

CAREWare 6

June 2019

Quick Start Guide #7

Creating Basic 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 create and run reports.
- You should have enough client data entered to see how report filtering works in practice.

Best practices

Check if there are pre-built reports that provide the desired information. Decide what the purpose of a custom report is. “I need a list of my clients with a break-out by race and gender,” for instance.

Diagram your report by selecting the fields you'll need - in this case, client name, race, and gender.

You may need to add fields, at least temporarily, that confirm your reports are running as intended. For example, you create a filter for active clients only, so to make sure it's working, you might add the “Enrollment status” field to your report. If the report runs correctly, and only Active results return in that column, you can delete that field from the report, if not needed in the results.

Demographic reports run differently than other reports:

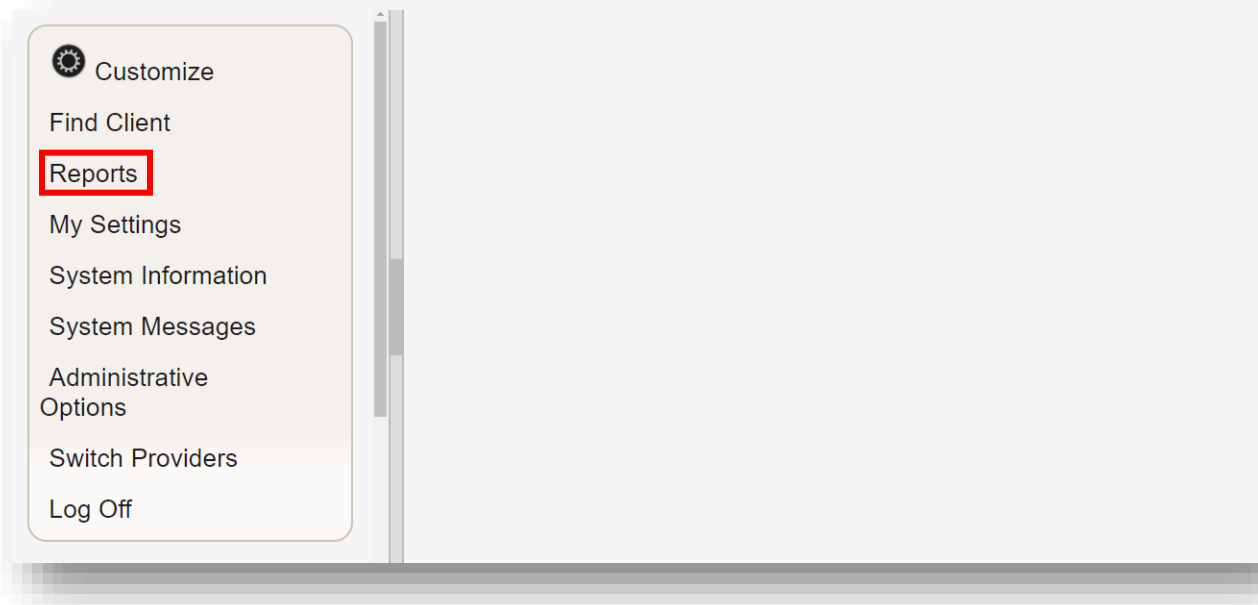
- Demographic reports display results per client. This can be useful in determining the number of clients in a given date span. With the use of calculated objects, demographic reports can be a powerful tool for data analysis (see Quick Start guide 8 - Advanced Reports).
- Other report types; such as services and labs display results ‘per service visit or lab date.’ This often results in several lines for each client, providing a detailed summary.

