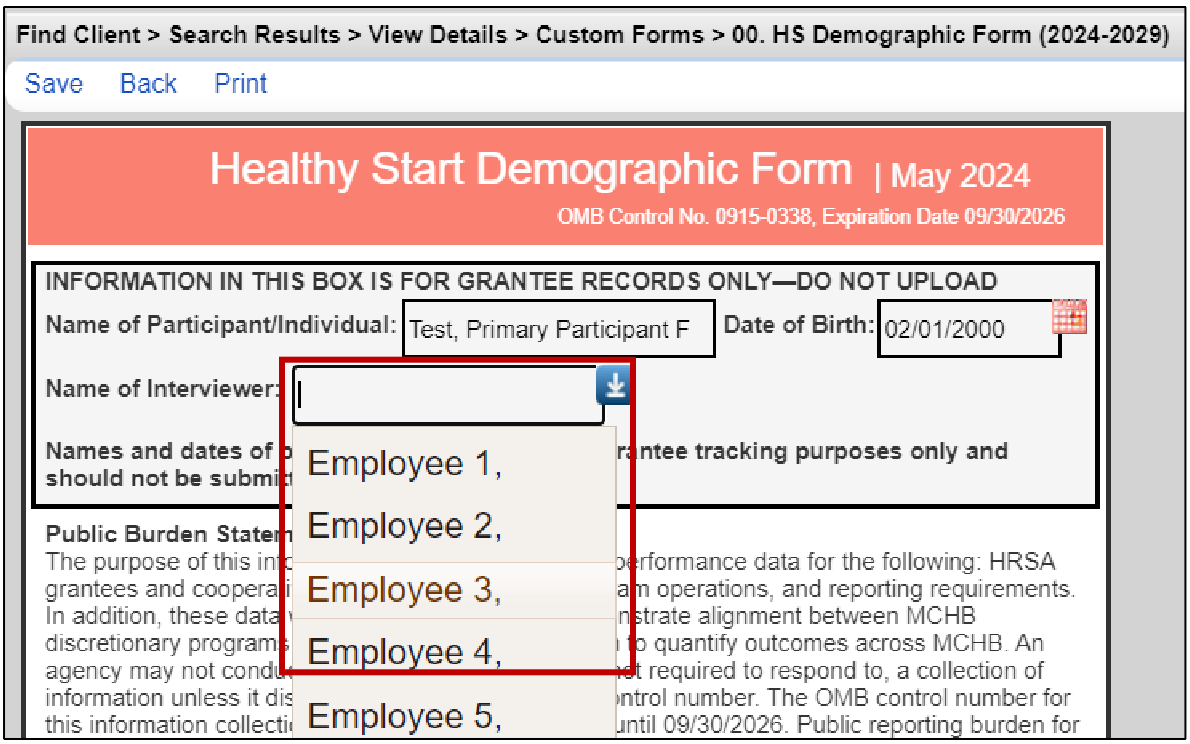


3. When the new form opens it will look as pictured below, the Primary Participant (PP) name will auto populate.
   a. In later questions when the UID is asked for, it will also auto populate.

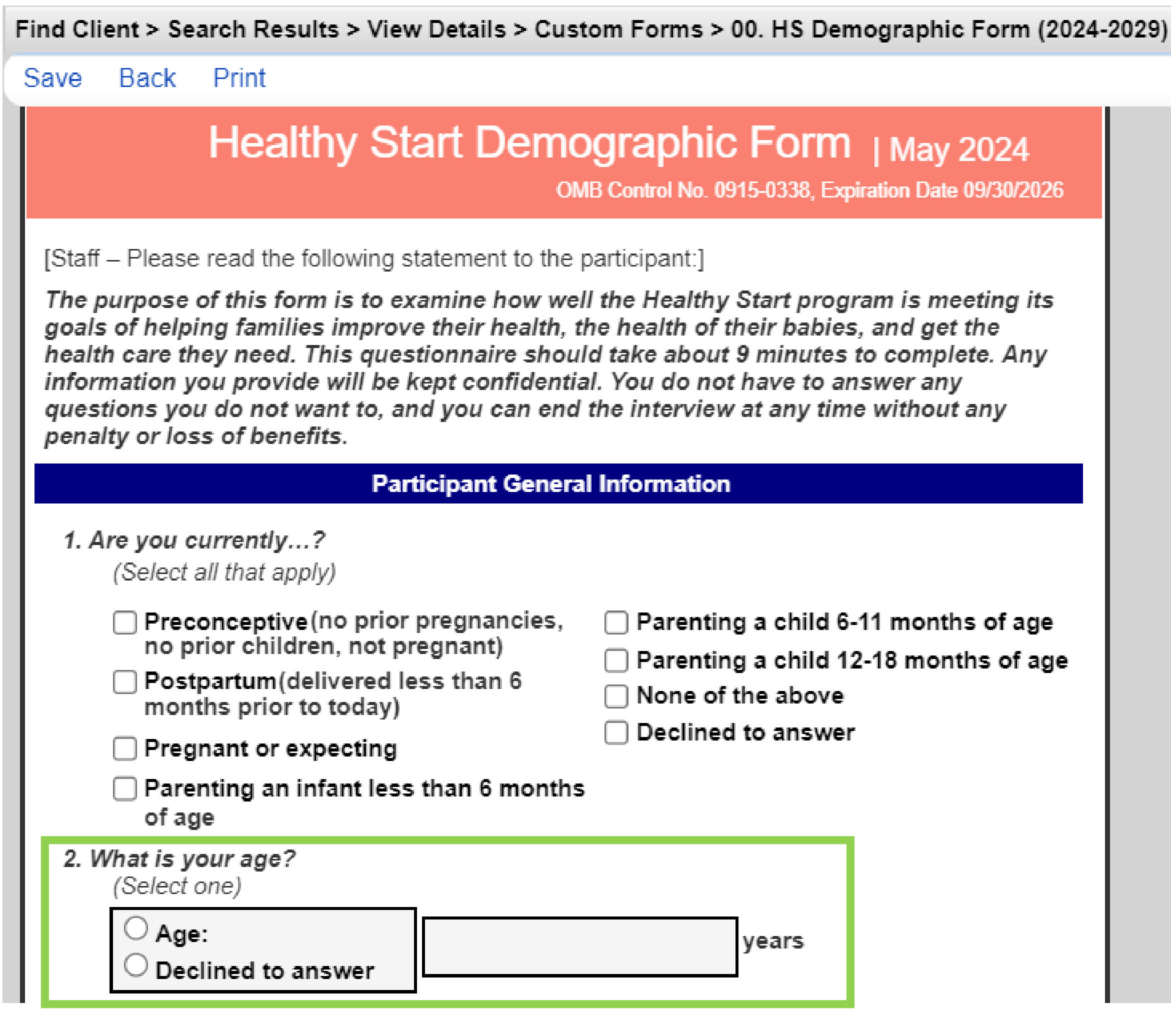


b. You can use the blue dropdown arrow to select the name of the interviewer.
   i. Contact your internal CAREWare admin if any name needs to be added as an option.





4. **Resetting some question responses:** some question types require fill in text, if you make a correction to this type of question you may need to reset the response. Doing so is simple. This is illustrated with the following example, question number 2 found in the "**Participant General Information**" section of the Demographic Form. The question is "**What is your age?**", see image below.



Find Client > Search Results > View Details > Custom Forms > 00. HS Demographic Form (2024-2029)

Save Back Print

Healthy Start Demographic Form | May 2024

OMB Control No. 0915-0338, Expiration Date 09/30/2026

[Staff – Please read the following statement to the participant:]

The purpose of this form is to examine how well the Healthy Start program is meeting its goals of helping families improve their health, the health of their babies, and get the health care they need. This questionnaire should take about 9 minutes to complete. Any information you provide will be kept confidential. You do not have to answer any questions you do not want to, and you can end the interview at any time without any penalty or loss of benefits.

