# CAREWare 6

# June 2019

# Quick Start Guide #6

## Working with Prebuilt Reports (Including the RSR and ADR)

CAREWare Quick Start Guides will walk you through the basics of setting up, managing, and using the main CAREWare functions. It is intended for non-technical users who need to get basic information in and out of CAREWare.

*PLEASE NOTE: The client data used in these manuals is purely fictional.*

# First Things First

## Getting Started

- You must have the appropriate user privileges to run reports.
- You should have a number of clients entered in the system so you can see how your reports will look.

# Running "Prebuilt" reports

CAREWare comes prepackaged with several summary and service reports. We'll cover a few of them here, and then look at running the RSR for both reporting and quality assurance purposes.

Custom reports are covered in Quick Start Guides #7 and #8.

1. Log into CAREWare. For more details on how to do so, please refer to the **Quick Start Guide #1**.

**NOTE:** Some pre-built reports can only be run from the Central Admin and vice-versa. i.e. WICY report (Central); Mailing Labels (Provider).

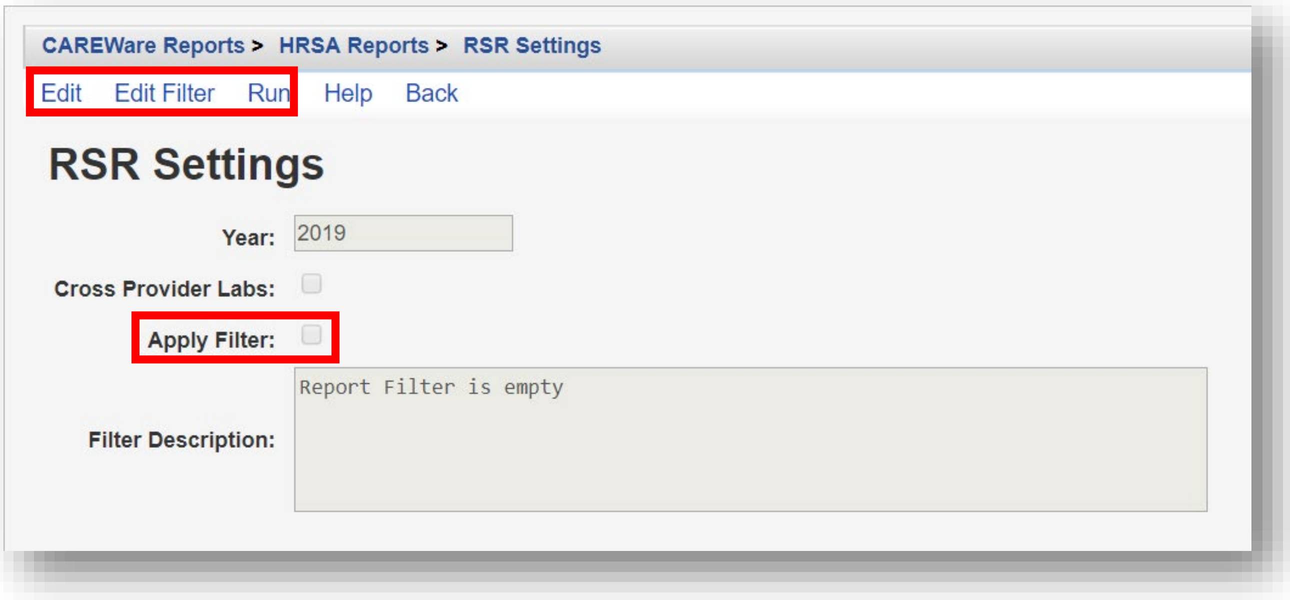
2. Select **Reports** from the **Menu of Links**. The various report categories will appear.

