



Oregon
Health
Authority



Intro to CAREWare 6



Training modules

For purposes of these modules, “Care Coordinator” will refer to all persons providing a case management function

1. CAREWare Basics
2. Case Management 1
3. Case Management 2
4. Reports
5. Specialty Reports (optional)
6. Administrative Training (for Administrative staff only)



*Training modules 1-4 are meant to be watched in order



MODULE 4:

Reports

Topics:

- Running performance measures
- Running CAREWare reports
- Running custom reports
- Building custom reports (optional)



Welcome!

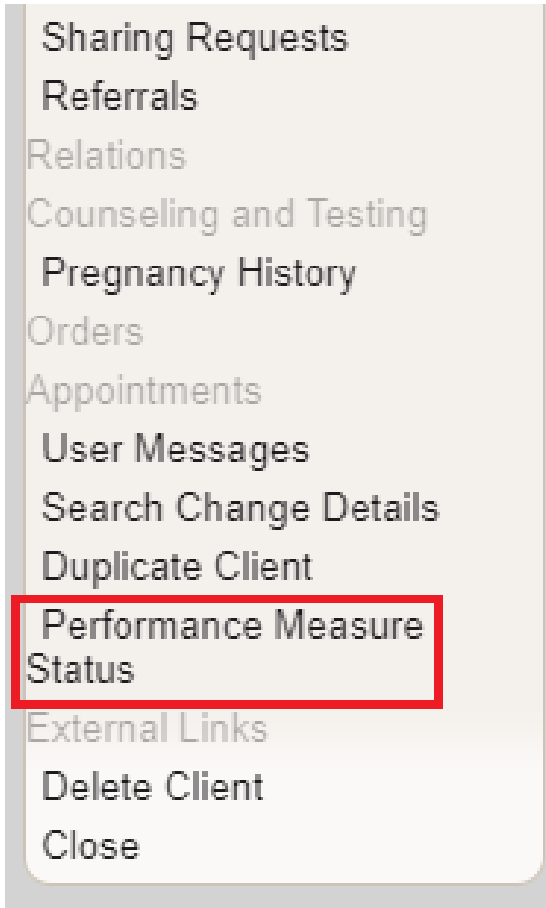
- The CAREWare 6 website is:
<https://careware.oregon.gov/careware/rs/index.htm>





Performance Measures

- Client-specific PM data can be accessed in a client's record.
- Click Performance Measure Status.





Performance Measures cont.

- The client PM page will only display the PMs applicable to the client.
- 'In Numerator' means the PM is being met.
- 'Not In Numerator' means the PM is NOT being met.

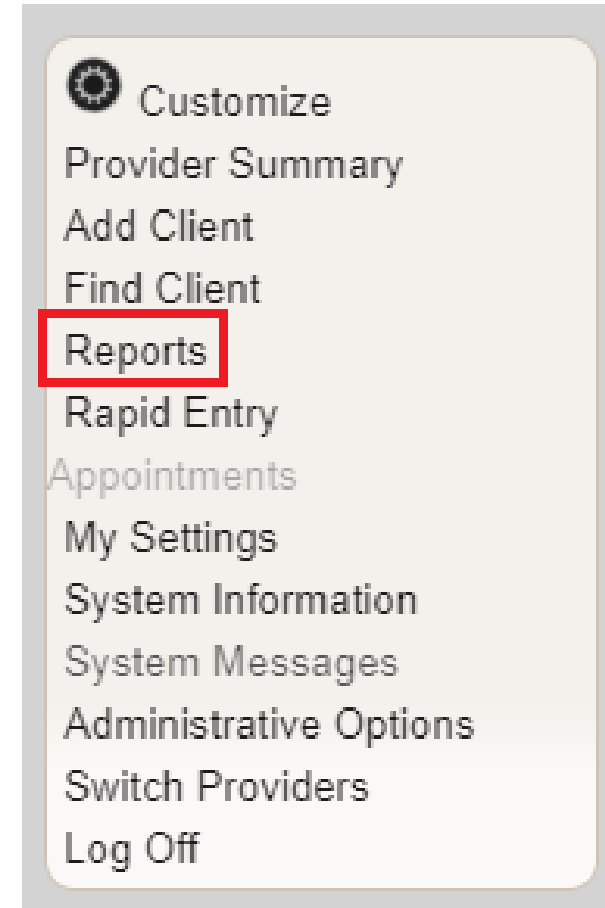
Performance Measure Status	
Search:	
Performance Measure	Client Status
Virally suppressed - County	In Numerator
Current VL Lab (w/in 12 mo) - County	In Numerator
Current CD4 or VL lab w/in 6 mo (No Gap)- County	In Numerator
Current CD4 or VL lab w/in 12 mo (No Gap) - County	In Numerator
Stable Housing - County	In Numerator
(RCP) RN Care Plan - All acuities (w/in 6 mo)	In Numerator
Current Intake/Eligibility Review C	Not In Numerator





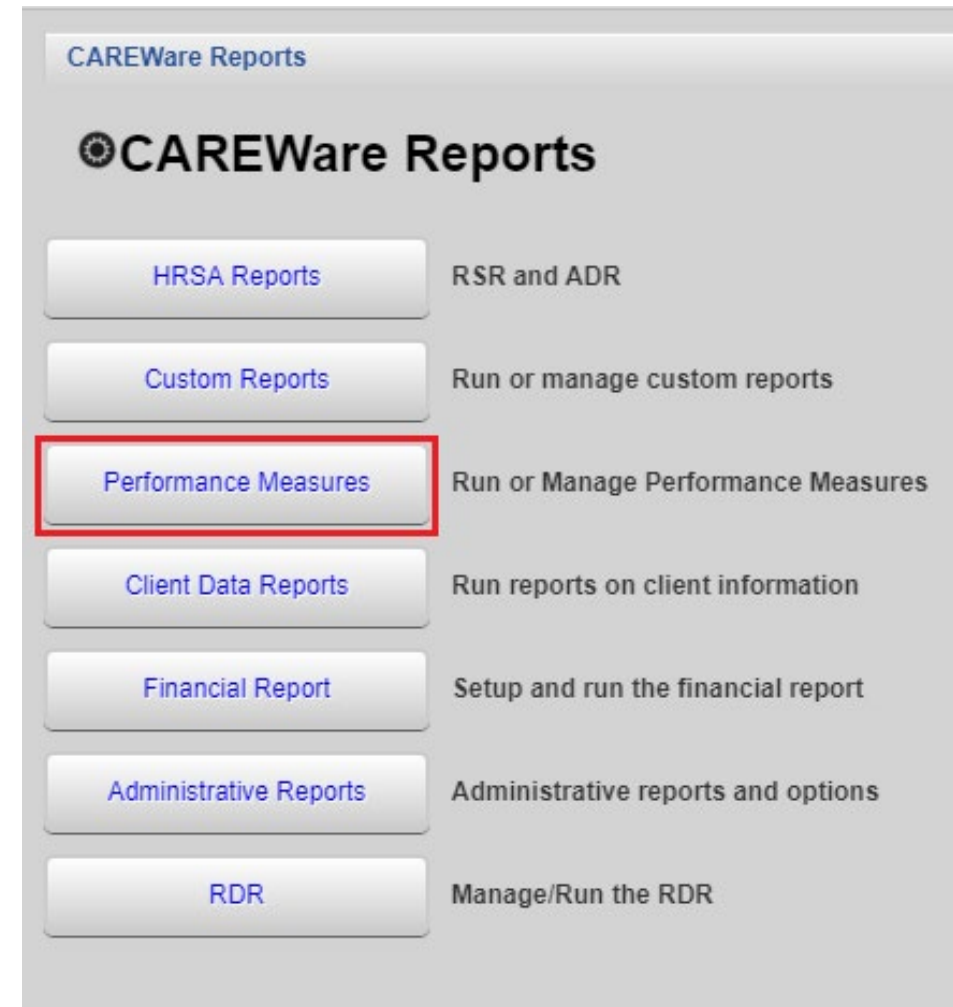
Performance Measures cont.

- To review overall performance measures for your agency (not client-specific PMs), start at the main page of CAREWare.
- Click Reports.



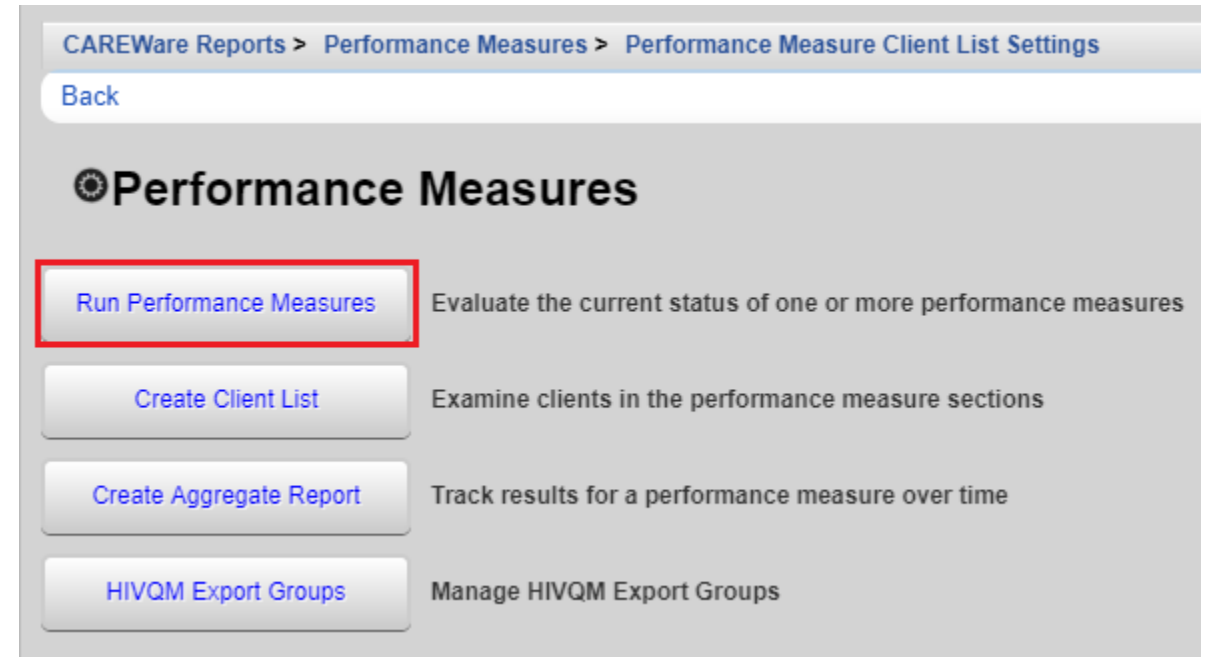
Performance Measures cont.

- Click Performance Measures.



Performance Measures cont.

- To run performance measures, click Run Performance Measures.
- This will open the Evaluate Measures screen.





Performance Measures cont.

- The Evaluate Measures screen contains a long list of PMs.
- Each PM has a unique code assigned to it.
- Only certain PMs are relevant to your agency.
 - SC## are relevant to **county-based** case management.
 - SR## are relevant to **regional-based** case management.
- The quickest way to find the PMs relevant to your agency is to search on the Evaluate Measures page.



Performance Measures cont.

- To search on the Evaluate Measures page, enter the criteria in the Search field.
- CAREWare will automatically display matching results.

CAREWare Reports > Performance Measures > Performance Measure Client List Settings > Evaluate Measures

[Evaluate Selected](#) [Evaluate Group](#) [Back](#) [Print or Export](#)

Evaluate Measures

Search:

Code	Name	Description	Selected
SR-01	Virally suppressed	Active clients in case management whose last	☐
SR-01 E	Virally suppressed EOCIL	Active clients in case management whose last	☐
SR-03	Current VL lab (w/in 12 mo)	Last VL lab entry was within the last 12 months	☐
SR-03 E	Current VL lab (w/in 12 mo) EOCIL	Last VL lab entry was within the last 12 months	☐
SR-04	Current CD4 or VL lab w/in 6 mo, (No Gap in care)	Clients who have a CD4 or viral load lab entry	☐



Performance Measures cont.

- To run a specific Performance Measure or a set of Performance Measures:
 - Select the PM(s) of interest. CW6 allows for multiple PMs to be evaluated at once.
 - Click Evaluate Selected.

CAREWare Reports > Performance Measures > Performance Measure Client List Settings > Evaluate Measures

[Evaluate Selected](#) [Evaluate Group](#) [Back](#) [Print or Export](#)

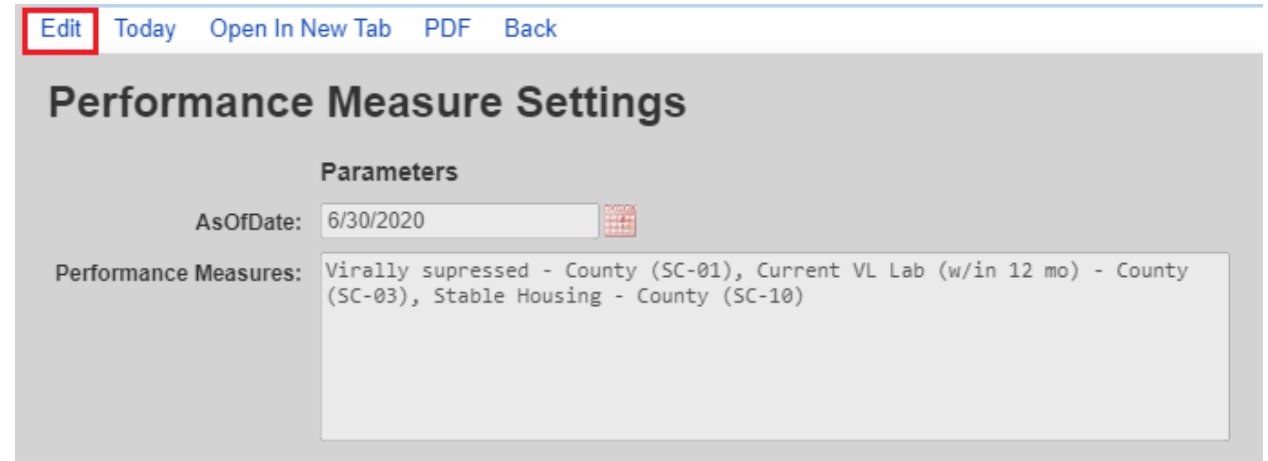
Evaluate Measures

Search: SC-0

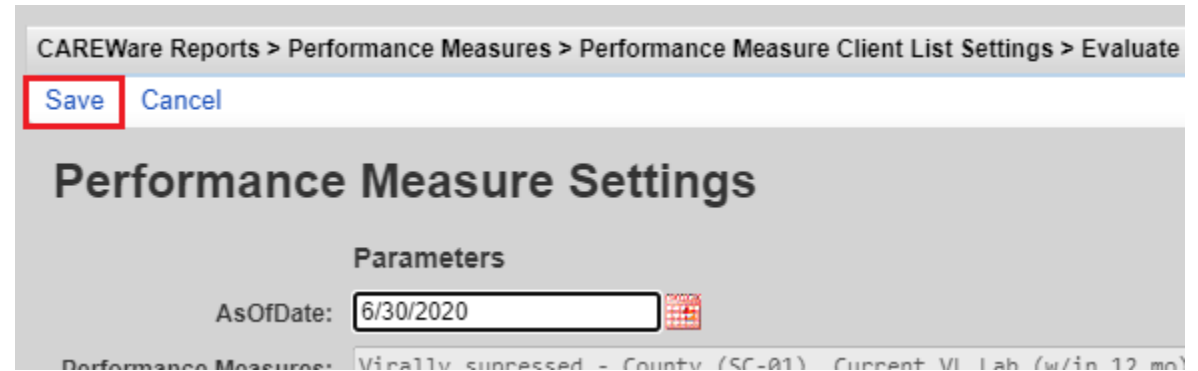
Code	Name	Description	Selected
HAB07	Cervical Cancer Screening	Percentage of HIV-infected adult female clients	☐
HAB09	Hepatitis C Screening	Percentage of client screened for Hepatitis C s	☐
SC-01	Virally suppressed - County	Last viral load lab within the past 12 months ur	☒
SC-03	Current VL Lab (w/in 12 mo) - County	Last VL lab entry was within the past 12 month	☒
SC-04	Current CD4 or VL lab w/in 6 mo (No Gap)- County	Clients who have a CD4 or viral load lab entry	☐
SC-05	Current CD4 or VL lab w/in 12 mo (No Gap) - County	CD4 or Viral Load lab entry within the past 12 m	☐
SC-08	(RCP) RN Care Plan - Acuity 3 (w/in 30 days)	At least one RCP care plan service for acuity 3	☐
SC-09	(RCP) RN Care Plan - Acuity 4 (w/in 14 days)	At least one RCP care plan service for acuity 4	☐
SC-10	Stable Housing - County	Clients with Stable housing	☒

Performance Measures cont.