Participant General Information

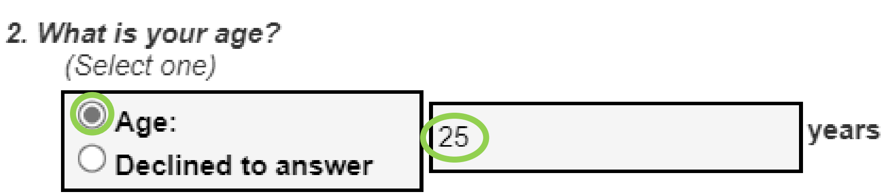
1. Are you currently...?
(Select all that apply)

- Preconceptive (no prior pregnancies, no prior children, not pregnant)
- Postpartum (delivered less than 6 months prior to today)
- Pregnant or expecting
- Parenting an infant less than 6 months of age
- Parenting a child 6-11 months of age
- Parenting a child 12-18 months of age
- None of the above
- Declined to answer

2. What is your age?
(Select one)

- Age: ______ years
- Declined to answer

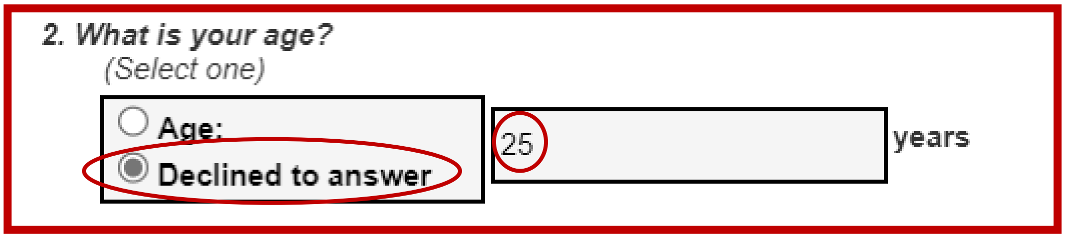
   a. This question requires a numerical response for the participant's age. See example of correctly filled in question with the participant's age.



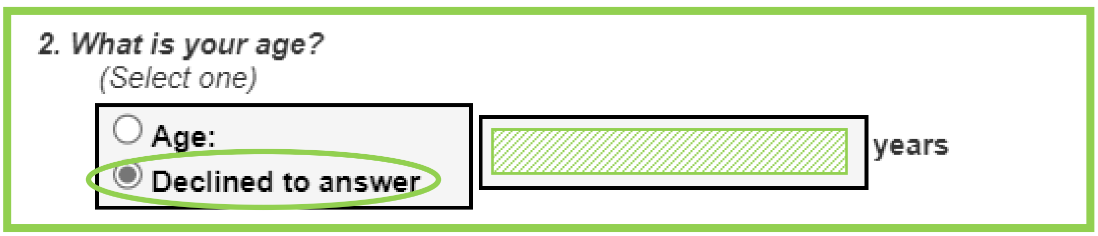
2. What is your age?
(Select one)

- Age: 25 years
- Declined to answer

b. However, if this was an error and the answer should be "***Declined to answer***"; you will need to delete the numerical response you typed when updating the response. If you do not delete the number, it will remain in the box despite the updated response, and this may skew reporting. **Image of mismatch response below**:



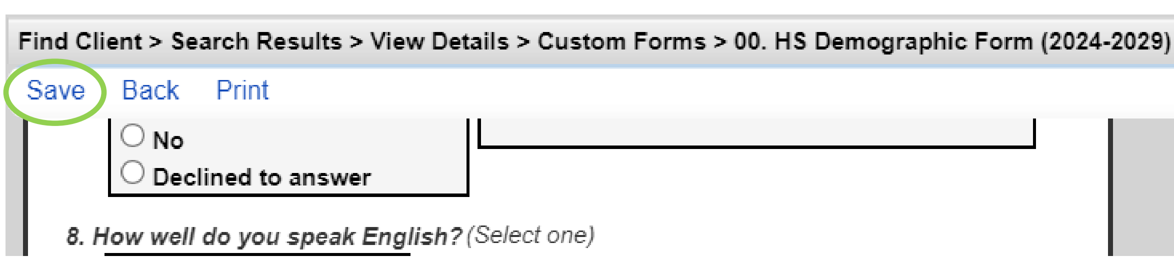
c. **Image of corrected response below**:



- **Any time you see these types of questions in the forms that require an update, please be mindful of when you need to delete the text/numerical response previously entered.**

5. Proceed with the completion of the form.
   a. You can view general information about the data collection forms, [on the TASC website with this link](). This includes a recording of the HRSA led data collection forms training.

6. Click "**Save**" once you are finished with the form, it will automatically close.



   a. You can come back into this form later to make updates.

Now you know how to create and update a client/participant's Demographic Form!

CW 102:3 Opening Previously Created Custom Forms

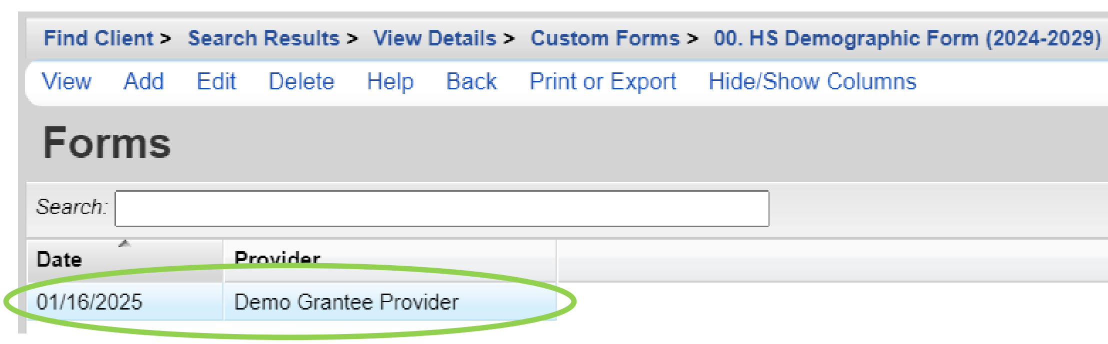
1. Once you are viewing the participant/client, you will navigate to the custom forms section. If needed, you can reference these previous lessons:

    a. [CW 101:3 Find a Participant]

    b. [CW 102:1 Navigating to Custom Forms]

2. Select the type of form you would like to view:

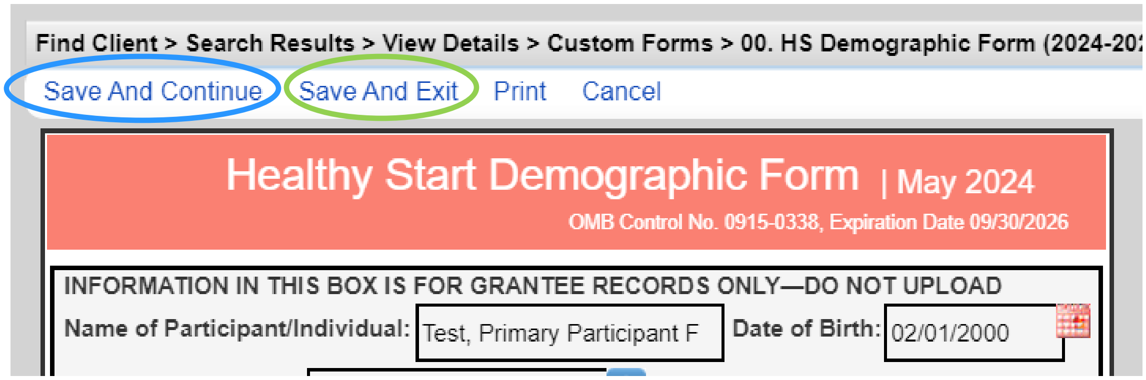
3. The next screen will look similar to the image below:



    b. From here, you have the option to "**View**" or "**Edit**" the form you have selected. (There are other options, as shown above, but "**View**" or "**Edit**" are the most common options for use).

    c. Selecting "**View**" when you simply are reading the Demographic Form and selecting "**Edit**" when you have some changes to make.

d. If you have selected "**Edit**", the form will reopen with the fillable fields. Once you have finished making your updates, you will have two options, "**Save And Continue**" OR "**Save And Exit**". Select the most appropriate option for you.