## Running HRSA Reports

1. From the CAREWare Reports screen, click **HRSA Reports**.


2. Select **RSR Client Report**. (From the Provider domain, select **Export Menu**, then **RSR Export**.)

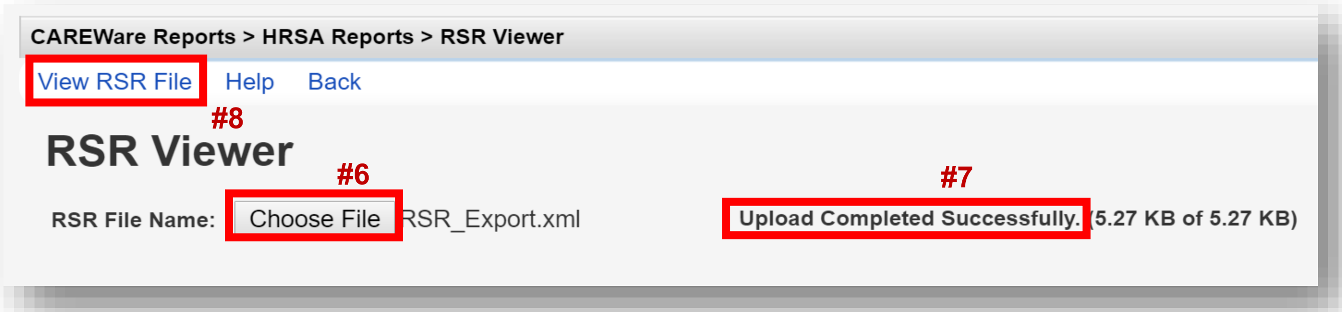
3. If necessary, change the **Report Year** by clicking **Edit**. To edit Filters, click **Edit Filter** and then check **Apply Filter**. Once complete, click **Run**.



4. Click **Download RSR file**. Select a location on your local computer to save the *RSR_Export.xml* file. Note: It is recommended to save the RSR file to the computer Desktop for easy retrieval, as it is used in the next step.


5. Return to the CAREWare Reports screen and click **HRSA Reports**, and then click **RSR Viewer**.

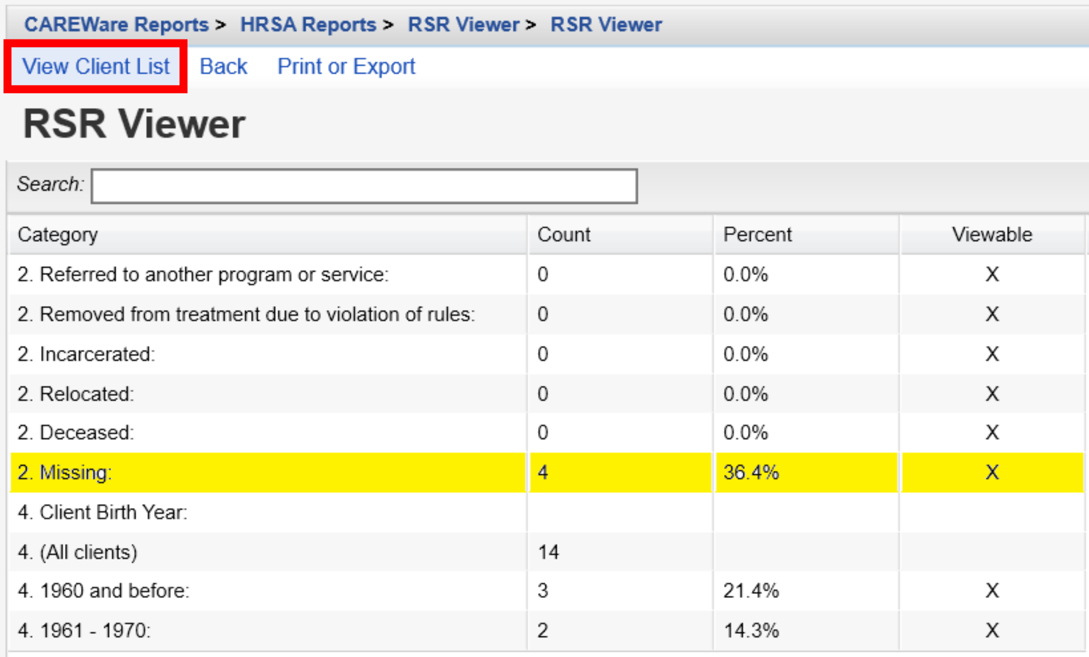
6. Click on **Choose File**.
7. Select the *RSR_Export.xml* file saved on your local computer in step #4. Once chosen, the message **Upload Completed Successfully** should appear.
8. Select **View RSR File**.