- Click Edit on the next screen.
- Enter the As Of Date.
- Click Save.



This screenshot shows the 'Performance Measure Settings' form. At the top, there is a navigation bar with buttons: 'Edit' (highlighted with a red box), 'Today', 'Open In New Tab', 'PDF', and 'Back'. Below the navigation bar, the title 'Performance Measure Settings' is displayed. Under the 'Parameters' section, the 'AsOfDate' is set to '6/30/2020'. The 'Performance Measures' field contains the text: 'Virally suppressed - County (SC-01), Current VL Lab (w/in 12 mo) - County (SC-03), Stable Housing - County (SC-10)'.



This screenshot shows the 'Performance Measure Settings' form. At the top, there is a breadcrumb trail: 'CAREWare Reports > Performance Measures > Performance Measure Client List Settings > Evaluate'. Below the breadcrumb trail, there is a navigation bar with buttons: 'Save' (highlighted with a red box) and 'Cancel'. Below the navigation bar, the title 'Performance Measure Settings' is displayed. Under the 'Parameters' section, the 'AsOfDate' is set to '6/30/2020'. The 'Performance Measures' field contains the text: 'Virally suppressed - County (SC-01), Current VL Lab (w/in 12 mo)'.



Performance Measures cont.

Click on Open In New Tab or PDF to view the PMs.

CAREWare Reports > Performance Measures > Performance Measure Client List Settings > Evaluate Measures > F

Edit Today **Open In New Tab** PDF Back

Performance Measure Settings

Parameters

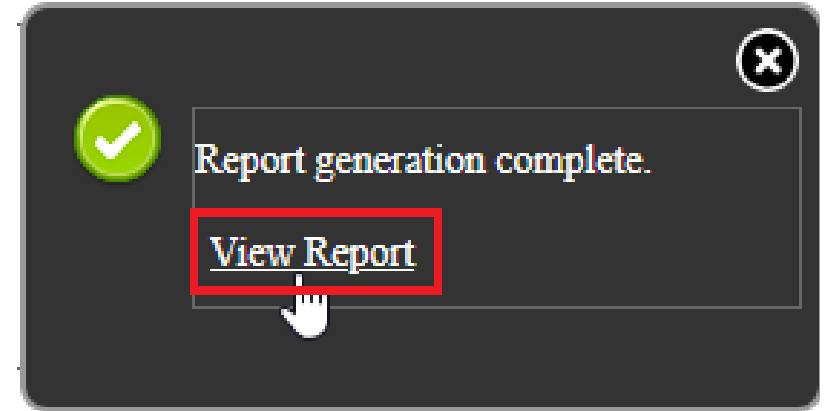
AsOfDate: 6/30/2020 

Performance Measures: Virally suppressed - County (SC-01), Current VL Lab (w/in 12 mo) - County (SC-03), Stable Housing - County (SC-10)



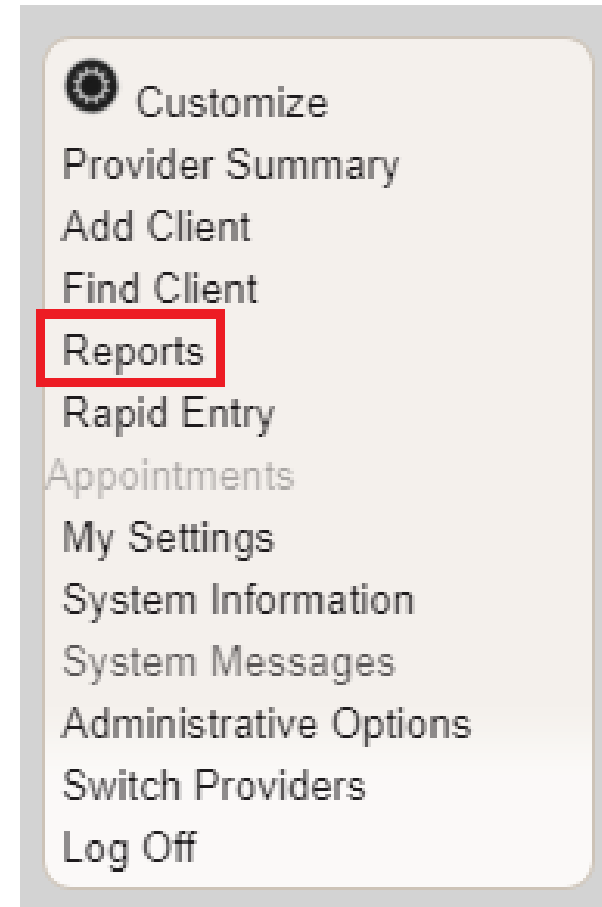
Performance Measures cont.

- If a user selected PDF, a pop up will appear.
- Click View Report.
- If a user selected Open In New Tab, a new tab will appear in the browser window to display the results.



Performance Measures cont.

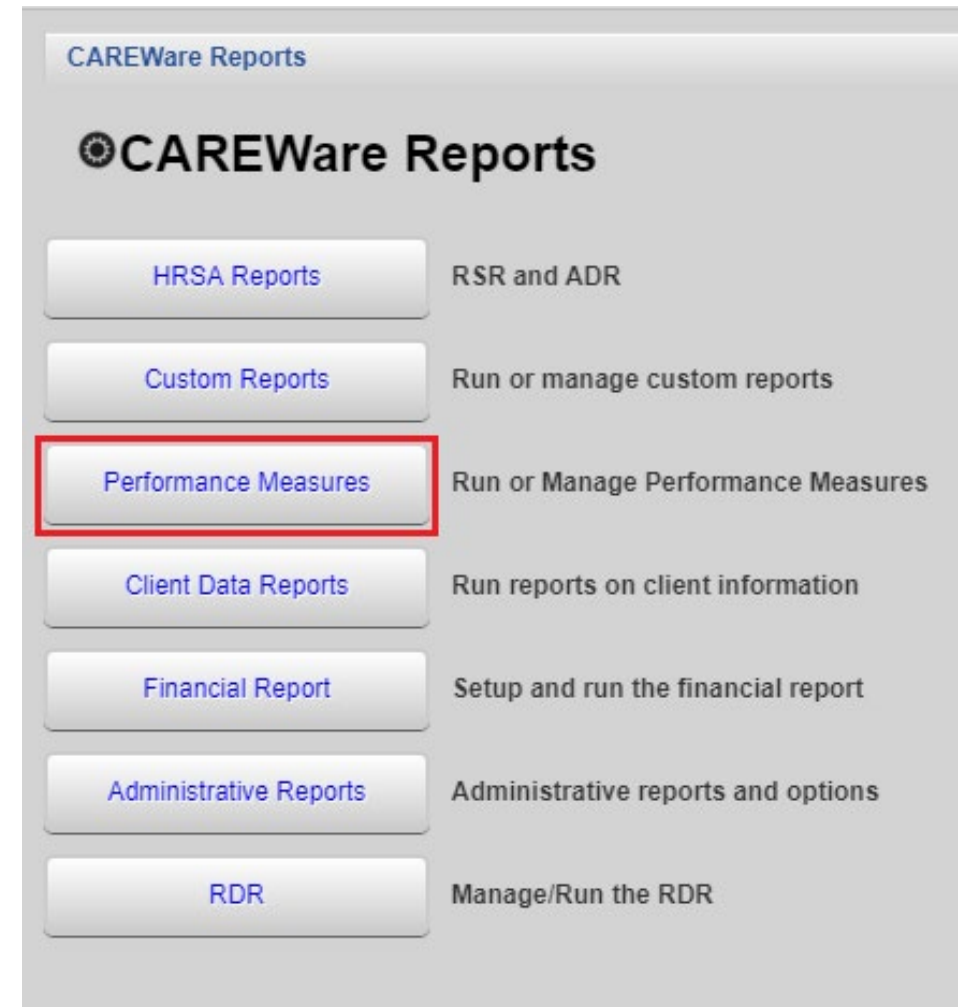
- To create a Performance Measure client list, begin at the CW6 main menu.
- Click Reports.





Performance Measures cont.

Click Performance Measures.





Performance Measures cont.

Click Create Client List.

CAREWare Reports > Performance Measures

[Back](#)

⚙️ Performance Measures

Run Performance Measures	Evaluate the current status of one or more performance measures
Create Client List	Examine clients in the performance measure sections
Create Aggregate Report	Track results for a performance measure over time
HIVQM Export Groups	Manage HIVQM Export Groups

Performance Measures cont.

- Navigate to the PM for which you would like to generate a Client List.
- Click Use Selected.

CAREWare Reports > Performance Measures > Client List

[Use Selected](#) [Back](#) [Print or Export](#)

Client List

Search:

Code	Name	Description
HAB07	Cervical Cancer Screening	Percentage of HI
HAB09	Hepatitis C Screening	Percentage of cli
SC-01	Virally supressed - County	Last viral load lab
SC-03	Current VL Lab (w/in 12 mo) - County	Last VL lab entry



Performance Measures cont.

Click Edit.

CAREWare Reports > Performance Measures > Client List > Performance Measure Client List

[Edit](#) [Today](#) [Create Client List](#) [Back](#)

Performance Measure Client List Settings

Performance Measure:

As Of Date: 

Performance Measure Section:

Output Format:

Performance Measures cont.

Enter the As Of Date and
Performance Measure Section.

CAREWare Reports > Performance Measures > Client List > Performance Measure C

[Save](#) [Cancel](#)

Performance Measure Client List Settings

Performance Measure:

As Of Date: 

Performance Measure Section: 

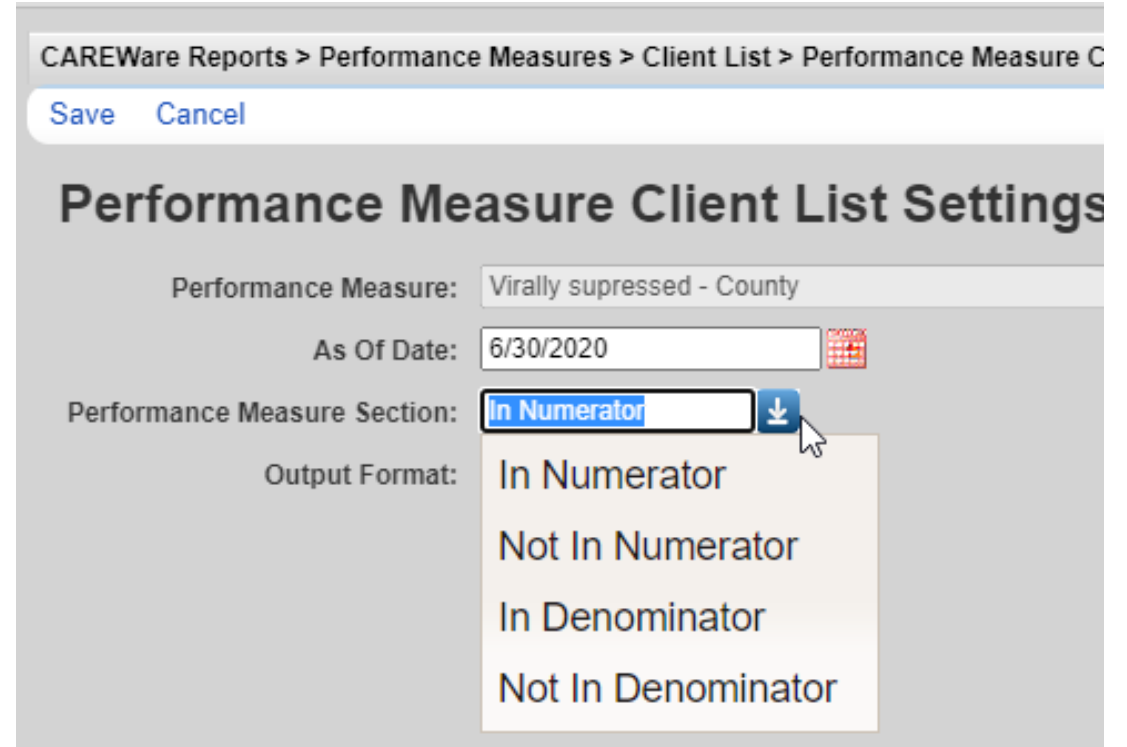
Output Format:

- In Numerator
- Not In Numerator
- In Denominator
- Not In Denominator



Performance Measures cont.

- 'Not In Numerator' will pull a list of clients *not* meeting the PM.
- 'In Numerator' will pull a list of clients meeting the PM.



The screenshot shows the 'Performance Measure Client List Settings' interface in CAREWare. The breadcrumb trail at the top reads 'CAREWare Reports > Performance Measures > Client List > Performance Measure C'. Below this are 'Save' and 'Cancel' buttons. The main title is 'Performance Measure Client List Settings'. The 'Performance Measure' field is set to 'Virally supressed - County'. The 'As Of Date' field is set to '6/30/2020'. The 'Performance Measure Section' field is set to 'In Numerator', and a dropdown menu is open showing four options: 'In Numerator', 'Not In Numerator', 'In Denominator', and 'Not In Denominator'. The 'Output Format' field is currently empty.

CAREWare Reports > Performance Measures > Client List > Performance Measure C

Save Cancel

Performance Measure Client List Settings

Performance Measure: Virally supressed - County

As Of Date: 6/30/2020

Performance Measure Section: In Numerator

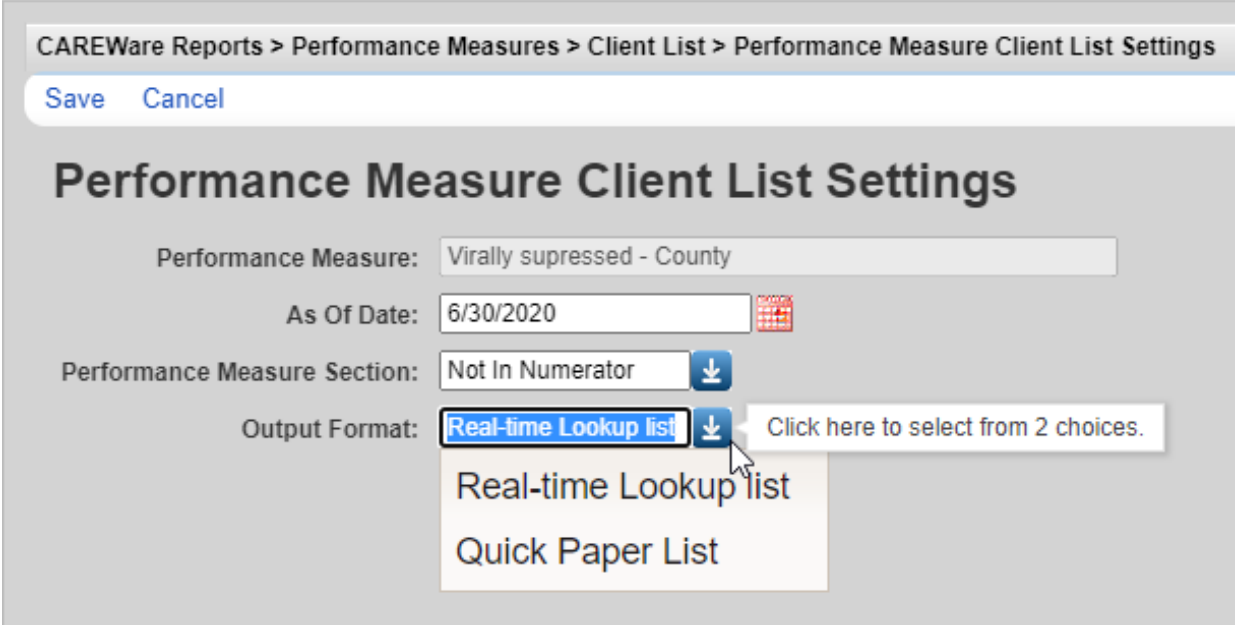
Output Format:

- In Numerator
- Not In Numerator
- In Denominator
- Not In Denominator

Performance Measures cont.