CAREWare User Training 103: Background Form

This section goes over how to complete the required HS Background Form. To complete the background form in CAREWare, follow the steps below. In some cases, the steps will refer to previous lessons.

1. First you will either add a new participant or find a participant you've already added. Both were covered in CW Training 101, refer to these lessons using the links below:
    a. **CW 101:1 Adding a New Participant/Client**
        i. If needed, **CW 101:2 Resolving Duplicates**

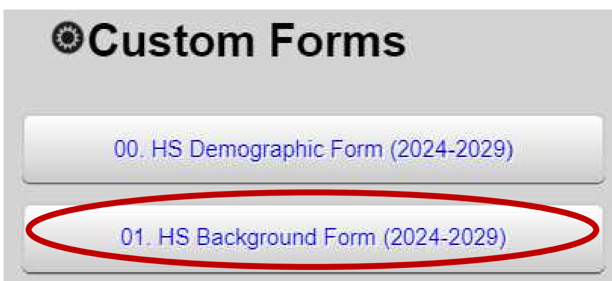
    b. **CW 101:3 Find a Participant**

2. Next you will navigate to the "*Custom Forms*" section, please see previous lesson on this: **CW 102:1 Navigating to Custom Forms**

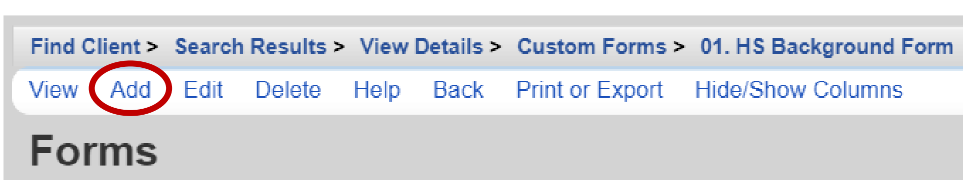
3. Now we are ready to add the Background Information Form.

CW 103:1 Adding Background Information Form

1. Navigate to "**Custom Forms**" and select the "**01. HS Background Form (2024-2029)**".



2. Now that you have selected "**01. HS Background Form (2024-2029)**", follow the steps below.
    a. Select "**Add**"

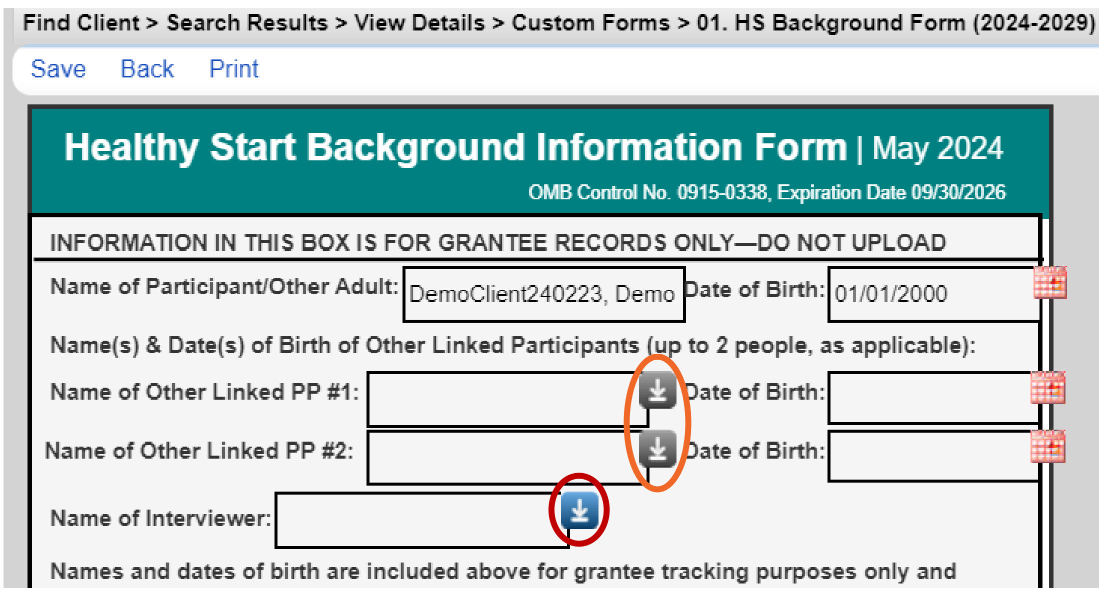


b. The system will pull in the information of the client you were viewing.

   i. You can click on the gray arrows (circled below) to select the "**Name of Other Linked PP #1/#2**". That is the Primary Participant(s) that should be listed in this form.

      - The other linked PP's date of birth will auto populate based on your PP selection.

   ii. You can use the blue arrow (circled below) in the "**Name of Interviewer**" field to select the correct staff person that collected this data from the participant. If the correct staff person is not listed, contact your team's internal CAREWare support to get the correct name added as an option.



c. If you do not have other PPs linked to this participant yet, you can reference these previous lessons:

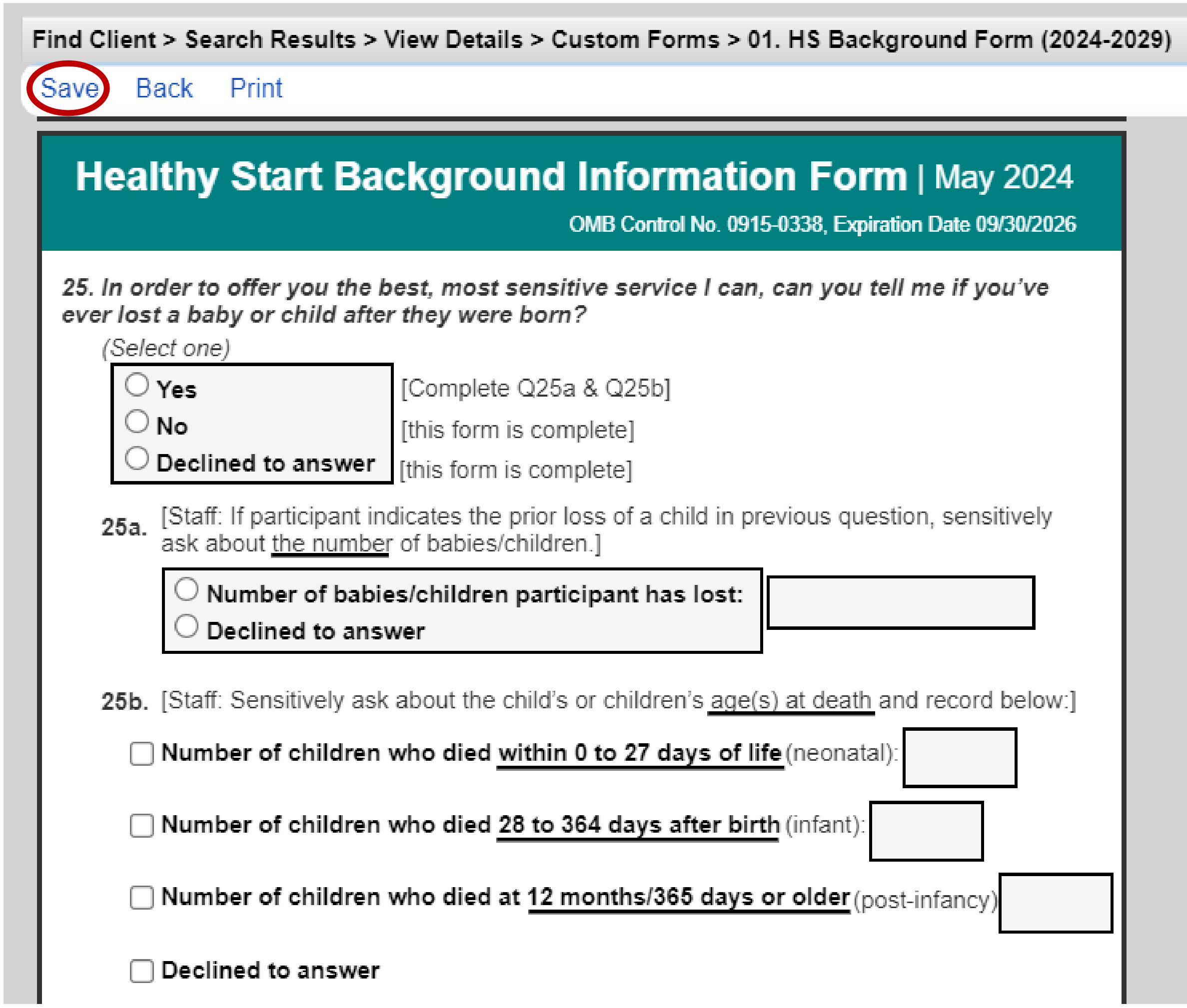
   i. [CW101:1 Adding a New Participant/Client]

   ii. [CW101:4 Setting Relationships of Other Primary Participant(s)]

d. Fill out the rest of the form as indicated.