The RSR Report is displayed, with *Category*, *Count*, *Percent*, and *Viewable* columns. The *Category* column contains each HRSA RSR data field with a number listed to the left, which corresponds to the HRSA RSR required client-level data element.

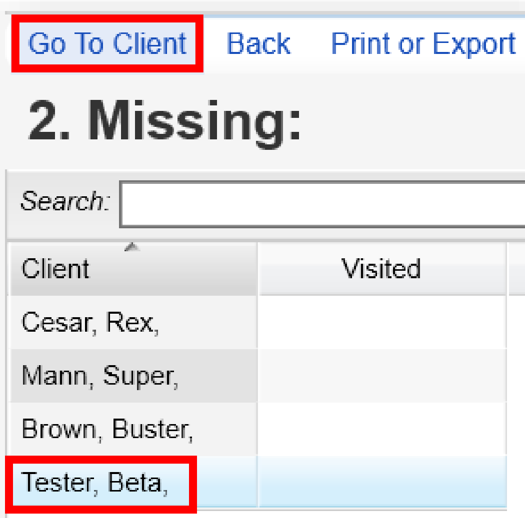
**TIP:** The RSR Report should also be used throughout the year, to identify and correct client data fields that are Missing, Unknown, or Out of Compliance with HRSA RSR data requirements.

9. In this example, on page 2 of the RSR Viewer, for the Category **2. Missing**, the Count shows 4. This indicates there are four (4) clients that are missing **#2 – Enrollment Status**. Select the 2. Missing row by clicking on it, and then click **View Client List**.



