



# CAREWare for Healthy Start Admin User Guide

## User Management

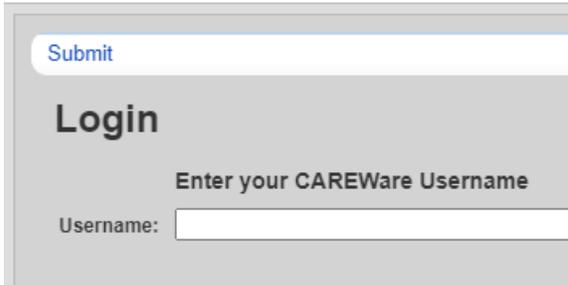
This user guide walks Provider Administrators through how to manage user accounts in CAREWare. If you are unsure whether you are a Provider Administrator for your Healthy Start project's CAREWare data system, please contact your project director or email CAREWare Support at [careware@nichq.org](mailto:careware@nichq.org).

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## A. How to Create a User Account

1. Log into CAREWare at <https://healthystart.iprog.net/careware/rs/index.htm>



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

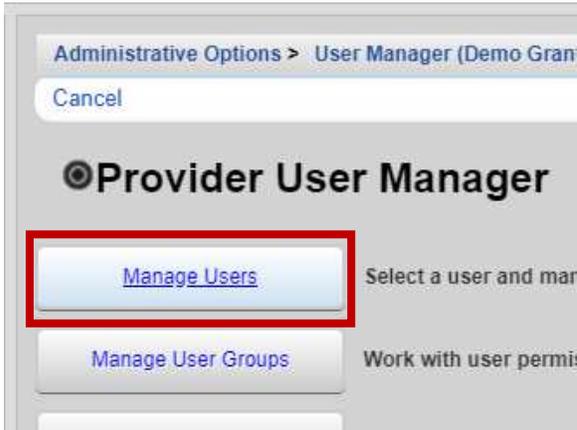


3. Click on **Provider User Manager**



4. Click on **Manage Users**

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

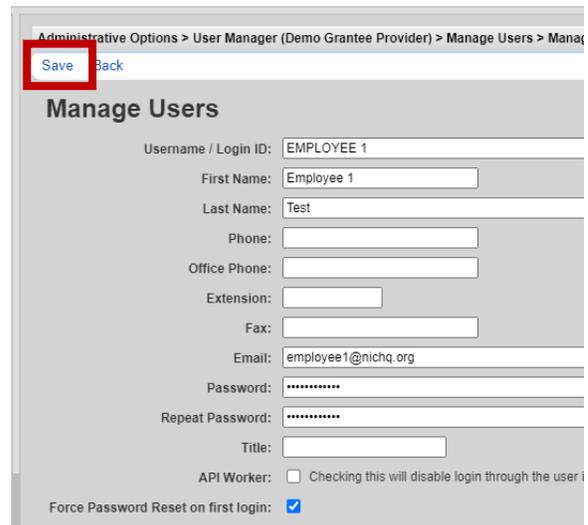


5. Click on **New User**

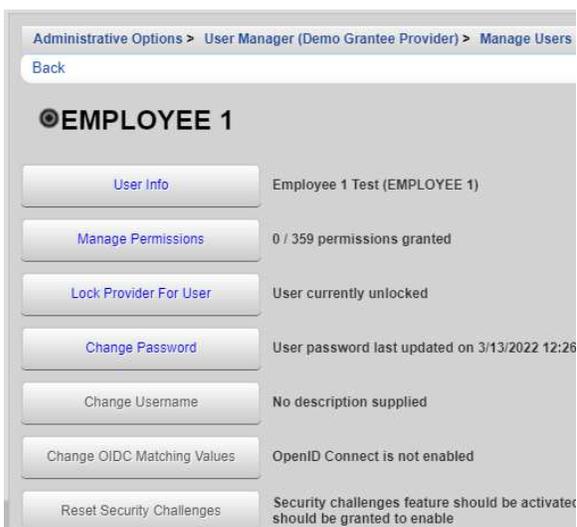


6. Complete the **Manage Users** form

- 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.



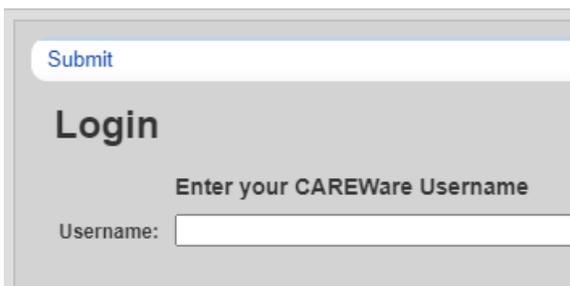
7. Click **Save** and the screen will automatically transition to the settings for the new user account



8. To assign user groups and permissions, follow the instructions in **How to Assign and Manage User Groups and Permissions** of this user guide.

