

Users can save reports they use often in a single location under My Reports. This includes custom reports, financial reports, and performance measures. This customized list of reports can be saved for a single user or shared with all users for the provider.

Follow these instructions to save custom reports under My Reports:

1. Click *Reports*.
2. Click *Custom Reports*.
3. Click *Manage/Run Custom Reports*.
4. Select a report.
5. Click *Manage/Run*.
6. Click *Run Report*.
7. Click *Save to My Reports*.
8. Enter the *My Report Name*.
9. Click *Save*.


Note: Check All Users if the report should be shared across the provider.


CAREWare Reports > Custom Reports > Manage/Run Custom Reports > RSR eligible by Age > Run Report


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Run Report

Parameters

Date From: 

Date Through: 

Clinical Review Year: 

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:

Follow these instructions to save financial reports under My Reports:

1. Click *Reports*.
2. Click *Financial Reports*.
3. Complete all settings for the financial report.
4. Enter the *My Report Name*.
5. Click *Save*.

Note: Check All Users if the report should be shared across the provider.

CAREWare Reports > Financial Report Settings

Funding Source Filter Edit Filter Run PDF Save to My Reports Help Cancel

Financial Report Settings

Begin Date: 01/01/2021

End Date: 12/31/2021

Funding Sources: HOPWA

Include Subservice Detail?:

Include Provider Information?:

Pull Amount Received from receipts in the date span?:

Apply Filter:

Filter Description: Age >= 25

Follow these instructions to save performance measures under My Reports:

1. Click *Reports*.
2. Click *Performance Measures*.
3. Click *Run Performance Measures*.
4. Select the performance measures to be included.
5. Click *Evaluate Selected*.
6. Click *Save to My Reports*.
7. Enter the *My Report Name*.
8. Click *Save*.


Note: Check All Users if the report should be shared across the provider.

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

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Performance Measure Settings

Parameters

AsOfDate: 

Performance Measures: HAB: HIV viral load suppression (Core01), HAB: Prescription of antiretroviral therapy (Core02), HAB: Gap in HIV medical visits (Core04), HAB: HIV medical visit frequency (Core03), Retention in Medical Care (PHL05)

Once the reports are saved, they are listed under My Reports where they can be run.

CAREWare Reports > **My Reports**

Run View Edit Delete Back Print or Export

My Reports

Search:

Name	Report Type	Custom Report	Creating User	Create Date
HOPWA Financial	Financial Report		cwtemp	3/8/2022
CORE	Performance Measure		cwtemp	3/30/2022
RSR eligible by Age	Custom Report	RSR eligible by Age	cwtemp	3/30/2022

Follow these instructions to run a report from My Reports:

1. Click *Reports*.
2. Click *My Reports*.
3. Select a report from the list.
4. Click *Run*.

CAREWare Reports > **My Reports**

Run View Edit Delete Back Print or Export

My Reports

Search:

Name	Report Type	Custom Report	Creating User	Create Date
HOPWA Financial	Financial Report		cwtemp	3/8/2022
CORE	Performance Measure		cwtemp	3/30/2022
RSR eligible by Age	Custom Report	RSR eligible by Age	cwtemp	3/30/2022


After clicking *Run*, the options that appear are based on the type of report selected. In this example, a performance measure report type was selected, so the *Performance Measure Settings* appear.

CAREWare Reports > My Reports > Performance Measure Settings

[Open In New Tab](#) [PDF](#) [Back](#)

Performance Measure Settings

Parameters

AsOfDate: 

Performance Measures: HAB: HIV viral load suppression (Core01), HAB: Gap in HIV medical visits (Core04), HAB: HIV medical visit frequency (Core03), HAB: Prescription of antiretroviral therapy (Core02), Retention in Medical Care (PHL05)

5. Select an *AsofDate*.
6. Click *Open in New Tab* or *PDF* to get the results.