Activating a Form

Grant access to a form and enter client data through it.

Purpose	Make a form available to providers, users, or groups so it can be accessed in client records.
Who should do this	CAREWare administrators, form owners, and designated power users.
Use this guide when you need to	Assign access to a form or enter data through an active form.
Main warning	Making a form provider-wide grants access to all providers. Use it only when intended.

Quick path
Administrative Options > Custom Features > Form Designs > select form > Edit > Provider Assignment, User Assignment, or Group Assignment.

Before you begin

- The form has been created and saved.
- Confirm whether access should be provider-wide, user-specific, group-based, or universal.
- Activate the form for at least one provider before assigning individual users.

Activate the form for a provider

Provider assignment grants access to all users in that provider.

Step 1. Select the form.

Step 2. Click Edit.

Step 3. Click Provider Assignment.

Step 4. Check the provider.

Step 5. Click Save.

Activate the form for a user or group

Use user or group assignment when access should be narrower than the provider.

Step 1. Click User Assignment or Group Assignment.

Step 2. Check the user or group.

Step 3. Click Save.

Form Assignment Buttons

Use these buttons when activating a custom form.

Provider Assignment

Item	What it does	When to use it
Save	Saves assignment for the selected provider domain(s) and returns to form designer.	Use when all applicable providers domains are selected.
Make Provider-Wide	Sets the custom form as available in all provider domains.	Use when the form should be available in all provider domains.
Make Not Provider-Wide	Sets the custom form as not available in all provider domains.	Use when the form should not be available in any provider domains.
Back	Closes the provider assignment and returns to the form designer.	Use when all changes are made for provider assignment.
Print or Export	Prints or exports the list of provider domains.	Use when a printed or exported list of all provider domains is needed.

User and Group Assignment

Item	What it does	When to use it
Save	Saves assignment for the selected user(s) or group(s) and returns to form designer.	Use when all applicable providers domains are selected.
Back	Closes the user or group assignment and returns to the form designer.	Use when all changes are made for user or group assignment..
Print or Export	Prints or exports the list of users or user groups domains.	Use when a printed or exported list of all users or user groups is needed.

How to confirm it worked

1. The form button appears from the client Custom Forms area.

2. Users with access can add a new form record.

3. Saved data appears in the expected client record area when linked fields are used.

Troubleshooting and common questions

Why do users not appear under User Assignment?

Users are available only after the form is activated for at least one provider.

How can I confirm that the activation worked?

Log into a provider domain where the form is activated. Open a client record and click Custom Forms in the left menu. The form should appear in the list of available forms.

What if the form is not listed under Custom Forms in the client record?

First, verify that the form is assigned to the provider. Next, verify that the user account and/or user groups assigned to the user are assigned in Form Designer.

Related HappyFox references

Document	Use it for
Form Designer	Overview, planning guidance, key terms, and permissions.
Custom Forms Menu Options	Configure how custom forms appear from the client record menu.