

# CAREWare 6

## June 2019

### Quick Start Guide #8

#### Advanced Custom Reports

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

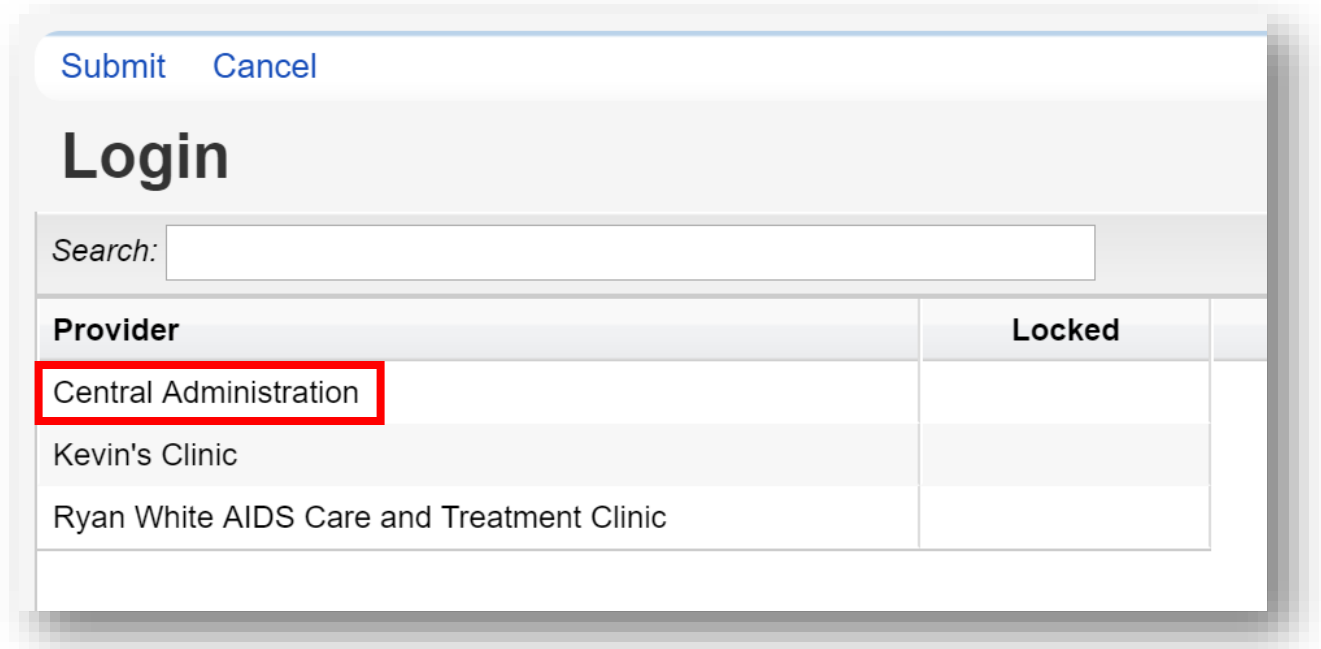
### Getting Started

- **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.
- Please see Quick Start guide #7, “Basic Custom Reports,” before moving on to this guide. This manual assumes basic knowledge on creating basic custom reports.

## Creating an advanced custom report

As you get comfortable with custom reports, you can create more complex reports. We will start by creating a “client list” report from the Central Administration domain.

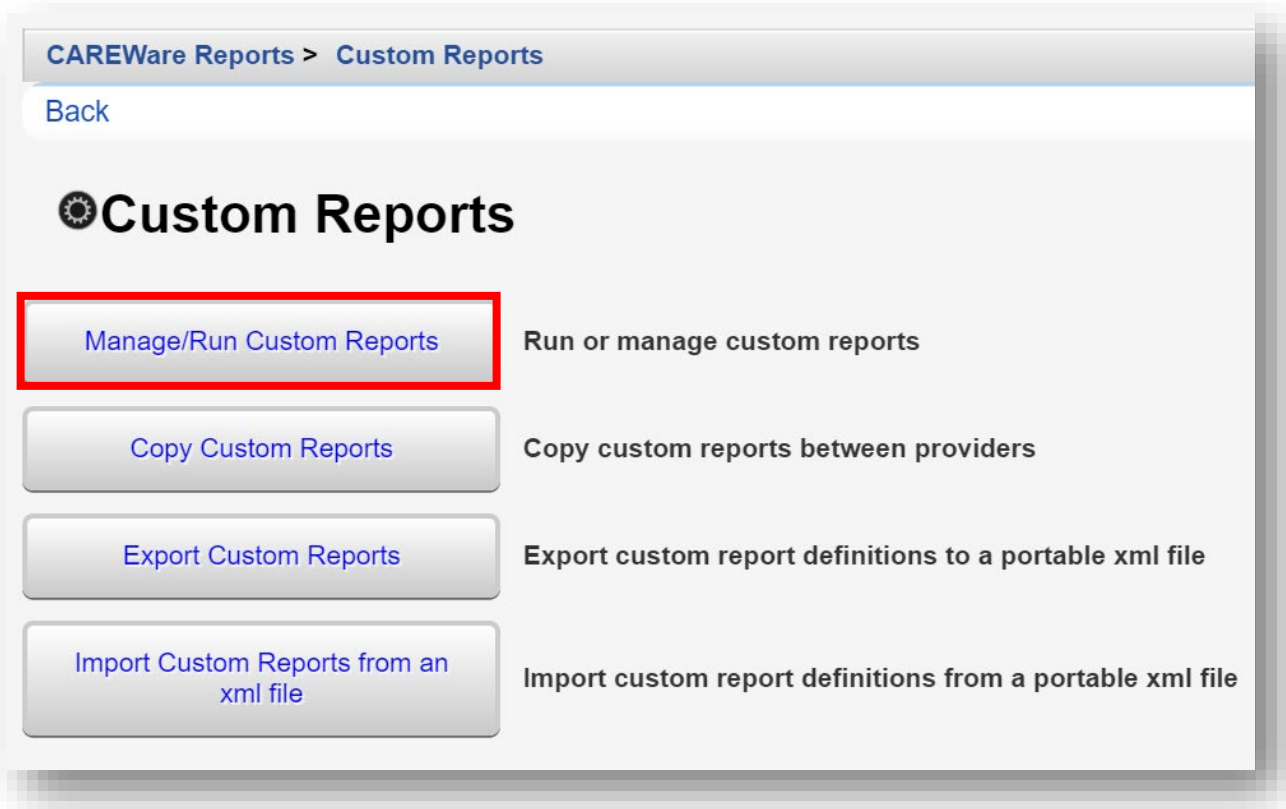
1. Log into CAREWare. For more details on how to do so, please refer to **Quick Start Guide #1**. Choose **Central Administration**.



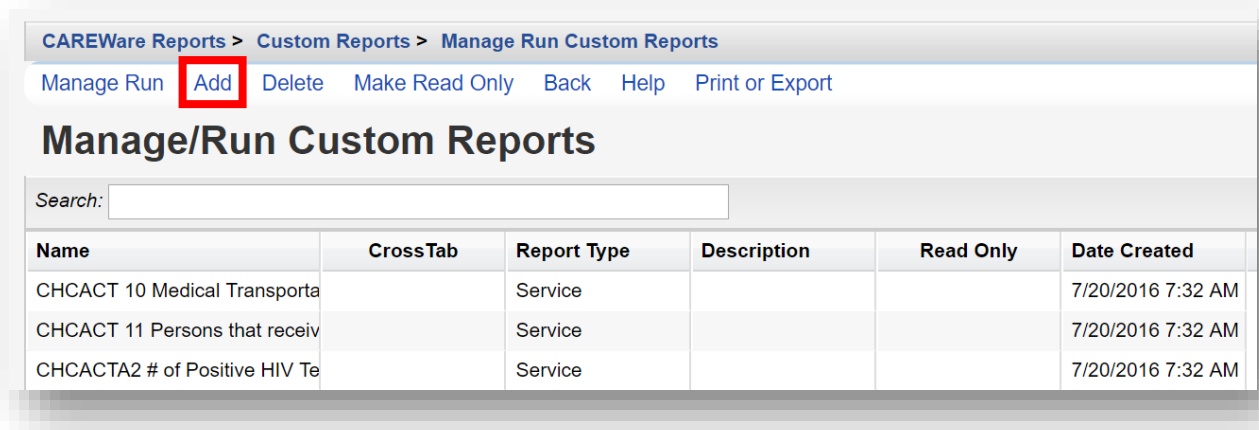
2. Select **Reports** from the Main Menu and then **Custom Reports** from the Menu of Links.



3. The Custom Reports menu will appear. Select **Manage/Run Custom Reports**.

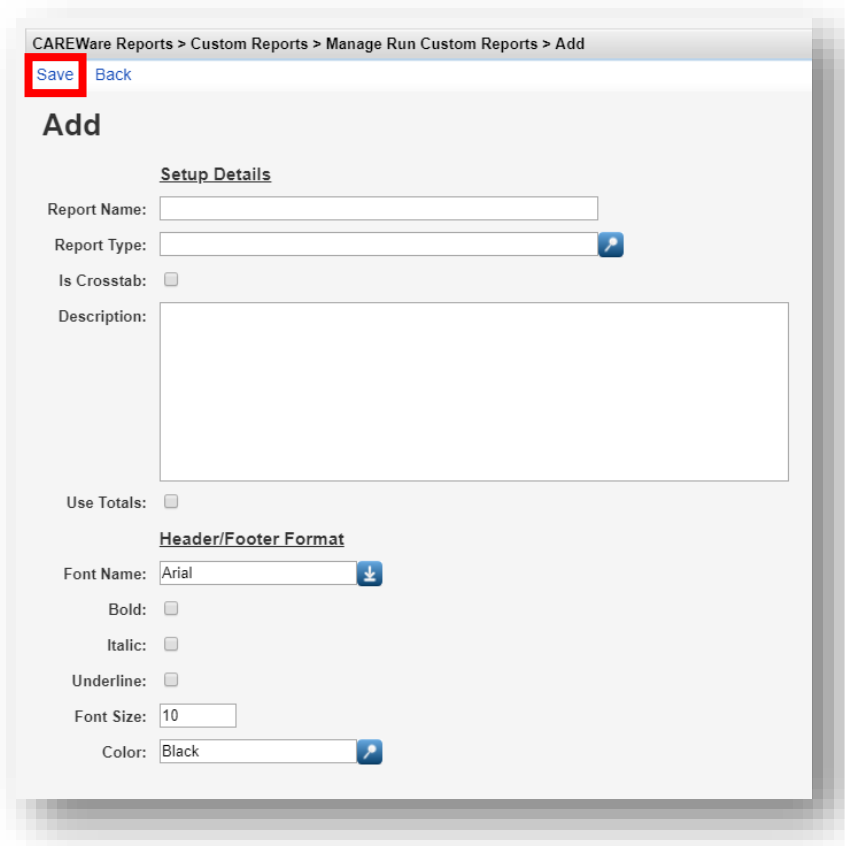


4. Select **Add** from the Action bar.



5. Enter in the following information (as applicable) and click **Save**.

- **Report Name**
- **Report Type**
- **Is Crosstab (checkbox)**
- **Description (optional)**
- **Use Totals (checkbox – will automatically sum total fields in the report)**
- **Header/Footer Format (optional)**