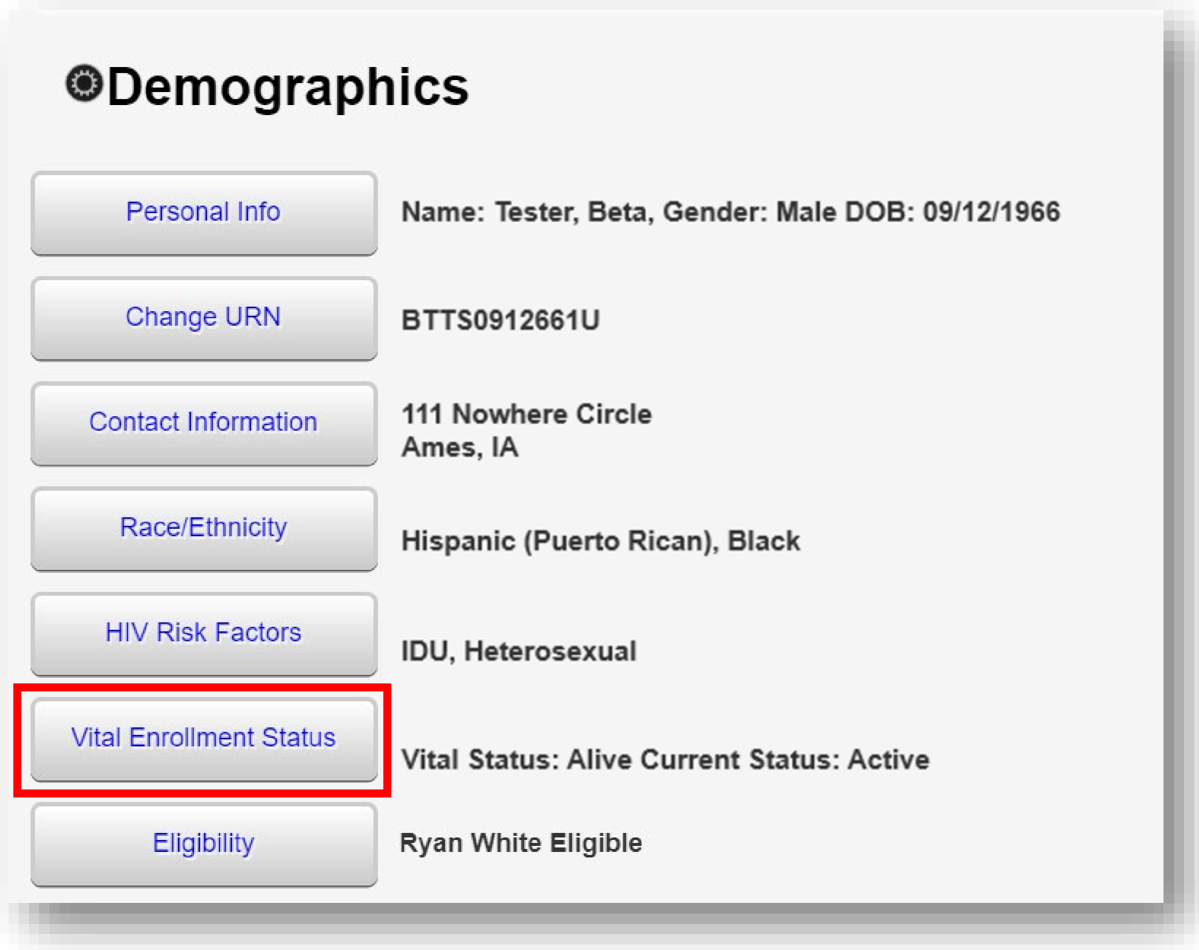

| Category | Count | Percent | Viewable |
|---|---|---|---|
| 2. Referred to another program or service: | 0 | 0.0% | X |
| 2. Removed from treatment due to violation of rules: | 0 | 0.0% | X |
| 2. Incarcerated: | 0 | 0.0% | X |
| 2. Relocated: | 0 | 0.0% | X |
| 2. Deceased: | 0 | 0.0% | X |
| 2. Missing: | 4 | 36.4% | X |
| 4. Client Birth Year: | | | |
| 4. (All clients) | 14 | | |
| 4. 1960 and before: | 3 | 21.4% | X |
| 4. 1961 - 1970: | 2 | 14.3% | X |

10. The four clients missing Enrollment Status are listed. Select a client by clicking on their name and click **Go To Client** or double-click the client's name. CAREWare performs a real-client lookup and opens the client record with the missing data automatically.