Two output options are available:

- Real-time Lookup List will pull the client list on a new screen. Users can access a client directly from this list.
- Quick Paper List will open a pop-up prompting users to open the file in a new window. This is the best choice to save the Client List as a PDF.



The screenshot shows the 'Performance Measure Client List Settings' page in the CAREWare system. The breadcrumb trail at the top reads: 'CAREWare Reports > Performance Measures > Client List > Performance Measure Client List Settings'. Below the breadcrumb are 'Save' and 'Cancel' buttons. The main title is 'Performance Measure Client List Settings'. The form contains the following fields:

- Performance Measure:** A dropdown menu with the selected value 'Virally suppressed - County'.
- As Of Date:** A date input field showing '6/30/2020' with a calendar icon to its right.
- Performance Measure Section:** A dropdown menu with the selected value 'Not In Numerator' and a downward arrow icon.
- Output Format:** A dropdown menu with 'Real-time Lookup list' selected. A tooltip is visible next to it, stating 'Click here to select from 2 choices.' The dropdown list shows two options: 'Real-time Lookup list' and 'Quick Paper List'.

Performance Measures cont.

- Review the settings.
- Click Create Client List.

CAREWare Reports > Performance Measures > Client List > Performance Measure Client List Settings

[Edit](#) [Today](#) [Create Client List](#) [Back](#)

Performance Measure Client List Settings

Performance Measure:

As Of Date: 

Performance Measure Section:

Output Format:





CAREWare Client - Level Reports

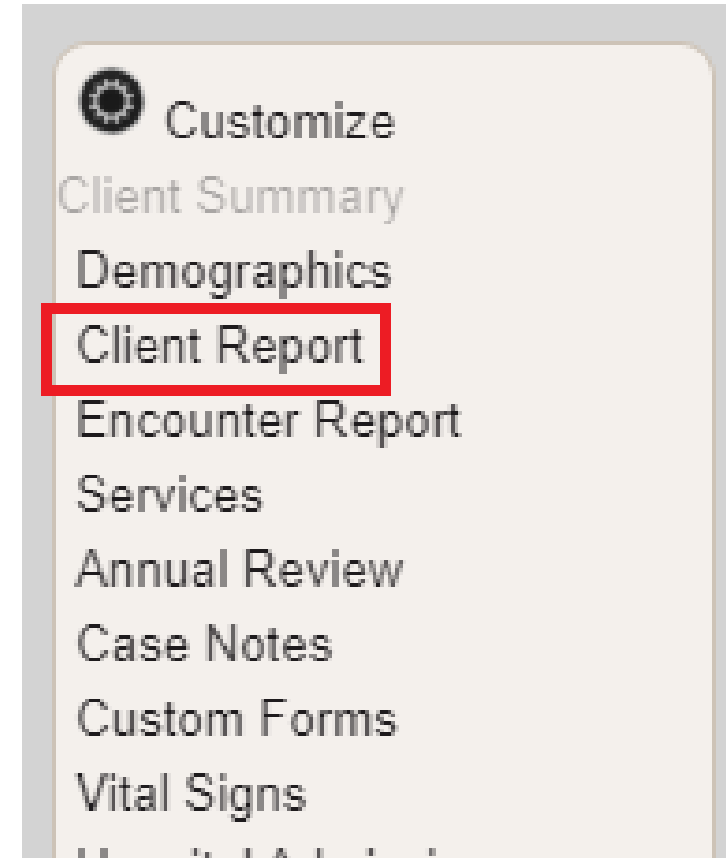
- Commonly used client-level reports include:
 - Client Report
 - Case Note Report
 - Lab Report





CAREWare Reports – Client Report

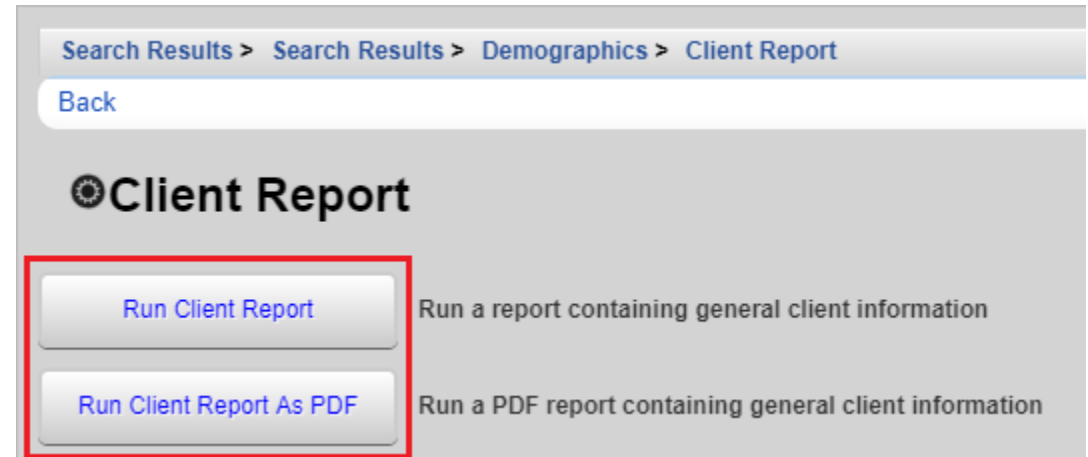
- Client Report displays information entered on the Demographics and Annual Review tabs.
- Navigate to the client main menu.
- Click Client Report.





CAREWare Reports – Client Report cont.

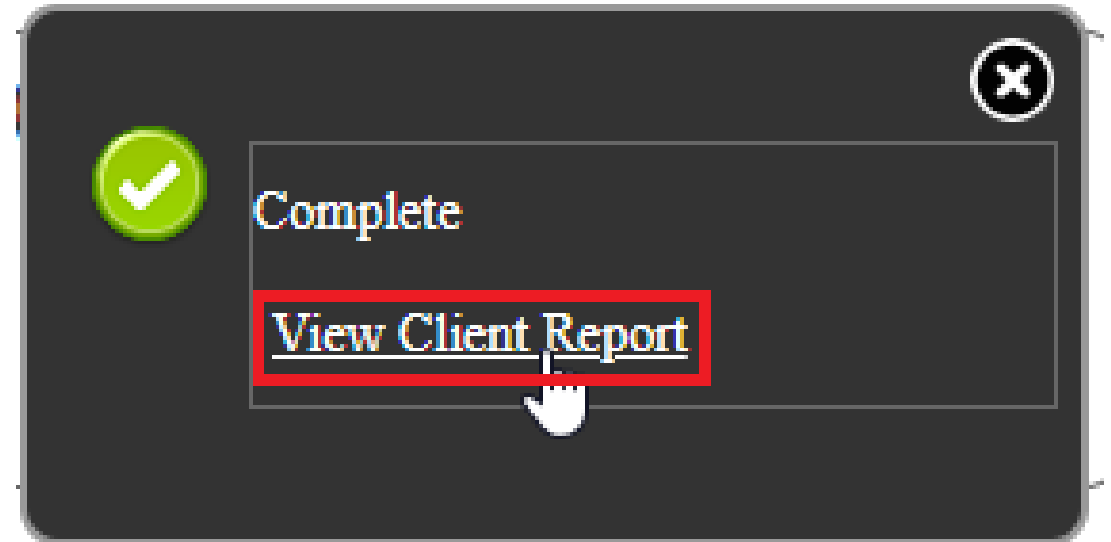
- Select the preferred viewing format:
 - Run Client Report will open the report in a new tab.
 - Run Client Report as PDF will open the client report as a PDF file. This is the best option for printing.





CAREWare Reports – Client Report cont.

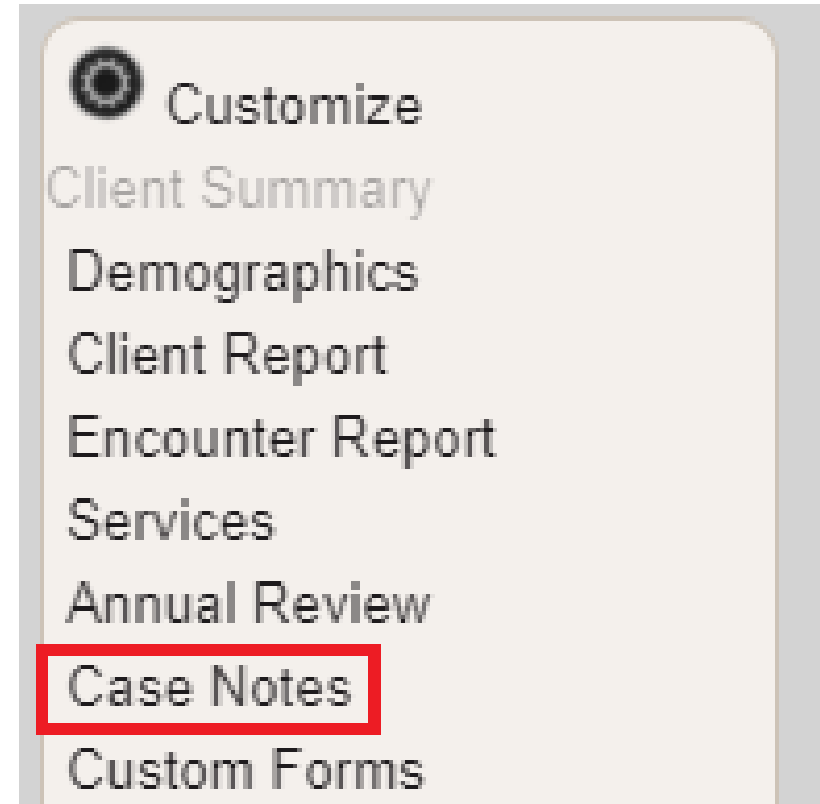
- A pop up will appear on the right side of the window.
- Click View Client Report.





CAREWare Reports – Case Note Report

- A Client-Level Case Note Report displays the case notes entered for a client over a specified timeframe.
- Navigate to the client main menu.
- Click Case Notes.





CAREWare Reports – Case Note Report Cont.

Click Case Note Report.

[Find Client](#) > [Search Results](#) > [Demographics](#) > [Case Notes](#)

[Back](#)

Case Notes

Case Note Entry	Enter a new case note for the client
Case Note Report	Run a report on case notes entered for this client





CAREWare Reports – Case Note Report Cont.

- Enter the From and Through dates.
- Check Only show this provider if desired.

Find Client > Search Results > Demographics > Case Notes > Case Notes Report

[Run](#) [PDF](#) [Cancel](#)

Case Notes Report

From: 

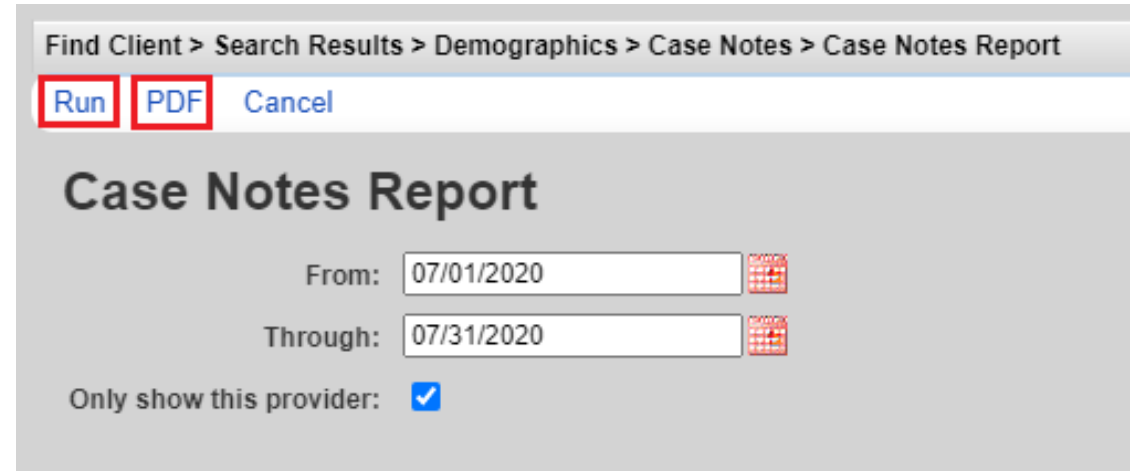
Through: 

Only show this provider: ☒



CAREWare Reports – Case Note Report Cont.

- Select the preferred viewing format:
 - Run will open the report in a new tab.
 - PDF will open the client report as a PDF file. This is the best option for printing.

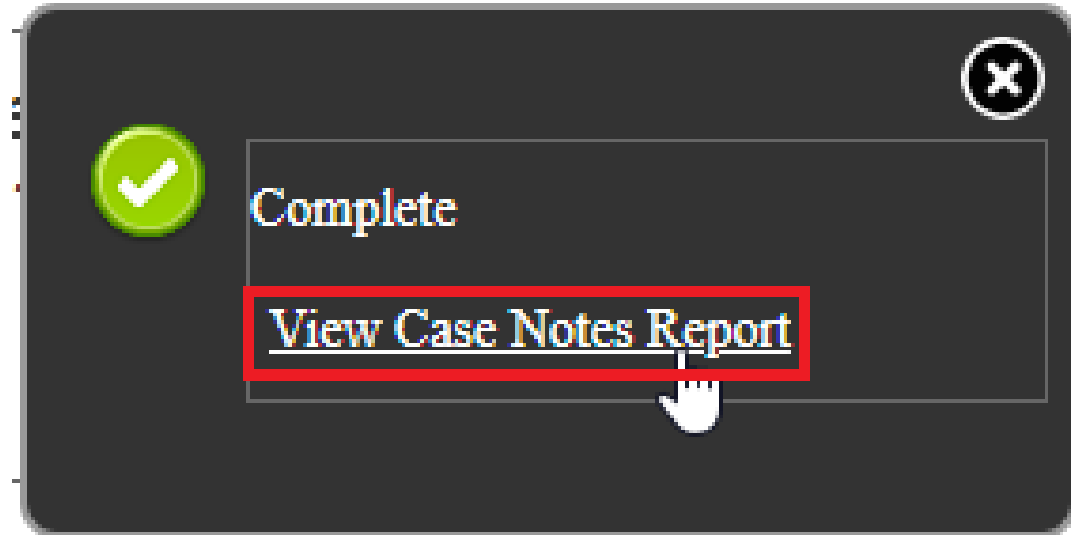


The screenshot shows a web application interface for generating a Case Notes Report. At the top, a breadcrumb trail reads: "Find Client > Search Results > Demographics > Case Notes > Case Notes Report". Below this, there are three buttons: "Run", "PDF", and "Cancel". The "Run" and "PDF" buttons are highlighted with red rectangular boxes. The main heading is "Case Notes Report". Below the heading, there are two date selection fields: "From:" with the value "07/01/2020" and "Through:" with the value "07/31/2020". Each date field has a small calendar icon to its right. At the bottom, there is a checkbox labeled "Only show this provider:" which is checked.



