Quick Start Guide #1
Navigating CAREWare Version 6.0

CAREWare Quick Start Guides will walk you through the basics of setting up, managing, and using the main CAREWare functions. It is intended for non-technical users who need to get basic information in and out of CAREWare.

PLEASE NOTE: The client data used in these manuals is purely fictional.
Logging in to CAREWare

1. Open your browser and enter the secure webpage address to connect to your CAREWare system (contact your CAREWare administrator if not known). Enter your CAREWare username and click **Submit**.

2. Enter your CAREWare password, click **Submit**.
3. If you have administrative privileges, you may see a list of several domains. If choosing between Central Administration ("Read-only") and Provider ("Default" until you change the name), log into a Provider domain.

Select a Provider domain, click **Submit** or double-click on **Domain** name.
Getting Started

CAREWare Version 6.0 is a design change that performs more like a web application than previous versions of CAREWare. After logging into CAREWare, a Menu of Links will be displayed on the left.

Links will list common user tasks in CAREWare. Upon selecting a particular link, the Link Summary description will be displayed on the right.

Similar formats, link menus, and descriptions are the same throughout CAREWare Version 6.0!

Menu of Links

Upon logging in to CAREWare, you will find a Menu of Links on the left-hand side of the screen. Simply click on the item you wish to access. Clicking Add Client or Find Client will open a new tab within your browser.
Link Summary

A Link Summary is displayed to the right of each link item. In the example below, once Reports is selected from the Menu of Links, a new screen appears with additional link items. To the right of each is a Link Summary.
**Breadcrumbs and Link Actions**

**Breadcrumbs** or **breadcrumb trails** allow users to keep track and maintain awareness of their locations within CAREWare 6.

In this example: **Find Client > Search Results > Demographics** is considered the **Breadcrumb trail**.

If the items in the Breadcrumb trail are blue (as in the example above), click on the item link to return to that section. If they are black, you must either click **Save** or **Cancel** to return to the previous section, as seen below.
Link Actions are displayed below the Breadcrumb trail and are actions that can be taken on each screen.

**Custom Reports**

**TIP:** Using the Help option within the Link Actions will open a new tab within your browser with more information on the section you are currently in.
Menu Customization

With adequate permissions, the user can personalize and customize the Menu of Links.

1. From the Menu of Links, select Customize. Then, click Personal Menu Settings.
2. Show or hide items in the CAREWare Menu of Links by checking or un-checking the box next to the relevant Menu Item. Once complete, click Save.

3. Click on the down arrow at the top of any column to Hide/Show Columns.

4. Click-and-drag the column header to reposition it within the table.
Menu Navigation

1. From the **Menu of Links**, select **Reports** and the CAREWare Reports screen will appear. For this example, click **Financial Report**.
   - Enter **Begin Date**
   - Enter **End Date**
   - Click **Run** to open the report in a new tab. Click **PDF** to open the report as a PDF.

   **TIP:** You may also filter the report by selecting either **Funding Source Filter** or **Edit Filter**.
3. Once you click Run, a report confirmation message will open in the upper right corner of the screen. Select View Financial Report. Your report will be displayed in a new tab.

4. Some screens will have editable fields:
   - Fields with a Magnifying-Glass icon indicate longer lists which are searchable.
   - Fields with a Down-Arrow icon will display the complete list for ten (10) or fewer choices.