- Once you click save, you'll be directed to the new Custom Report menu (in this example, *Client List* is the name of our custom report). Select **Field Selection**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List

[Back](#)

## Client List

[Run Report](#) Start Date : 06/11/2018, End Date : 06/11/2019, Clients with services, Report Display as : Open in New Window, Most medical services in date span

[Report Layout](#) Client List, Demographics

[Field Selection](#) No fields selected

[Report Filter](#) Report Filter is empty

- Click **Add**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List > Field Selection

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

## Field Selection

Search:

Field Name	Column Header	Column Width (in)	Totals	Sort	Sort Priority

8. Select **Field Name**, *Name*. Note we have entered “name” in the **Search** box to narrow the list of available field names. Click **Use Field**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List > Field Selection > Add

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

## Report Fields

Search:

Field Name	Keywords	Previous Field Name	Description
First Name	Demographics	First Name	
Last Name	Demographics	Last Name	
Last Service In Con	Demographics	Last Service In Con	Returns name of se
Middle Name	Demographics	Middle Name	
<b>Name</b>	Demographics	<b>Name</b>	
Physician name	Demographics	Phys. Name	

- 9. Select **Sort**, “Ascending” in order to display the Field Name values (in this example, client names) alphabetically in the report. Use default values for **Header Column Format** and **Data Column Format**. Click **Save**.


CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List > Field Selection > Add > Use Field

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

### Use Field

Select Field:


Column Header:

Sort:  

Sort Priority:

#### Header Column Format

Column Width:  inches


Column Header Font Name:  

Bold:


Italic:

Underline:

Font Size:

Font Color:  

#### Data Column Format


Font Name:  


Bold:

Italic:

Underline:

Font Size:

Font Color:  

Field Justification:  

- 10. Repeat the same steps to add and save Field Names: *DOB*, *Gender*, and *Race/Ethnicity*.

Use default settings for these additional report fields and do not sort. When finished, the **Field Selection** should look like this:

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List > Field Selection

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

### Field Selection

Search:

Field Name	Column Header	Column Width (in)	Totals	Sort	Sort Priority	Status
Name	Name	1.44		Ascending	1	Complete
DOB	DOB	0.68			0	Complete
Gender	Gender	0.88			0	Complete
Race/Ethnicity	Race/Ethnicity	1.44			0	Complete

11. Click **Back** (see previous screenshot) and then select **Run Report**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client List

Back

### Client List

**Run Report** Start Date : 06/11/2018, End Date : 06/11/2019, Clients with services, Report Display as : Open in New Window, Most medical services in date span