- You can view general information about the data collection forms, on the TASC website with this link. This includes a recording of the HRSA led data collection forms training.

3. Click "**Save**" once you have finished filling out the fields in the form, it will automatically close.



Find Client > Search Results > View Details > Custom Forms > 01. HS Background Form (2024-2029)

Save Back Print

Healthy Start Background Information Form | May 2024

OMB Control No. 0915-0338, Expiration Date 09/30/2026

25. In order to offer you the best, most sensitive service I can, can you tell me if you've ever lost a baby or child after they were born?

(Select one)

- Yes [Complete Q25a & Q25b]
- No [this form is complete]
- Declined to answer [this form is complete]

25a. [Staff: If participant indicates the prior loss of a child in previous question, sensitively ask about the number of babies/children.]

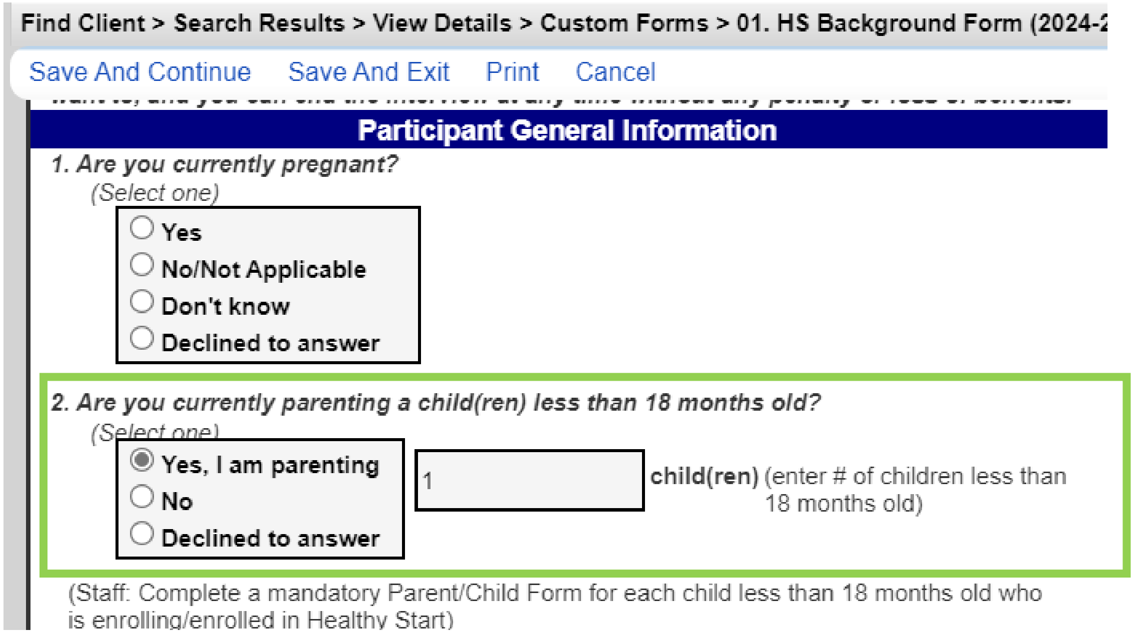
- Number of babies/children participant has lost:
- Declined to answer

25b. [Staff: Sensitively ask about the child's or children's age(s) at death and record below:]

- Number of children who died within 0 to 27 days of life (neonatal):
- Number of children who died 28 to 364 days after birth (infant):
- Number of children who died at 12 months/365 days or older (post-infancy)
- Declined to answer

   a. You can come back into this form later to make updates. To do so, follow the steps found in this lesson: [CW 102:3 Opening Previously Created Custom Forms]

4. **Resetting some question responses:** some question types require fill in text, if you make a correction to this type of question you may need to reset the response. Doing so is simple. This is illustrated with the following example, question number 2 found in the "**Participant General Information**" section of the Background Form. The question is "**Are you currently parenting a child(ren) less than 18 months old?**", see image below.



Find Client > Search Results > View Details > Custom Forms > 01. HS Background Form (2024-2

Save And Continue Save And Exit Print Cancel

Participant General Information

1. Are you currently pregnant?
(Select one)
- Yes
- No/Not Applicable
- Don't know
- Declined to answer

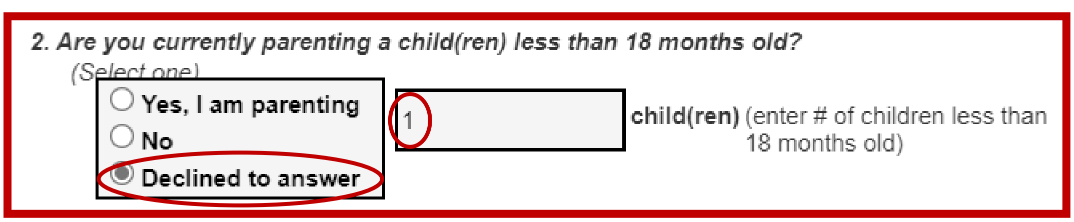
2. Are you currently parenting a child(ren) less than 18 months old?
(Select one)
- Yes, I am parenting
- No
- Declined to answer

1 **child(ren)** (enter # of children less than 18 months old)

(Staff: Complete a mandatory Parent/Child Form for each child less than 18 months old who is enrolling/enrolled in Healthy Start)

This question requires a numerical response IF you select "***Yes, I am parenting***". As you can see in the image above, **"Yes, I am parenting"** is selected and the number **"1"** has been typed for the number of children.

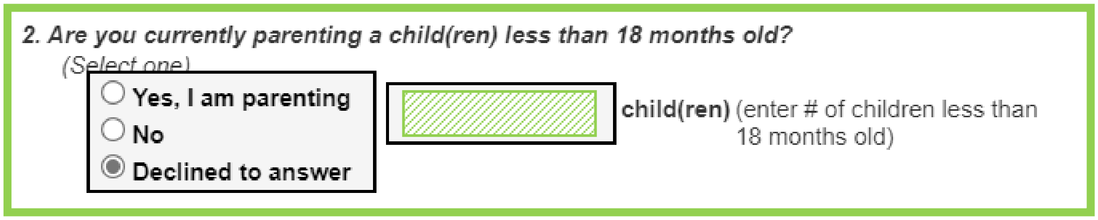
a. However, if this was an error and the answer should be "***No***" or "***Declined to answer***"; you will need to delete the numerical response entered when updating the response. If you do not delete the number, it will remain in the box despite the negative response you have updated to, and this will skew reporting. **Image of mismatch response below**:



2. Are you currently parenting a child(ren) less than 18 months old?
(Select one)
- Yes, I am parenting
- No
- Declined to answer

1 **child(ren)** (enter # of children less than 18 months old)

b. Image of corrected response below:


2. Are you currently parenting a child(ren) less than 18 months old?
(Select one)
- Yes, I am parenting
- No
- Declined to answer

child(ren) (enter # of children less than 18 months old)

- **Any time you see these types of questions in the forms that require an update, please be mindful of when you need to delete the text/numerical response previously entered.**

Now you know how to create and update a client/participant's Background Information Form!