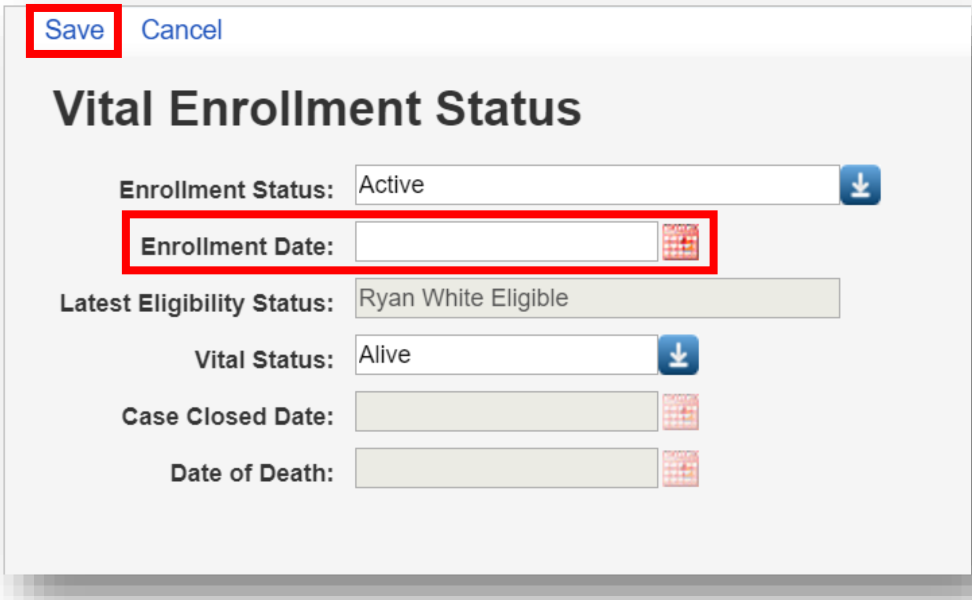



| Client | Visited |
|---|---|
| Cesar, Rex, | |
| Mann, Super, | |
| Brown, Buster, | |
| Tester, Beta, | |

11. A new tab will open and the client's Demographic screen will appear. For this example, client "Tester, Beta" was selected. Click on **Vital Enrollment Status** from the Demographics Menu List.



12. The Enrollment Date field is null (blank). A valid enrollment date needs to be entered to correct the missing data field. Once complete, click **Save**.




Check all the remaining RSR Report Categories and Columns for Missing, Unknown, and Out of Compliance data values, including, Demographic and Clinical information. Review all Categories to check program data accuracy.

**NOTE:** Remember to rerun the RSR Client Report to include any changes made to the client record(s) in CAREWare.

# Running Client Data Reports

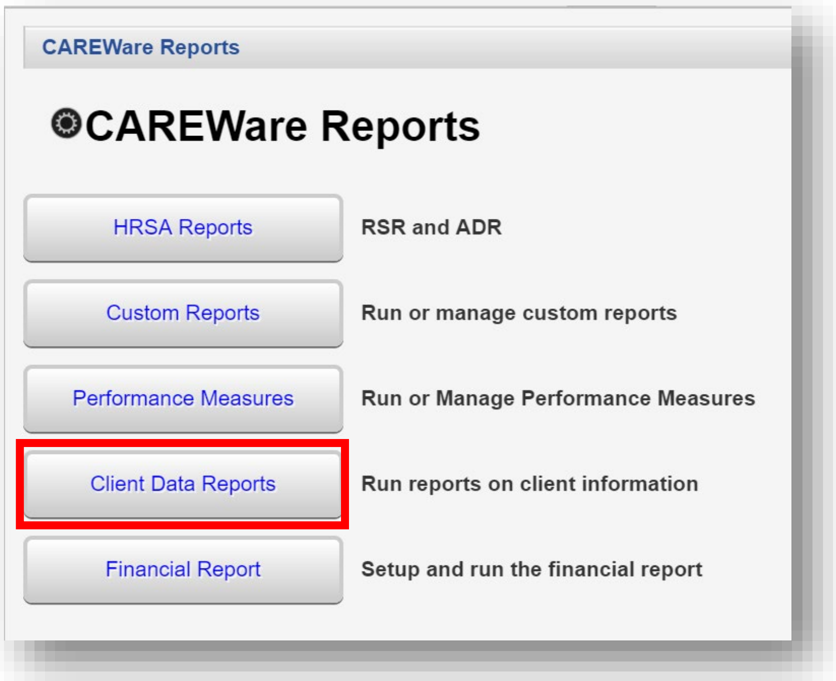
The following Client Data Reports are available to you within CAREWare 6:

- Clinical Encounter Reports – Run 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
- ***Clinical Encounter Preprints*** – Run clinical encounter preprints for selected clients
- ***Multiple Client Case Note Report*** – Run case note report on multiple clients
- ***Service Detail Report*** – List details of services provided to clients within a specified range of dates
- ***Referrals Report*** – List details of referrals provided to clients