Creating Custom Reports

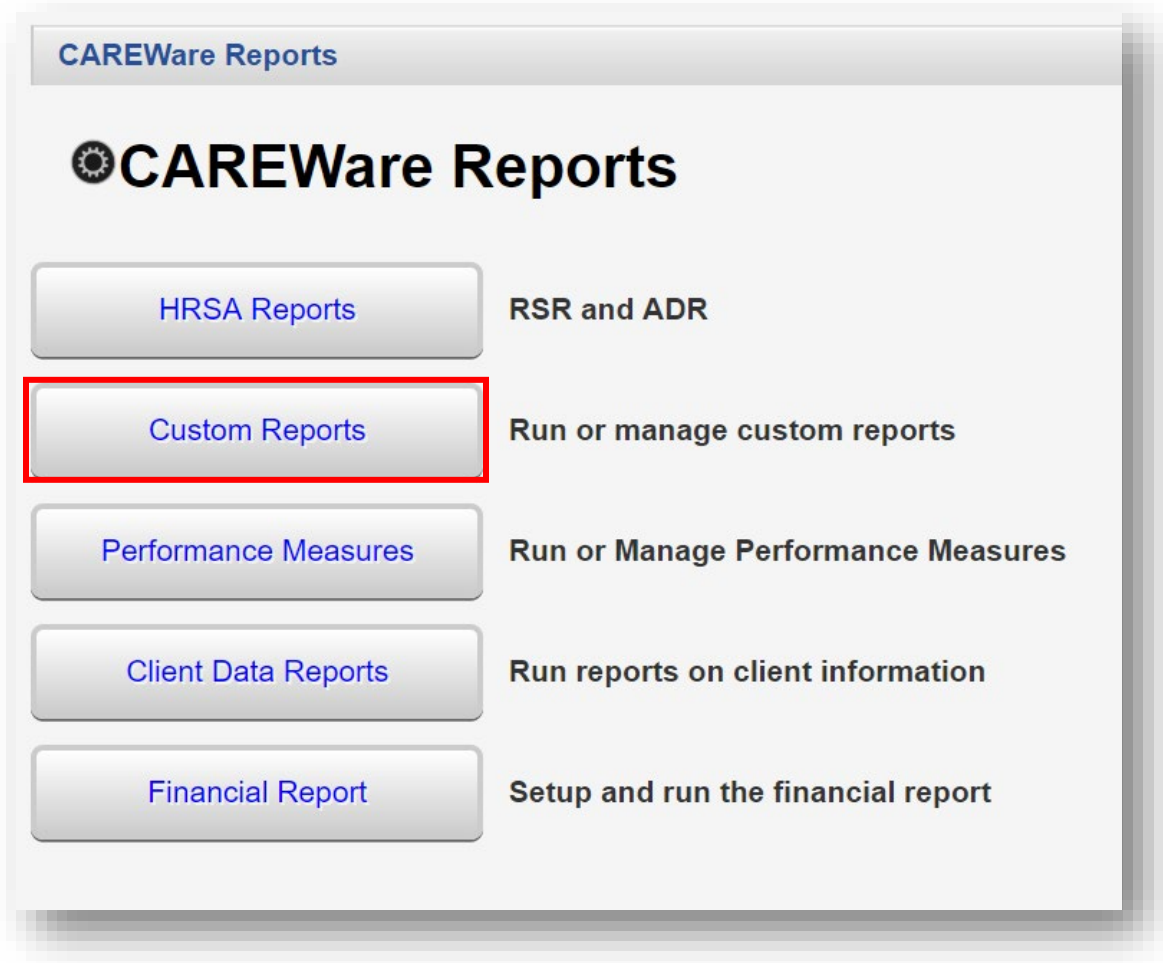
In addition to the prebuilt reports in CAREWare, you can use custom reports to view data sets tailored to your needs. It helps if you have some familiarity with SQL databases before you use custom reports, but if not, the report builder feature will help you design queries without prior database experience.

1. Log into CAREWare. For more details on how to do so, please refer to the **Navigating CAREWare Version 6.0 Guide**. If you have administrative privileges and are asked to choose between Central Administration and Provider (“Default” until you change the name) domain, you can log into either a Provider or the Central Administration domain. To run reports for multiple agencies within a provider network, log in to the Central Administration domain.

2. Select **Reports** from the **Main Menu**.



3. Select **Custom Reports** from the link menu.



4. Select **Manage/Run Custom Reports** from the link menu.

CAREWare Reports > Custom Reports

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Custom Reports

[Manage/Run Custom Reports](#) Run or manage custom reports

[Export Custom Reports](#) Export custom report definitions to a portable xml file

[Import Custom Reports from an xml file](#) Import custom report definitions from a portable xml file

5. Select **Add**.

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	Report Type	Description
Death dates		01	Demographics	dates of death
First Medical Service		01	Demographics	1st srvc
Sum of Services		01	Demographics	add em up
Cap on charges II		01	Demographics	
Body Weights		01	Demographics	weigh them.

6. 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)


CAREWare Reports > Custom Reports > Manage Run Custom Reports > Add

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

Add

Setup Details

Report Name:


Report Type: 

Is Crosstab:

Description:

Use Totals:

Header/Footer Format


Font Name: 

Bold:

Italic:

Underline:

Font Size:

Color: 

7. After clicking save, you will be on the custom report’s menu. Select **Field Selection**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender

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⊙ Clients by Race and Gender

[Run Report](#) Start Date : 03/27/2018, End Date : 03/27/2019, Clients with services, Report Display as : Open in New Window

[Report Layout](#) Clients by Race and Gender, Demographics

[Field Selection](#) No fields selected

[Report Filter](#) Report Filter is empty

8. Select **Add**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > 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
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- Use the *Search* box to find the fields to display in the report. In this example, “Name” was entered. Since the complete client name is desired for the report, the Name field has been selected. Click **Use Field**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Field Selection > Add

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

Report Fields

Search:

Field Name	Keywords	Previous Field Name	Description
Medications by indication	Demographics	Client Meds By Ind.	Returns full medication name for selected indication
Current Regimen	Demographics	Current Regimen	Returns a list of ARV medications in a current regimen
First Name	Demographics	First Name	
Last Name	Demographics	Last Name	
Last Service In Contract	Demographics	Last Service In Contract	Returns name of service category
Middle Name	Demographics	Middle Name	
Name	Demographics	Name	
Physician name	Demographics	Phys. Name	
Preferred Name (Cln. Custom)		Preferred Name (Cln. Custom)	Culturally Sensitive Name requested by the client