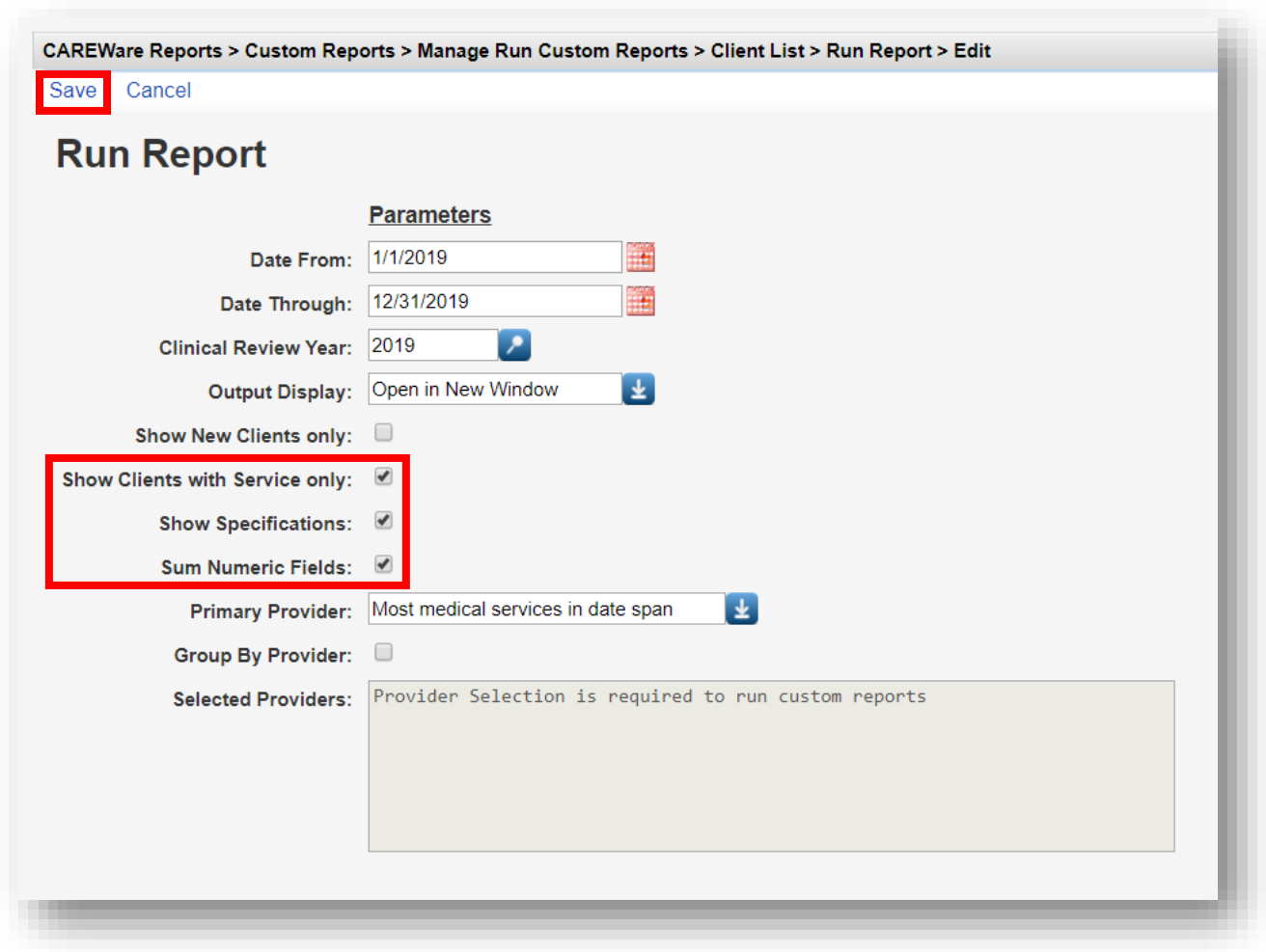
Report Layout Client List, Demographics

Field Selection Name, DOB, Gender, Race/Ethnicity

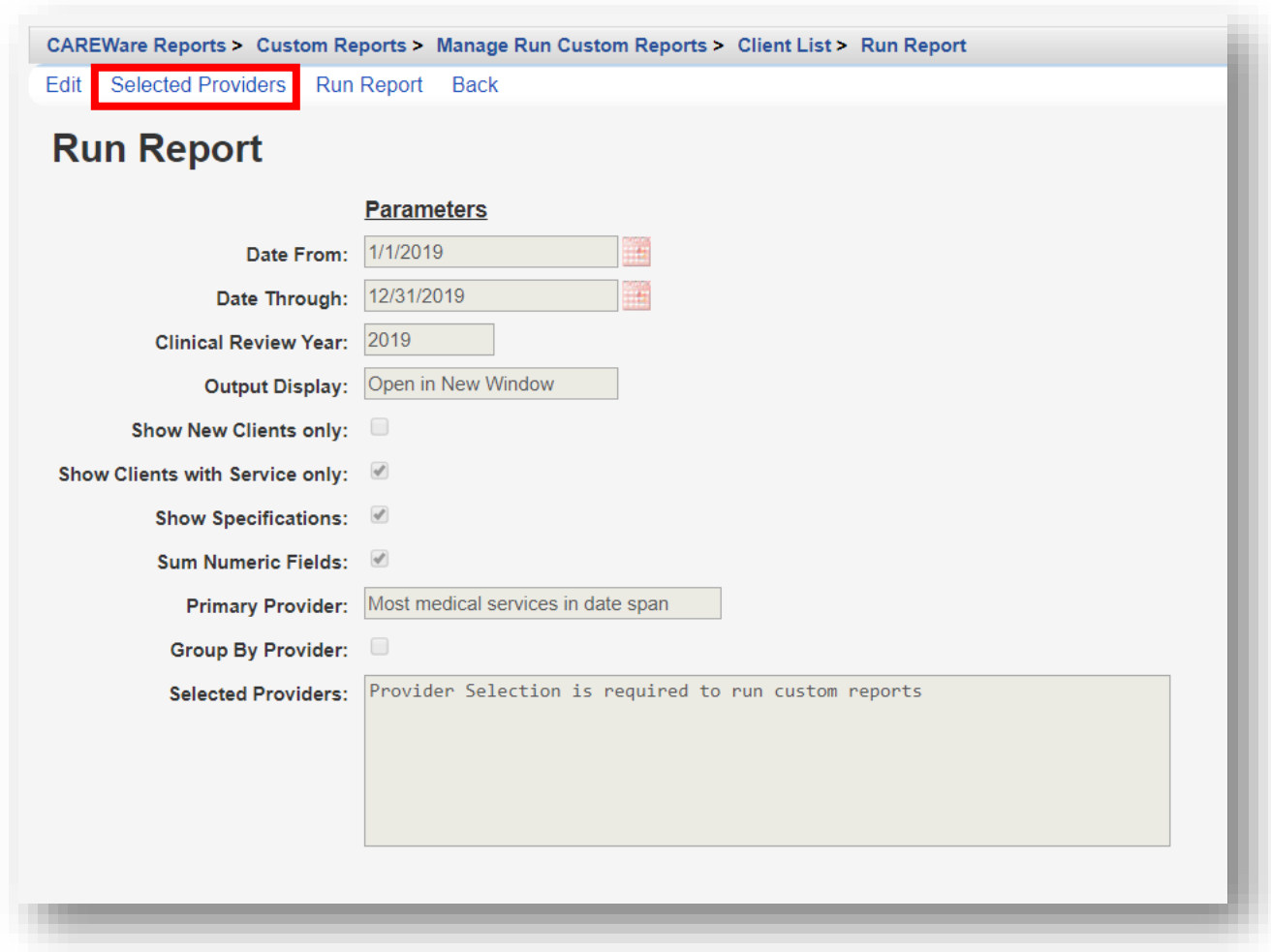
Report Filter Report Filter is empty



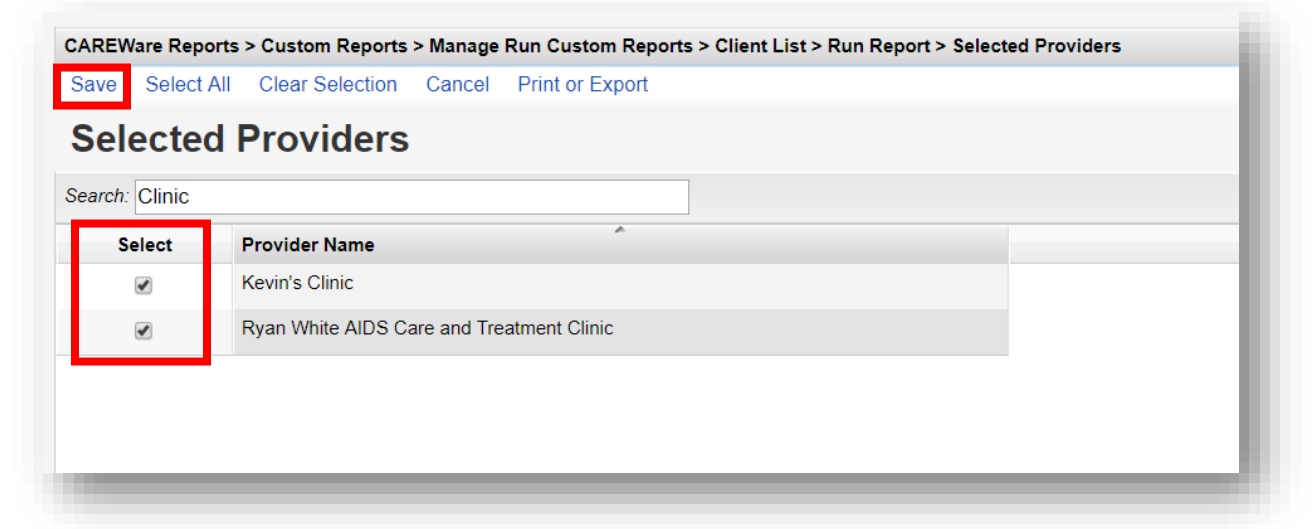
12. Click **Edit** (where Save is in the screenshot below) to change the parameters/date span as desired. Click **Save**. We have selected checkboxes for:
- **Show Clients with Service only**
  - **Show Specifications**
  - **Sum Numeric Fields**



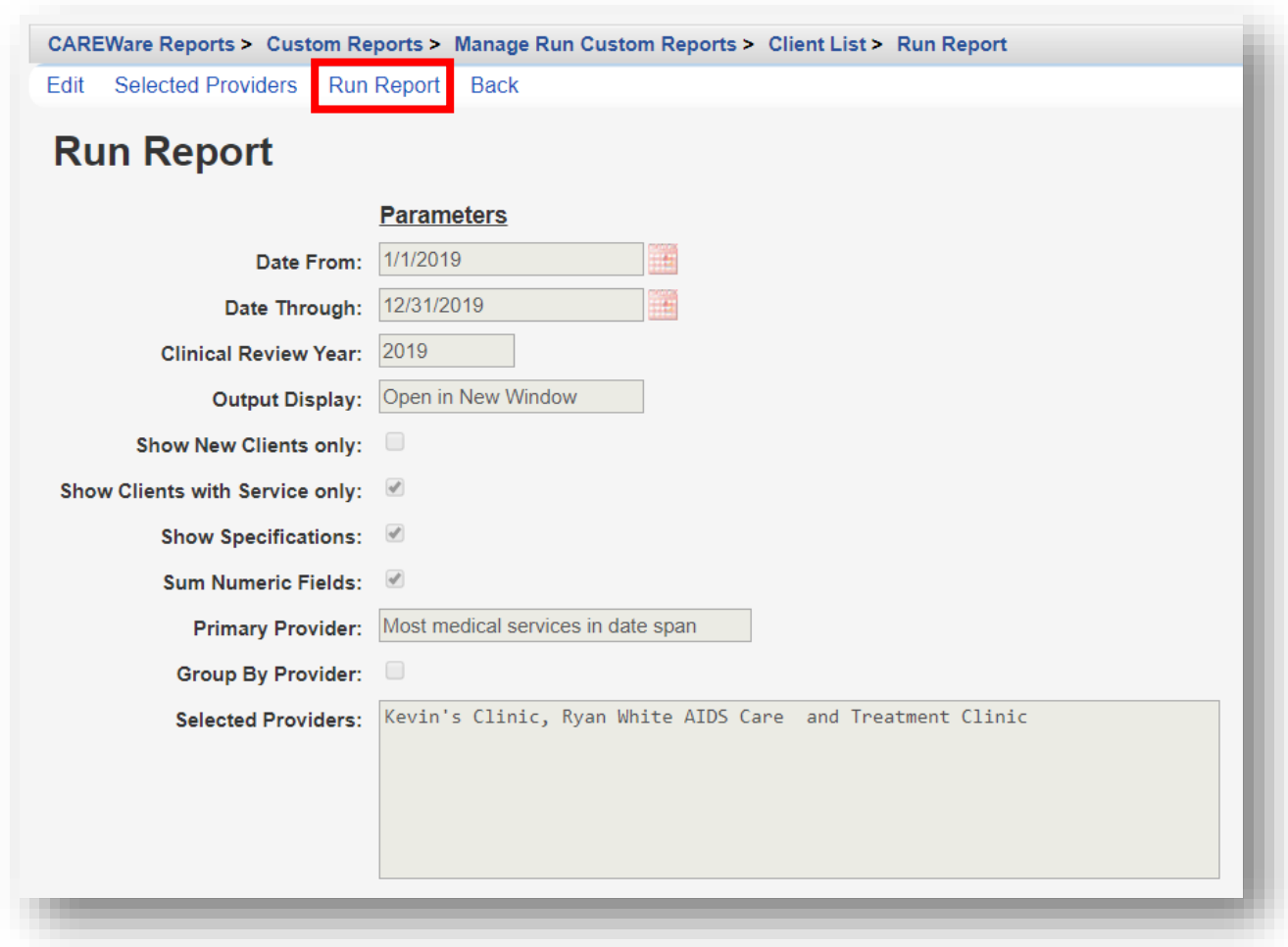
**13. Select Selected Providers.**



**14. Select the desired providers using the checkbox. Once complete, click **Save**.**



15. Select **Run Report**. Click **View Client List** in the Report generation complete box (not pictured).



**16.** Below is an example report.

**Client List**

**Data Scope:** Kevin's Clinic, Ryan White AIDS Care and Treatment Clinic, State ADAP Program

**Report Start Date:** 01/01/2019

**Report End Date:** 12/31/2019

**Report Criteria:** Report Filter is empty

**Restrictions:** Clients with services only

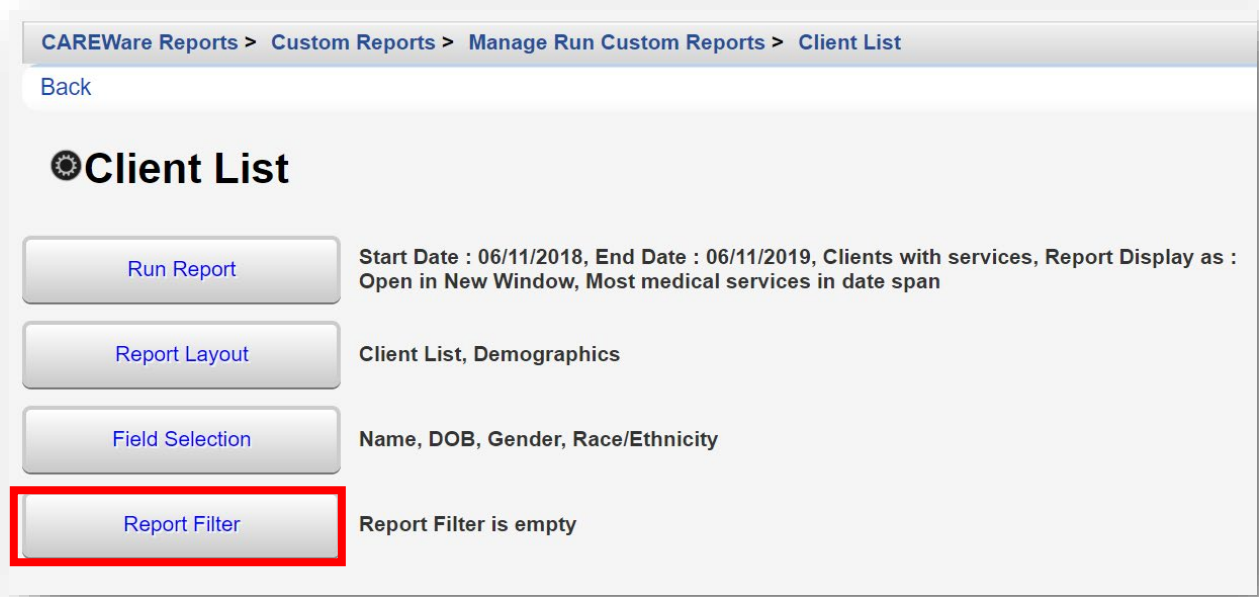
<u>Name:</u>	<u>DOB:</u>	<u>Gender:</u>	<u>Race/Ethnicity:</u>
Aaberg, Aaron, Morin	04/05/1992	Male	Hispanic
Aadland, Abbey,	06/27/1975	Female	More than one race
Aaland, Abdul,	08/08/1989	Male	More than one race
Adap, Sigourney,	10/19/1991	Female	Hispanic
Appleseed, Johnny,	12/05/1965	Male	Hispanic

**NOTE:** Clients need to have at least one service visit during the date span to be included in the report. If no date span was entered, you would get a list of ALL your clients.