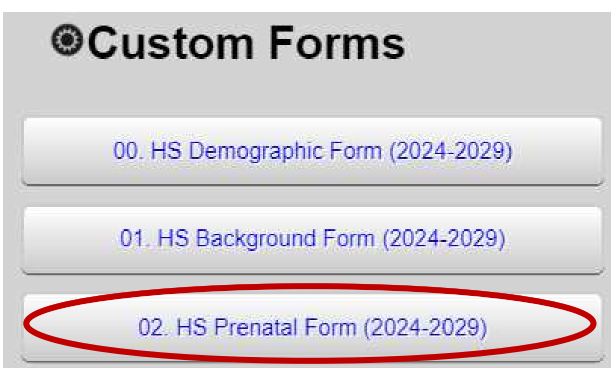
CAREWare User Training 104: Prenatal Form

This section goes over how to complete the required HS Prenatal Form. CAREWare, follow the steps below. In some cases, the steps will refer to previous lessons.

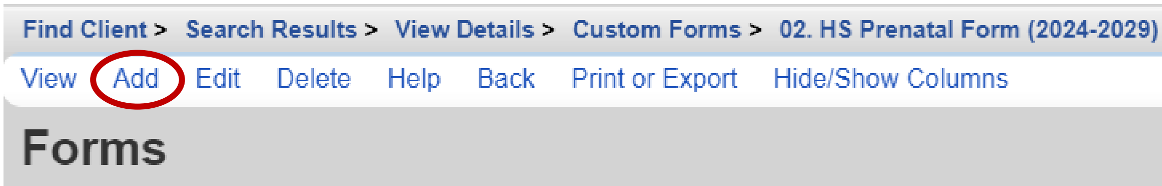
1. First you will either add a new participant or find a participant you've already added. Both were covered in CW Training 101, refer to these lessons using the links below:
    a. CW 101:1 Adding a New Participant/Client
        i. If needed, CW 101:2 Resolving Duplicates
    b. CW 101:3 Find a Participant
2. When applicable you will need to link a child(s) to this form. For instructions on how to add a child to CAREWare and link them to the Primary Participant (PP), refer to the previous lessons linked below:
    a. CW101:5 Add a New Child
    b. CW101:6 Set Relationship of Child with the Primary Participant
3. Next you will navigate to "Custom Forms", for guidance on how to get here, see previous lesson: CW 102:1 Navigating to Custom Forms
4. Now you're ready to add a new Prenatal Form.

CW 104:1 Adding the Prenatal Form

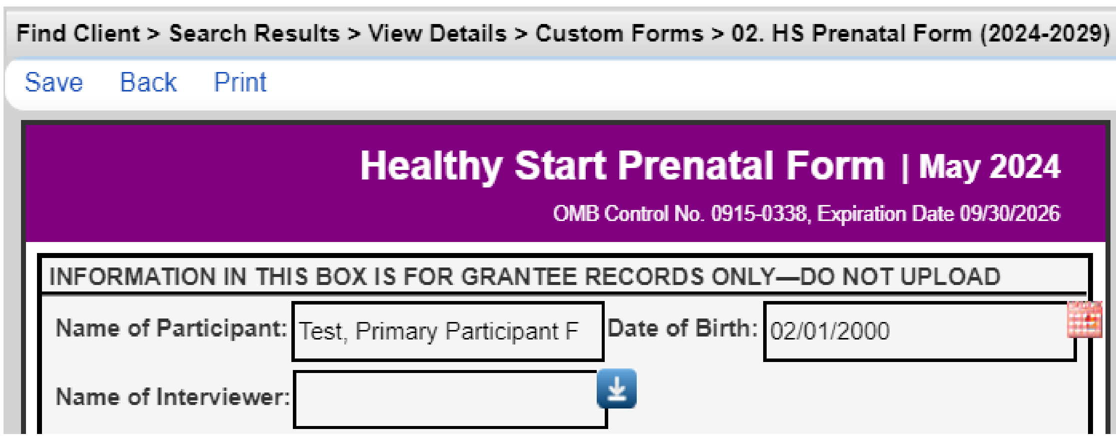
1. Navigate to "**Custom Forms**" and select "**02. HS Prenatal Form (2024-2029)**".



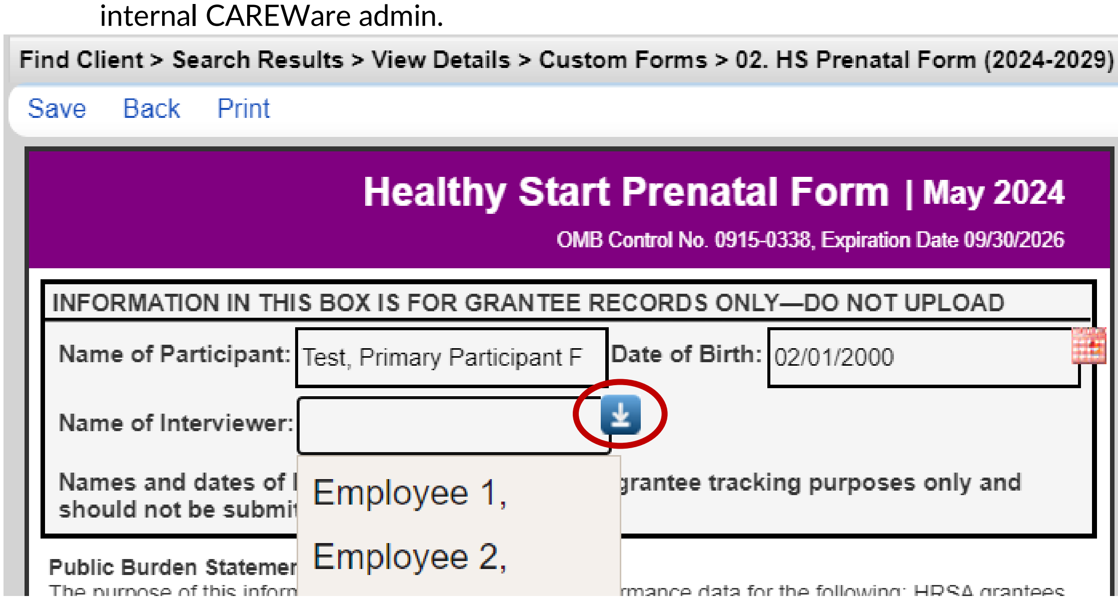
2. Click on "**Add**".



3. The form will load for you to complete.

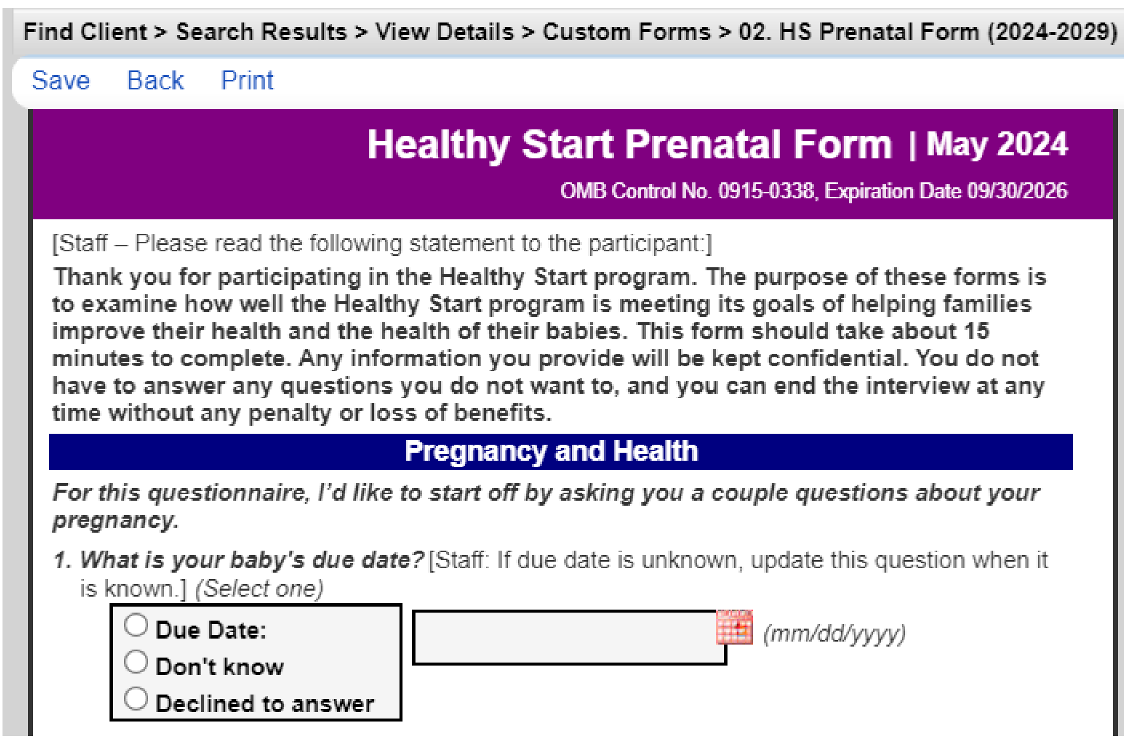


   a. Use the blue arrow to select the interviewer that should be listed on this form.
      i. If a name needs to be added to the interviewer options, contact your internal CAREWare admin.

