



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 5:

Specialty Reports

Topic:

- Process for a variety of specialty reports including:
 - No Service in X Days Report
 - Clients with no Tests in X Days Report
 - Clients with Last Selected Lab Report
 - Service Detail Report
 - Multiple Client Case Notes Report



Clinical Encounter Reports

Click Reports on the main menu,
then click Client Data Reports.





Clinical Encounter Reports cont.

Click Clinical Encounter Reports.



No Service in X Days Report

- This report lists clients who have not received a specified service in a certain number of days.
- Click No Service in X Days Report.

CAREWare Reports > Client Data Reports > Clinical Encounter Reports

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Clinical Encounter Reports

Clients with no encounter in X days	Clients who have not had an encounter in the last specified number of days
No Service in X Days Report	List clients who have not received a service in a specified category or a particular subservice within the specified number of days
Clients with no test in X days	Clients who have not had the specified screening test in the specified number of days
Clients with last selected lab result	Clients whose last selected lab result was less than or greater than the specified result
ARV Ingredient Report	Displays ARV ingredient counts for active HIV-positive clients on the specified date
Clients with no Hepatitis vaccinations	Clients who have not had a vaccination for a specified hepatitis virus
Clients ever diagnosed with Hepatitis	Clients ever diagnosed with Hepatitis
Clients with no Pneumovax in X months	Clients who have not had a Pneumovax immunization in a specified number of months



No Service in X Days Report cont.

- Enter the Service Category and Subservice fields (if applicable).
 - Leaving these fields blank will run the report on all services.
- Enter the Number of Days.
- Check Apply Filter if a filter is desired.
- Check Hide Personally Identifying Information if desired.
- Check Include shared services entered by other providers if desired.
- Click Run or PDF.

CAREWare Reports > Client Data Reports > Clinical Encounter Reports > Clients with no service in X days

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

Clients with no service in X days

Service Category:

Subservice Type:

Number of Days:

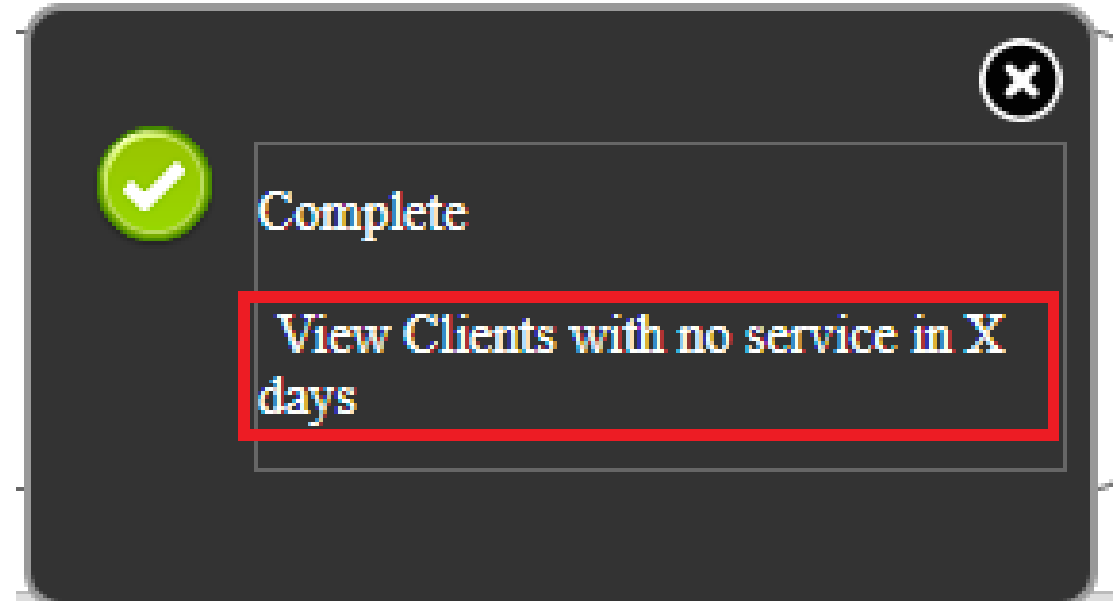
Apply Custom Filter: ☐

Hide Personally Identifying Information: ☐

Include shared services entered by other providers: ☐

No Service in X Days Report cont.