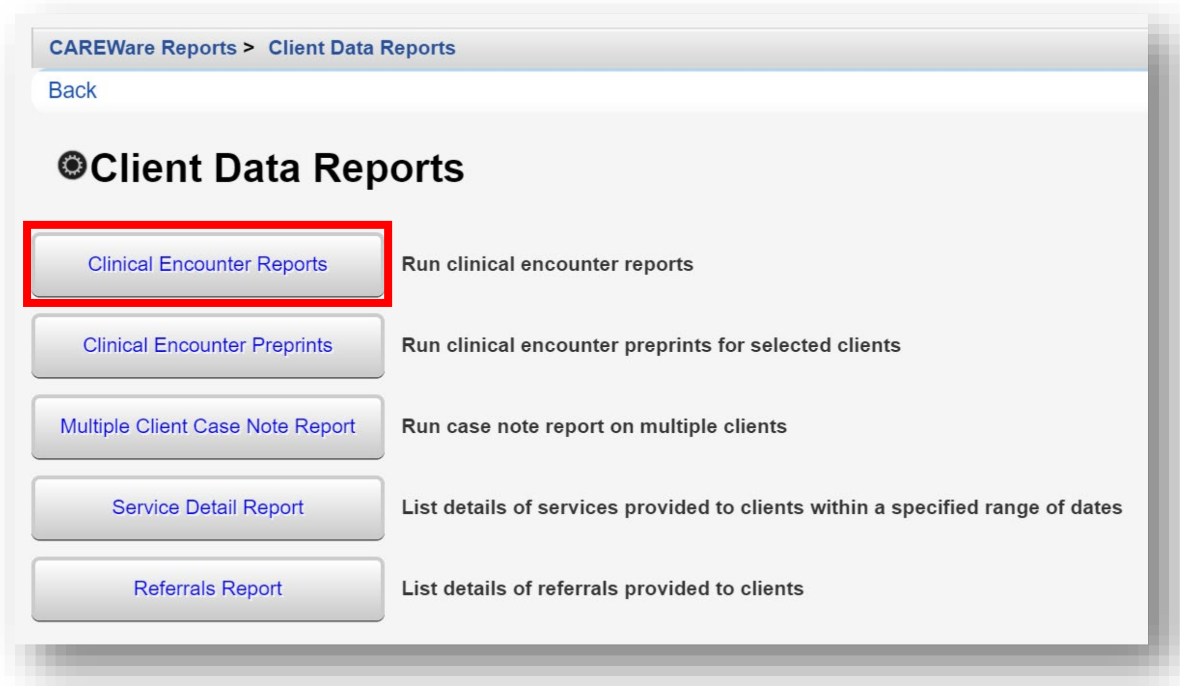
## Running the No Services in X Days Report

This report can assist in identifying clients who are overdue receiving services or may be Out of Care. Generally, clients who have not received services in six months or greater are considered to be “out of care.” (Note: that this report only includes clients with Enrollment Status of Active or Unknown.)