10. You will now be on the Use Field menu. Enter in the following information (as applicable) and click **Save**.

- **Column Header**
- **Sort**
- **Sort Priority**
- **Header Column Format**
- **Data Column Format**

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > 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:

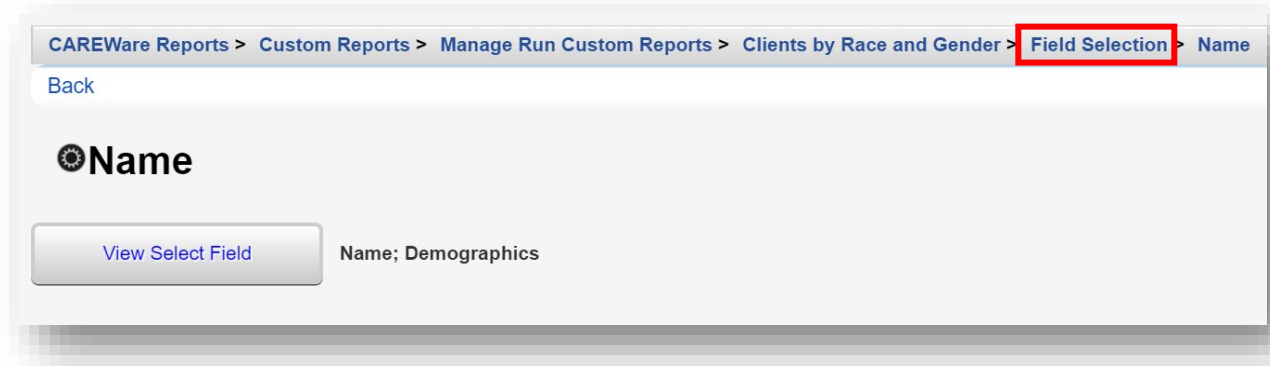
Underline:

Font Size:

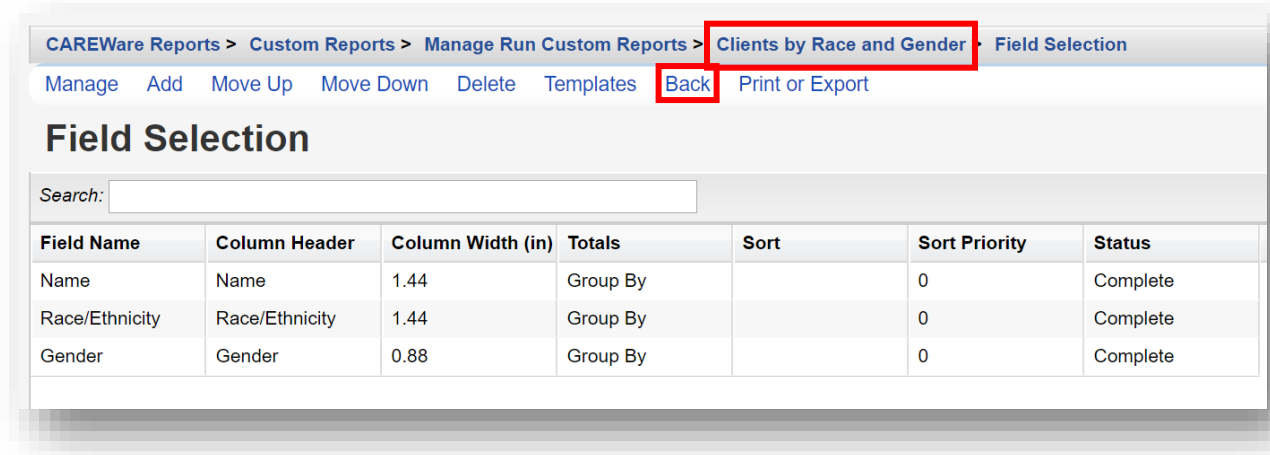
Font Color: 

Field Justification: 