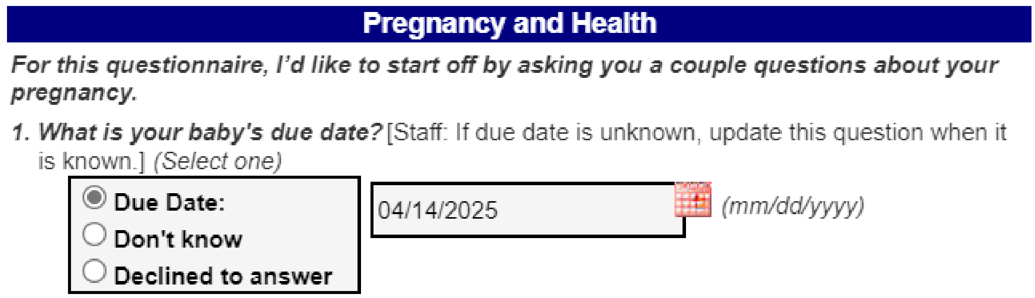


4. Proceed through the form as needed.
   - You can view general information about the data collection forms, **on the TASC website with this link**. This includes a recording of the HRSA led data collection forms training.

5. **Resetting some question responses:** some question types require fill in text, if you make a correction to this type of question you may need to reset the response. Doing so is simple. This is illustrated with the following example, question number 1 found in the "**Pregnancy and Health**" section of the Prenatal Form. The question is "**What is your baby's due date?**", see image below:



   a. This response requires you to select the due date, see image below:



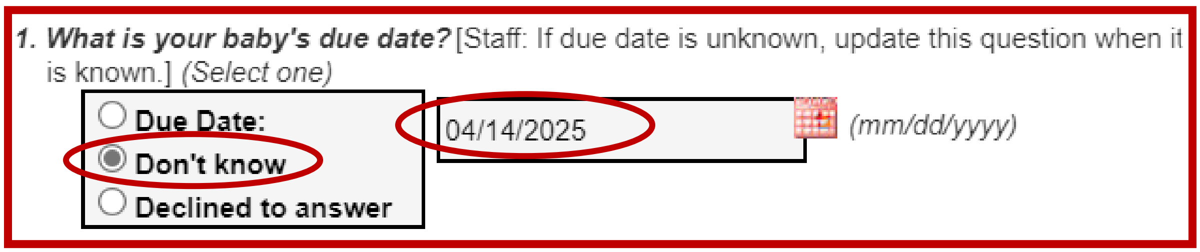
Pregnancy and Health

For this questionnaire, I'd like to start off by asking you a couple questions about your pregnancy.

1. What is your baby's due date? [Staff: If due date is unknown, update this question when it is known.] *(Select one)*

- (•) Due Date: 04/14/2025 *(mm/dd/yyyy)*
- ( ) Don't know
- ( ) Declined to answer

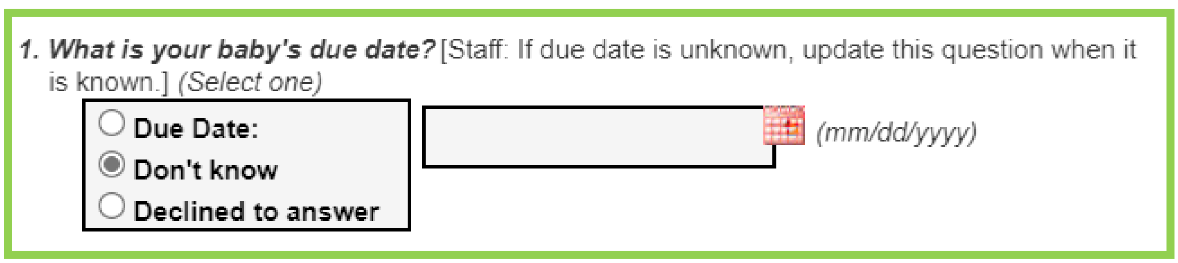
b. If the due date was entered in error and the response is updated to "**Don't know**" or "**Declined to answer**", the date must also be deleted. If the date is not deleted, it will remain in the box despite the updated response, and this will skew reporting. **Image of mismatch response below**:



1. What is your baby's due date? [Staff: If due date is unknown, update this question when it is known.] *(Select one)*

- ( ) Due Date: 04/14/2025 *(mm/dd/yyyy)*
- (•) Don't know
- ( ) Declined to answer

c. **Image of** corrected **response below**:



1. What is your baby's due date? [Staff: If due date is unknown, update this question when it is known.] *(Select one)*

- ( ) Due Date: *(mm/dd/yyyy)*
- (•) Don't know
- ( ) Declined to answer

❖ **Any time you see these types of questions in the forms, that require an update, please be mindful of when you need to delete the text/numerical response previously entered.**

6. Click "**Save**" once you have finished filling out the fields in the form, it will automatically close.

7. You can come back into this form later to make updates. To do so, follow the steps found in this lesson: CW 102:3 Opening Previously Created Custom Forms

Now you know how to create and update a client/participant's Prenatal Form!

CAREWare User Training 105: Parent Child Form

***This section goes over how to complete the required HS Parent Child Form.* CAREWare, follow the steps below. In some cases, the steps will refer to previous lessons.**

1. First you will either add a new participant or find a participant you have already added. Both were covered in CW Training 101, refer to these lessons using the links below:
    a. [CW 101:1 Adding a New Participant/Client]
        i. If needed, [CW 101:2 Resolving Duplicates]
    b. [CW 101:3 Find a Participant]

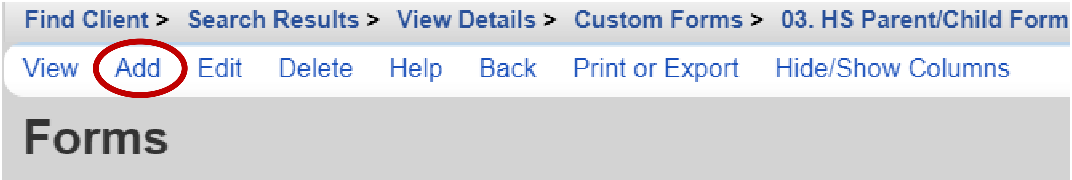
2. When applicable you will need to link a child(s) to this form. For instructions on how to add a child to CAREWare and link them to the Primary Participant (PP), refer to the previous lessons linked below:
    a. [CW101:5 Add a New Child]
    b. [CW101:6 Set Relationship of Child with the Primary Participant]
3. Next you will navigate to "Custom Forms," for guidance on how to get here, see previous lesson: [CW 102:1 Navigating to Custom Forms]