- If PDF was selected, a pop-up will appear on the right side of the screen.
- Click View Clients with no service in X days.



Clients with no test in X Days Report

- This report will list the clients who have not had a particular screening test in a specified number of days.
- This can be useful for determining which clients need a reassessment or updated lab values.
- Click Clients with no test in X days.

CAREWare Reports > Client Data Reports > Clinical Encounter Reports

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⚙️ Clinical Encounter Reports

Clients with no encounter in X days	Clients who have not had an encounter in the last specified number of days
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Clients with no test in X Days Report cont.

- Enter the Test Definition and the Number of days.
- 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.

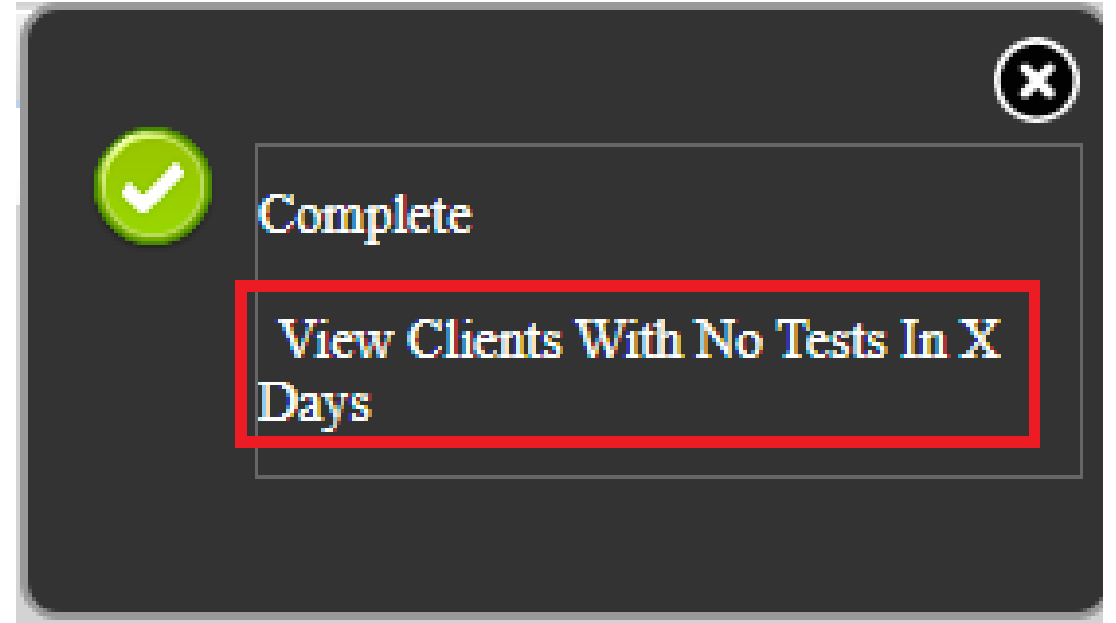
The screenshot shows the 'Clients With No Tests In X Days' report configuration window. The breadcrumb trail at the top reads: 'CAREWare Reports > Client Data Reports > Clinical Encounter Reports > Clients With No Tests In X Days'. Below this, there are four buttons: 'Edit Filter', 'Run', 'PDF', and 'Cancel'. The 'Run' and 'PDF' buttons are highlighted with red boxes. The main title of the window is 'Clients With No Tests In X Days'. Below the title, there are three input fields: 'Test Definition:' (an empty text box with a red border), 'Number of days:' (a text box containing '60' with a red border), and 'Apply Filter:' (an unchecked checkbox). At the bottom, there is a 'Filter Description:' label followed by a text area containing the text 'Report Filter is empty'.





Clients with no test in X Days Report cont.

- If PDF was selected, a pop-up will appear on the right side of the screen.
- Click View Clients With No Tests In X Days.





Clients with last selected lab result Report

- This report identifies clients with certain lab values.
- This can be useful to identify clients with specific Acuity Levels, CD4 Counts, Viral Loads, Adherence, Life Areas, etc.
- In this example, we will pull clients with an Acuity Client Level of 3 or 4.





Clients with last selected lab result Report cont.

Click Clients with last selected lab result.