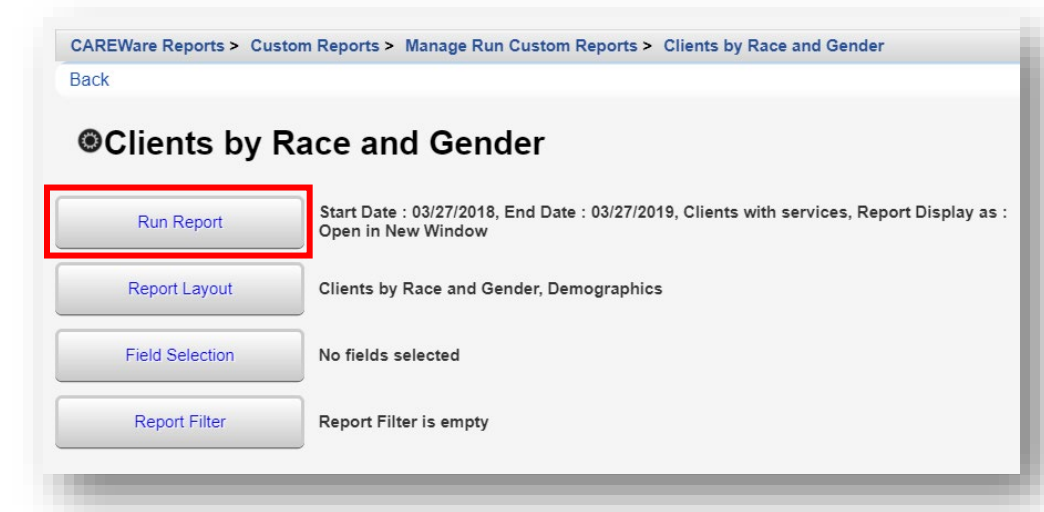
11. After clicking save, you will be on the selected field’s menu. Return to the Field Selection menu by clicking **Field Selection** within the breadcrumb trail. Repeat steps 8 through 10 to add additional Report Field selections (such as *Race/Ethnicity* and *Gender*).



12. To Return to the custom report’s menu, click the name of the custom report in the breadcrumb trail (in this example, “Clients by Race and Gender”) or click **Back** from the Field Selection menu.



13. Click **Run Report**



14. Click **Edit**. Select the following report parameters and click **Save** (will be visible after clicking **Edit**).

- **Date From**
- **Date Through**
- **Clinical Review Year** (optional – typically matches the reporting year)
- **Output Display**
 - Download as CSV
 - Open in New Window
 - Open as PDF
- **Show New Client only** (check box)
- **Show Clients with Service only** (check box – will only list clients with services within date span)
- **Show Specifications** (check box – to list report criteria)
- **Sum Numeric Fields** (check box)
- **Domain Sharing Settings** (default value)

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Run Report

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

Run Report

Parameters

Date From:

Date Through:

Clinical Review Year:

Output Display:

Show New Clients only:

Show Clients with Service only:

Show Specifications:

Sum Numeric Fields:

Domain Sharing Settings

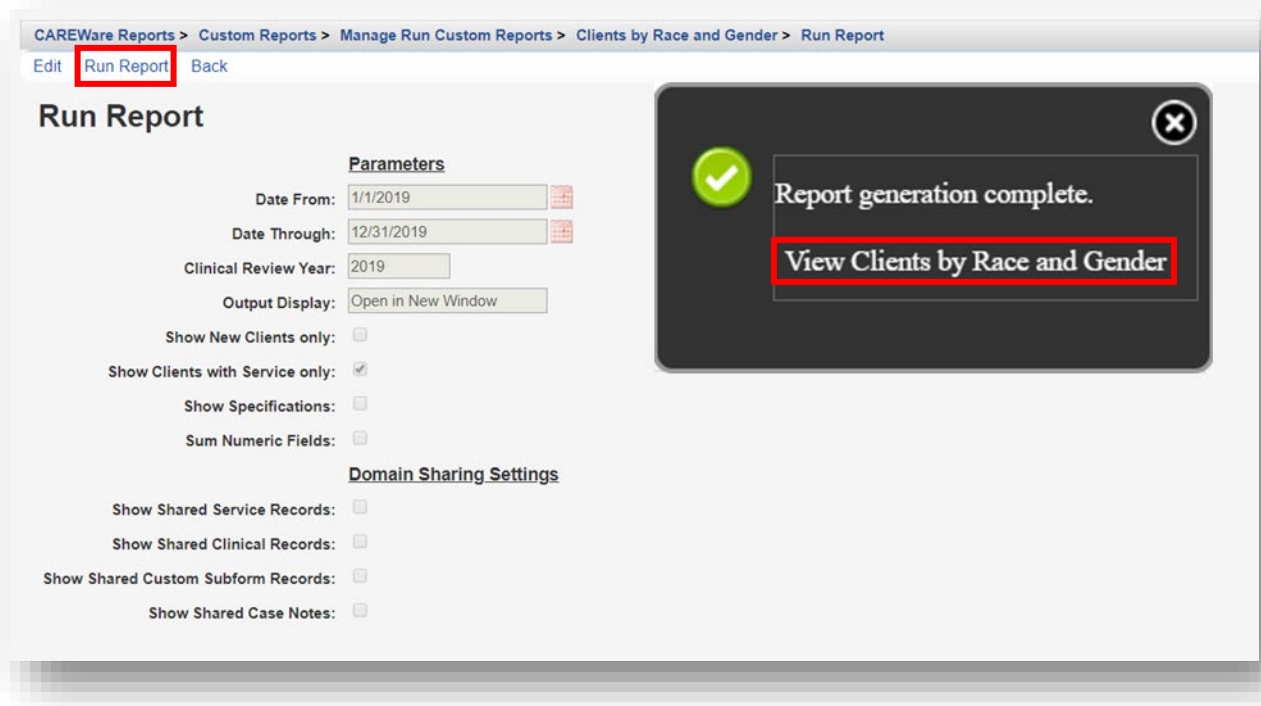
Show Shared Service Records:

Show Shared Clinical Records:

Show Shared Custom Subform Records:

Show Shared Case Notes:

- Click **Run Report** and then click **View [name of report]** (in this example, View Clients by Race and Gender). The report will appear in a new tab within your browser.