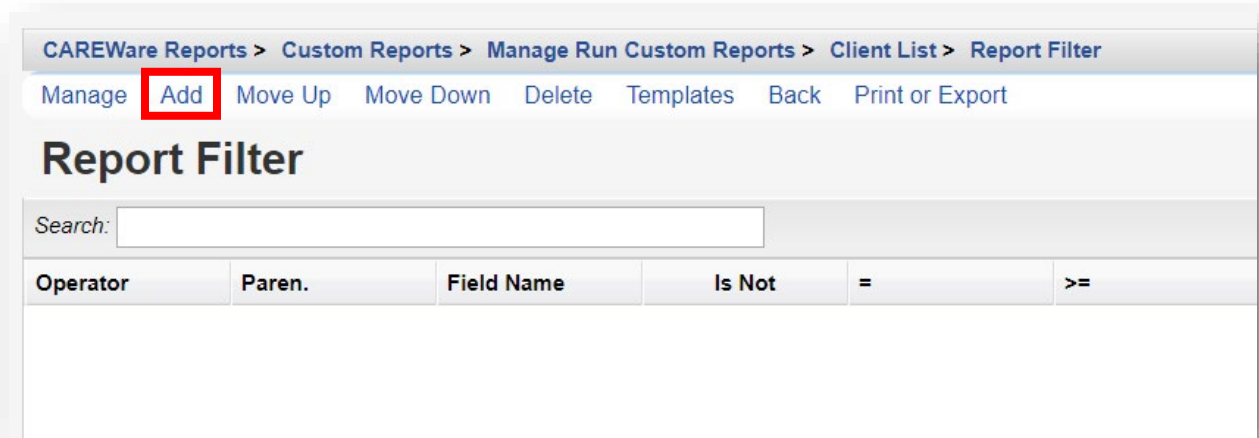
## Adding Report Filters

Now we will add some filters to the report.

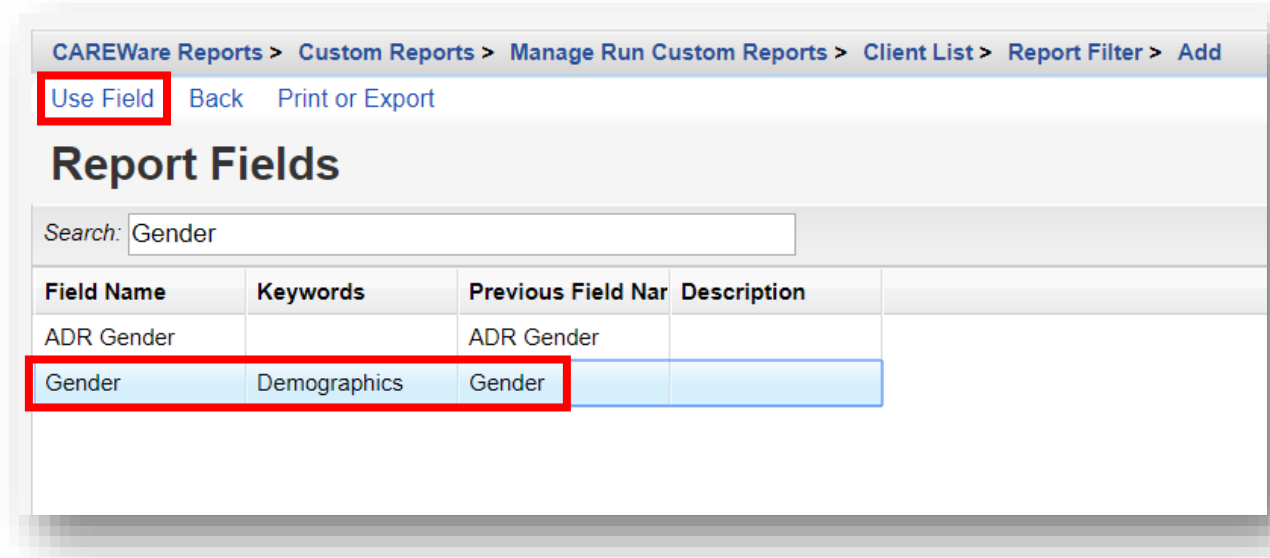
1. Select **Report Filter** from the Custom Report menu (in this example, *Client List* is the name of our custom report).



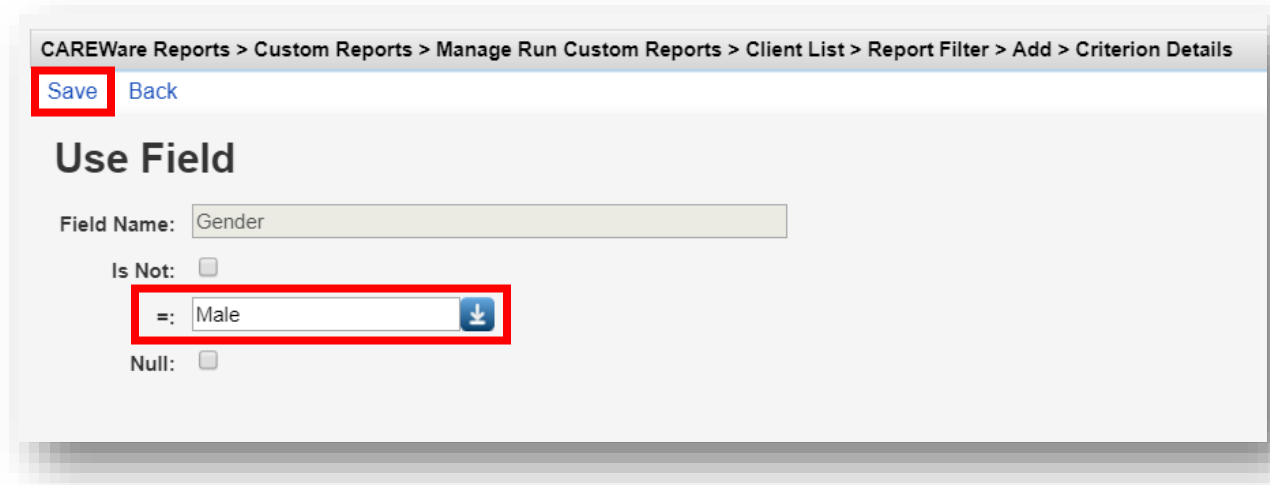
2. Click **Add** from the Action bar.



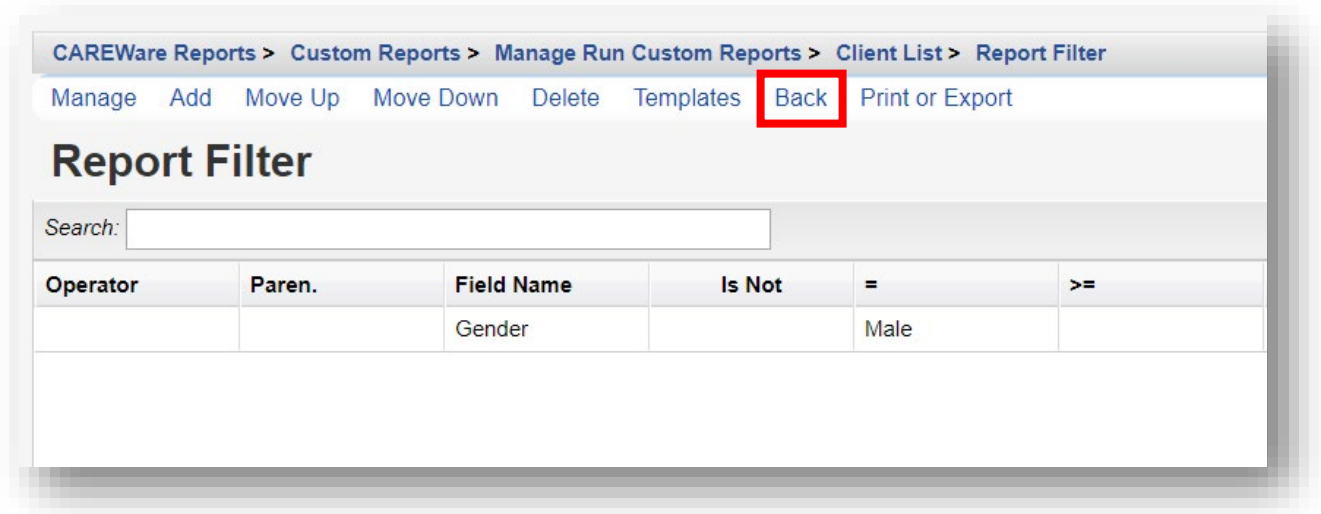
3. Select *Gender* from the **Field Name** column (use the search bar to narrow your results, if desired). Click **Use Field**.



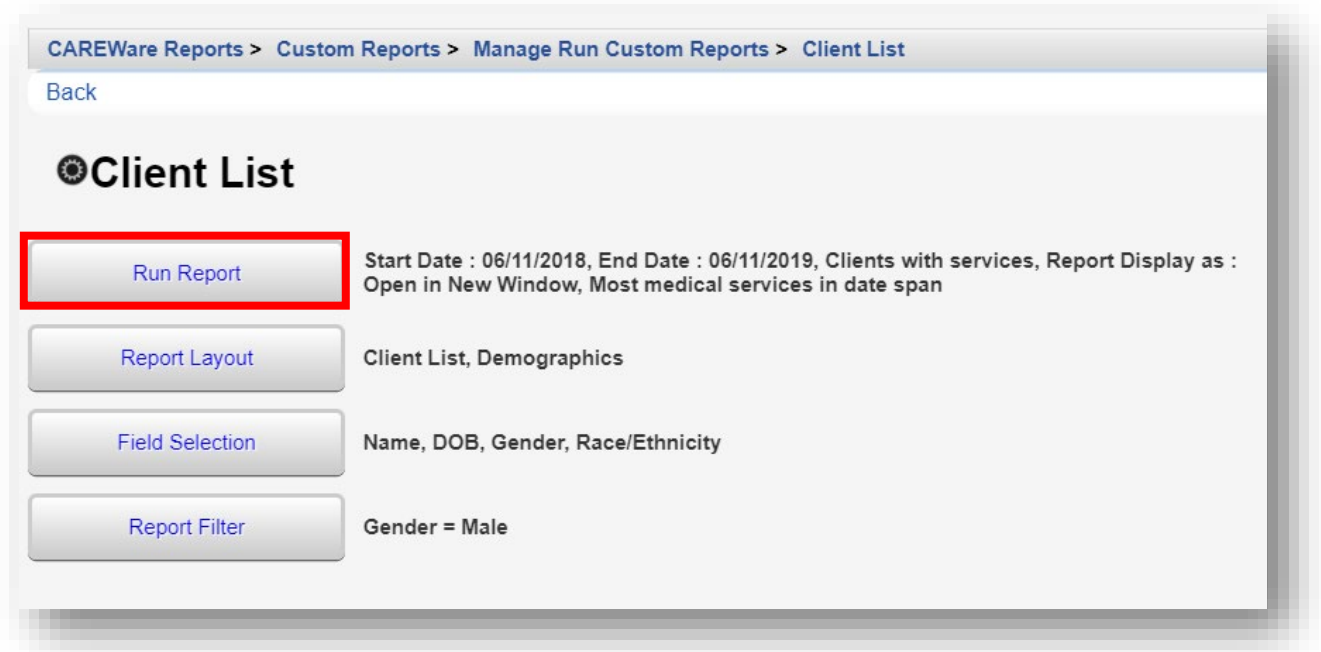
4. Enter in the desired criterion. In this example, we are filtering for clients who identify as Male. Click **Save**.