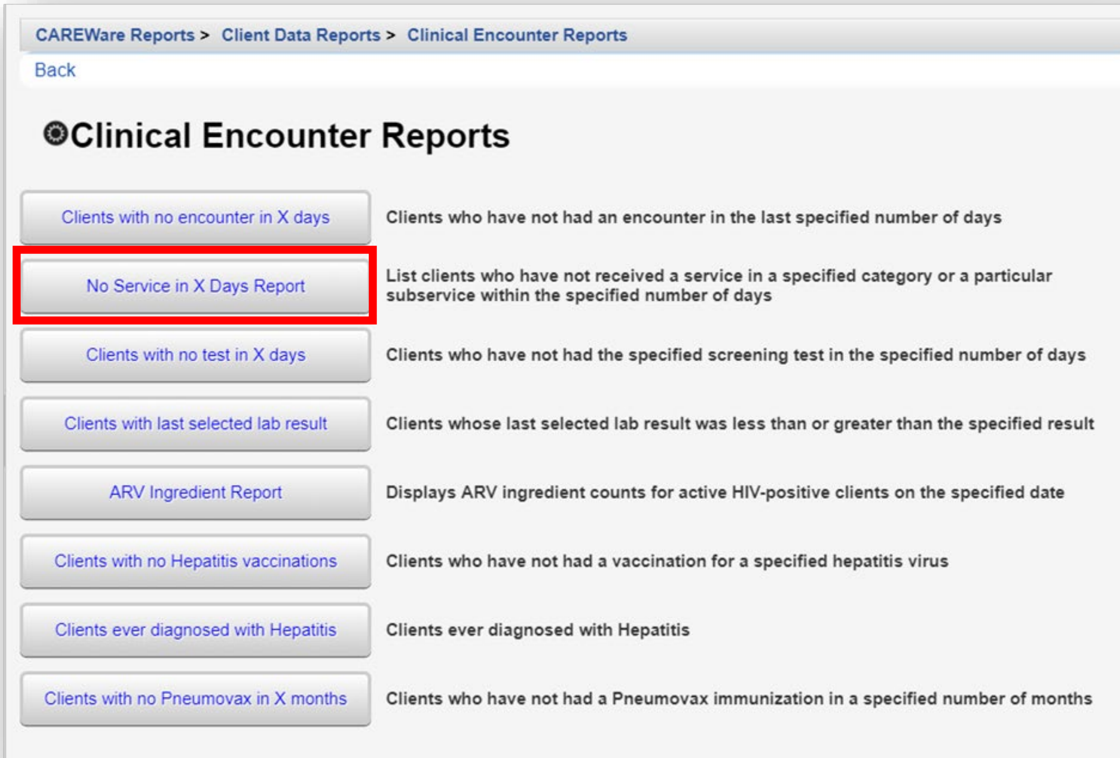
1. From the CAREWare Reports menu, click **Client Data Reports**.




2. On the next menu, select **Clinical Encounter Reports**.



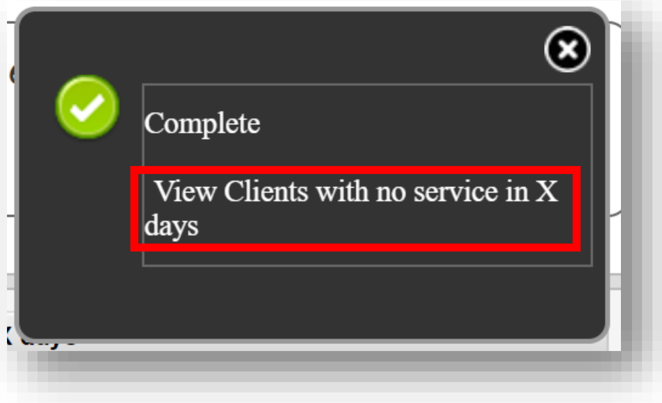
3. Select the **No Service in X Days Report**.




4. Select the **Service Category**, **Subservice Type**, and **Number of Days**. Check **Apply Custom Filter**, **Hide Personally Identifying Information**, and/or **Include shared services entered by other providers**, as applicable.


5. Click **Run** to open the report in a new tab. Click **PDF** to open the report as a PDF.

6. Once you click **Run**, a report confirmation message will open in the upper right corner of the screen. Select **View Clients with no service in X days**. Your report will be displayed in a new tab.




**NOTE:** Blank service date records indicate that a client record was created, but no service was entered. This could be either a data entry issue, where service information needs to be entered, or an indication that clients made an appointment but did not return for service.

This report can be used as a tool to perform chart review and monitoring, or to determine the cause of client record(s) without services.