Clients by Race and Gender

Data Scope: Ryan White AIDS Care and Treatment Clinic
Report Start Date: 01/01/2019
Report End Date: 12/31/2019

<u>Name:</u>	<u>Race/Ethnicity:</u>	<u>Gender:</u>
Adap, Sigourney	Hispanic	Female
Appleseed, Johnny	Hispanic	Male
Appleseed, Martha	Not Specified	Transgender MtF
Badge, Jane	Hispanic	Female
Badland, Abbey	Hispanic	Female
Baker, Clam	Pacific Islander	Male
Brown, Buster	Hispanic	Transgender MtF

Add Report Filters to “Clients by Race and Gender”

Use the **Report Filter** to choose how to sort your data. (It is a good idea to include Field Selections that will verify your filters are working as intended.) For example: if you filter your report for Females only, you would want to include the ‘Gender’ column among your Field Selections in the report.

You can add a filter at the same time you create your field selections, before saving your report. However, you may first want to run a report without filters to make sure you’re getting data, and then add the filters.

1. From the Manage/Run Custom Reports menu (see pages 2 through 3), use the *Search* box to find the relevant report. We will be using the custom report: “Clients by Race and Gender.” Select the report and 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: Race and Gender

Name	Description	Report Type	Date Created
Clients by Race and Gender		Demographics	5/17/2019 7:54 AM

2. Click **Report Filter**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender

Back

⚙️ Clients by Race and Gender

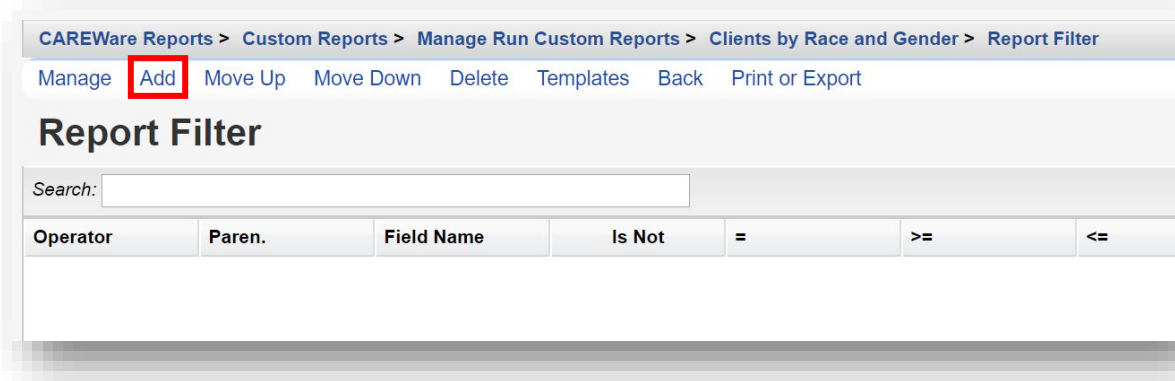
Run Report Start Date : 03/27/2018, End Date : 03/27/2019, Clients with services, Report Display as : Open in New Window