- Click **Back** from the Report Filter screen to return to the Custom Report menu.

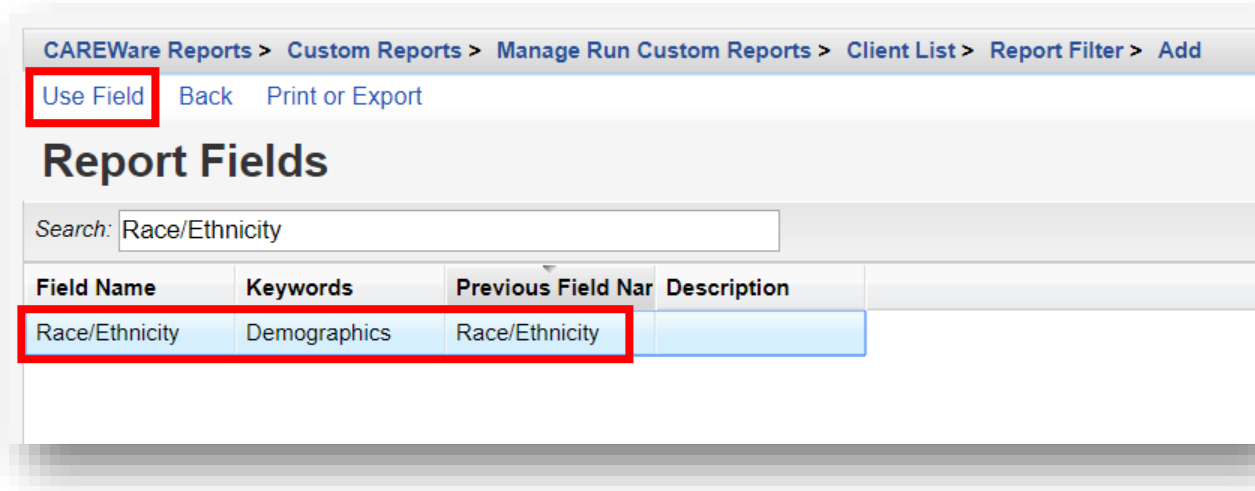


- Select **Run Report** and then follow the steps on pages 9 through 11 (beginning with step 12). Once you run the report, you will now note that only “Male” clients are included.

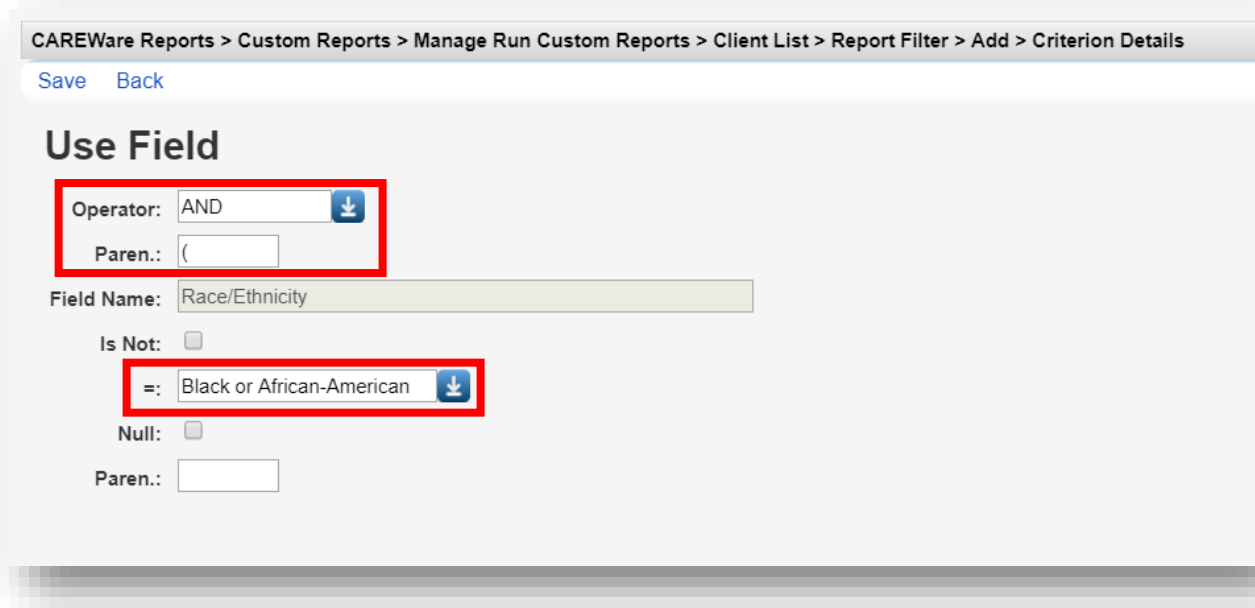


We will now use the AND / OR operators in our report criteria:

7. Follow steps 1 and 2 on page 13 to return to the Report Fields menu and search for the field name “Race/Ethnicity.” Select the field name and click **Use Field** from the Action bar.



8. Use the Operator field to choose between “And” or “Or.” The Paren field is used to define additional report filter criteria within the parenthesis. In this example, we are using the “And” operator and only filtering for clients whose race/ethnicity is Black or African-American (the selection is made from the drop down list within the “=” field). The first “open” Paren field denotes that the race/ethnicity must be Black or African American. Click **Save**.





- Repeat the previous step except this time, use the “Or” operator and include clients whose race/ethnicity is Hispanic. This time, the second “closed” Paren field (while using the “Or” operator) denotes that the race/ethnicity could be Hispanic.

The *Client List* criteria are listed next to the Report Filter in the Link Summary. For the client to be listed on the report, they would need to be Male AND Black/African American OR Hispanic.

In addition to the other report parameters and restrictions, they would also need to have received a service in the 2019 reporting year (calendar year).

**Client List**

**Data Scope:** Kevin's Clinic, Ryan White AIDS Care and Treatment Clinic, State ADAP Program  
**Report Start Date:** 01/01/2019  
**Report End Date:** 12/31/2019  
**Report Criteria:** Gender = Male AND Race/Ethnicity = Black or African-American OR Race/Ethnicity = Hispanic  
**Restrictions:** Clients with services only

<u>Name:</u>	<u>DOB:</u>	<u>Gender:</u>	<u>Race/Ethnicity:</u>
Aaberg, Aaron, Morin	04/05/1992	Male	Black or African-American
Appleseed, Johnny,	12/05/1965	Male	Hispanic
Cesar, Rex,	06/30/1987	Male	Hispanic
Fish, Blue,	04/12/1990	Male	Hispanic
Ghost, Caspar,	11/19/1974	Male	Hispanic
Kranepool, Bob,	12/21/1955	Male	Hispanic
Smith, Dominic,	01/01/1990	Male	Black or African-American

## Using Totals

NOTE: The following sections assume you are now comfortable creating field selections and filters. We will show you what your field selections and filters should look like, but we'll now skip walking through each step to create them.

If you need to sum certain values or group the report in a specific way (e.g. over clients or service categories), you can check the **Use Totals** on the **Report Layout** link. **Use Totals** also includes functions to calculate the minimum or maximum or average of a group of observations, such as CD4 or Viral Load counts.

We'll do two examples of the Use Totals function, one for a custom service report where there are often multiple services per client, and one for a custom lab report, where there are often multiple lab tests per individual.

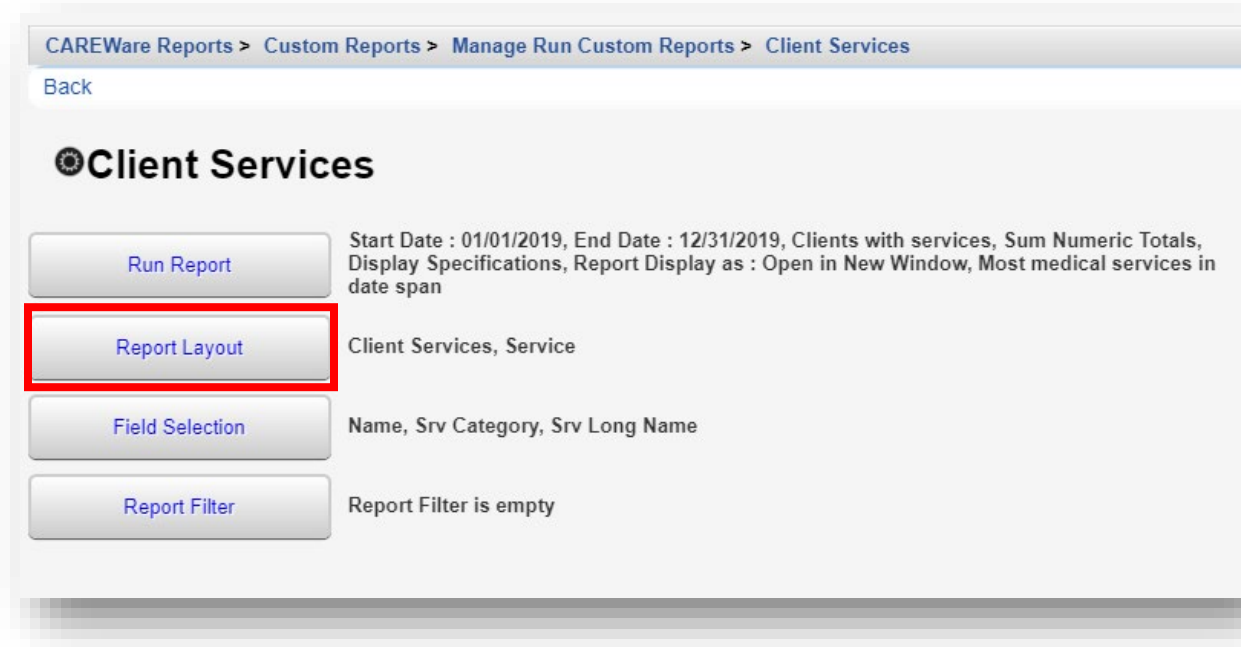
### Service Report (with totals)

1. Here is the top portion of a basic custom service report (fields "Name," "Srv Category," and "Srv Long Name") sorted in "Ascending" order by client.

Client Services		
<b>Data Scope:</b>	Kevin's Clinic, Ryan White AIDS Care and Treatment Clinic, State ADAP Program	
<b>Report Start Date:</b>	01/01/2019	
<b>Report End Date:</b>	12/31/2019	
<b>Report Criteria:</b>	Report Filter is empty	
<b>Restrictions:</b>	Clients with services only	
<u>Name:</u>	<u>Srv Category:</u>	<u>Srv Long Name:</u>
Aaberg, Aaron Morin	Oral Health Care	Oral Health Care
Aadland, Abbey	Medical Case Management	MCM Non Face-to-face
Aadland, Abbey	Medical Case Management	MCM Face-to-face
Aaland, Abdul	Medical Case Management	Medical Case Management
Adap, Sigourney	Medical Case Management	Assessment/CMF
Appleseed, Johnny	Medical Case Management	MCM Non Face-to-face
Appleseed, Johnny	Medical Case Management	MCM Face-to-face
Appleseed, Johnny	Early Intervention Services	EIS Outreach
Appleseed, Johnny	Early Intervention Services	EIS Outreach
Appleseed, Johnny	Early Intervention Services	EIS Outreach

You can see that some clients appear multiple times on the report, because they've received multiple services in the date range.