## B. 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

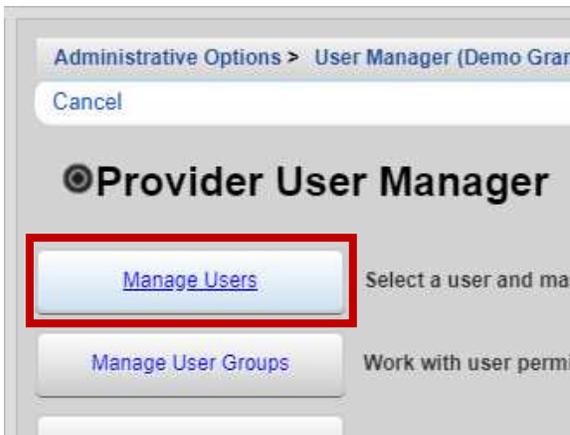


3. Click on **Provider User Manager**

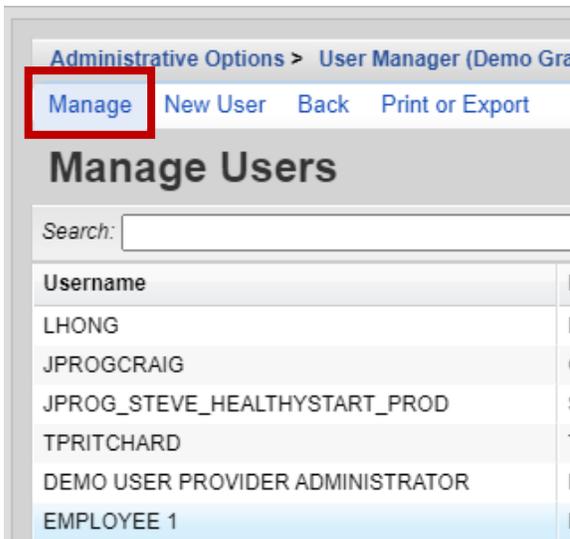


4. Click on **Manage Users**

- 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**.

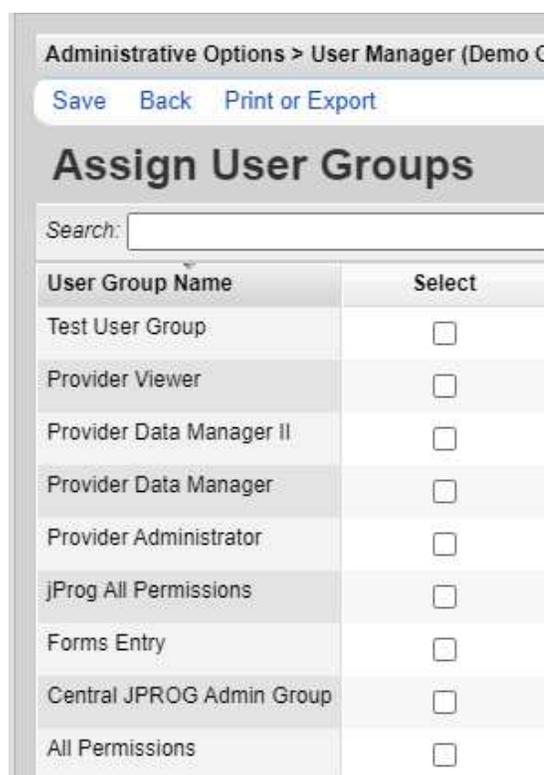


4. Once in the settings of the selected user account, click on **Manage Permissions**



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 suggested applicable staff roles.
  - We add the following groups to all admin users:
    - Provider Administrator
    - Provider Viewer
    - Forms Entry
  - Recommended permissions for non admin users:
    - Provider Viewer
    - Forms Entry
  - Differentiating Provider Administrator & Provider Data Manager
    - **Provider Administrators** are able to run reports in addition to all of the administrative duties.
    - **Provider Data Manager** allows the user to run reports without additional administrator permissions. A useful group of permissions for an evaluator that may need to just run reports.
    - The “**Provider Data Manager**” permission user group only allows the reporting function. This group of permissions does not allow one to view a provider record, “Provider Viewer” is needed for that.

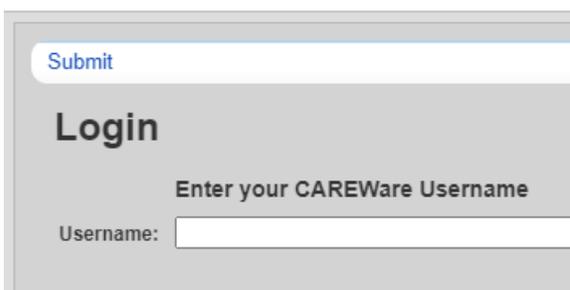


- The following remaining staff roles **should not be used by Healthy Start projects**.
  - Test User Group
  - jProg All Permissions
  - Group uno
  - All Permissions
  - Provider Data Manager II

## C. 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](mailto: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**

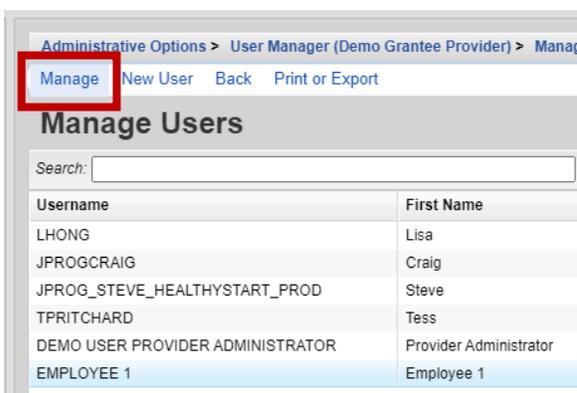


4. Click on **Manage Users**

- 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.

