

Group Rapid Entry

Purpose	Enter the same service for several clients at one time.
Who should do this	CAREWare users who enter client services.
Use this guide when you need to	Use a custom report to select clients and add one service to the group.
Main warning	Review every client and service entry before you click Add Records.

Quick path
Rapid Entry > Group Rapid Entry > Edit > Select Clients > Next > Continue > Add Records

Before you begin

Create a custom report that lists the clients you want to update. Include any service fields you plan to copy from the report.

Enter the group service details

- Step 1.** Open Rapid Entry, and then select Group Rapid Entry.
- Step 2.** Select Edit and choose the custom report.
- Step 3.** Enter the As Of Date, choose whether to use today’s date, and select the subservice.

SaveCancel

Group Rapid Entry

Selected Report *:Has STI Test

As Of Date:05/01/2026

Do Not Supply Date:

Subservice *:Office Visit Short

Selected Clients:4 client(s) selected

Button	What it does
Selected Report	The custom report used to create the client list.
As Of Date	The Through Date used when the custom report runs.
Do Not Supply Date	Uses today’s date when selected.
Subservice	The service that will be added to the new records.

JPROG

2026-07-30

1

Step 4. Use Select Clients to run the custom report.

EditSelect ClientsNextBack

Group Rapid Entry

Selected Report *:Has STI Test

As Of Date:05/01/2026

Do Not Supply Date:☐

Subservice *:Office Visit Short

Selected Clients:4 client(s) selected

Step 5. Check each client who should receive the service. Checked clients appear in the Selected Clients list. Select Save Selected Clients.

Save Selected ClientsBackPrint or ExportColumn visibility▼Copy

Select Clients

Search:

«<12>»

Go to page1▼100▼

Selected	Name	Has Specific STI Test In Period
☒	Carter, Elise RSR25	Not Medically Indicated
☒	Davidson, Theodore	No
☒	Stearns, Jaron	No
☒	Porter, Camila RSR25	No

Step 6. Select Next to begin entering the service information.

EditSelect ClientsNextBack

Group Rapid Entry

Selected Report *:Has STI Test

As Of Date:05/01/2026

Do Not Supply Date:☐

Subservice *:Office Visit Short

Selected Clients:4 client(s) selected

JPROG2026-07-302

Step 7. For each field, choose Get From Report or Direct Entry.

SaveCancel

Service Data Setup

Get Date From Report:

☐

Date:05/04/2026

Get Contract From Report:

☐

Contract:Main Contract

Get Units From Report:

☐

Units:1

Get Price From Report:

☐

Price:0

Get Type of Rapid HIV Test From Report:

☐

Type of Rapid HIV Test:

Get HIV Test Result From Report:

☐

HIV Test Result:

Get Adherence to Cotrimoxazole From Report:

☐

TIP

Get From Report copies a value from a field included in the custom report. Direct Entry applies the value you enter to every selected client. Get From Report only works for fields included in the report. For example, if Service Comment is in the report, CAREWare can copy those comments into the new service records.

Step 8. Select Continue to review the client and service list.

Step 9. Review the list. If the Error column shows a problem, correct it before adding the record.

Step 10. Select Add Records to add the service to each client.

Add RecordsBackPrint or ExportColumn visibility

Verify Add Service

earch: <div><<<1>>>></div>

Error	Name	Date
	Carter, Elise RSR25	05/04/2026
	Davidson, Theodore	05/04/2026

How to confirm it worked

- The records are added without an error message.
- The new service appears in each selected client’s record.

Troubleshooting and common questions

Why can't I copy a field from the report?

The field must be included in the custom report before you can use Get From Report.

What should I do if the Error column has a message?

Review the message and correct the service data before selecting Add Records.

Related References

Document	Use it for
Creating Custom Reports	Creating custom reports used for Group Rapid Entry.