Report Layout Clients by Race and Gender, Demographics

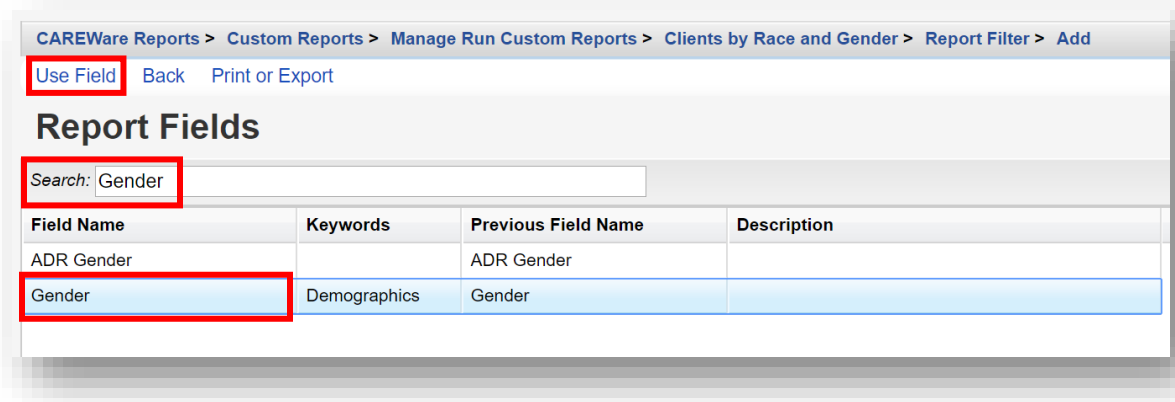
Field Selection No fields selected

Report Filter Report Filter is empty

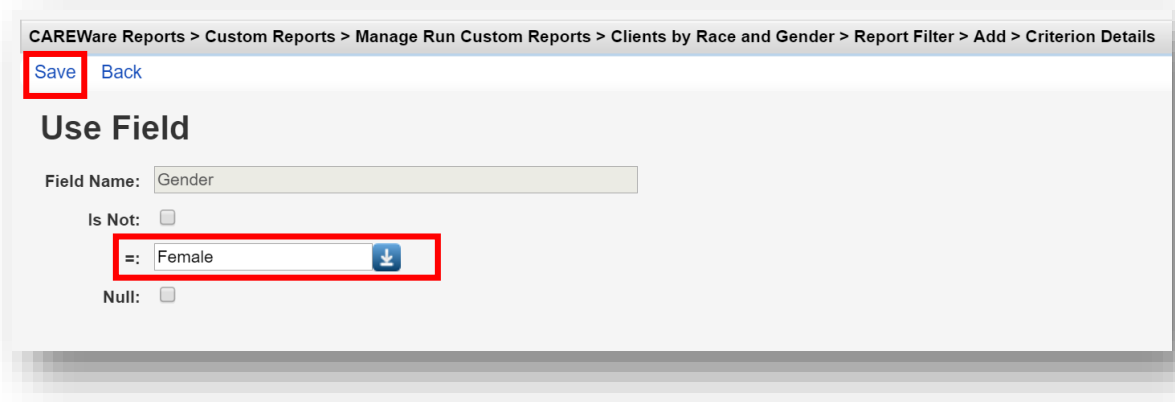
3. Click **Add**.



4. Enter “Gender” in the *Search* box to limit available Field Names. Chose the appropriate Field Name and select **Use Field**.



5. Select Female from drop-down box. Click **Save**.



NOTE: The default value for Use Field is equal to “=”. Checking the **Is Not** box will return all values unlike the one selected. For example, if you selected Gender IS NOT Female, the report would return Male, Transgender, Refused to Report, and Unknown values. Checking the **Null** box would return any values where the Gender field was missing.

Saving Filters as Templates

After selecting your filter field(s), you may also save this field selection as a template. Saving as a template lets you apply the filter you've created to any report type.

1. From the Report Filter menu, select **Templates**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Report Filter

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

Report Filter

Search:

Field Name	Is Not	=	>=	<=	Null	Status
Gender		Female				Complete

2. Select **Save to New Template**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Report Filter > Filter Templates

Use Selected Template Save To Selected Template **Save To New Template** Delete Back Print or Export

Filter Templates

Search:

Template Name
activeOnly
CD4 decline
MissingDemFilter
RsrDemographics1
RW funded

3. Enter the **New Template Name** and then click **Save**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Report Filter > Filter Templates

Save Back

Save To New Template

New Template Name:

- The filter template will appear on the Template Name list. In the future you can go to the Templates window and select a template to use as a filter or set of filters. Just select the filter and click **Use Selected Template**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Report Filter > Filter Templates

Use Selected Template Save To Selected Template Save To New Template Delete Back Print or Export

Filter Templates

Search:

Template Name
activeOnly
CD4 decline
Females Only
MissingDemFilter
RsrDemographics1
RW funded