4. Now you are ready to add/edit the Parent Child Form.

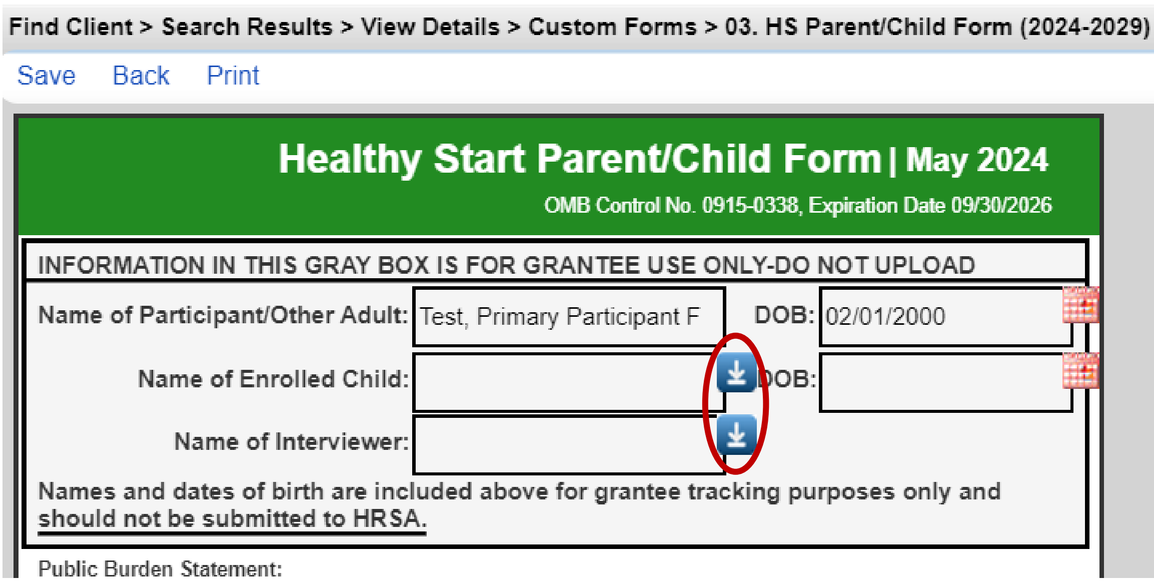
CW105:1 Add a New Parent Child Form

1. Select the "**03. HS Parent/Child Form (2024-2029)**"

2.



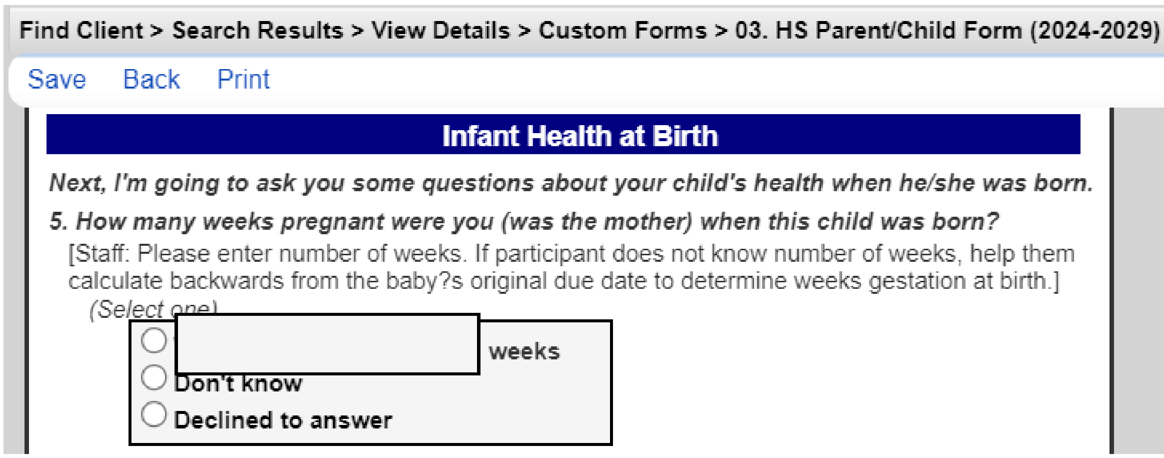
3. The form will load for you to complete.



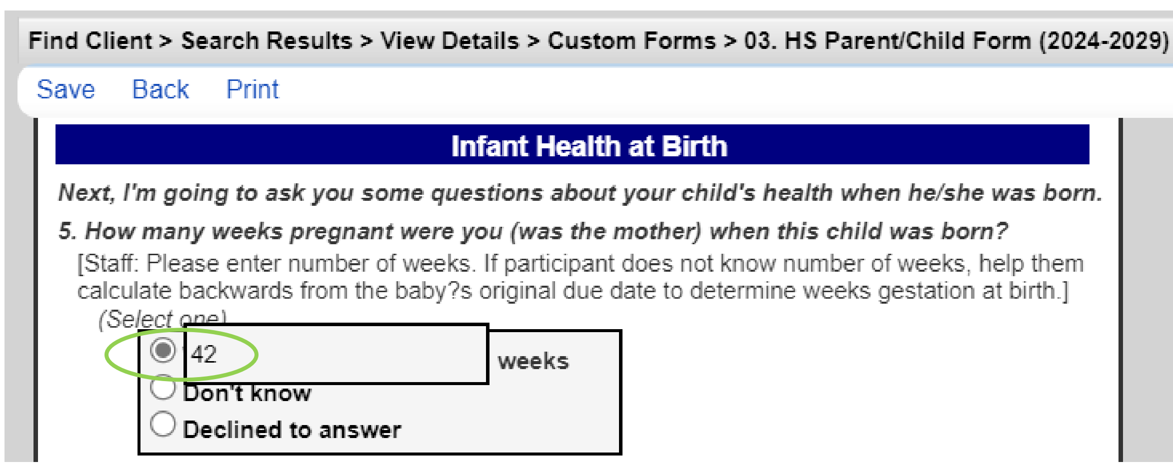
   a. Use the blue arrows to select the interviewer and enrolled child that should be listed on this form.
      i. If a name needs to be added to the interviewer options, contact your internal CAREWare admin.
   b. The "Name of Enrolled Child" dropdown options are specifically the child(ren) that you have linked to the primary participant. How to link a child to a participant is outlined here:
      i. CW101:5 Add a New Child
      ii. CW101:6 Set Relationship of Child with the Primary Participant

4. Proceed through the form as needed.
   ➢ You can view general information about the data collection forms, **on the TASC website with this link**. This includes a recording of the HRSA led data collection forms training.

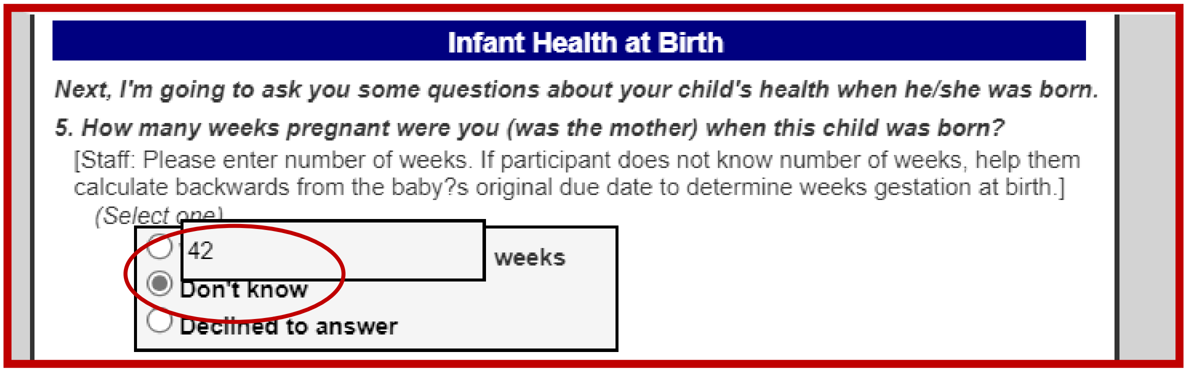
5. **Resetting some question responses:** some question types require fill in text, if you make a correction to this type of question you may need to reset the response. Doing so is simple. This is illustrated with the following example, question number 5 found in the "**Infant Health at Birth**" section of the Background Form. The question is "**How many weeks pregnant were you (was the mother) when this child was born?**", see image below.