CAREWare Reports – Case Note Report Cont.

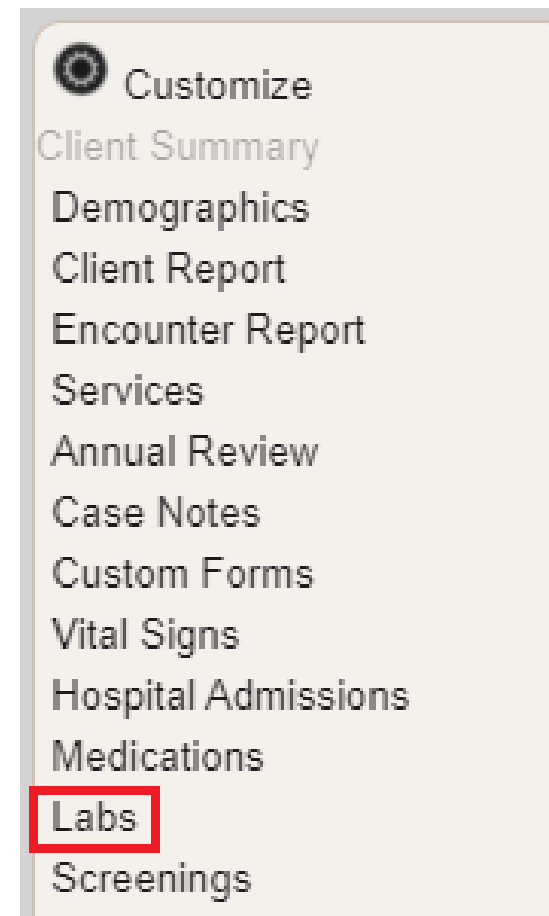
- A pop up will appear on the right side of the window.
- Click View Case Notes Report.





CAREWare Reports – Lab Report

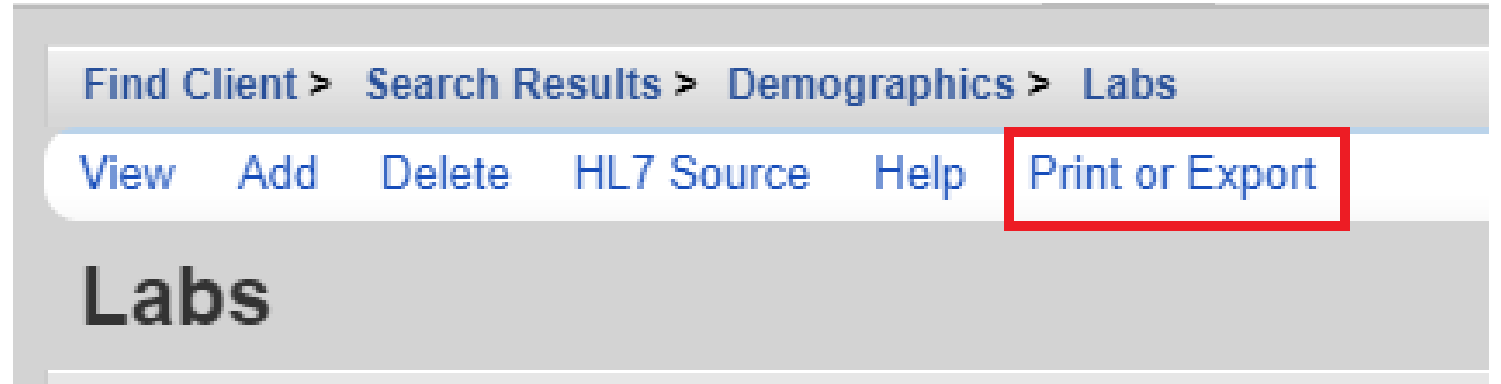
- The Client Lab Report is useful if you would like to print the client's labs.
- Navigate to the client main menu.
- Click Labs.





CAREWare Reports – Lab Report cont.

Click Print or Export.





CAREWare Reports – Lab Report cont.

- Select the format to print the labs:
 - Print Current Page will only print the first page of client labs.
 - Print All Pages will print all the pages of client labs.
 - View Current Page as PDF will only print the first page of client labs into a PDF file.
 - View All Pages as PDF will print all pages of client labs into a PDF file.
 - CSV Export (All Pages) and CSV For Excel (All Pages) will pull all labs into an excel format.



Report Setup

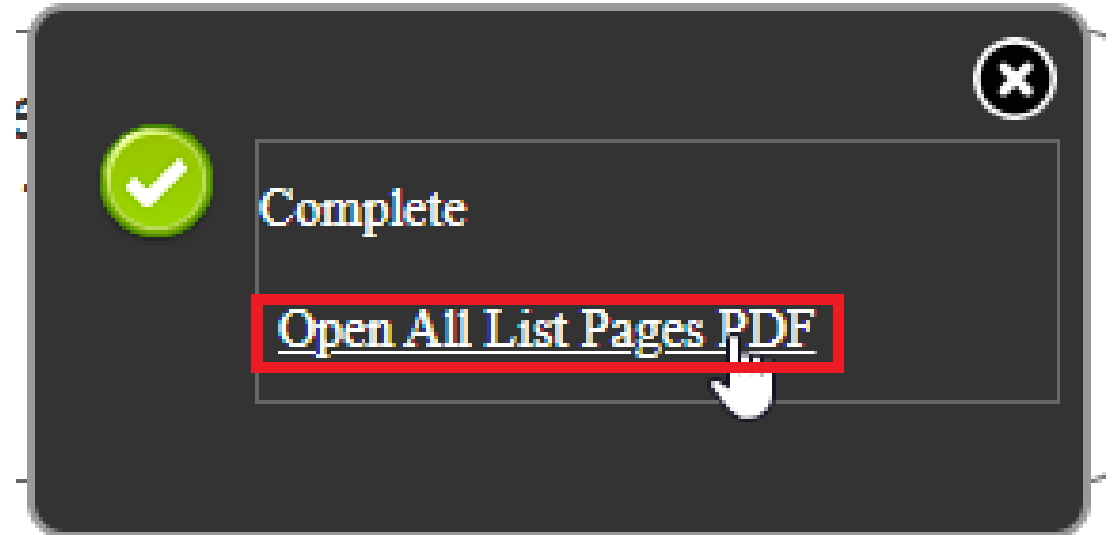
- Print Current Page
- Print All Pages
- View Current Page as a PDF document
- View All Pages as a PDF document
- Printable List Format Options
- CSV Export (All Pages)
- CSV For Excel (All Pages)





CAREWare Reports – Lab Report cont.

- A pop up will appear on the right side of the window.
- Click the live link (names will be different based upon the format chosen in the last step).





CAREWare Multi Client Reports

CAREWare Reports

CAREWare Reports

HRSA Reports	RSR and ADR
Custom Reports	Run or manage custom reports
Performance Measures	Run or Manage Performance Measures
Client Data Reports	Run reports on client information
Financial Report	Setup and run the financial report
Administrative Reports	Administrative reports and options
RDR	Manage/Run the RDR
EHE Triannual Report	Requires permission: 'Run EHE Triannual Report'
Mailing Labels Report	Setup and run the Mailing Labels Report





CAREWare Multi Client Reports cont.

- Custom Reports opens the custom reporting module.
- Performance Measures opens the Performance Measures screen.
- Client Data Reports houses the following:
 - Clinical Encounter Reports includes the No Service in X Days and Clients With Last Selected Lab Result reports.
 - Multiple Client Case Note Report prints case notes for a group of clients in a specified time frame.
 - Referrals Report provides referral information.
- Financial Report provides information on quantity and type of services provided.
- Mailing Label Report prepares a set of labels to be used for US postal mail.



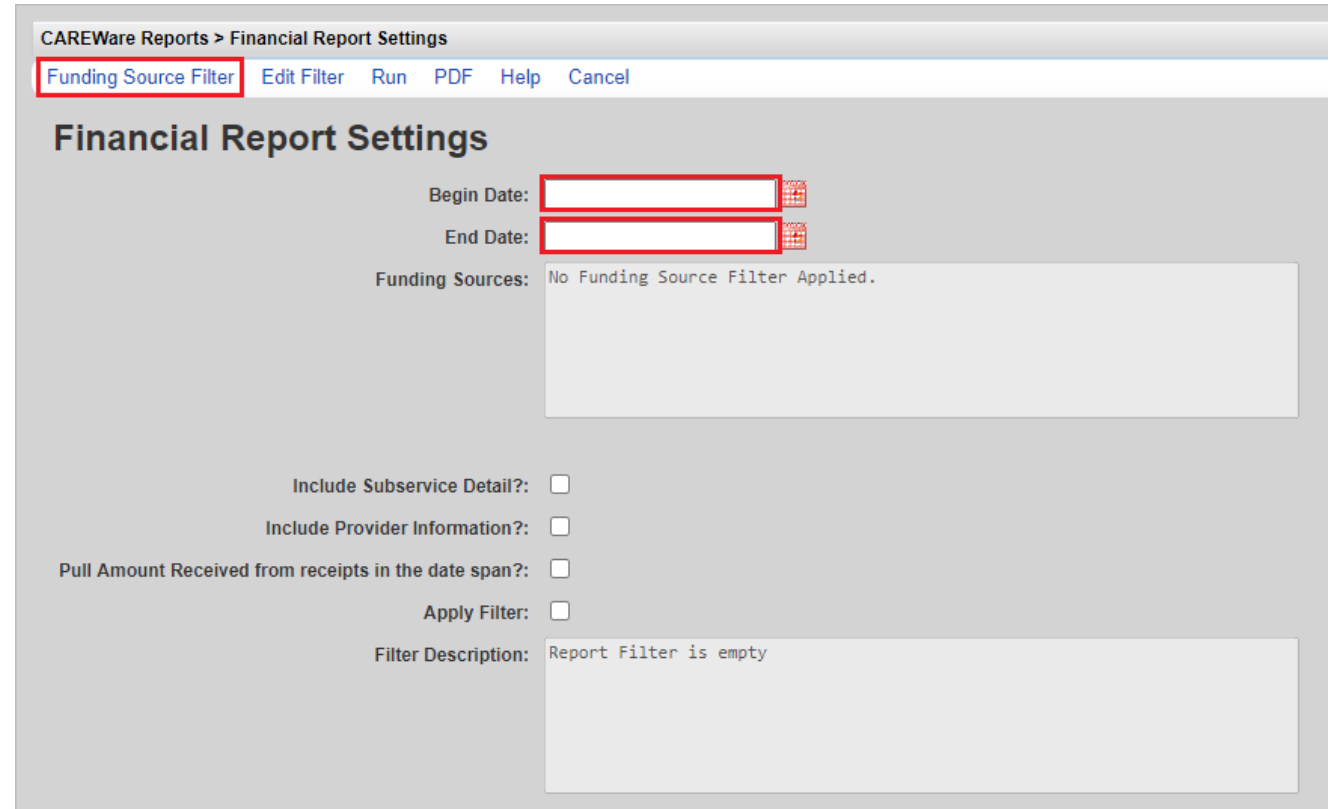
Financial Report

- This report displays the units and total costs of services/subservices provided by your agency and the number of unduplicated clients served in a specified time period.
- Click Financial Report on the Reports screen.



Financial Report cont.

- Enter the Begin Date and End Date.
- Click on Funding Source Filter.



CAREWare Reports > Financial Report Settings

Funding Source Filter Edit Filter Run PDF Help Cancel

Financial Report Settings

Begin Date:

End Date:

Funding Sources: No Funding Source Filter Applied.

Include Subservice Detail?: ☐

Include Provider Information?: ☐

Pull Amount Received from receipts in the date span?: ☐

Apply Filter: ☐

Filter Description: Report Filter is empty

Financial Report cont.

- Select the Funding Source from the list.
 - Common funding sources include Part B and Part B Program Income.
 - Let the HIV Care and Treatment Team know if a funding source does not appear.
- Click Save.

CAREWare Reports > Financial Report Settings > Funding Source Filter

[Save](#) [Cancel](#) [Print or Export](#)

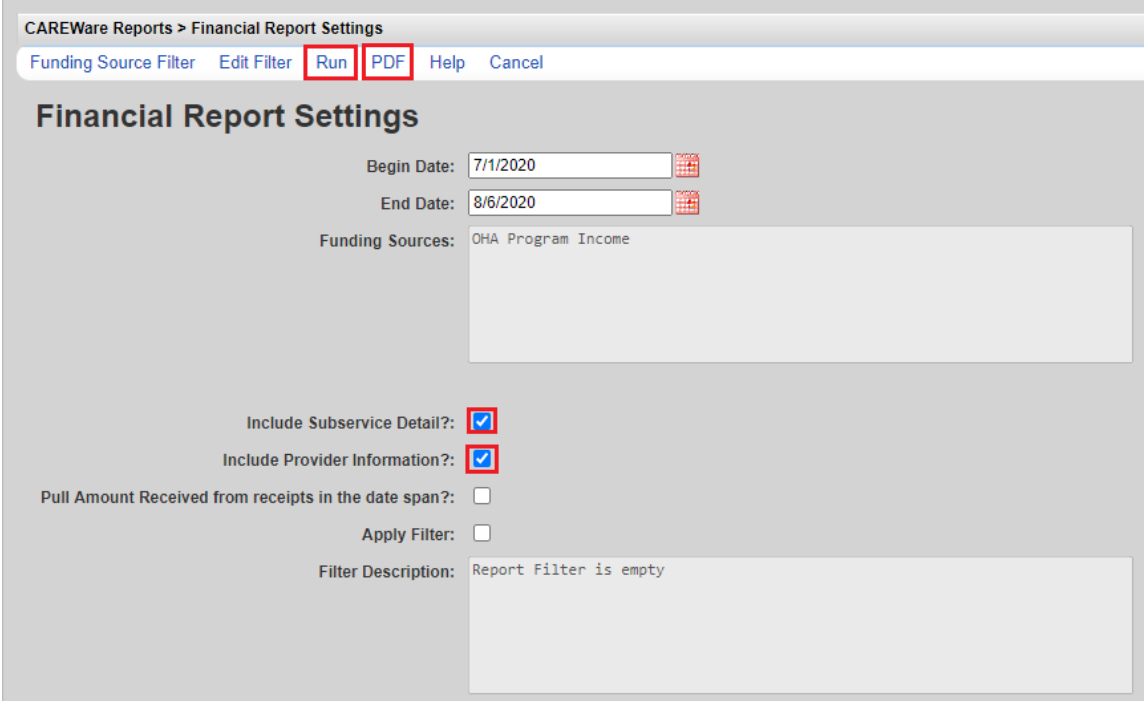
Funding Source Filter

Search:

Select	Funding Source
☒	OHA Program Income
☐	OHA Program Incomes
☐	Other Funding through OHA

Financial Report cont.

- Check the Include Subservice Detail? and Include Provider Information? check boxes.
- Check Apply Filter if a filter is desired.
- Click Run or PDF.
 - Run will open the report in a new browser tab.
 - PDF will open a PDF file in a new browser tab. This is best if the report will be printed.