- Select **Back**

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Report Filter

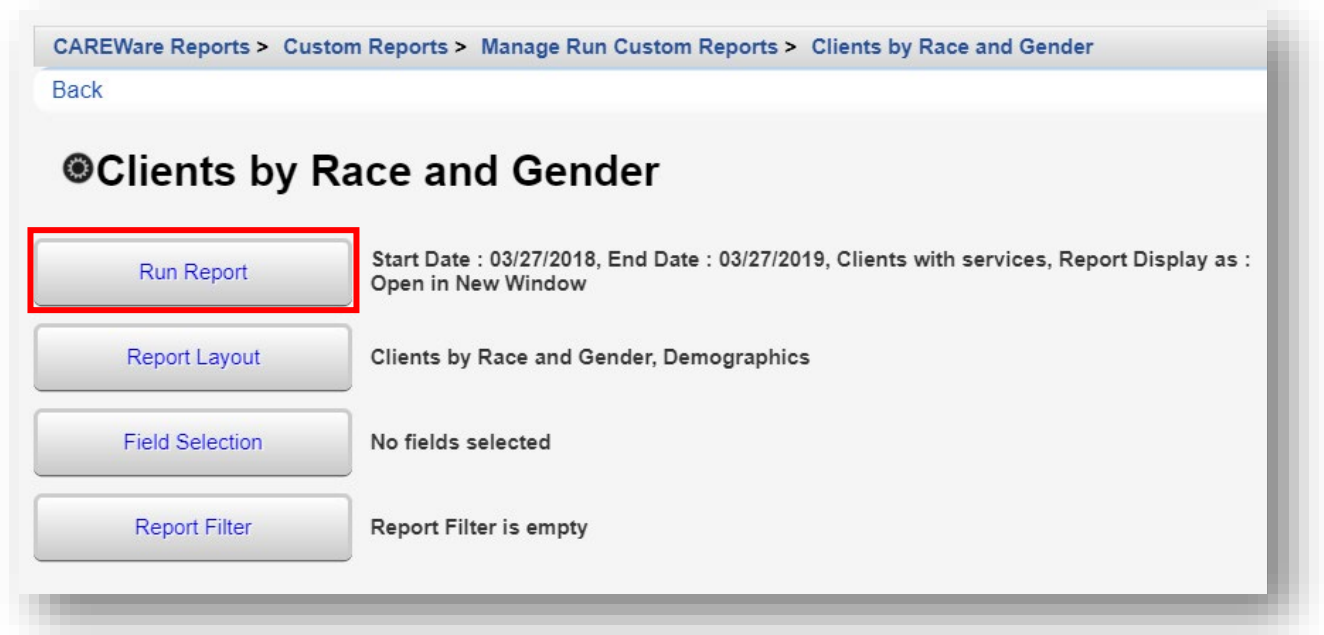
Manage Add Move Up Move Down Delete Templates Back Print or Export

Report Filter

Search:

Field Name	Is Not	=	>=	<=	Null	Status
Gender		Female				Complete

6. Click **Run Report**. Follow steps 14 and 15 on page 9-10.



Crosstab Reports

In the example above, we produced a report that listed each client separately. This is especially helpful when you need a list in order to identify specific clients requiring follow up (e.g. needing a vaccine, or who haven't had an office visit for more than 3 months).

In addition, custom reports can be very useful in assessing data quality, for example, by listing all the clients who have missing or out-of-range information for a certain field(s).

Crosstab Reports, however, allow you to quickly obtain the *counts* of clients for specific criteria. For example, you may need to report the number of clients you are serving cross-classified by race/ethnicity and gender, or by HIV status and CD4 group. The crosstab wizard allows you to generate client counts.

Crosstabs have a row, column, and, if specified, a strata field. We will use the custom report created in the previous step and change the report type to a Crosstab.

1. From the Custom Reports menu, click **Manage/Run Custom Reports**.

CAREWare Reports > Custom Reports

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Custom Reports

Manage/Run Custom Reports Run or manage custom reports

Export Custom Reports Export custom report definitions to a portable xml file

Import Custom Reports from an xml file Import custom report definitions from a portable xml file

2. Use the *Search* box to filter the existing custom reports. Select the report **Name** and 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: race

Name	Description	Report Type	Date Created
Last CD4 by Race		Demographics	7/16/2007 2:51 PM
Race*Gender		Demographics	11/19/2007 3:34 PM
Race/ethnicity by Gender		Demographics	9/1/2009 10:57 AM
Clients by Race and Gender		Demographics	5/17/2019 7:54 AM

3. Select **Report Layout**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender

[Back](#)

🔍 Clients by Race and Gender

Run Report	Start Date : 01/01/2019, End Date : 12/31/2019, Clients with services, Report Display as : Open in New Window
Report Layout	Clients by Race and Gender, Demographics
Field Selection	Name, Race/Ethnicity, Gender
Report Filter	Gender = Female

4. Select **Edit** (located where Save is in the screenshot below). Select the **Is Crosstab** checkbox. Click **Save**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Report Layout > Edit

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

Edit

Layout Details

Report Name:

Report Type:

Is Crosstab:

Description:

5. After clicking save, click **Field Selection** from the menu.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender

[Back](#)

🔍 Clients by Race and Gender

[Run Report](#) Start Date : 01/01/2019, End Date : 12/31/2019, Clients with services, Report Display as : Open in New Window

[Report Layout](#) Clients by Race and Gender, Demographics, Crosstab

[Field Selection](#) Name, Race/Ethnicity, Gender

[Report Filter](#) Gender = Female

6. Confirm the Field Names are correct. To remove a Field, select it and click **Delete**. In this example, we are deleting the “Name” field.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Field Selection

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

Field Selection

Search:

Field Name	Column Header	Setup Status	Field Status
Name	Name	Complete	Row
Race/Ethnicity	Race/Ethnicity	Complete	Column
Gender	Gender	Complete	Strata

- Race/Ethnicity will be the **Row** and Gender will be the **Column** of the Crosstab Report. Click **Back**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Field Selection

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

Field Selection

Search:

Field Name	Column Header	Setup Status	Field Status
Race/Ethnicity	Race/Ethnicity	Complete	Row
Gender	Gender	Complete	Column