# Running Financial Reports

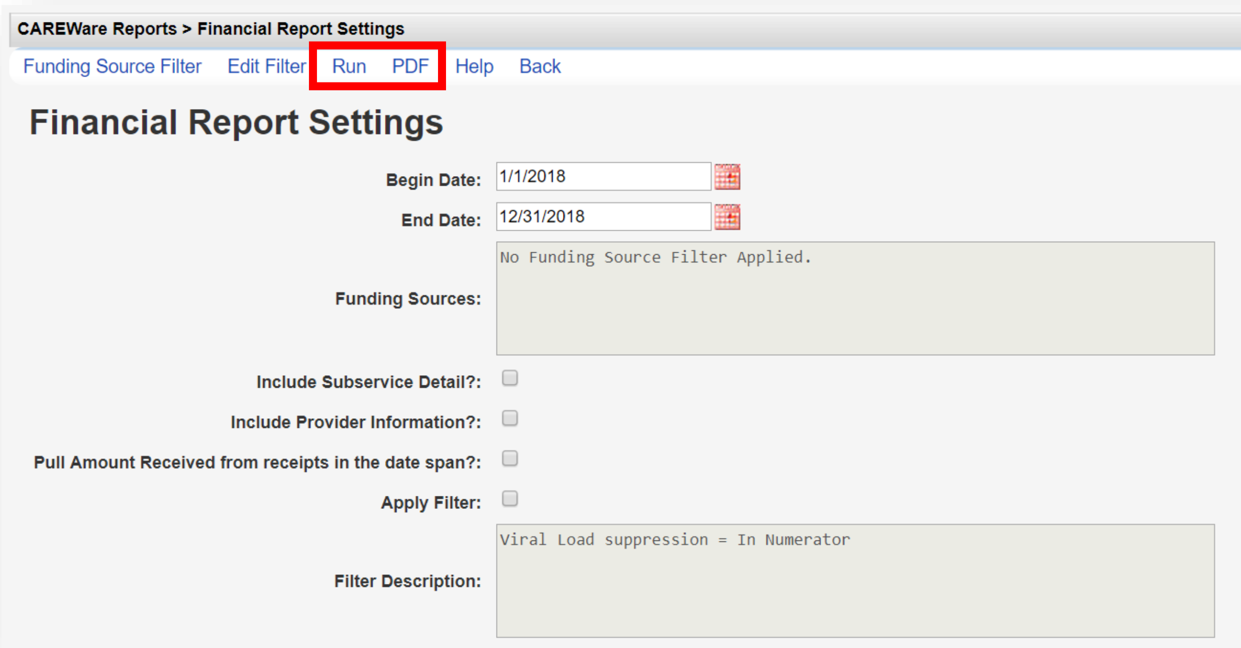
The Financial Report can be run to determine how much you've expended in a specific time frame for any or all service categories and subservices, if you have specified a service cost when you set up your contracts and services.

Even if you aren't tracking cost information, the Financial Report is an easy way to get a quick summary of unduplicated clients served within a specific date span, as well as a distribution of the number of clients for each HRSA Service Category.

The Financial Summary report can also display client totals and services for a single or multiple Funding Source(s).

1. From the **Reports** menu, select the **Financial Report**.

2. Make your selections as detailed below:
    - Begin Date
    - End Date
    - **Funding Sources** can be edited under the Funding Source Filter link
    - Check **Include Subservice Detail** if you wish to see service category information broken down to the subservice level.
    - **Include Provider Information** is only relevant when you run a report on one provider; it includes provider address and phone number
    - Check **Pull Amount Received from receipts in the date span** if you wish to see the amount received from receipts between the begin and end date
    - You can **Apply Filter(s)** to use a custom report filter on your data to get more granular results. Click the **Edit Filter** link to *Manage*, *Add*, *Delete*, etc. filters.




3. Click **Run** to open the report in a new tab. Click **PDF** to open the report as a PDF.
4. Once you click **Run**, a report confirmation message will open in the upper right corner of the screen. Select **View Financial Report**. Your report will be display in a new tab.