CAREWare Reports > Financial Report Settings

Funding Source Filter Edit Filter **Run** **PDF** Help Cancel

Financial Report Settings

Begin Date: 7/1/2020

End Date: 8/6/2020

Funding Sources: OHA Program Income

Include Subservice Detail?: ☒

Include Provider Information?: ☒

Pull Amount Received from receipts in the date span?: ☐

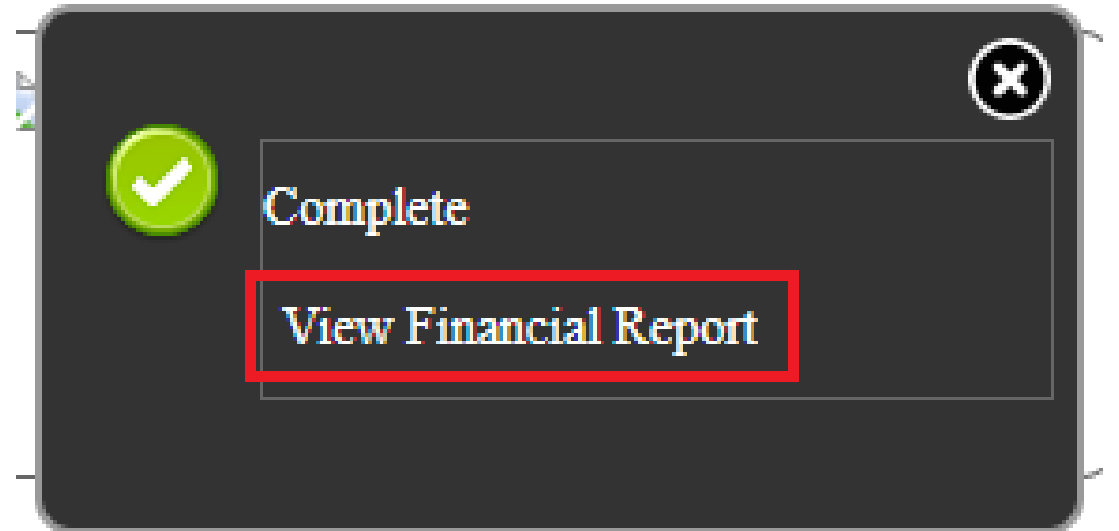
Apply Filter: ☐

Filter Description: Report Filter is empty



Financial Report cont.

- If PDF was selected, a pop-up will appear on the right side of the screen.
- Click View Financial Report.





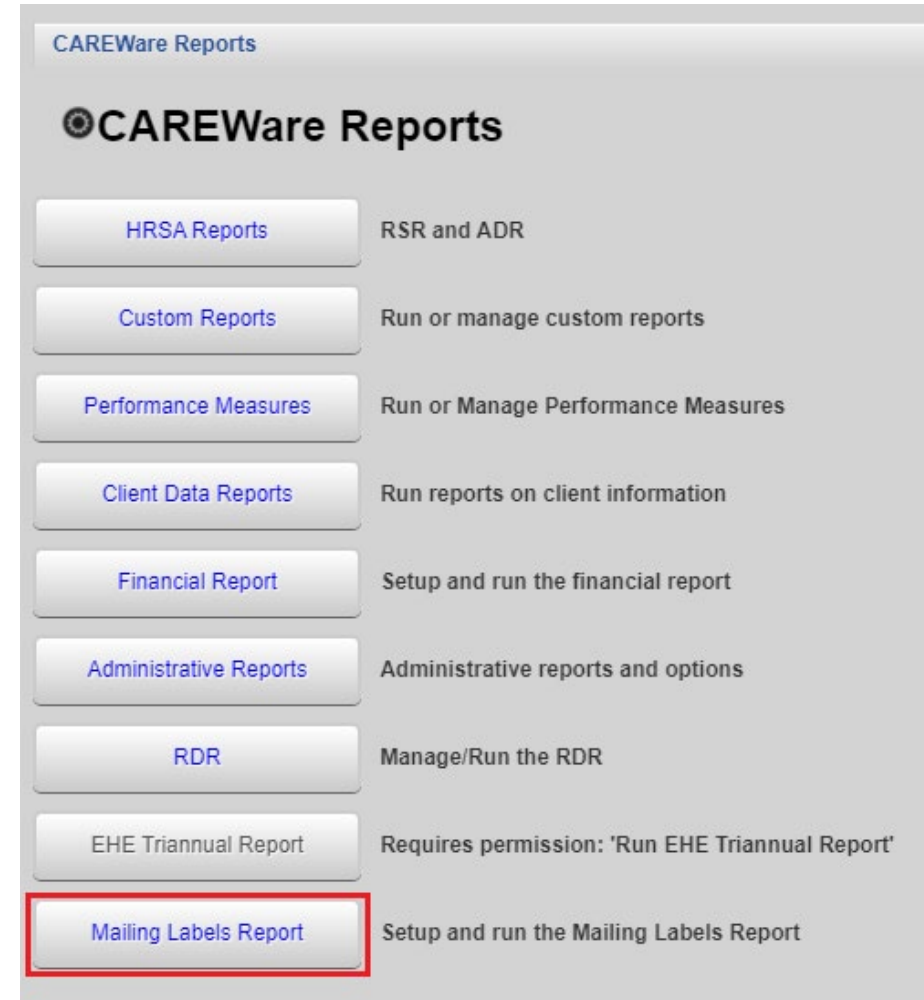
Mailing Labels Report

- This report generates a list of client names and addresses in the Avery 5160 layout.
- Only clients with the Include in mailing labels report? box checked on their Contact Information screen will be included in the report.
- Do not check this box for a client who does not want to receive mail.



Mailing Labels Report cont.

- Click Mailing Labels Report from the Reports screen.



Mailing Labels Report cont.

Click Edit.

CAREWare Reports > Mailing Labels Report

[Edit](#) [Edit Filter](#) [Run](#) [Back](#)

Mailing Labels Report

Provider:

Clients To Include:

OnlyClientsWith StreetAddress: ☐

Sort By:

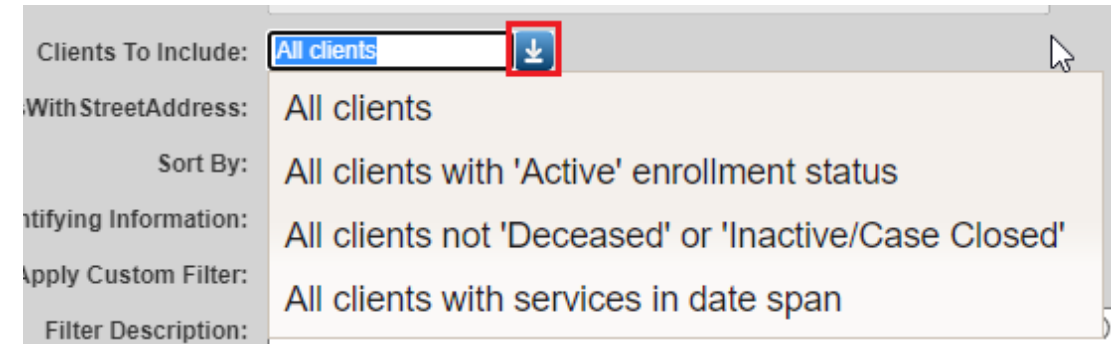
Hide Personally Identifying Information: ☐

Apply Custom Filter: ☐



Mailing Labels Report cont.

- Determine which clients to include on the labels by selecting from the four options:
 - All Clients in the agency's database.
 - All clients whose enrollment status is "Active".
 - All clients whose vital status is not "Deceased" and whose enrollment status is not "Inactive/Case Closed".
 - All clients who have received services for a selected date range.



The screenshot shows a software interface for selecting clients. On the left, there are labels for 'Clients To Include:', 'With StreetAddress:', 'Sort By:', 'Identifying Information:', 'Apply Custom Filter:', and 'Filter Description:'. The 'Clients To Include:' dropdown menu is open, showing four options: 'All clients', 'All clients with 'Active' enrollment status', 'All clients not 'Deceased' or 'Inactive/Case Closed'', and 'All clients with services in date span'. A red box highlights the 'All clients' option and the dropdown arrow button. A mouse cursor is visible near the top right of the dropdown menu.

Label	Selected Option
Clients To Include:	All clients
With StreetAddress:	All clients
Sort By:	All clients with 'Active' enrollment status
Identifying Information:	All clients not 'Deceased' or 'Inactive/Case Closed'
Apply Custom Filter:	All clients with services in date span
Filter Description:	

Mailing Labels Report cont.

Check the box Only include clients with street addresses. This will omit clients who do not have an address entered in CAREWare.

Find Client > Search Results > Demographics > Contact Information

Save Cancel

Contact Information

Address: 555 Tinkerbell Lane

City: Madras

State: Oregon

County: Jefferson

Zip Code: 97888

Phone: 9718888888

Phone Type: Home

Include in mailing label reports?: ☒

Mailing Address:

Mailing City: Madras

Mailing State: Oregon

Mailing Zip Code: 97888

Alt. Phone 1:

Phone Type (Alt. Phone 1):

Alt. Phone 2:

Phone Type (Alt. Phone 2):



Mailing Labels Report cont.

Select whether to sort alphabetically by last name or numerically by zip code.

CAREWare Reports > Mailing Labels Report

Save Cancel

Mailing Labels Report

Provider: HIV Alliance

Clients To Include: All clients

OnlyClientsWith StreetAddress: ☒

Sort By: Last Name, First Name

Hide Personally Identifying Information: Last Name, First Name

Apply Custom Filter: Zip Code

Mailing Labels Report cont.

Click Save.

CAREWare Reports > Mailing Labels Report

[Save](#) [Cancel](#)

Mailing Labels Report

Provider: HIV Alliance

Clients To Include: All clients 

OnlyClientsWithStreetAddress: ☒

Sort By: Last Name, First Nam 

Hide Personally Identifying Information: ☐

Apply Custom Filter: ☐

Filter Description: Report Filter is empty





Mailing Labels Report cont.

Click Run.

CAREWare Reports > Mailing Labels Report

[Edit](#) [Edit Filter](#) [Run](#) [Back](#)

Mailing Labels Report

Provider:

Clients To Include:

OnlyClientsWithStreetAddress: ☒

Sort By:

Hide Personally Identifying Information: ☐

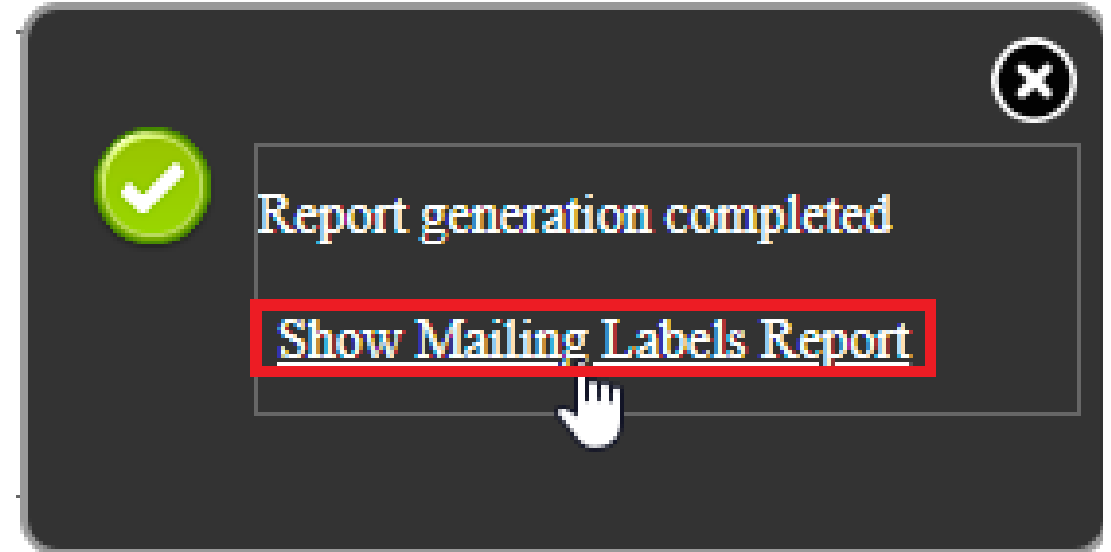
Apply Custom Filter: ☐

Filter Description:



Mailing Labels Report cont.

- A pop up will appear on the right-hand side of the window.
- Click Show Mailing Labels Report.
- The report will open in a new window.





Running Custom Reports

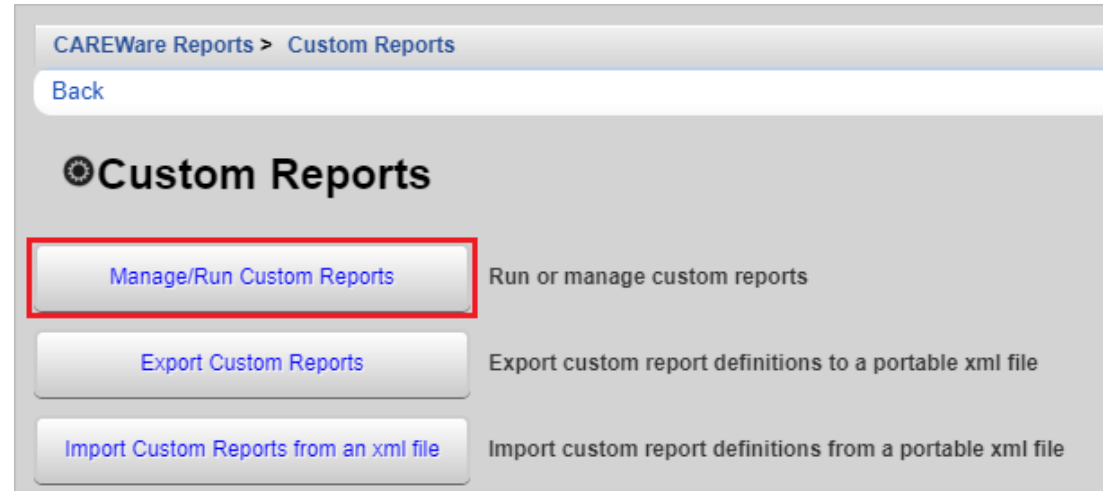
Click Custom Reports on the Reports screen





Running Custom Reports cont.

Click Manage/Run Custom Reports.



Running Custom Reports cont.

- Enter the report name into the Search field (if known).
- Users can also find a report by scrolling through the results page.
- Select the report you'd like to run.

CAREWare Reports > Custom Reports > Manage Run Custom Reports

[Manage Run](#) [Add](#) [Delete](#) [Make Read Only](#) [Back](#) [Help](#) [Print or Export](#)

Manage/Run Custom Reports

Search:

Name	CrossTab	Report Type	De
Viral Load and Acuity County (CB03072016)		Demographics	



Running Custom Reports cont.

Click Manage Run.

CAREWare Reports > Custom Reports > Manage Run Custom Reports

Manage Run Add Delete Make Read Only Back Help Print or Export

Manage/Run Custom Reports

Search:

Name	CrossTab	Report Type
Viral Load and Acuity County (CB03072016)		Demographics
test		Referrals



Running Custom Reports cont.

Click Run Report.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Viral Load and Acuity County (CB03072016)

[Back](#)

⚙️Viral Load and Acuity County (CB03072016)

Run Report	Start Date : 08/06/2019, End Date : 08/06/2020, Clients with services
Report Layout	Viral Load and Acuity County (CB03072016), Demographics
Field Selection	URN, County, Viral Load, Viral Load Lab Date, Acuity Level, Acuity Score, Acuity Level Date
Report Filter	Enrollment status = Active



Running Custom Reports cont.

Click Edit Parameters.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Viral Load and Acuity County (CB03072016) > Run Report

[Edit Parameters](#) [Open in New Tab](#) [PDF](#) [CSV](#) [Excel](#) [Back](#)

Run Report

Parameters

Date From: 8/6/2019 

Date Through: 8/6/2020 

Clinical Review Year: 2020

Show New Clients only: ☐

Show Clients with Service only: ☒

Show Specifications: ☐

Sum Numeric Fields: ☐



Running Custom Reports cont.