2. Select **Report Layout** from the Custom Report menu (in this example, *Client Services* is the name of our custom report).



3. Click **Edit** (will be where Save is in the below screenshot) and then check the **Use Totals** box. Click **Save**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client Services > Report Layout > Edit

**Save** Cancel

## Edit

**Layout Details**

Report Name: Client Services

Report Type: Service

Is Crosstab:

Description:

Read Only:

**Use Totals:**

**Header/Footer Format**

Font Name: Arial

Bold:

Italic:

Underline:

Font Size: 10

Color: Black

4. Click on the **Field Selection** Link.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client Services

Back

## Client Services

Run Report Start Date : 01/01/2019, End Date : 12/31/2019, Clients with services, Sum Numeric Totals, Display Specifications, Report Display as : Open in New Window, Most medical services in date span

Report Layout Client Services, Service

**Field Selection** Name, Srv Category, Srv Long Name

Report Filter Report Filter is empty

5. Highlight the Field Name (in this example, *Srv Long Name*) and click **Manage** from the Action bar.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client Services > Field Selection

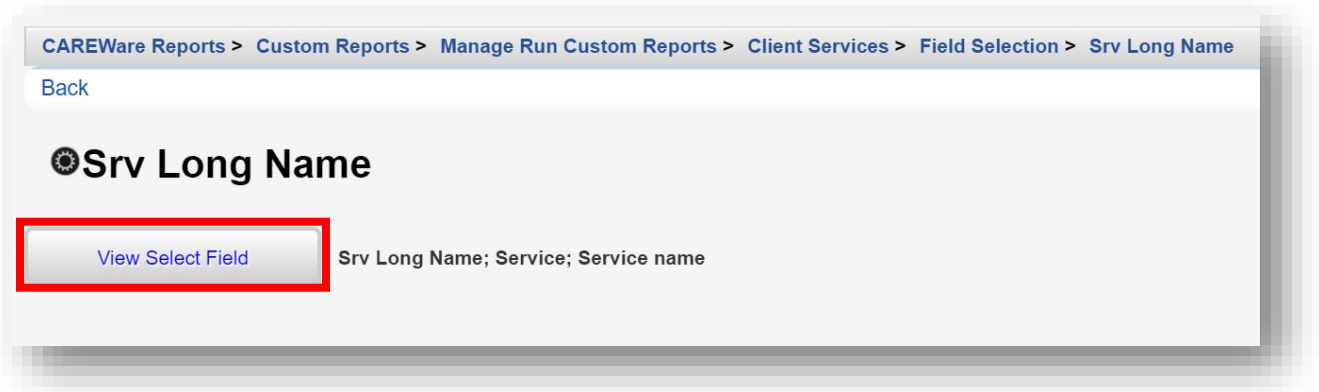
Manage Add Move Up Move Down Delete Templates Back Print or Export

## Field Selection

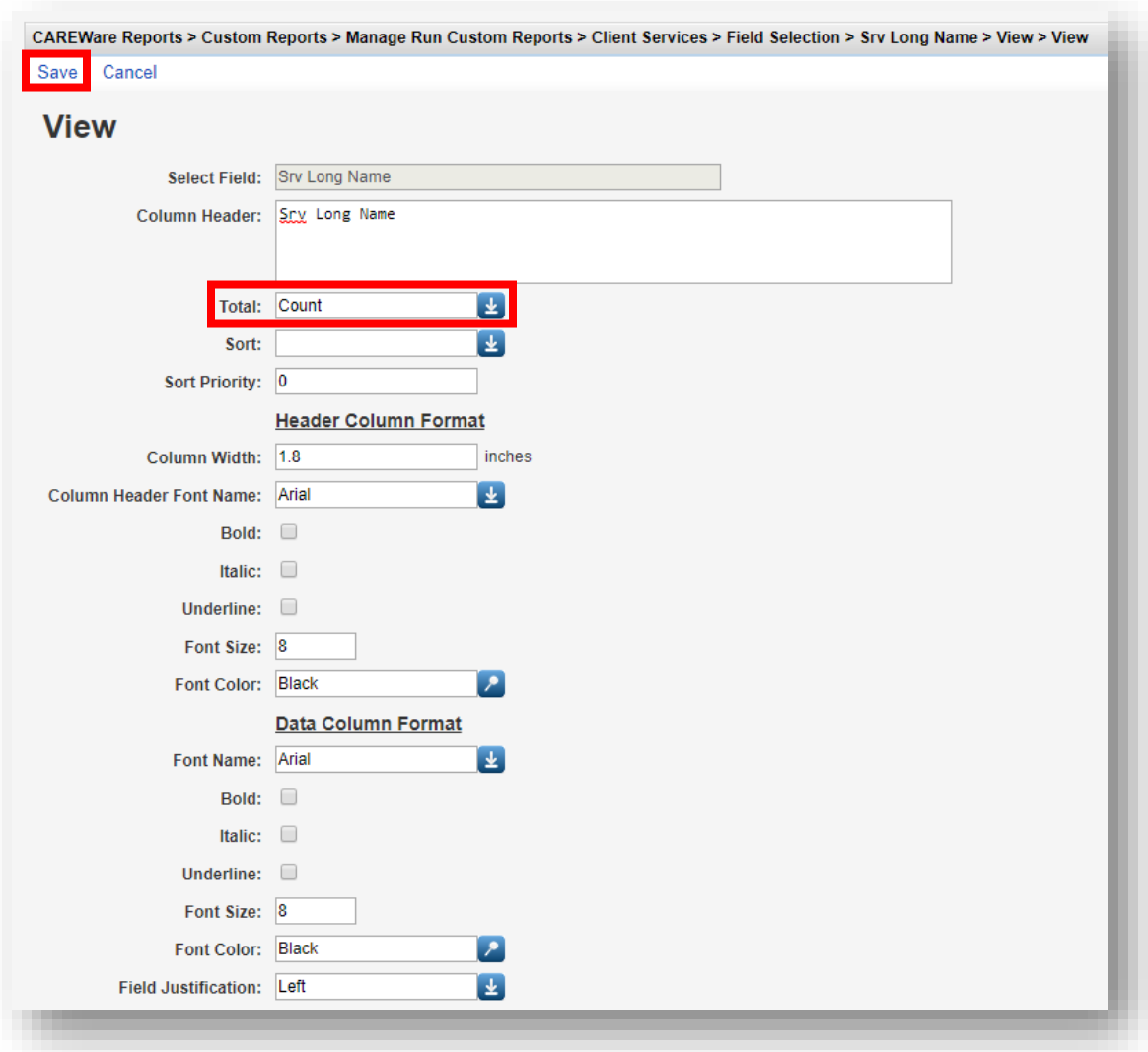
Search:

Field Name	Column Header	Column Width (in)	Totals	Sort	Sort Priority	Status
Name	Name	1.44	Group By	Ascending	1	Complete
Srv Category	Srv Category	1.80	Group By		0	Complete
Srv Long Name	Srv Long Name	1.80	Group By		0	Complete

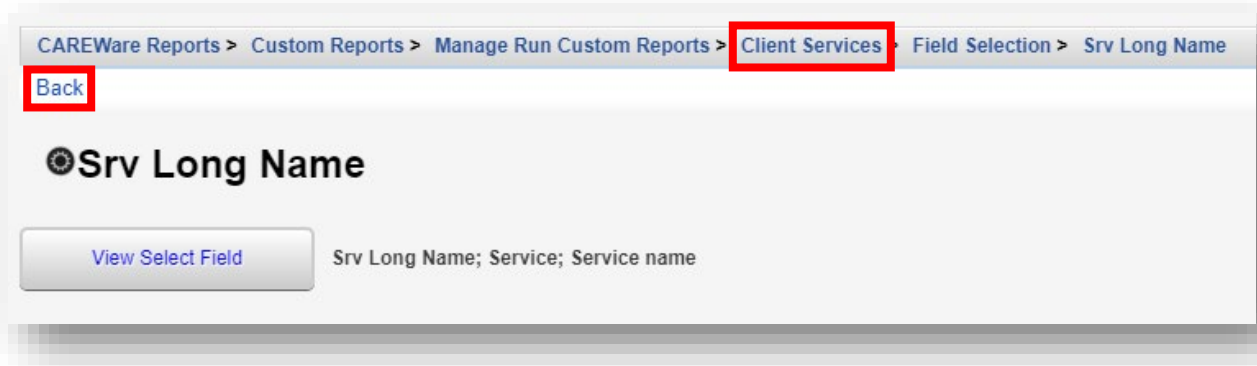
6. Click View Select Field.



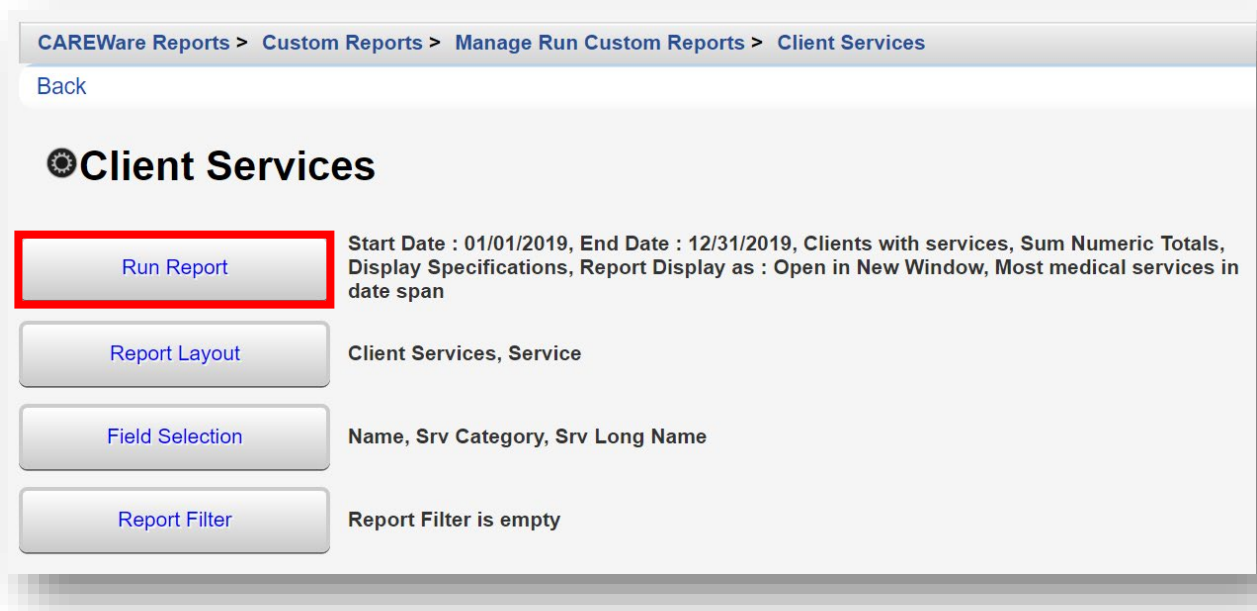
7. Click **Edit** (will be where Save is in the below screenshot) and then change the Total field, from *Group By* to *Count* in the drop-down box. Click **Save**.