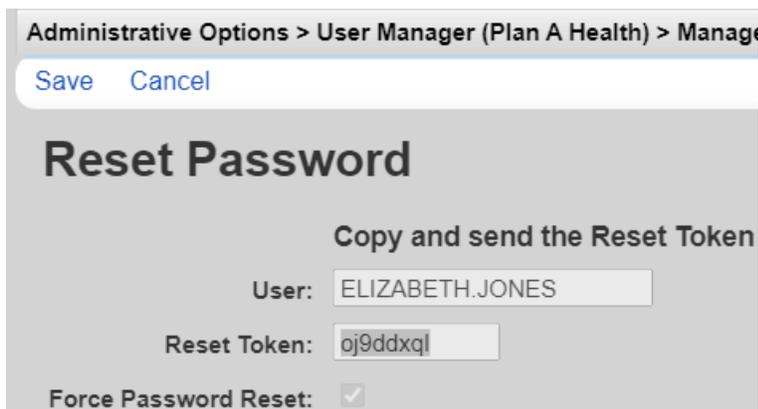
- If the user account is not unlocked, the user will not be able to access their account even if they enter the correct password.
- If the user remembers their password, there is no need to reset the password.
- If the user does not remember their password, follow the instructions below for resetting the password to a user account.



7. Click on **Reset Password**



8. Copy the **Reset Token** and paste it into the message you will send the user. Click **Save BEFORE** sending the reset token to the user.
- *If you forget to click **Save** the password will not reset.*



9. Send the user the temporary password **reset token**.

## D. How to Change a Username

Please email [careware@nichq.org](mailto: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.

## E. How to Deactivate a User Account

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

1. Simply follow the above steps to reset the users password, but do **not** send them the reset token. This will prevent them from logging into CAREWare.
2. Email [careware@nichq.org](mailto:careware@nichq.org) to request the user account be deactivated. Make sure to provide the user's username and email address for verification purposes.

## F. How to Reactivate a Retired or Deactivated User Account

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

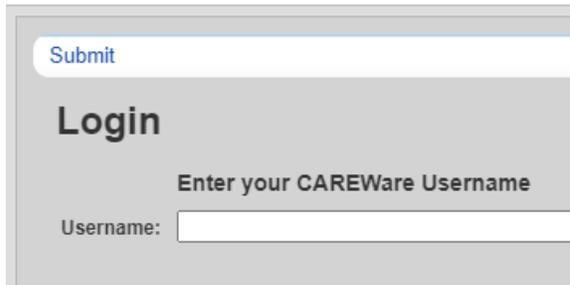
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The following section is only relevant if you have separate employees doing data entries, then those providing services.

## G. 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>

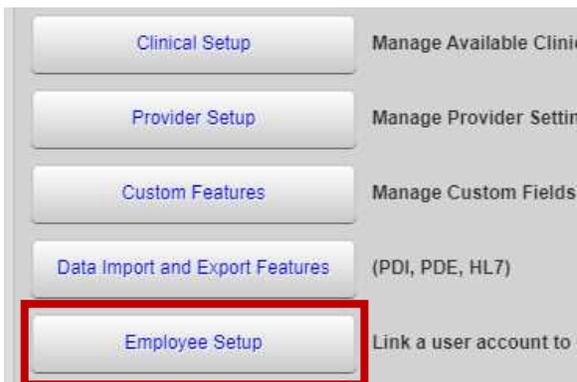


2. Click on **Administrative Options** in the left navigation menu

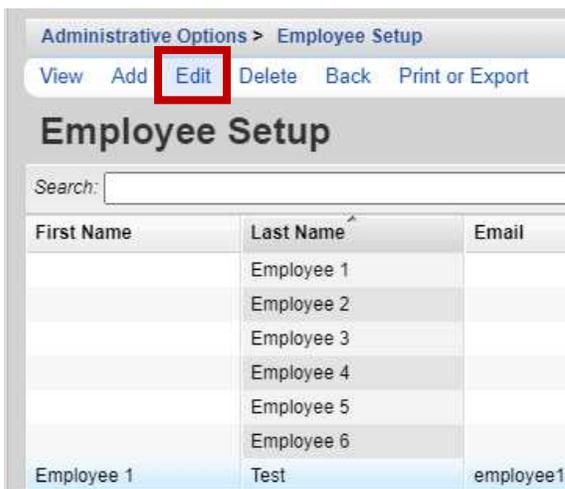


3. Click on **Employee Setup**

- Only Provider Administrators will see **Employee Setup** under Administrative Options.



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.