CAREWare Reports > Client Data Reports > Clinical Encounter Reports

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⚙️ Clinical Encounter Reports

Clients with no encounter in X days	Clients who have not had an encounter in the last specified number of days
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Clients with last selected lab result Report cont.

- Enter the Lab, Operator and Value.
- 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 > Client Data Reports > Clinical Encounter Reports > Clients with last selected lab results

Edit Filter Run PDF Cancel

Clients with last selected lab results

Lab: Acuity Level

Operator: >=

Value: 3

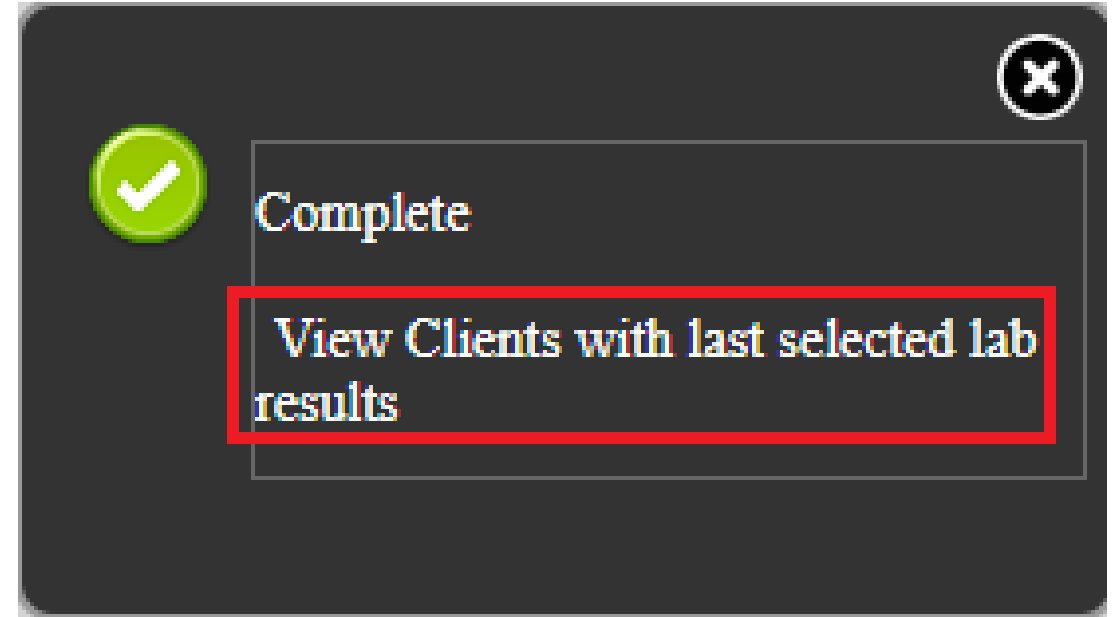
Apply Filter: ☐

Filter Description: Report Filter is empty



Clients with last selected lab result Report cont.

