

# CAREWare Account Request Form Instructional Guide

The first step in getting a CAREWare Account Request Form (CARF) completed is calling the Help Desk at 850-922-7599. (“NEW” accounts need to be requested by the agency’s CAREWare Provider Administrator. If this person is not available, a Supervisor from the agency who is an existing CAREWare user needs to call in the Help Desk ticket.) Tell the Help Desk operator that you want to fill out a CAREWare Account Request Form. The operator will create a ticket for your request. Make sure you tell the operator to assign the ticket to the CAREWare Team. A CAREWare Team member will attach a CARF to the ticket which you will then receive via email. Print off the completed document and have both the applicant and the applicant’s supervisor sign and date the form. Open the email you received from the Help Desk and hit reply all. Add the following sentence to the email, “I have attached the CARF.” Attach the scanned signed form to the email reply and hit send.

## Fields

**DOH Help Desk Ticket Number** – Enter the Help Desk ticket number assigned to this request.

**New User** – Check this box for staff who do not have a current CAREWare user id.

**Network ID** - For County Health Department/Department of Health staff, please include the applicant’s current Network ID. This is the id the staff member uses to log into their computer.

**Close Account** – To remove access to an agency.

**Access Additional Domains** – To grant access to additional agencies for an existing CAREWare user.

**Adjust User Access Level/Groups** – To change the User Access Level or add additional User Groups to the user’s profile. A person can only belong to one User Access Level per agency.

**Other**- If the action you are requesting does not fall under one of the other CARF request items (such as New User, Close Account, Access Additional Domains, or Adjust User Access Level/Groups) then place a check mark in this box. Make sure to add a description to the Comments Box in the middle of the form detailing what you need done.

Only the CAREWare User ID and Agency Name need to be filled out for **Close Account**, **Access Additional Domains**, **Adjust User Access Level/User Groups** and **Other** actions. The following fields may remain blank: Agency Address, Agency City, Agency Zip, First Name, Last Name, Middle Initial, Job Title, Work Phone Number, Extension and Email Address.

**First Name** – First name of applicant.

**Last Name** – Last name of applicant.

**Middle Initial** –Middle initial of applicant. This is very important as the DOH I.T. Team use this to create the Network Account for the user.

**Job Title** – Job title of applicant.

**Work Phone Number** – Work phone number of applicant. Include area code.

**Extension** – Work phone number extension of applicant.

**Email address** – Work email address of applicant.

**Agency Name** – Name of CAREWare agency user needs to be added to, closed out from, have user level adjusted at, etc.

**Agency Address** – Address of agency.

**Agency City** - City where agency is located.

**Agency Zip** – Zip code of agency.

**User Access Level** – Identify the level of access the applicant should be given for each corresponding agency. Select one group. (Below descriptions are not complete descriptions of the group rights, they are short synopses to give a quick breakdown between the different groups.

**Basic User** – This is the standard group most users are added to. The core functions these users can perform are add/edit/delete data and run reports.

**View Only** – This user can view data but cannot add/edit/delete it.

**Provider Administrator** – Users in this group have all the rights of the Basic User with some additional rights. These include the ability to run client merges, unlock/lock users and edit value lists. Additionally, we contact the Provider Administrator of an agency to have them approve adding/removing/adjusting the rights of users within their agency. If you do not want a person to have the ability to approve or request new users, close out accounts, etc., do not grant them the Provider Administrator User level. Each agency should have a maximum number of two Provider Administrators.

**Reporting Unit** – This group is for the HIV/AIDS Patient CARE Resources Program, Reporting Unit staff.

**Community Programs Unit** – This group is for the HIV/AIDS Patient CARE Resources Program, Community Programs Unit staff.

**Help Desk** – This group is for the Tallahassee DOH Help Desk staff.

**Additional User Groups** – Placing check marks in these boxes will add rights to the user's current profile. Only those groups marked on the current form will be applied to the applicant. If a user previously was a member of the PDI User group and a new CARF was completed with only Edit Values checked under Additional User Groups, then the user would be removed from the PDI User group. If the applicant should still remain a member of the PDI User group, make sure to check that box on the current CARF.

Be aware users who are Provider Administrators already are members of the following groups: Contract Set Up, Delete Merge Client, Edit Values and User Administration.

**Contract Set Up** – Allows user to add/edit/delete contract information

**Delete Merge Client** – Allows user to run the merge client operation as well as delete clients.

**Edit Values** – Allows user to adjust data within custom fields, such as a local case manager field. A person in this group can add new or remove inactive case managers in the case manager field.

**Mapping Group** – User in this group can map values for data imports.

**PDI User** – Allows user to run the Provider Data Import for their agency.

**Sharing Approver** – Allows user to approve sharing requests from other agencies.

**Sharing Requestor** – Allows user to make client sharing requests from other agencies.

**User Administration** – Allows user to unlock/lock users and change users' passwords.

**Agency CAREWare Provider Administrator (Print Name, Signature, User ID)** – Forms will not be approved without the signature of a person in authority. Having Provider Administrators sign off on CARFs is our preferred method of approval. However, in certain circumstances we may allow other individuals to approve CARFs. HIV/AIDS Program Coordinators, Agency Executive Directors or the CAREWare System Administrator are some examples of other staff who on occasion may be approved to sign off on CARFs. Provider Administrators can only approve CARFs for their agency. For example, the Duval CHD Provider Administrator cannot approve adding a new user to the Palm Beach CHD agency.

**Comments box** – When “Other” is selected as the request item, please detail what action you need completed for the user.

**General Notes:**

If an applicant is requesting access to multiple agencies, a separate CARF must be completed for each individual agency. The exception is when the same person is the CAREWare Provider Administrator at each additional agency. For example, if Barney Ruble is an applicant requesting access to 5 domains and Fred Flintstone is the CAREWare Provider Administrator at all 5 domains then one form may be completed. The primary agency Barney Ruble belongs to will be inputted in the Agency Name field. The additional agencies will be added to the comments box. The User Access Level and Additional Groups marked on the CARF will be applied to all of the agencies. Fred Flintstone has the authority to sign this document as he is a CAREWare Provider Administrator at each location. However, if Barney Ruble is requesting access to 5 domains with different User Level Access or different Additional User Groups at each site then a separate form needs to be completed.