- 8. Return to the Custom Report menu by clicking **Back** twice or clicking on the report's name within the Breadcrumb links.



- 9. Re-run the “Client Services” report.





The report now returns the total subservices a client receives within a service category. Notice for the client Abbey Aadland, there is now only one line for Medical Case Management, with the number 2 in the Srv Long Name column, indicating how many of those services were received in the date span.

**Client Services**

**Data Scope:** Kevin's Clinic, Ryan White AIDS Care and Treatment Clinic, State ADAP Program

**Report Start Date:** 01/01/2019

**Report End Date:** 12/31/2019

**Report Criteria:** Report Filter is empty

**Restrictions:** Clients with services only

<u>Name:</u>	<u>Srv Category:</u>	<u>Srv Long Name:</u>
Aaberg, Aaron Morin	Oral Health Care	1
Aadland, Abbey	Medical Case Management	2
Aaland, Abdul	Medical Case Management	1
Adap, Sigourney	Medical Case Management	1
Appleseed, Johnny	Early Intervention Services	3
Appleseed, Johnny	Medical Case Management	2

**Lab Report (with totals)**

- Here is the Field Selection setup of a basic custom report (fields “Name”, “Lab Result”), sorted “Ascending” by client.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client CD4 Count > Field Selection

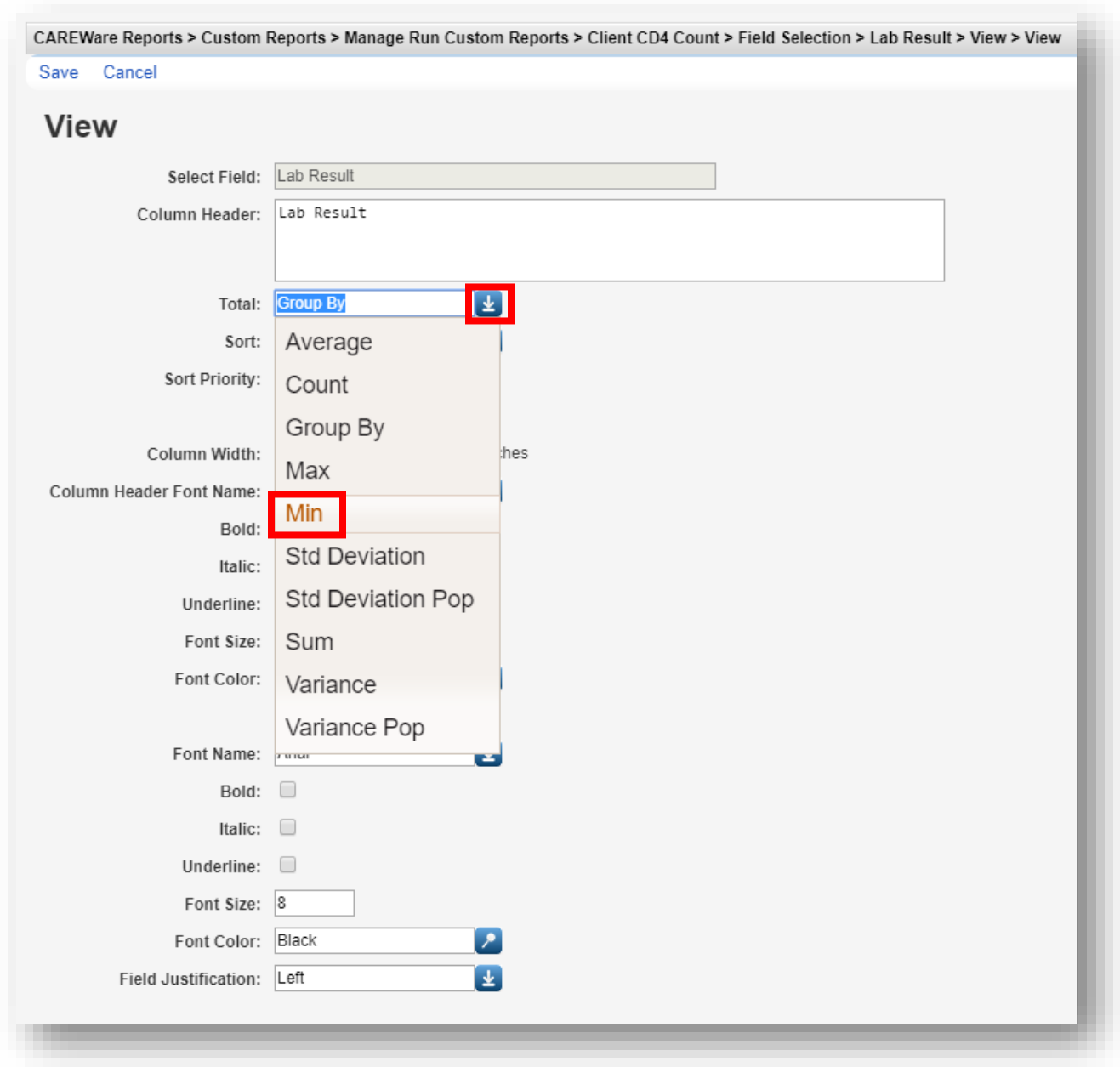
Manage Add Move Up Move Down Delete Templates Back Print or Export

### Field Selection

Search:

Field Name	Column Header	Column Width (in)	Totals	Sort	Sort Priority	Status
Name	Name	1.44	Group By	Ascending	1	Complete
Lab Result	Lab Result	0.70	Group By		0	Complete

2. Change the **Total** field in the Field Name “Lab Result” from *Group By* to *Min* in the drop-down box.



3. Below is an example of the “Client CD4 Count” custom lab report with *Min* total used.

**Client CD4 Count**

**Data Scope:** Kevin's Clinic, Ryan White AIDS Care and Treatment Clinic, State ADAP Program  
**Report Start Date:** 01/01/2019  
**Report End Date:** 12/31/2019  
**Report Criteria:** Report Filter is empty  
**Restrictions:** Clients with services only

<u>Name:</u>	<u>Lab Result:</u>
Appleseed, Johnny	300
Beagle, Barney J	1
Brown, Buster j	45
Cesar, Rex	221
Client, Natalia S	900

## Using Calculated Objects in Custom Reports

The ability to analyze changes in lab results and other indicators is available with the addition of calculated objects fields in CAREWare.

Using calculated objects will allow you to determine:

- The highest and lowest quantitative lab value within a specified date range
- The change in lab values from one period to the next (e.g., how much did a client’s CD4 count or viral load increase or decrease?)
- The first medical service after HIV diagnosis with a specified date range

### Setting up date ranges for comparison

Say you want to look at how long your clients have been receiving services.

There is a calculated object field that will look at the first service date and compare that to the last service date and calculate the difference between them.

In custom demographic reports, we select one of the calculated objects as one of our report fields.

1. Add a new custom *Demographic* report (see *Creating an advanced custom report* on page 2). We have named the report “Client Length of Care” in this example.
2. Use the following Field Names within the Field Selection menu: “Name,” “1st Overall Service,” “Last Service,” and “Date Diff.” For a refresher on how to access the Field Selection menu and how to add fields, please see page 5 through 8.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Client Length of Care > Field Selection

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


### Field Selection

Search:

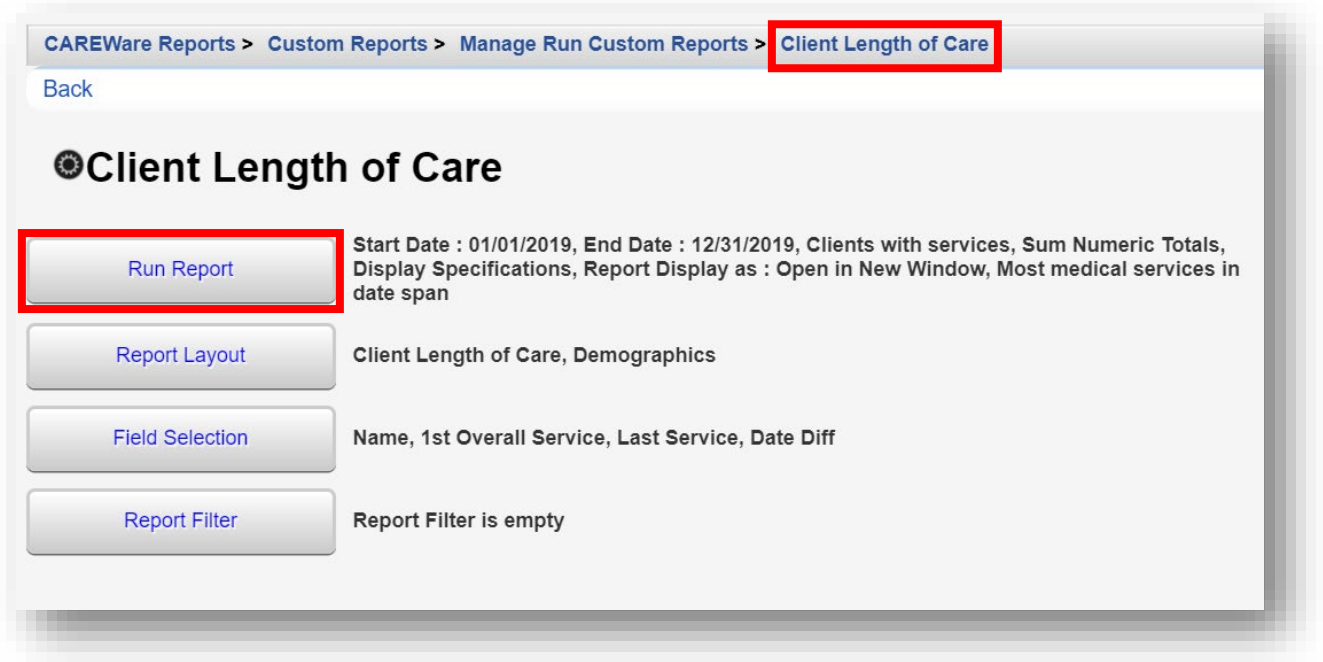
Field Name	Column Header	Column Width (in)	Totals	Sort	Sort Priority	Status
Name	Name	1.44		Ascending	1	Complete
1st Overall Service	1st Overall Service	0.80			0	Complete
Last Service	Last Service	1.08			0	Complete
Date Diff	Date Diff	0.80			0	Complete

