

Delete Data by Date

Purpose	Permanently delete selected types of records in a provider domain for a set date range.
Who should do this	CAREWare administrators, IT staff, or database administrators who understand mass deletion.
Use this guide when you need to	Remove records by date or remove older historical data from the working database.
Main warning	Deletion is permanent. Back up the database before using this feature.

Quick path

Central Administration > Administrative Options > Data Import and Export Features > Delete Data by Date

WARNING: This feature deletes many records at once. Deletion is permanent. We recommend [backing up the CAREWare database](#) before you begin.

WARNING: Delete Data by Date deletes records that are added via import, as well as records that are added via manual data entry. This feature does not limit deletion to one import.

WARNING: Preview Records shows counts by record type. It does not list the individual records or clients that will be deleted.

WARNING: Only administrators who understand this process and can determine when mass deletion is needed should use this feature.

When to use this feature

Delete Data by Date is an alternative to Undo Import or using the _delete column in CSV import files. Use it when deletion needs to be based on record types and dates. Review the scope carefully before choosing this method.

A provider with limited server space may want to use the feature to reduce the size of the database by removing older historical data for clients who have not received services in years.

Make a [backup of the database](#) before using this feature.

Before you begin

[Back up the database](#) before deleting any records. Confirm that the backup completed and that your IT staff or database administrator can use it if recovery is needed. See [Managing CAREWare Data](#) in Related References for backup instructions.

Decide which provider domain, record types, and date range to use. Check that the data can be removed under your organization's record retention and reporting requirements. Deleted records will no longer be available in the working database for reports or review.

Understand the date range

With the exception of client deleting, CAREWare checks the date of the record, such as the service date, lab date, or assessment date. It does not use the date the record was entered or created in CAREWare.

Both the Begin Date and End Date are included. For example, a range from January 1 through January 31 includes records dated January 1 and January 31, as well as dates between them.

The date range is based on the Business Tier server's date and time. Business Tier Server Time is shown so you can compare it with your local time. The two may differ when your CAREWare server is in another time zone.

IMPORTANT: An old date range selects old records. It does not select clients based on when they last received services. Older records for clients who still receive services may also be deleted.

Record types and dates used for deletion

Use this table to check what each option includes. Select only the types of records you intend to delete. The same date range applies to the selected types.

Delete Data by Date option	Location in client records	Date used
ADAP Enrollment History	ADAP Domain only. Demographics > ADAP Enrollment History	Date of Enrollment History status record
Appointments	Appointments (left menu)	Appointment date
HIV Primary Care Screenings	Annual Review > Annual Screenings > HIV Primary Care Screening	Date of screening
HIV Risk Reduction Counseling Screenings	Annual Review > Annual Screenings > HIV Risk Reduction Counseling	Date of screening
Housing Arrangement Screenings	Annual Review > Annual Screenings > Housing Arrangement	Date of screening
Insurance Assessments	Annual Review > Insurance Assessments	Date of assessment
Mental Health Screenings	Annual Review > Annual Screenings > Mental Health	Date of screening
Poverty Levels	Annual Review > Poverty Level Assessments	Date of assessment
Substance Abuse Screenings	Annual Review > Annual Screenings > Substance Abuse	Date of screening
Case Notes	Case Notes > Case Note Entry	Date of case note
Counseling Testing	Counseling and Testing	Test Date (not the pre-test or post-test date)
Custom Subforms (individual subforms are selected)	Subform name in left menu	Subform date
Diagnoses	Diagnoses > All Diagnoses	Date of diagnosis
Drug Payments	Drug Payment	Date of drug payment
Immunizations	Immunizations	Date of immunization
Labs/Screenings	Labs and Screenings and Screening Labs	Date of lab, screening, and screening labs
Medications	Medications > All (Start, Stop, Change)	Medication Start Date
Pregnancy Histories	Pregnancy History	First day of the last menstrual period (LMP)
Referrals	Referrals	Date of referral
Services	Services	Date of service
Vital Signs	Vital Signs	Date of vital signs record
Eligibility Records	Non-ADAP domains only. Demographics > Eligibility	Date of eligibility record

Delete Data by Date option	Location in client records	Date used
Cap on Charges	Cap on Charges > Cap on Charges Ledger	Date of ledger entry
User Messages	User Messages	Date of user message
Delete clients added within the date range when no data remains	Client in the selected provider domain; only clients with no remaining records qualify.	Date the client was added to the provider domain

IMPORTANT: Data in subforms labeled Excluded cannot be deleted with this feature.

