

Creating a Form in Form Designer

Purpose	Create a new Form Designer form and add controls.
Who should do this	CAREWare administrators and users with Form Design permissions.
Use this guide when you need to	Build a new form or add a service container and service controls.
Main warning	Do the planning first. Form layout and data source choices affect data entry and client records.

Quick path

Administrative Options > Custom Features > Form Designs > Add > select Page Size > Continue.

Before you begin

- Complete the form plan, including data elements, edit/view access, and provider or user access.
- Confirm you are working in the provider that owns the form or in Central Administration.
- Know which controls require containers before they can be added.

Create the form shell

- Use these steps to start a new form.
- Step 1.** Click Administrative Options.
 - Step 2.** Click Custom Features.
 - Step 3.** Click Form Designs.
 - Step 4.** Click Add.
 - Step 5.** Select a Page Size.
 - Step 6.** Click Continue.

Custom Forms list buttons

Use this table when working from the Custom Forms list.

Item	What it does	When to use it
Edit	Opens the selected form for editing.	Use when changing a design.
Add	Starts a new form.	Use when creating a new form.
Delete	Deletes the selected form.	Use only when the form should be removed from Form Designer.
Enable/Disable Imports	Enable or disable imports for the selected form.	Use when imports need to be enabled or disabled.
Back	Returns to Custom Feature Setup.	Use to leave the list.
Print or Export	Prints or exports the custom forms list.	Use for review or documentation.

Add a service container example

A [service](#) container must be selected before [service](#) controls become available.

Step 1. Click the page to highlight it.

Step 2. Click Add Control.

Step 3. Type [Service](#) in the Search field.

Step 4. Click Longitudinal Container (Service).

Step 5. Select the Longitudinal Container Definition.

Step 6. Click Add, then drag the container to the desired location.

Step 7. With the container still selected, click Add Control.

Step 8. Add Service Date, Service Contract, Service Units, Service Price, and Service Total.

Step 9. Click Save.

How to confirm it worked

1. The form appears in the Custom Forms list.
2. The form opens in Form Designer.
3. Added controls appear where expected and the form saves without error.

Troubleshooting and common questions

Why do service controls not appear in Add Control?

Select the [service](#) container first. [Service](#) controls are available only while the [service](#) container is selected.

How do I add a text label to a form?

Select the container. Click Add Control. Search for Label, highlight the label row, and click Add.

Related References

Document	Use it for
Form Designer	Overview, planning guidance, key terms, and permissions.
Form Designer Adding Encounter Grids	Add an encounter grid to the form.
Services	Add services to a client record.