

Form Designer Overview

Purpose	Understand what Form Designer does and what to plan before building a form.
Who should do this	CAREWare administrators, data managers, and form designers.
Use Form Designer when you need to	Create a data entry form that combines fields from multiple areas of CAREWare.
Main warning	Plan data sources, edit access, provider access, and layout before creating the form.

Quick path

Administrative Options > Custom Features > Form Designs.

Before you begin

- Decide which clinical or program data elements belong on the form.
- Confirm where each data element is stored in CAREWare and whether it should be editable or view-only.
- Confirm which [providers](#), [users](#), or [groups](#) should have access.
- Plan the layout, labels, field lengths, and any abbreviations before building the form.

Important

Fields placed on a form can affect the client record. Confirm the data source and edit behavior before users begin data entry.

Terms to know

Use these terms when planning and building forms.

Term	Meaning
Page	The main document area where the form is created.
Form	The workspace where fields and labels are placed. A form can have multiple pages.
Record	A group of related fields that must be placed together, such as service fields inside a service container.
Field	A CAREWare data field, such as age, risk factor, service date, or phone number.
Label	Text used to identify fields or reproduce paper-form wording.
Properties	Formatting options for labels and fields, such as font or color.

Plan the form

Complete the planning steps before creating or changing a form.

Step 1. List the data elements and where they currently appear in CAREWare.

Step 2. Mark each field as editable or view-only.

Step 3. Identify any record groups or containers, such as [services](#) or [case notes](#).

Step 4. Decide which [providers](#), [users](#), and [groups](#) should have access.

Step 5. Sketch the layout and confirm there is enough space for labels and values.

Step 6. Use the [Creating a Form guide](#) to build the form.

How to confirm it worked

1. The form plan lists all data elements, data sources, and access needs.
2. You know which controls require containers before adding them.
3. The form designer or administrator can explain who can view or edit the form.

Troubleshooting and common questions

Why are some controls unavailable?

Some controls only appear after the correct page or container is selected. For example, [service](#) controls are only available inside the [service](#) container.

What permissions are needed?

Users who create or edit forms need Form Design permissions.

Related References

Document	Use it for
Custom Forms Menu Options	Menu options in Form Designer.
Form Designer Creating a Form	Creating a form.
Form Designer Activating a Form	Making a form available in provider domains and for users and user groups.
Form Designer Setting Up Controls	Setting controls for fields in custom forms.
Services	Add services to a client record.
Case Notes	Add case notes to a client record.
Manage Providers	Manage providers (domains).
Manage Users	Manage user accounts and permissions.
Manage User Groups	Manage user groups for standardized permission settings.