- Enter the Date From and Date Through fields.
- Check Show New Clients only (if applicable).
- Check Show Clients with Service Only.
- Check Show Specifications.
- Click Save.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Viral Load and Acuity County (CB03072016) > Run Report > Edit

[Save](#) [Cancel](#)

Run Report

Parameters

Date From: 

Date Through: 

Clinical Review Year: 

Show New Clients only: ☐

Show Clients with Service only: ☒

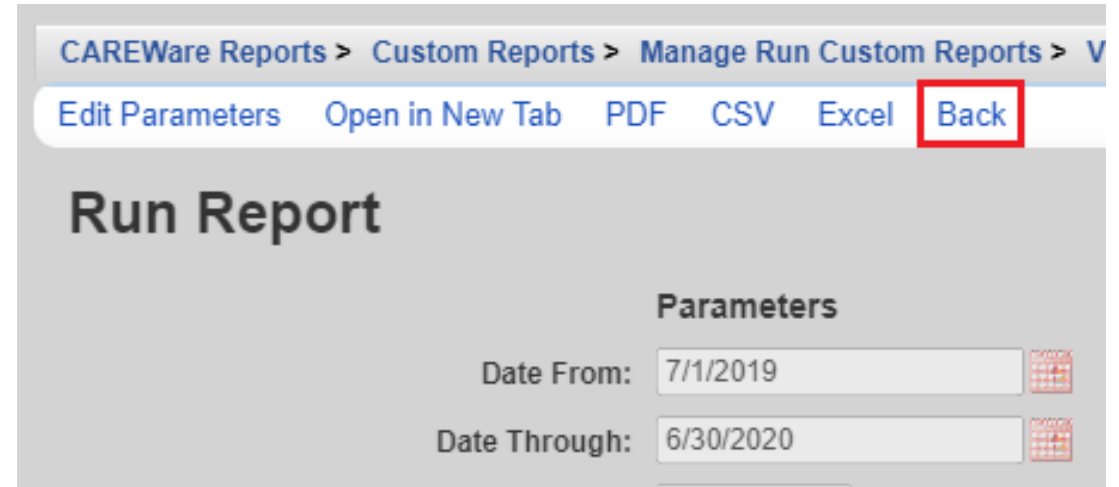
Show Specifications: ☒

Sum Numeric Fields: ☐



Running Custom Reports – Applying Filters

- If a filter needs to be applied to the report, click Back
- If a filter does NOT need to be applied, disregard the next 8 slides



The screenshot shows the CAREWare Reports interface. The breadcrumb trail at the top reads: CAREWare Reports > Custom Reports > Manage Run Custom Reports > V. Below this, there is a row of buttons: Edit Parameters, Open in New Tab, PDF, CSV, Excel, and Back. The 'Back' button is highlighted with a red rectangle. Below the buttons, the main heading is 'Run Report'. Underneath, there is a section titled 'Parameters' with two date input fields: 'Date From:' with the value '7/1/2019' and 'Date Through:' with the value '6/30/2020'. Each date field has a small calendar icon to its right.



Running Custom Reports – Applying Filters cont.

Click Report Filter.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Viral Load and Acuity

[Back](#)

⚙️ Viral Load and Acuity County (CB03072016)

Run Report	Start Date : 07/01/2019, End Date : 06/30/2020, Clients with ser
Report Layout	Viral Load and Acuity County (CB03072016), Demographics
Field Selection	URN, County, Viral Load, Viral Load Lab Date, Acuity Level, Ac
Report Filter	Enrollment status = Active





Running Custom Reports – Applying Filters cont.

If using a filter template, click Templates.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Viral Load and Acuity County (CB03072016) > Report Filter

[Manage](#) [Add](#) [Move Up](#) [Move Down](#) [Delete](#) [Templates](#) [Back](#) [Print or Export](#)

Report Filter

Search:

Operat	Paren.	Field Name	Is Not	=	>=	<=	Null	Paren.	Status	
		Enrl Status		Active					Complete	
AND		Last Quantitative Lab Value			2				Complete	



Running Custom Reports – Applying Filters cont.

- Search for the template to use.
- Click Use Selected Template

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Viral Lo

[Use Selected Template](#) [Save To Selected Template](#) [Save To New Template](#)

Filter Templates

Search:

Template Name
Active client

Running Custom Reports – Applying Filters cont.

- Take note of the current filter if applicable.
- If further filtering is needed, click Add.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Viral Load and Acuity County (CB030720)

[Manage](#) [Add](#) [Move Up](#) [Move Down](#) [Delete](#) [Templates](#) [Back](#) [Print or Export](#)

Report Filter

Search:

Op	Paren.	Field Name	Is Not	=	>=	<=	Null
		Enrl Status		Active			

Running Custom Reports – Applying Filters cont.

- To add to the current filter, search for the Field Name to use.
- Select the field.
- Click Use Field.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Viral Load and Acuity Co

[Use Field](#) [Back](#) [Print or Export](#)

Report Fields

Search:

Field Name	Keywords	Previous Field Name	Description
Last Quantitative Date With Values		Last Quantitative Date	
Last Quantitative Lab Date	Demographics	Last Quantitative Lab	
Last Quantitative Lab Operator		Last Quantitative Lab	
Last Quantitative Lab Value	Demographics	Last Quantitative Lab	
Last Quantitative Result With Values		Last Quantitative Result	

Running Custom Reports – Applying Filters cont.

- Enter the filter criteria for the selected field.
- In this example, clients with an Acuity level in the last 6 months from the local provider only will be included in the report.
- Click Next.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Viral Load

[Next](#) [Back](#) [Help](#)

Last Quantitative Lab Value>Subfilter

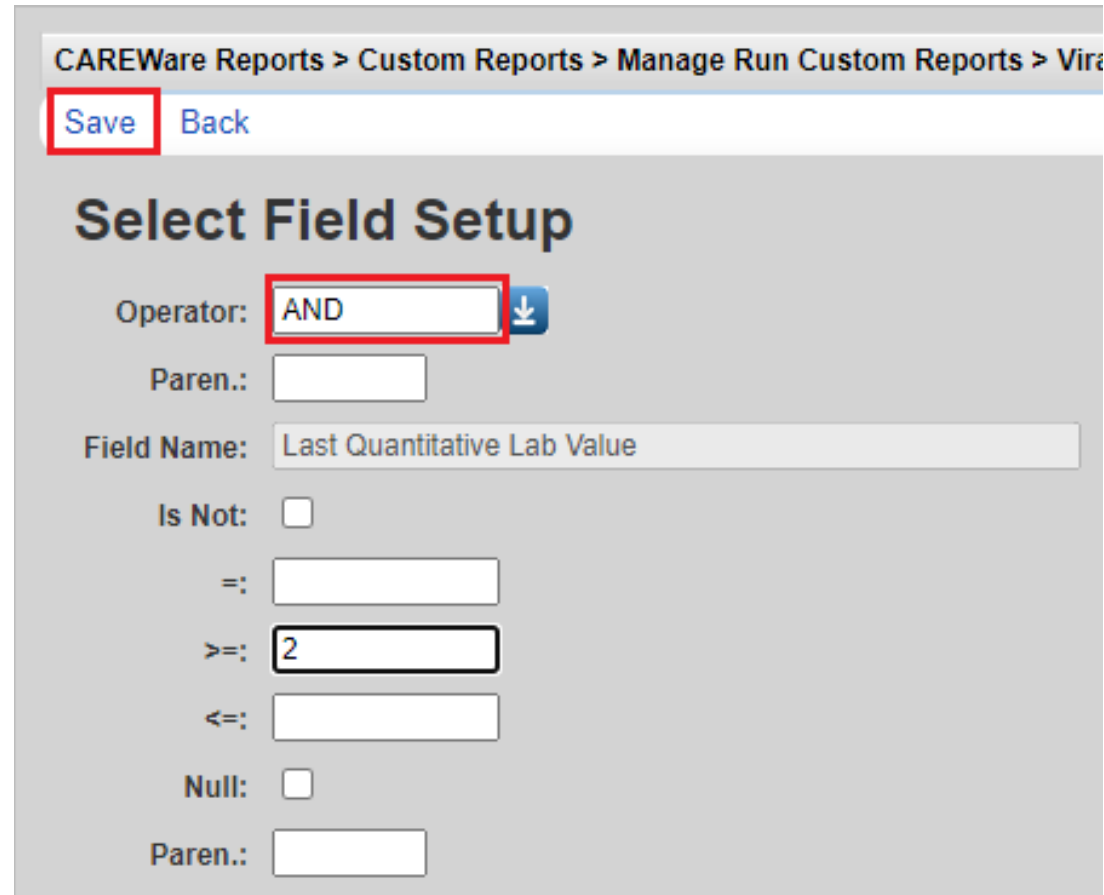
The following 3 criteria need completion for the subfilter

1. Lab
=: 
2. Date Range
Date Option: 
>=: Max. months before end date
<=: Min. months before end date
3. Cross-Provider
=: 



Running Custom Reports – Applying Filters cont.

- Select the Operator.
- Enter parentheses if needed (Paren.).
- Enter the value associated with the field.
- In this example, clients with an Acuity score of 2 or more will be included in the report.
- Click Save.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Vir

[Save](#) [Back](#)

Select Field Setup

Operator: **AND** 

Paren.:

Field Name:

Is Not: ☐

=:

>=:

<=:

Null: ☐

Paren.:

Running Custom Reports – Applying Filters cont.

- Review the report filter.
- In this example, all clients with an enrollment status of active and an Acuity score of at least 2 in the last 6 months will be included.
- Click Back.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Viral Load and Acuity County (CB03072016) > Report Filter

Manage Add Move Up Move Down Delete Templates **Back** Print or Export

Report Filter

Search:

Operat	Paren.	Field Name	Is Not	=	>=	<=	Null	Paren.	Status
		Enrl Status		Active					Complete
AND		Last Quantitative Lab Value			2				Complete





Running Custom Reports cont.

Click Run Report.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Viral Load and Acuity County (CB03072016)

[Back](#)

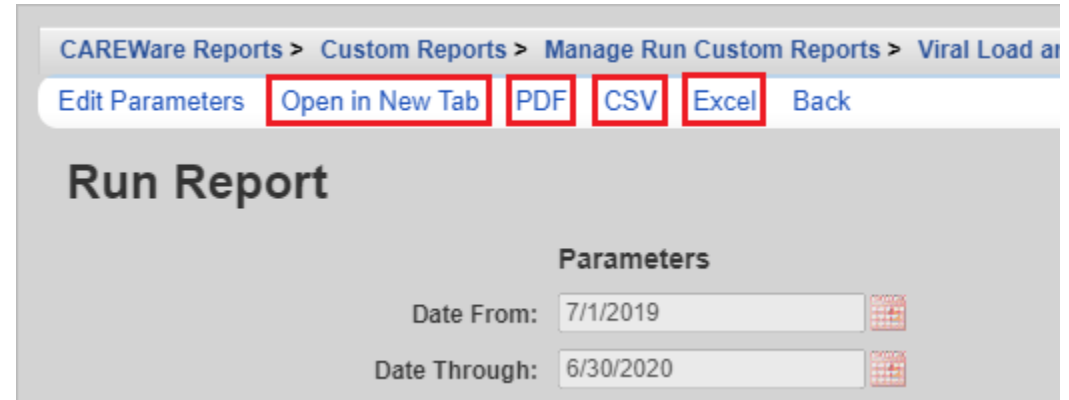
⚙️Viral Load and Acuity County (CB03072016)

Run Report	Start Date : 07/01/2019, End Date : 06/30/2020, Clients with services, Display Specifications
Report Layout	Viral Load and Acuity County (CB03072016), Demographics
Field Selection	URN, County, Viral Load, Viral Load Lab Date, Acuity Level, Acuity Score, Acuity Level Date
Report Filter	Enrollment status = Active AND Last Quantitative Lab Value (Lab = Acuity Level Date Range Between 6 AND 0 months before the end date or as of date (12/30/2019 And 6/30/2020). AND Cross-Provider = No) >= 2



Running Custom Reports cont.

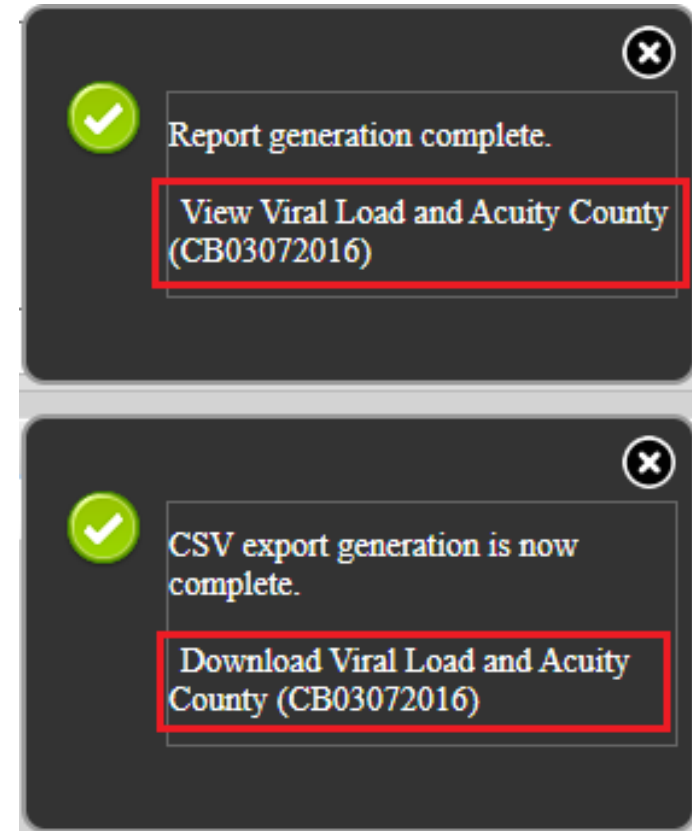
- Click Open in New Tab, PDF, CSV or Excel.
 - Open in New Tab will open the report in a new browser tab.
 - PDF will open a PDF file in a new browser tab. This is best if the report will be printed.
 - CSV or Excel will download the report in an Excel format.



The screenshot displays the 'Run Report' interface within the CAREWare Reports system. The breadcrumb trail at the top reads: 'CAREWare Reports > Custom Reports > Manage Run Custom Reports > Viral Load at'. Below this, a row of buttons is visible: 'Edit Parameters', 'Open in New Tab', 'PDF', 'CSV', 'Excel', and 'Back'. The 'Open in New Tab', 'PDF', 'CSV', and 'Excel' buttons are highlighted with red rectangular boxes. The main section is titled 'Run Report' and contains a 'Parameters' section with two date input fields: 'Date From:' set to '7/1/2019' and 'Date Through:' set to '6/30/2020'. Each date field has a small calendar icon to its right.

Running Custom Reports cont.

- A popup will appear on the right side of the screen.
- Click View [Custom Report Name] or Download [Custom Report Name].





Building Custom Reports

Slides 73-122 are optional for staff who will build custom reports

Questions to ask for designing a custom report:

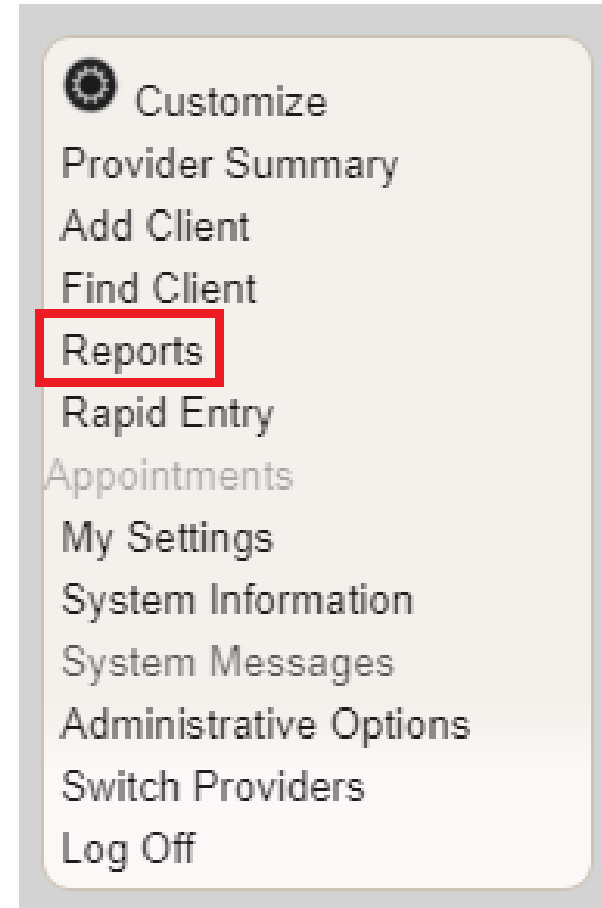
- How will this information be used?
- What information should be included (e.g., poverty level and HIV Risk Factor by client name)?
- How should the information be displayed (e.g., by client name, by service category)?
- Which clients should be included (e.g., clients served in the past year, Hispanic clients only)?
- Should any clients be excluded (e.g., clients under 18 years of age)?
- Does this report require a filter (e.g., Active clients only, no specialty programs, etc.)?