- Select Run Report.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and gender

Back

🔗 Clients by Race and gender

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

Report Layout Clients by Race and gender, Demographics, Crosstab

Field Selection Race, Gender

Report Filter Report Filter is empty

9. A sample Crosstab report of Race/Ethnicity by Gender is provided below.

Clients by Race and Gender (Race/Ethnicity by Gender)
Data Scope: Ryan White AIDS Care

Race/Ethnicity by Gender

Race/Ethnicity:	Total:	Col. %:	Female:	Male:	Transgender FtM:	Transgender MtF:
Asian	6	8.0	1 (16.7%)	5 (83.3%)	0	0
Black or African-American	20	26.7	11 (55.0%)	8 (40.0%)	0	1 (5.0%)
Hispanic	24	32.0	6 (25.0%)	14 (58.3%)	1 (4.2%)	3 (12.5%)
More than one race	5	6.7	1 (20.0%)	3 (60.0%)	0	1 (20.0%)
Not Specified	3	4.0	0	3 (100.0%)	0	0
Pacific Islander	1	1.3	0	1 (100.0%)	0	0
White (non-Hispanic)	16	21.3	5 (31.3%)	11 (68.8%)	0	0
Total:	75	100.0	24 (32.0%)	45 (60.0%)	1 (1.3%)	5 (6.7%)

Number of Records: 8

- **Total** column: lists the number of clients by race.
- **Col. %** column: lists the percent distribution of clients by Race.
- **Female, Male, Transgender FtM, and Transgender MtF** columns: show the gender distribution for each race category.

In the example above, Hispanic clients are 25% female and about 60% male clients, whereas about 70% of white clients are male.

Crosstab Report (Adding a Strata field)

To see the race and gender distribution of clients by HIV risk, you can add **HIV Risk Factor** as a third Field Selection or **Strata** field.

1. From the Field Selection menu (see page 19), click **Add**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Field Selection

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

Field Selection

Search:

Field Name	Column Header	Setup Status	Field Status
Race/Ethnicity	Race/Ethnicity	Complete	Row
Gender	Gender	Complete	Column

- Use the *Search* box to find the desired Field Name. Choose the appropriate Field Name (in this example we are adding HIV Risk Factor) and select **Use Field**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Field Selection > Add

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

Report Fields

Search:

Field Name	Keywords	Previous Field Name	Description
Hemophilic HIV risk factor	Demographics	Hemo	Returns yes or no
Heterosexual HIV risk factor	Demographics	Hetero	Returns yes or no
HIV Risk Factor	Demographics	HIV Risk Factor	
Perinatal HIV transmission risk	Demographics	Peri	Returns yes or no if client has perinatal HIV transmissi

- Click **Save**, then **Back**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Field Selection > Add > Use Field

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

Use Field

Select Field:

Column Header:

Total:

Sort:

Sort Priority:

- Race/Ethnicity will be the **Row**, Gender will be the **Column**, and HIV Risk Factor will be the **Strata** of the Crosstab Report. Click **Back**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Field Selection

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

Field Selection

Search:

Field Name	Column Header	Setup Status	Field Status
Race/Ethnicity	Race/Ethnicity	Complete	Row
Gender	Gender	Complete	Column
HIV Risk Factor	HIV Risk Factor	Complete	Strata

5. Select **Run Report**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and gender

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🕒 Clients by Race and gender

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

Report Layout Clients by Race and gender, Demographics, Crosstab

Field Selection Race, Gender, HIV Risk Factor

Report Filter Report Filter is empty

6. A sample (excerpt) Crosstab report of Race/Ethnicity by Gender and HIV Risk Factor is provided below.

IDU						
Race/Ethnicity:	Total:	Col. %:	Female:	Male:	Transgender FtM:	Transgender MtF:
Asian	2	11.8	0	2 (100.0%)	0	0
Black or African-American	3	17.6	3 (100.0%)	0	0	0
Hispanic	5	29.4	1 (20.0%)	3 (60.0%)	0	1 (20.0%)
More than one race	2	11.8	1 (50.0%)	1 (50.0%)	0	0
White (non-Hispanic)	5	29.4	1 (20.0%)	4 (80.0%)	0	0
Total:	17	100.0	6 (35.3%)	10 (58.8%)	0 (0.0%)	1 (5.9%)

Number of Records: 6

MSM						
Race/Ethnicity:	Total:	Col. %:	Female:	Male:	Transgender FtM:	Transgender MtF:
Black or African-American	5	35.7	0	5 (100.0%)	0	0
Hispanic	4	28.6	0	3 (75.0%)	0	1 (25.0%)
More than one race	1	7.1	0	1 (100.0%)	0	0
Not Specified	1	7.1	0	1 (100.0%)	0	0
White (non-Hispanic)	3	21.4	0	3 (100.0%)	0	0
Total:	14	100.0	0 (0.0%)	13 (92.9%)	0 (0.0%)	1 (7.1%)

Number of Records: 6