IMPORTANT: Deleting records from a custom subform does not delete the subform itself.

Understand the client deletion option

Deleting services, labs, case notes, or other records does not automatically remove the client from the provider domain. To request client removal, select *Delete clients added within the date range when no data remains*.

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Delete clients added within the date range when no data remains

This option uses the date the client was added to the selected provider domain. A client must fall within that date range and have no remaining records that prevent deleting the client, such as services, labs, case notes, medications, or eligibility records.

CAREWare deletes the selected records first. It then asks for a separate confirmation before removing eligible clients from the provider. A client is permanently deleted only when the selected provider is their last provider.

Task Confirm

All records for the selected types entered within the date range will be deleted first. If client deletion is selected, you will receive a second confirmation before any eligible clients are deleted.

Confirm

Cancel

The first confirmation deletes selected record types before any client removal.

Delete Clients Confirm

About to delete:

The selected records have been deleted. 20 client(s) added to this provider within the selected date range have no remaining records. Type DELETE to remove them from this provider. A client is permanently deleted only when this is their last provider

Confirm

Cancel

Client removal has a separate confirmation after the selected records are deleted.

Delete Clients Confirm

records. Type DELETE to remove them from this provider. A client is permanently deleted only when this is their last provider.

If you are sure you want to do this, type the word DELETE into the box below

Confirm:

Confirm

Cancel

Type DELETE only when you intend to remove the eligible clients.

IMPORTANT: Canceling the client deletion confirmation does not restore records already deleted in the first stage.

Open the feature and set the date range

- Step 1.** [Back up the CAREWare database](#). Complete the checks in the *Before you begin* section of this article.
- Step 2.** Log in to Central Administration.
- Step 3.** Select Administrative Options, then Data Import and Export Features.
- Step 4.** Select Delete Data by Date.
- Step 5.** Choose the provider domain in Provider Name. Use the search button if needed.
- Step 6.** Enter the Begin Date and End Date. Check Business Tier Server Time and review the dates before continuing.

Administrative Options > Data Import and Export Features > Delete Data by Date

Preview Records Back

Delete Data by Date

Provider Name:

Begin Date:

End Date:

Business Tier Server Time:

Provider and date range settings, including Business Tier Server Time.

IMPORTANT: Use dates that match your intended record dates. The range includes both endpoints and uses server date and time.

- Step 7.** Select Preview Records. CAREWare opens Select Sections and shows record counts for the date range.
- Preview Records does not provide a list of individual records. Review the counts against what you expect before selecting anything for deletion.

Select records and confirm deletion

- Step 8.** Check each section you want to delete. Scroll through the list to review all selections. Leave sections you want to keep unchecked.

Administrative Options > Data Import and Export Features > Delete Data by Date > Select Sections

Delete All Selected Select All Deselect All Back Print or Export Column visibility Copy

Select Sections

Search:

« < 1 > » Go to page entries per page Showing

Select	Sections	Record Count
☒	Services	2
☐	Vital Signs	0
☐	Eligibility Records	0
☐	Cap on Charges	0
☐	User Messages	1
☐	Delete clients added within the date range when no data remains	

Select Sections shows checkboxes and a Record Count for each section.

If you also intend to remove clients who have no records in CAREWare (i.e., services, labs, case notes, etc.), check *Delete clients added within the date range when no data remains*. Read *Understand the client deletion option* in this article before selecting this option.

☐	Delete clients added within the date range when no data remains
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Step 9. Review the selected sections and counts, then select Delete All Selected.

Step 10. Read the Task Confirm message. Select Confirm only when you are ready to permanently delete the selected records. Select Cancel to stop before deletion begins.

Task Confirm

All records for the selected types entered within the date range will be deleted first. If client deletion is selected, you will receive a second confirmation before any eligible clients are deleted.