Building Custom Reports cont.

- Start at the main page of CAREWare.
- Click on Reports.





Building Custom Reports cont.

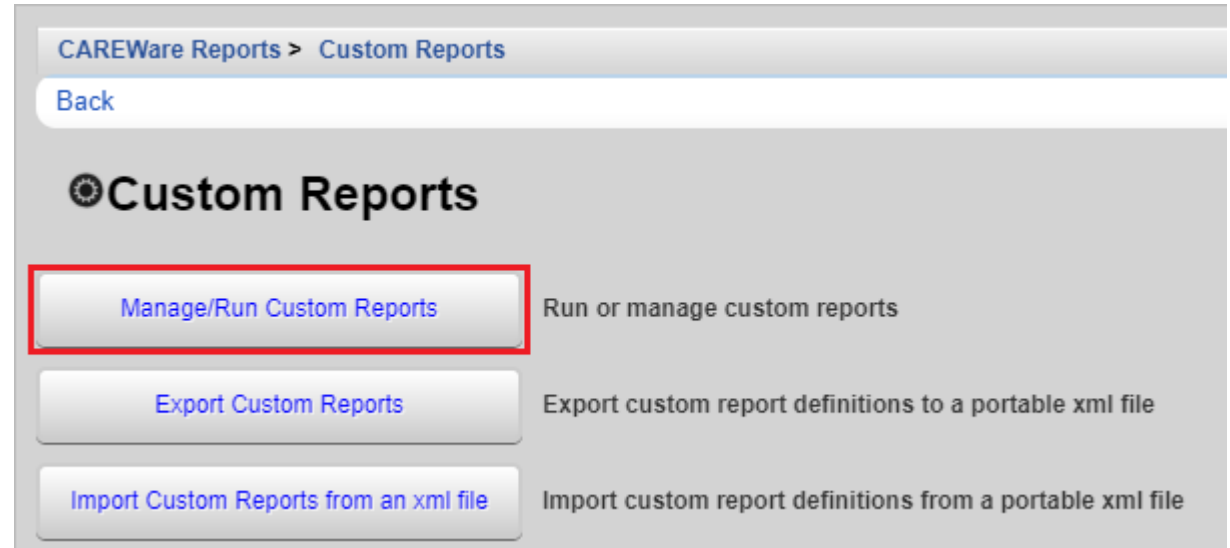
Click on Custom Reports.





Building Custom Reports cont.

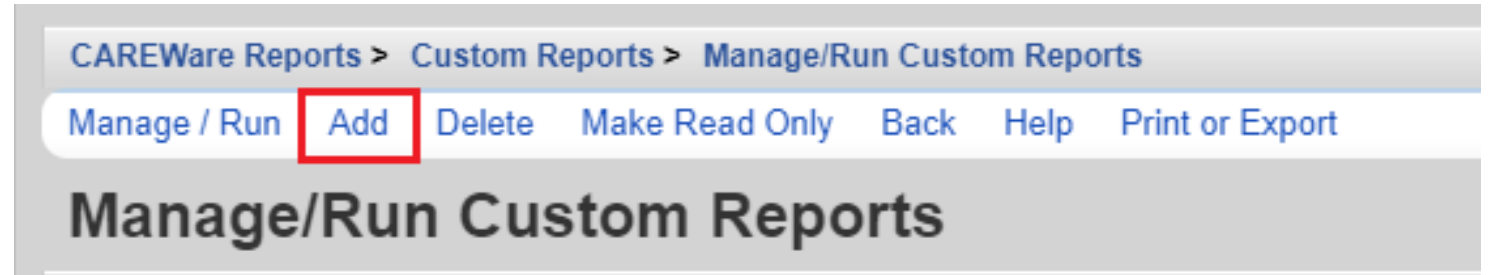
Click Manage/Run Custom Reports.





Building Custom Reports cont.

Click Add.



Building Custom Reports cont.

- Enter your Report Name.
- Choose your Report Type.
- Add a Description if desired.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Manage/Run Custom Reports

[Save](#) [Back](#)

Manage/Run Custom Reports

Setup Details

Report Name:

Report Type: 

Is Crosstab: ☐

Description:

Use Totals: ☐

Header/Footer Format



Building Custom Reports cont.

Click Save.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Manage/Run Custom Reports

[Save](#) [Back](#)

Manage/Run Custom Reports

Setup Details

Report Name:

Report Type: 

Is Crosstab: ☐

Description:

Use Totals: ☐

Header/Footer Format





Building Custom Reports cont.

Click Field Selection.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build

[Back](#)

Example Custom Build

Run Report	Start Date : 06/01/2021, End Date : 06/30/2021, Clients with services, Disp Most medical services in date span
Report Layout	Example Custom Build, Demographics
Field Selection	No fields selected
Report Filter	Report Filter is empty



Building Custom Reports cont.

Click Add.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Field Selection

[Manage](#) [Add](#) [Move Up](#) [Move Down](#) [Delete](#) [Templates](#) [Back](#) [Print or Export](#)

Field Selection

Search:

Field N	Column Header	Column Width (in)	Tota	Sort	Sort Priority	Status	
---------	---------------	-------------------	------	------	---------------	--------	--

Building Custom Reports cont.

- Search for the field you would like to include.
- Select the desired field.
- Click Use Field.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Field Selection

[Use Field](#) [Back](#) [Print or Export](#)

Report Fields

Search:

Field Name	Keywords	Previous Field Nar	Description
Encrypted URN	Demographics	eURN	
URN	Demographics	URN	Uniquire Record Nu

Building Custom Reports cont.

- Edit the Column Header if desired.
- Sort the field.
- Click Save.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Field Selection > Select F

[Save](#) [Back](#)

Select Field Details

Select Field: URN

Column Header: URN

Sort: 

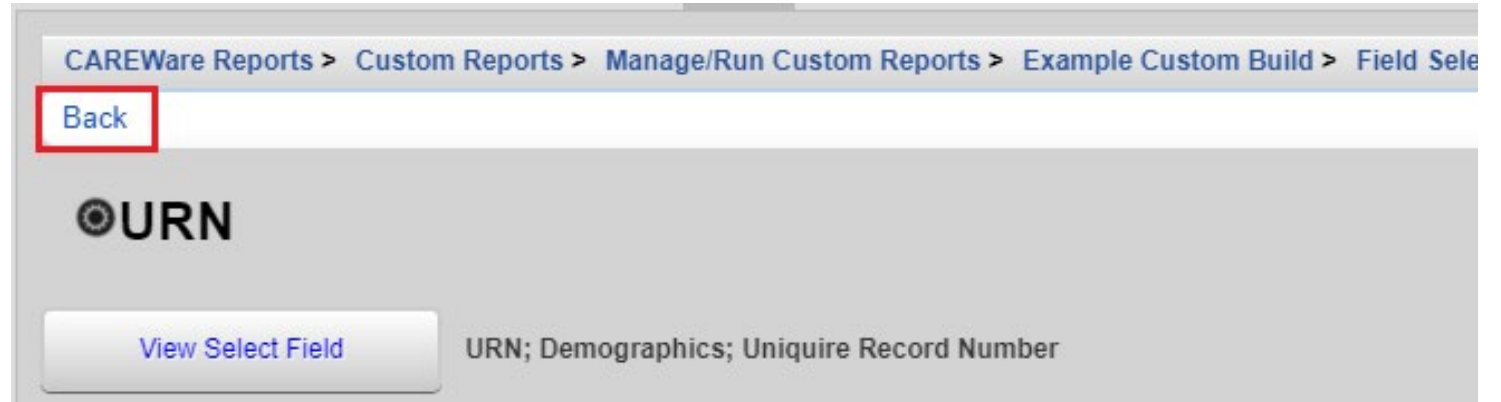
Sort Priority: **Ascending**
Descending

Column Width: 1.2 inches



Building Custom Reports cont.

Click Back.





Building Custom Reports cont.

The new field will show up on the Field Selection screen.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Field Selection

[Manage](#) [Add](#) [Move Up](#) [Move Down](#) [Delete](#) [Templates](#) [Back](#) [Print or Export](#)

Field Selection

Search:

Field N	Column Header	Column Width (in)	Total	Sort	Sort Priority	Status
URN	URN	1.20		Asce	1	Complete



Building Custom Reports cont.

Click Add.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Field Selection

[Manage](#) [Add](#) [Move Up](#) [Move Down](#) [Delete](#) [Templates](#) [Back](#) [Print or Export](#)

Field Selection

Search:

Field N	Column Header	Column Width (in)	Total	Sort	Sort Priority	Status
URN	URN	1.20		Asce	1	Complete

Building Custom Reports cont.

- Search for the field you would like to include.
- Select the desired field.
- Click Use Field.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Field Select

[Use Field](#) [Back](#) [Print or Export](#)

Report Fields

Search:

Field Name	Keywords	Previous Field Name	Description
Last Quantitative Lab Date	Demographics	Last Quantitative La	
Last Quantitative Lab Value	Demographics	Last Quantitative La	
Quantitative BMI Change	Demographics	Quantitative BMI Ch	Returns change in b
Quantitative Lab Amount Change	Demographics	Quantitative Lab Am	Returns change in a
Quantitative Lab Percent Change	Demographics	Quantitative Lab Pe	Returns the percent
Last Quantitative Date With Values		Last Quantitative Da	
Last Quantitative Lab Operator		Last Quantitative La	
Last Quantitative Result With Values		Last Quantitative Re	

Building Custom Reports cont.

- Edit the Subfilter:
 - Select the Lab.
 - Enter the Max months before end date.
 - Enter the Min months before end date.
 - Select whether you want the field to be cross-provider. Usually this is 'yes' for viral load labs.
- Click Next.
- In this example, we are pulling in the last Viral Load Lab Date in the last 12 months in any provider domain.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Exam Date>Subfilter

[Next](#) [Back](#) [Help](#)

Last Quantitative Lab Date>Subfilter

The following 3 criteria need completion for the subfilter

1. Lab
=: 
2. Date Range
Date Option: 
>=: Max. months before end date
<=: Min. months before end date
3. Cross-Provider
=: 



Building Custom Reports cont.

- Edit the Column Header if desired.
- Sort the field if desired.
- Click Save.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Field Selection > Last Quantitative Lab Date > Subfilter > Select Field Details

[Save](#) [Back](#)

Select Field Details

Select Field: Last Quantitative Lab Date

Column Header: Last Viral Load Lab Date

Sort: 

Sort Priority: 0



Building Custom Reports cont.

Click Back.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Field Selection > Last Viral Load Date

[Back](#)

☒ Last Viral Load Lab Date

View Select Field	Last Viral Load Lab Date; Demographics
Subfilter	Lab = Viral Load Date Range Between 12 AND 0 months before the end date or as of date (7/1/2020 And 6/30/2021). AND Cross-Provider = Yes
Date Format	No formatting chosen





Building Custom Reports cont.

The new field will show up on the Field Selection screen.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Field Selection						
Manage Add Move Up Move Down Delete Templates Back Print or Export						
Field Selection						
Search:						
Field Name	Column Header	Column Width (in)	Total	Sort	Sort Priority	Status
URN	URN	1.20		Ascending	1	Complete
Last Quantitative Lab Date	Last Viral Load Lab Date	0.68			0	Complete



Building Custom Reports cont.

Click Add.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Field Selection

Manage **Add** Move Up Move Down Delete Templates Back Print or Export

Field Selection

Search:

Field Name	Column Header	Column Width (in)	Total	Sort	Sort Priority	Status
URN	URN	1.20		Ascending	1	Complete
Last Quantitative Lab Date	Last Viral Load Lab Date	0.68			0	Complete

Building Custom Reports cont.

- Search for the field you would like to include.
- Select the desired field.
- Click Use Field.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom B

Use Field Back Print or Export

Report Fields

Search:

Field Name	Keywords	Previous Field Name	Description
Last Quantitative Lab Date	Demographics	Last Quantitative La	
Last Quantitative Lab Value	Demographics	Last Quantitative La	
Quantitative BMI Change	Demographics	Quantitative BMI Ch	Returns change in b
Quantitative Lab Amount Change	Demographics	Quantitative Lab Am	Returns change in a
Quantitative Lab Percent Change	Demographics	Quantitative Lab Pe	Returns the percent
Last Quantitative Date With Values		Last Quantitative De	
Last Quantitative Lab Operator		Last Quantitative La	
Last Quantitative Result With Values		Last Quantitative Re	

Building Custom Reports cont.

- Edit the Subfilter:
 - Select the Lab.
 - Enter the Max months before end date.
 - Enter the Min months before end date.
 - Select whether you want the field to be cross-provider. Usually this is 'yes' for viral load labs.
- Click Next.
- In this example, we are pulling in the last Viral Load Lab Value in the last 12 months in any provider domain.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Exam Value>Subfilter

[Next](#) [Back](#) [Help](#)

Last Quantitative Lab Value>Subfilter

The following 3 criteria need completion for the subfilter

1. Lab
=: 
2. Date Range
Date Option: 
>=: Max. months before end date
<=: Min. months before end date
3. Cross-Provider
=: 



Building Custom Reports cont.

- Edit the Column Header if desired.
- Sort the field if desired.
- Click Save.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Field Selection > Last Quantitative Lab Value > Subfilter > Select Field Details

[Save](#) [Back](#)

Select Field Details

Select Field: Last Quantitative Lab Value

Column Header: Last Viral Load Lab Value

Sort: 

Sort Priority: 0



Building Custom Reports cont.

Click Back.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Field Selection > L
Value

[Back](#)

☒ Last Viral Load Lab Value

View Select Field	Last Viral Load Lab Value; Demographics
Subfilter	Lab = Viral Load Date Range Between 12 AND 0 months before the end date or as of date (7/1/2020 And 6/30/2021). AND Cross-Provider = Yes
Number Format	No format chosen





Building Custom Reports cont.

The new field will show up on the Field Selection screen

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Field Selection						
Manage Add Move Up Move Down Delete Templates Back Print or Export						
Field Selection						
Search:						
Field Name	Column Header	Column Width (in)	Total	Sort	Sort Priority	Status
URN	URN	1.20		Asce	1	Complete
Last Quantitative Lab Date	Last Viral Load Lab	0.68			0	Complete
Last Quantitative Lab Value	Last Viral Load Lab	0.55			0	Complete



Building Custom Reports cont.

Click Add.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Field Selection

Manage **Add** Move Up Move Down Delete Templates Back Print or Export

Field Selection

Search:

Field Name	Column Header	Column Width (in)	Total	Sort	Sort Priority	Status
URN	URN	1.20		Asce	1	Complete
Last Quantitative Lab Date	Last Viral Load Lab	0.68			0	Complete
Last Quantitative Lab Value	Last Viral Load Lab	0.55			0	Complete

Building Custom Reports cont.