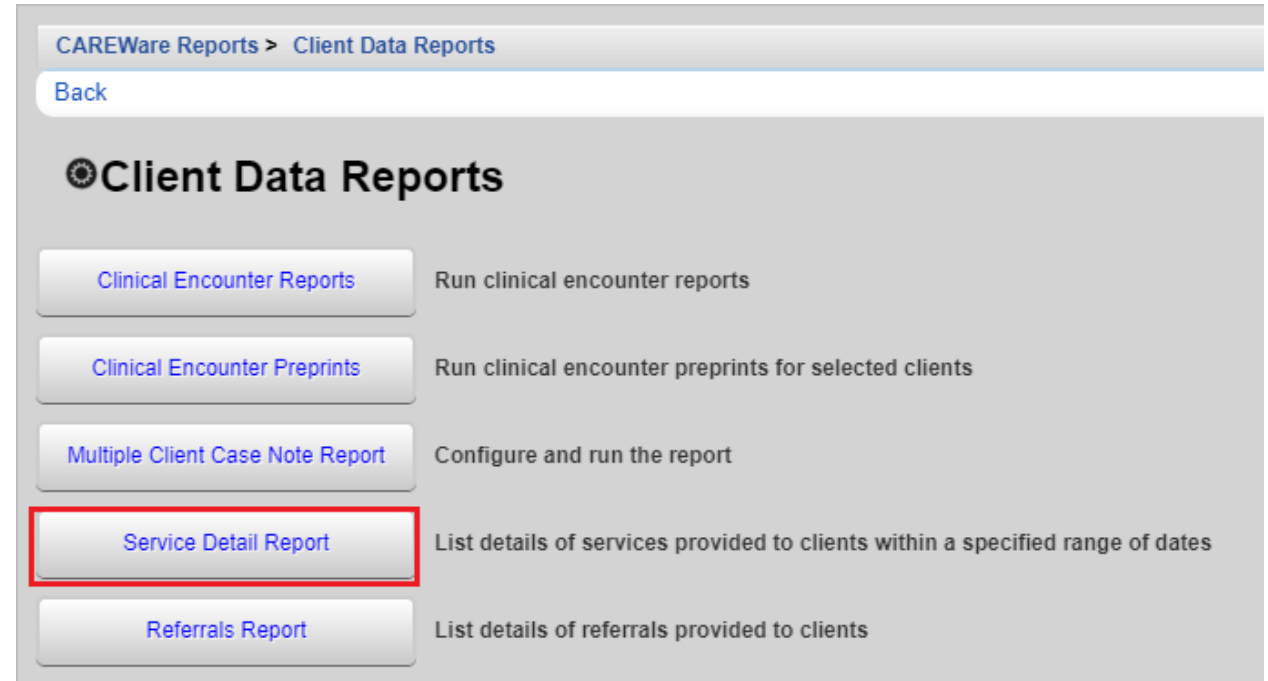
- If PDF was selected, a pop-up will appear on the right side of the screen.
- Click View Clients with last selected lab results.





Service Detail Report

- This report provides client level information for services provided within a specified time frame.
- Click Service Detail Report on the Client Data Reports screen.





Service Detail Report cont.

- Enter the Start Date and End Date
- Check Apply Custom Filter if a filter is desired.
- Check Only Include Services with Amount Received or Hide. Personally Identifying Information if desired.

CAREWare Reports > Client Data Reports > Service Detail Report

Edit Filter Run PDF CSV Cancel

Service Detail Report

Start Date: 7/1/2020

End Date: 7/31/2020

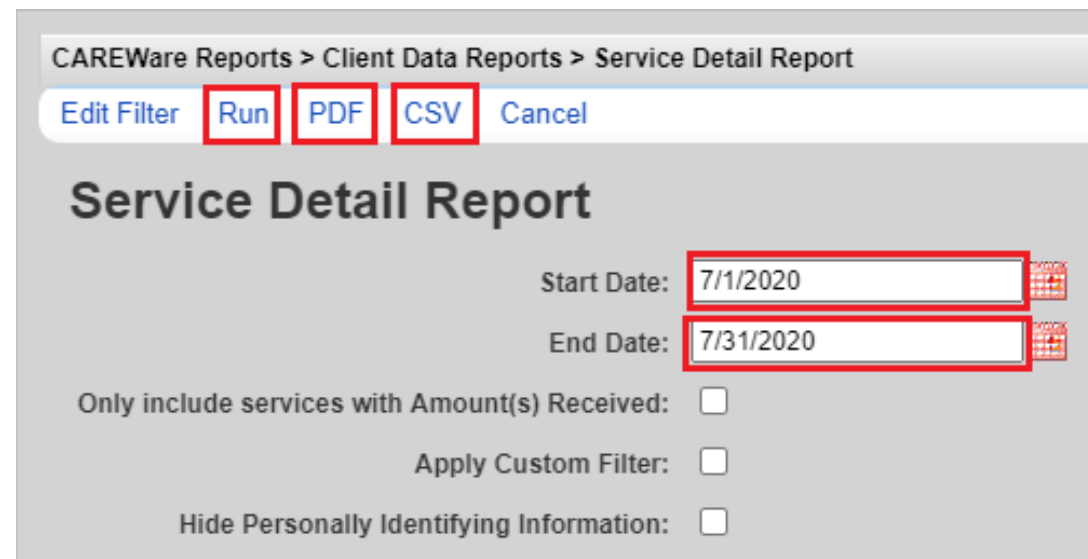
Only include services with Amount(s) Received: ☐

Apply Custom Filter: ☐

Hide Personally Identifying Information: ☐

Service Detail Report cont.