Confirm

Cancel

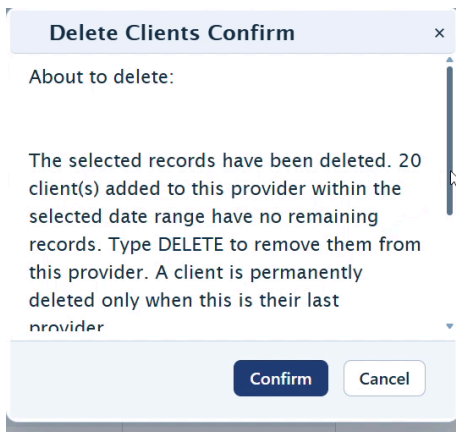
The first confirmation deletes selected record types before any client removal.

Confirm optional client removal

If you did not select the client deletion option, continue to the *How to confirm it worked* section in this article. If you selected this option, CAREWare checks for eligible empty client records after deleting the other types of selected records.

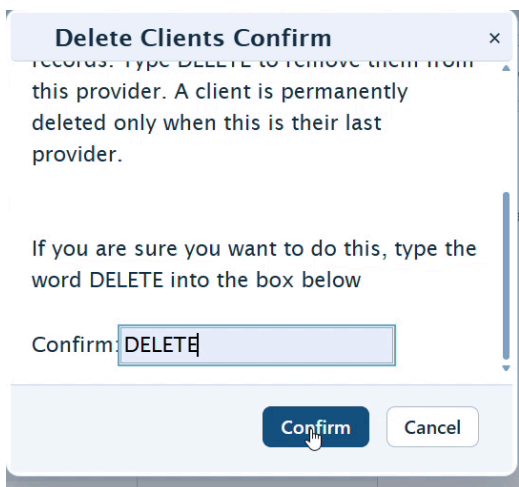
Important: The client deletion option only deletes the client from the domain in which you are running the Delete by Date. It will not remove the client from other domains. If clients need to be removed from more than one domain, the Delete by Date feature needs to be run in all applicable domains.

Step 11. If Delete Clients Confirm appears, read the message and review the count of eligible clients. There may be reasons why some eligible clients aren't deleted during this process, such as an error in the Delete Client process. This may result in the count of eligible clients being higher than the total number of client records that are actually deleted. Otherwise, this stage removes clients from the selected provider domain. *It will not remove the client from all domains in which the client has records.*



Client removal has a separate confirmation after the selected records are deleted.

Step 12. Scroll within the message to the confirmation field. To remove the eligible clients, type DELETE and select Confirm. To keep the clients in the provider, select Cancel.



Type DELETE only when you intend to remove the eligible clients.

IMPORTANT: A client is permanently deleted only when this is their last provider. Cancel at this stage keeps the clients but does not undo the record deletion already completed.

Menu options

Button	What it does
Preview Records	Shows the section list and record counts for the selected provider and date range.
Delete All Selected	Starts confirmation for deletion of the checked sections.
Select All	Checks all available sections. Review every selection before deletion.
Deselect All	Clears selections so you can choose only the sections you need.
Back	Returns to the previous screen.
Print or Export	Prints or exports the section list and counts, not a list of individual records.
Column visibility	Changes which list columns are displayed.
Copy	Copies the displayed list data.

How to confirm it worked

- Read the completion messages and record the results. If client removal was selected, review its result separately from record deletion.
- Use the same provider and date range to preview the records again. Check the counts for the sections you deleted.
- Review relevant client records or reports to confirm that the intended data was removed and data you meant to keep remains.
- Keep the pre-deletion backup and a record of the provider, date range, selected sections, and results.

Troubleshooting and common questions

Can this delete records for clients who still receive services?

Yes. Selection is based on record dates and selected sections. An old service date can belong to a client who still receives services.

Why does a client remain after their services were deleted?

Other records may remain, the client may have been added to the provider outside the date range, or client removal may not have been selected and confirmed.

Can I undo the deletion?

Deletion is permanent. [Make a backup of the database prior to using this feature.](#) Contact your IT staff or database administrator if recovery is needed. A database restore returns data to the backup's point in time; work saved after that backup is not included.

Why can't I delete an Excluded subform?

Subforms labeled *Excluded* are not eligible for deletion with this feature. The subform may be excluded for various reasons, such as a custom subform missing from the database tables or a subform table that lacks the default custom subform date column (cst_sb_date).

Related References

Document	Use it for
Managing CAREWare Data	Plan, create, and restore CAREWare database backups.