- Search for the field you would like to include.
- Select the desired field.
- Click Use Field.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Bu

[Use Field](#) [Back](#) [Print or Export](#)

Report Fields

Search:

Field Name	Keywords	Previous Field Name	Description
Last Quantitative Lab Date	Demographics	Last Quantitative La	
Last Quantitative Lab Value	Demographics	Last Quantitative La	
Quantitative BMI Change	Demographics	Quantitative BMI Ch	Returns change in b
Quantitative Lab Amount Change	Demographics	Quantitative Lab Am	Returns change in a
Quantitative Lab Percent Change	Demographics	Quantitative Lab Pe	Returns the percent
Last Quantitative Date With Values		Last Quantitative De	
Last Quantitative Lab Operator		Last Quantitative La	
Last Quantitative Result With Values		Last Quantitative Re	

Building Custom Reports cont.

- Edit the Subfilter:
 - Select the Lab.
 - Enter the Max months before end date.
 - Enter the Min months before end date.
 - Select whether you want the field to be cross-provider.
- Click Next.
- In this example, we are pulling in the last RN Acuity Level in the last 12 months in only the provider domain.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Date>Subfilter

[Next](#) [Back](#) [Help](#)

Last Quantitative Lab Date>Subfilter

The following 3 criteria need completion for the subfilter

1. Lab
 - =:
2. Date Range
 - Date Option:
 - >=: Max. months before end date
 - <=: Min. months before end date
3. Cross-Provider
 - =:



Building Custom Reports cont.

- Edit the Column Header if desired.
- Sort the field if desired.
- Click Save.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Field Selection > Last F View

[Save](#) [Cancel](#)

View

Select Field: Last Quantitative Lab Date

Column Header: Last RN Acuity Level Date

Sort: 

Sort Priority: 0



Building Custom Reports cont.

Click Back.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Field Selection > Last RN Acuity Level Date > View

[Back](#)

View

View Select Field	Last RN Acuity Level Date; Demographics
Subfilter	Lab = RN Acuity Level Date Range Between 12 AND 0 months before the end date or as of date (7/1/2020 And 6/30/2021). AND Cross-Provider = No
Date Format	No formatting chosen





Building Custom Reports cont.

The new field will show up on the Field Selection screen.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Field Selection						
Manage Add Move Up Move Down Delete Templates Back Print or Export						
Field Selection						
Search:						
Field Name	Column Header	Column Width (in)	Total	Sort	Sort Priority	Status
URN	URN	1.20		Asce	1	Complete
Last Quantitative Lab Date	Last Viral Load Lab Date	0.68			0	Complete
Last Quantitative Lab Value	Last Viral Load Lab Value	0.55			0	Complete
Last Quantitative Lab Date	Last RN Acuity Level Date	0.68			0	Complete

Building Custom Reports cont.

Click Add.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Field Selection

[Manage](#) [Add](#) [Move Up](#) [Move Down](#) [Delete](#) [Templates](#) [Back](#) [Print or Export](#)

Field Selection

Search:

Field Name	Column Header	Column Width (in)	Total	Sort	Sort Priority	Status
URN	URN	1.20		Asce	1	Complete
Last Quantitative Lab Date	Last Viral Load Lab Date	0.68			0	Complete
Last Quantitative Lab Value	Last Viral Load Lab Value	0.55			0	Complete
Last Quantitative Lab Date	Last RN Acuity Level Date	0.68			0	Complete



Building Custom Reports cont.

- Search for the field you would like to include.
- Select the desired field.
- Click Use Field.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom B

[Use Field](#) [Back](#) [Print or Export](#)

Report Fields

Search:

Field Name	Keywords	Previous Field Name	Description
Last Quantitative Lab Date	Demographics	Last Quantitative La	
Last Quantitative Lab Value	Demographics	Last Quantitative La	
Quantitative BMI Change	Demographics	Quantitative BMI Ch	Returns change in b
Quantitative Lab Amount Change	Demographics	Quantitative Lab Am	Returns change in a
Quantitative Lab Percent Change	Demographics	Quantitative Lab Pe	Returns the percent
Last Quantitative Date With Values		Last Quantitative Da	
Last Quantitative Lab Operator		Last Quantitative La	
Last Quantitative Result With Values		Last Quantitative Re	

Building Custom Reports cont.

- Edit the Subfilter:
 - Select the Lab.
 - Enter the Max months before end date.
 - Enter the Min months before end date.
 - Select whether you want the field to be cross-provider.
- Click Next.
- In this example, we are pulling in the last RN Acuity Level in the last 12 months in only the provider domain.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Exam Value>Subfilter

[Next](#) [Back](#) [Help](#)

Last Quantitative Lab Value>Subfilter

The following 3 criteria need completion for the subfilter

1. Lab
=: 
2. Date Range
Date Option: 
>=: Max. months before end date
<=: Min. months before end date
3. Cross-Provider
=: 



Building Custom Reports cont.

- Edit the Column Header if desired.
- Sort the field if desired.
- Click Save.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Field Selection > Last Value > Subfilter > Select Field Details

[Save](#) [Back](#)

Select Field Details

Select Field: Last Quantitative Lab Value

Column Header: Last RN Acuity Level

Sort: 

Sort Priority: 0



Building Custom Reports cont.

Click Back.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Field Selection > Las

[Back](#)

☒ Last RN Acuity Level

View Select Field	Last RN Acuity Level; Demographics
Subfilter	Lab = RN Acuity Level Date Range Between 12 AND 0 months before the end date or as of date (7/1/2020 And 6/30/2021). AND Cross-Provider = No
Number Format	No format chosen





Building Custom Reports cont.

The new field will show up on the Field Selection screen.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Field Selection

Manage Add Move Up Move Down Delete Templates Back Print or Export

Field Selection

Search:

Field Name	Column Header	Column Width (in)	Total	Sort	Sort Priority	Status
URN	URN	1.20		Asce	1	Complete
Last Quantitative Lab Date	Last Viral Load Lab Date	0.68			0	Complete
Last Quantitative Lab Value	Last Viral Load Lab Value	0.55			0	Complete
Last Quantitative Lab Date	Last RN Acuity Level Date	0.68			0	Complete
Last Quantitative Lab Value	Last RN Acuity Level	0.55			0	Complete

Building Custom Reports cont.

- Next, we are going to add a filter.
- You may not need to add a filter, depending on your report needs.
- Click Back.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Field Selection

[Manage](#) [Add](#) [Move Up](#) [Move Down](#) [Delete](#) [Templates](#) [Back](#) [Print or Export](#)

Field Selection

Search:

Field Name	Column Header	Column Width (in)	Total	Sort	Sort Priority	Status
URN	URN	1.20		Asce	1	Complete
Last Quantitative Lab Date	Last Viral Load Lab Date	0.68			0	Complete
Last Quantitative Lab Value	Last Viral Load Lab Value	0.55			0	Complete
Last Quantitative Lab Date	Last RN Acuity Level Date	0.68			0	Complete
Last Quantitative Lab Value	Last RN Acuity Level	0.55			0	Complete



Building Custom Reports cont.

Click Report Filter.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build

[Back](#)

Example Custom Build

Run Report	Start Date : 06/01/2021, End Date : 06/30/2021, Clients with services, Disp Most medical services in date span
Report Layout	Example Custom Build, Demographics
Field Selection	URN, Last Viral Load Lab Date, Last Viral Load Lab Value, Last RN Acuity RN Acuity Level
Report Filter	Report Filter is empty

Building Custom Reports cont.

- Click Add.
- In this example, we will only be including clients whose current enrollment status is Active.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Report Filter

[Manage](#) [Add](#) [Move Up](#) [Move Down](#) [Delete](#) [Templates](#) [Back](#) [Print or Export](#)

Report Filter

Search:

Op	Paren.	Field Nam	Is Not	=	>=	<=	Null	Paren.	Status
----	--------	-----------	--------	---	----	----	------	--------	--------



Building Custom Reports cont.

- Search for the field to filter by.
- Select the desired field.
- Click Use Field.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Report Filter

[Use Field](#) [Back](#) [Print or Export](#)

Report Fields

Search:

Field Name	Keywords	Previous Field Name	Description
Date of ADAP enrollment	Demographics	ADAP Legacy Enrl	
ADAP enrollment status	Demographics	ADAP Legacy Enrl	Values:
Age at Enrollment	Demographics	Age at Enrollment	Client's age at enrol
Client pregnant at enrollment	Demographics	Client is Pregnant a	Returns: Yes or No
Days Enrolled	Demographics	Days Enrolled	Total days enrolled i
Enrollment date	Demographics	Enrl Date	From services scree
Enrollment status	Demographics	Enrl Status	From services scree
Enrollment status (old)	Demographics	Enrl. Status	Enrollment status pi
Enrollment status by date	Demographics	Enrl. Status By Date	Used to determine c

Building Custom Reports cont.

Enter the Filter Criteria Details.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Exam

[Save](#) [Back](#)

Criterion Details

Field Name:

Is Not: ☐

=: 

Null:

- Active
- Inactive/Case Closed
- Incarcerated
- Referred or Discharged
- Relocated
- Removed



Building Custom Reports cont.

Click Save.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Exa

[Save](#) [Back](#)

Criterion Details

Field Name:

Is Not: ☐

=: 

Null: ☐



Building Custom Reports cont.

The new filter field will now show up on the Filter screen.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Criterion Details

Manage Add Move Up Move Down Delete Templates Back Print or Export

Criterion Details

Search:

Paren.	Operat	Field Name	Is Not	=	>=	<=	Null	Paren.	Status
		Enrl Status		Active					Complete

Building Custom Reports cont.

Click Back.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Criterion Details

Manage Add Move Up Move Down Delete Templates **Back** Print or Export

Criterion Details

Search:

Paren.	Operatc	Field Name	Is Not	=	>=	<=	Null	Paren.	Status
		Enrl Status		Active					Complete

Building Custom Reports cont.

- Next, we will specify the date range.
- Click Run Report.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build

[Back](#)

Example Custom Build

Run Report	Start Date : 06/01/2021, End Date : 06/30/2021, Clients with services, Display Spe Most medical services in date span
Report Layout	Example Custom Build, Demographics
Field Selection	URN, Last Viral Load Lab Date, Last Viral Load Lab Value, Last RN Acuity Level I RN Acuity Level
Report Filter	Enrollment status = Active



Building Custom Reports cont.

Click Edit Parameters.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Run Report

[Edit Parameters](#) [Selected Providers](#) [Open in New Tab](#) [PDF](#) [CSV](#) [Excel](#) [Help](#) [Back](#)

Run Report

Parameters

Date From: 

Date Through: 

Building Custom Reports cont.

- Enter the Date From and Date Through.
- Check Show Clients with Service only.
- Check Show Specifications.
- Click Save.

CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Run Report > Edit

[Save](#) [Cancel](#)

Run Report

Parameters

Date From: 06/01/2020

Date Through: 06/30/2020

Clinical Review Year: 2021

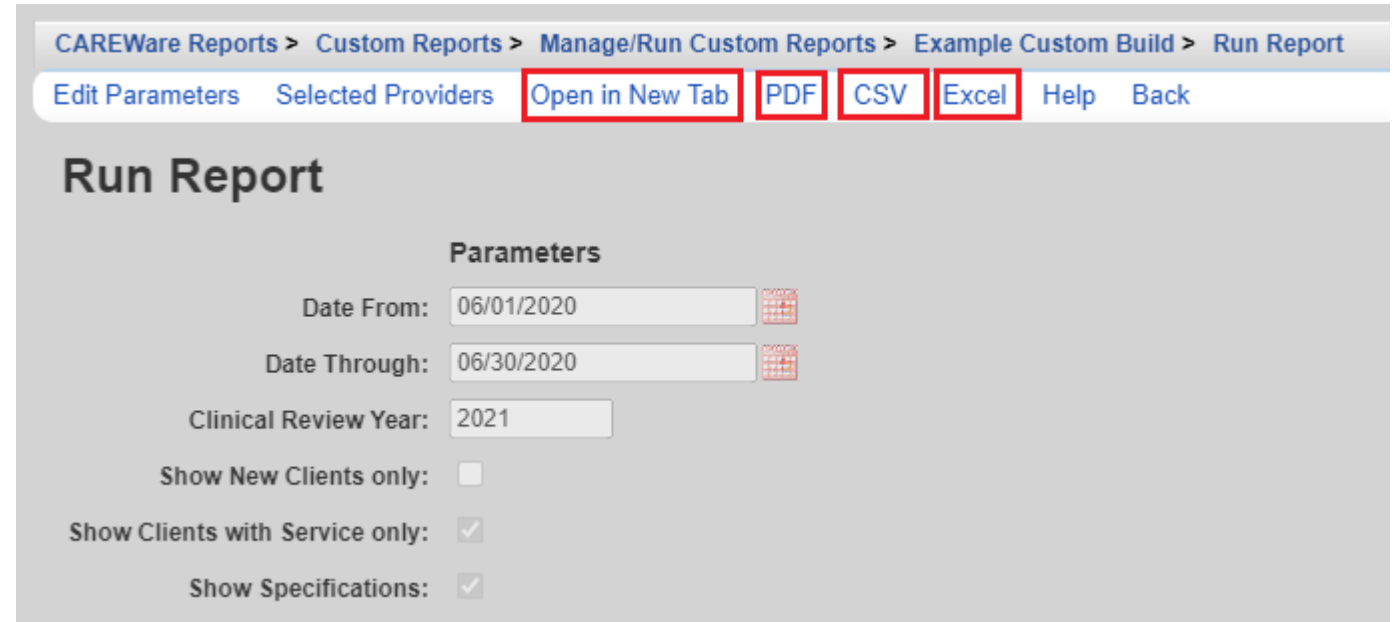
Show New Clients only: ☐

Show Clients with Service only: ☒

Show Specifications: ☒

Building Custom Reports cont.

- Click Open in New Tab, PDF, CSV or Excel.
 - Open in New Tab will open the report in a new browser tab.
 - PDF will open a PDF file in a new browser tab. This is best if the report will be printed.
 - CSV or Excel will download the report in an Excel format.

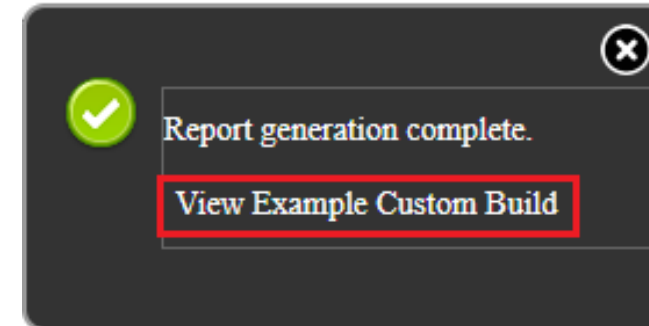


The screenshot displays the 'Run Report' page within the CAREWare Reports system. The breadcrumb trail at the top reads: CAREWare Reports > Custom Reports > Manage/Run Custom Reports > Example Custom Build > Run Report. Below this, a navigation bar contains links: Edit Parameters, Selected Providers, Open in New Tab (highlighted with a red box), PDF (highlighted with a red box), CSV (highlighted with a red box), Excel (highlighted with a red box), Help, and Back. The main section is titled 'Run Report' and contains a 'Parameters' section with the following fields: 'Date From' (06/01/2020), 'Date Through' (06/30/2020), and 'Clinical Review Year' (2021). Below these are three checkboxes: 'Show New Clients only' (unchecked), 'Show Clients with Service only' (checked), and 'Show Specifications' (checked).



Running Custom Reports cont.

- A popup will appear on the right side of the screen.
- Click View [Custom Report Name] or Download [Custom Report Name].





Thank you

Please complete all the CAREWare 6 training modules and download a copy of the CAREWare 6 User Manual.

[CAREWare 6 User Support Website](#)