- Click Run, PDF or CSV.
 - 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.
 - CSV will download the report in an Excel format.



CAREWare Reports > Client Data Reports > Service Detail Report

Edit Filter Run PDF CSV Cancel

Service Detail Report

Start Date: 7/1/2020

End Date: 7/31/2020

Only include services with Amount(s) Received: ☐

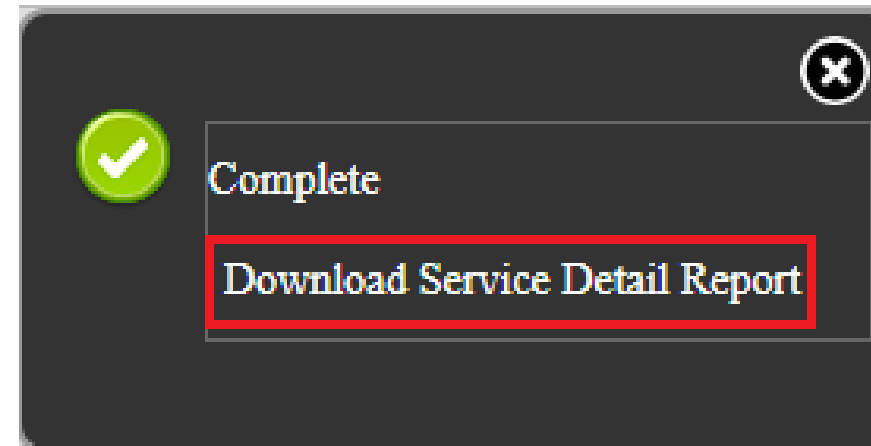
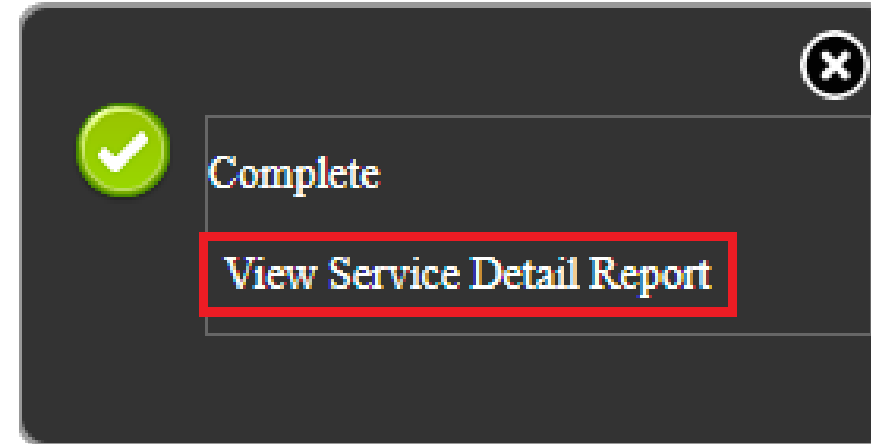
Apply Custom Filter: ☐

Hide Personally Identifying Information: ☐



Service Detail Report cont.

- If PDF or CSV was selected, a pop-up will appear on the right side of the screen.
- Click View Service Detail Report or Download Service Detail Report.