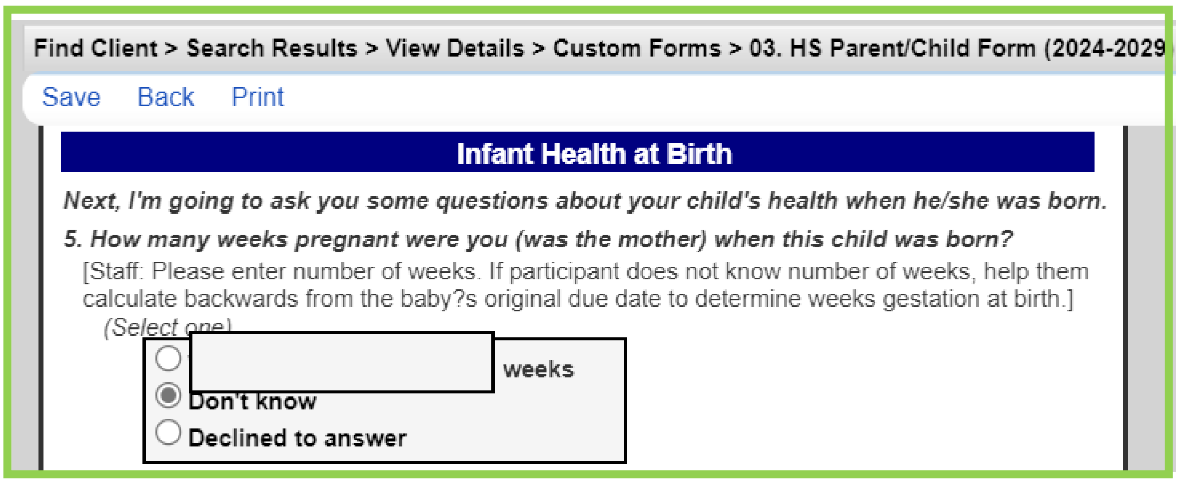
   a. This response requires fill in text to provide how many weeks along the mother was when the child was born. I have entered 42, see image below:



b. If something was entered into the text box in error and the answer will now be "**Don't know**" or "**Declined to answer**", the numerical response must be deleted. If the number is not deleted, it will remain in the box despite the negative response you have updated to, and this will skew reporting. **Image of mismatch response below**:



a. **Image of corrected response below**:



❖ **Any time you see these types of questions in the forms that require an update, please be mindful of when you need to delete the text/numerical response previously entered.**

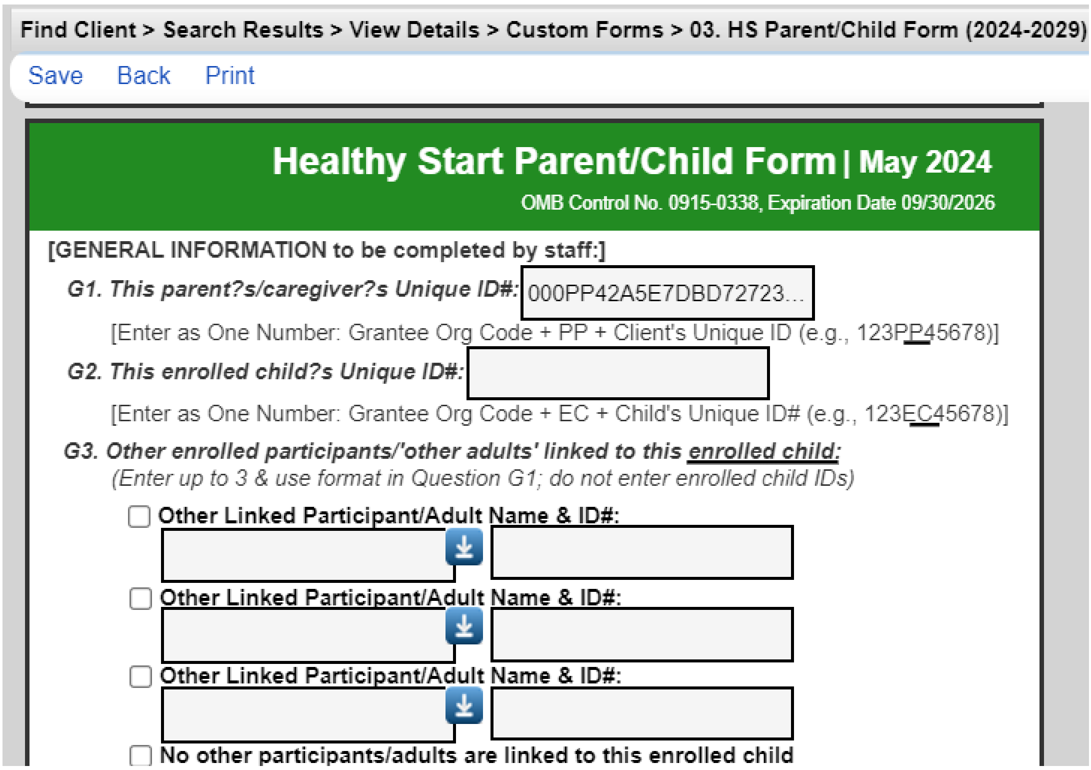
6. Click "**Save**" once you have finished filling out the fields in the form, it will automatically close.

7. You can come back into this form later to make updates. To do so, follow the steps found in this lesson: [CW 102:3 Opening Previously Created Custom Forms]

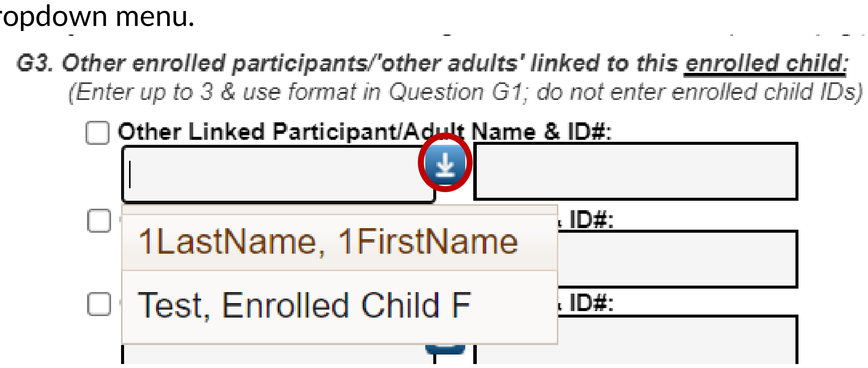
Now you know how to create and update a client/participant's Parent Child Form!

CW105:2 Attach Other Linked Primary Participant in a Parent Child Form

1. When the Parent Child form loads, you will notice that there is space to attach three participants to this form.



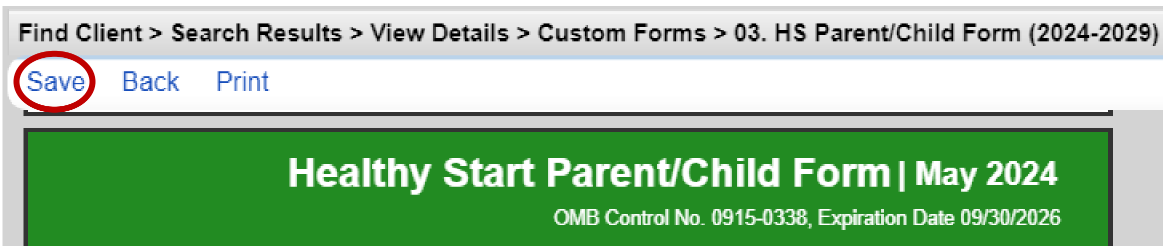
2. Use the blue arrows to select the person you would like to link to this form from the dropdown menu.



   a. You can repeat this process if you need to link additional adults to this form.

b. The options in the dropdown are the other primary participants you have linked with this primary participant. If you need to link additional primary participants, please reference the lessons below:
   i. [CW101:1 Adding a New Participant/Client]
   ii. [CW101:3 Setting Relationships of Other Primary Participant(s)]

3. Once you are done editing the form, be sure to click on "**Save**".



- When you click "**Save**" the form will automatically close.