3. When adding the “Date Diff” field, use the following parameters:
  - 1. **DateColumn** = *1<sup>st</sup> Overall Service* from the drop-down box
  - 2. **DateColumn** = *Last Service* from the drop-down box
  - 3. **Diff Type** = *Months* from the drop-down box
  - 4. **Cross-Provider** = *No* from the drop-down box

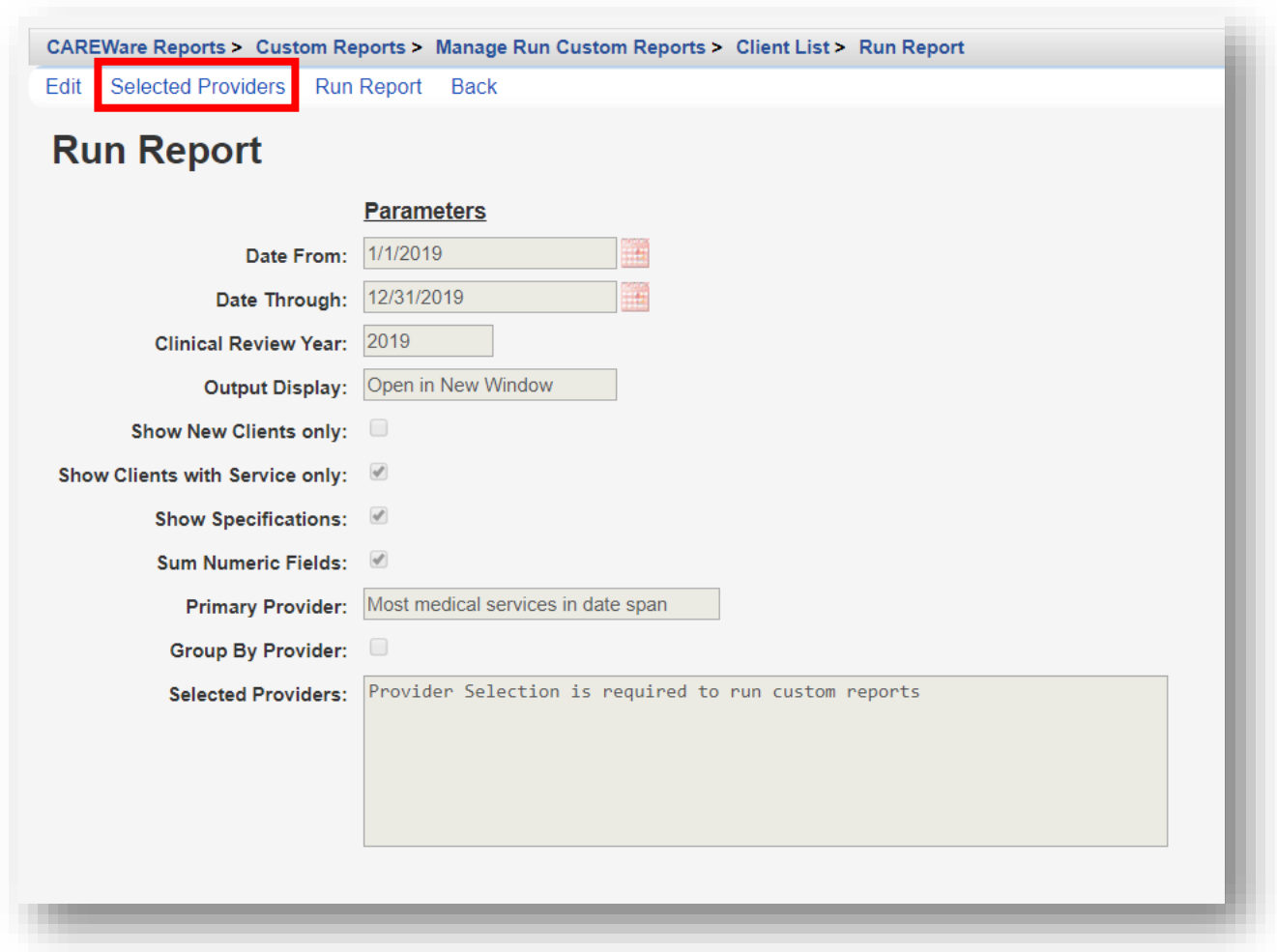


 **NOTE:** Select “No” for the Cross-Provider Subfilter when running a report for a single provider. Select “Yes” to run a report for multiple providers and if there are multiple provider domains configured in CAREWare.

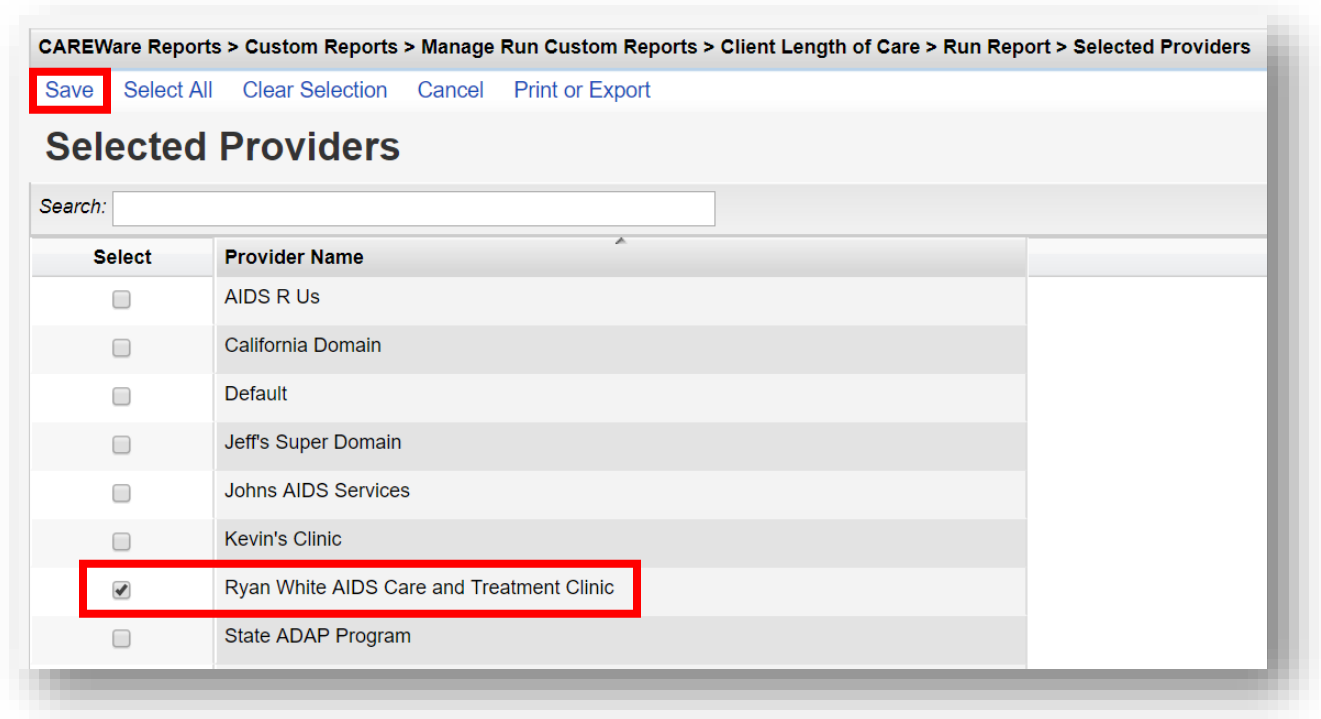
4. Return to the Custom Report menu by clicking the name of the report in the breadcrumb link and click the **Run Report** Link.



5. Click **Selected Providers** from the Action bar.



6. Select the desired providers using the checkbox. Once complete, click **Save**.



7. Run the “Client Length of Care” custom demographic report (see step 15 on page 11). An example of the results are found below.

**Client Length of Care**

**Data Scope:** Ryan White AIDS Care and Treatment Clinic

**Report Start Date:** 01/01/2019

**Report End Date:** 12/31/2019

**Report Criteria:** Report Filter is empty

**Restrictions:** Clients with services only

<u>Name:</u>	<u>1st Overall Service:</u>	<u>Last Service:</u>	<u>Date Diff:</u>
Adap, Sigourney	10/02/2012	04/10/2019	78
Appleseed, Johnny	01/30/2019	04/08/2019	3
Appleseed, Martha	04/01/2019	04/01/2019	0
Badland, Abbey	11/13/2018	02/11/2019	3
Baker, Clam	09/25/2012	03/01/2019	78
Brown, Buster	09/27/2018	01/24/2019	4



Now looking at the same report, we will select multiple providers (see step #6), and change the Cross-Provider Subfilter to “Yes” (see step #3). Below are the results.

### Client Length of Care

**Data Scope:** Kevin's Clinic, Ryan White AIDS Care and Treatment Clinic  
**Report Start Date:** 01/01/2019  
**Report End Date:** 12/31/2019  
**Report Criteria:** Report Filter is empty  
**Restrictions:** Clients with services only

<u>Name:</u>	<u>1st Overall Service:</u>	<u>Last Service:</u>	<u>Date Diff:</u>
Aaberg, Aaron Morin	01/01/2013	05/31/2019	76
Aaland, Abdul	11/01/2014	01/26/2019	50
Adap, Sigourney	10/02/2012	04/10/2019	78
Appleseed, Johnny	01/30/2019	04/08/2019	3
Appleseed, Martha	05/06/2014	04/01/2019	59
Badland, Abbey	11/01/2014	05/15/2019	54
Baker, Clam	09/25/2012	03/01/2019	78
Ball, Abigail	11/17/2014	05/31/2019	54
Ball, Wrecking	05/23/2019	05/23/2019	0
Brown, Buster	09/27/2018	01/24/2019	4

The number of months elapsed between the first and last service dates, with Cross-Provider Subfilter, set to “Yes”, and multiple provider names selected, changes the report results.

Notice there are additional clients in the report and the number in the **Date Diff** column for client Martha Appleseed changed from 0 (in the previous single-provider report) to 59 months of care.

Other similar reports can be configured, such as the length of time between a client’s First Service and First Medical Visit, or the length of time between a client’s Enrollment Date and First Medical Visit or Lab result.

For further information, please see the Creating Custom Reports section of the jProg website: <https://www.jprog.com/wiki/CAREWare%206.UG-Creating-Custom-Reports.ashx>