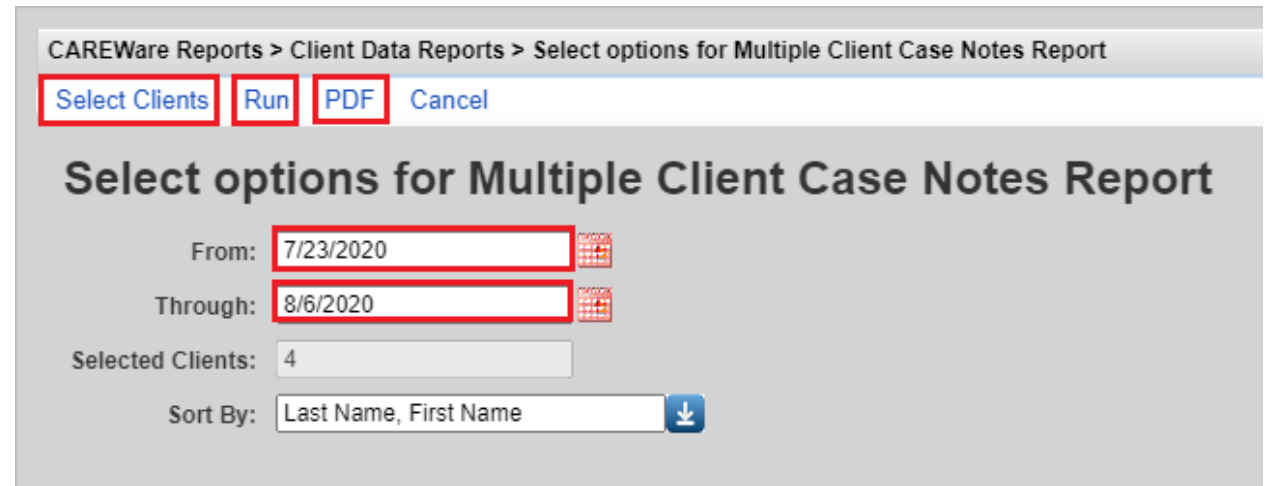
Multiple Client Case Notes Report

- This report prints case notes for a group of clients for a specified time frame.
- Click Multiple Client Case Note Report.



Multiple Client Case Notes Report

- Enter the From and Through dates.
- Click on Select Clients to specify which clients to be pulled into the report.
- Edit the Sort By field if 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.

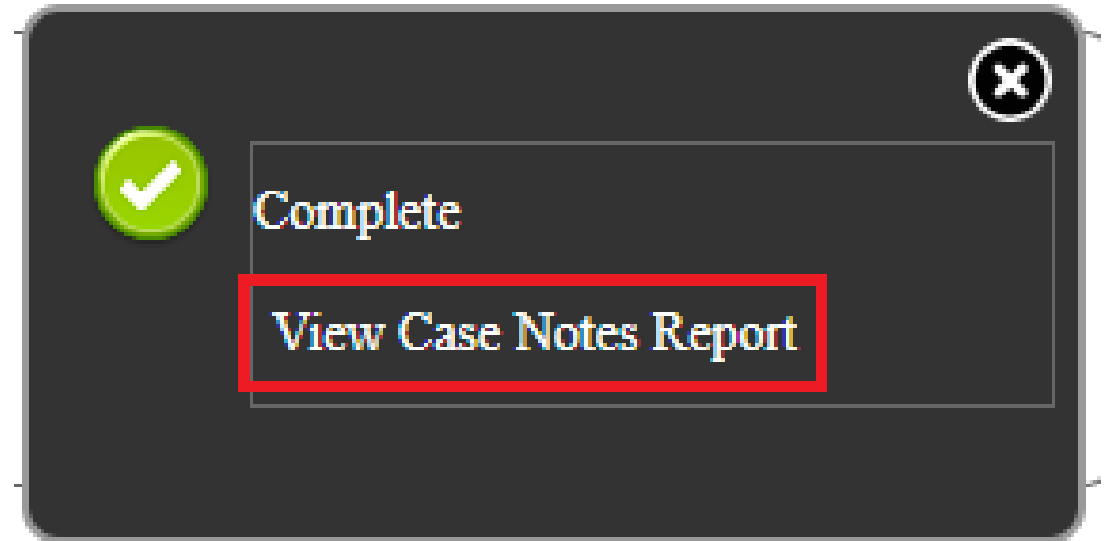


The screenshot shows the 'Select options for Multiple Client Case Notes Report' window. At the top, the breadcrumb path is 'CAREWare Reports > Client Data Reports > Select options for Multiple Client Case Notes Report'. Below this is a toolbar with four buttons: 'Select Clients', 'Run', 'PDF', and 'Cancel'. The 'Select Clients', 'Run', and 'PDF' buttons are highlighted with red boxes. The main area of the window is titled 'Select options for Multiple Client Case Notes Report'. It contains the following fields: 'From:' with a date input '7/23/2020' and a calendar icon; 'Through:' with a date input '8/6/2020' and a calendar icon; 'Selected Clients:' with a text input '4'; and 'Sort By:' with a dropdown menu showing 'Last Name, First Name' and a download icon.



Multiple Client Case Notes Report

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





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](#)

