# Creating Custom Reports

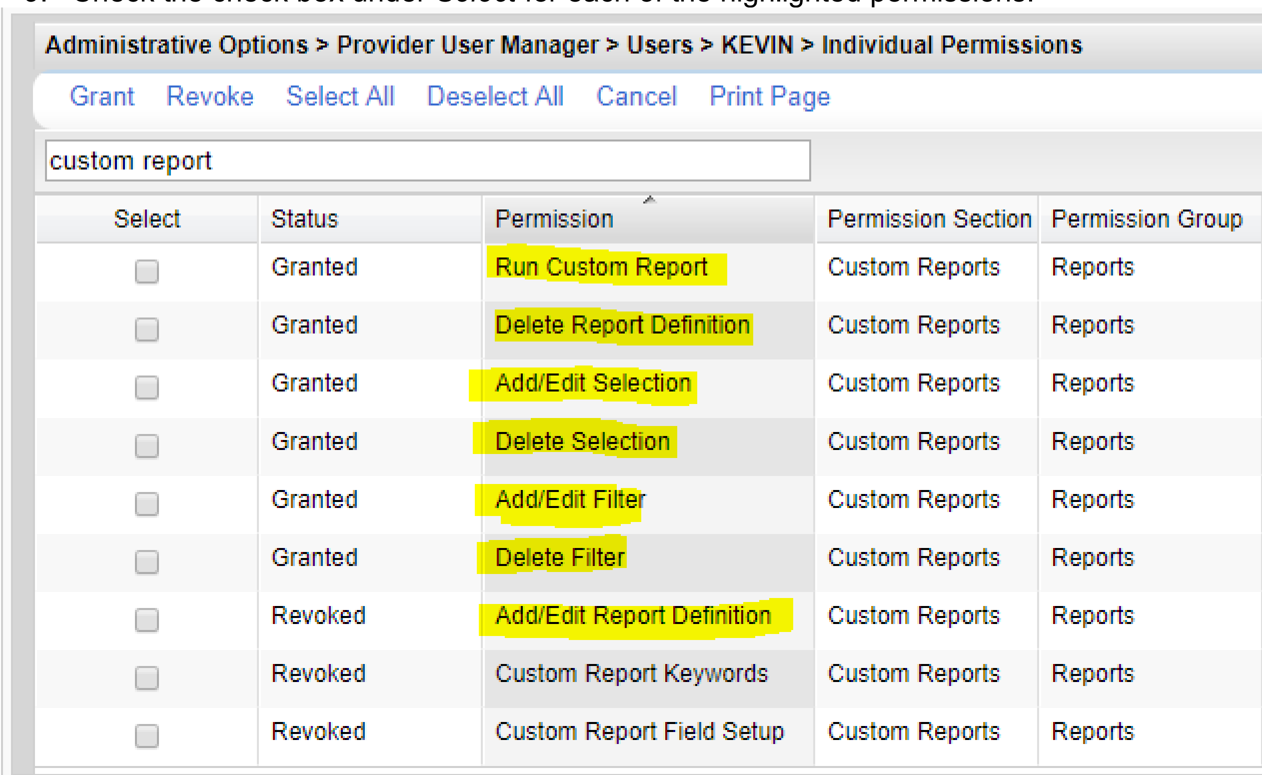
Custom reports can be used to create unique reports tailored to the providers needs. These customized reports can display several data elements in CAREWare, including:

- ADAP enrollment history
- Counseling and testing
- Case notes
- Composite
- Custom subform
- Demographics
- Diagnosis
- Dispensary
- Drug service
- Eligibility
- HIVQUAL
- Indicator
- Immunization
- Insurance assessment
- Lab
- Medication
- Poverty level assessment
- Pregnancy history
- Referrals
- Relations
- ROI agreement
- Screening
- Screening lab
- Service
- Store adjustments
- Store inventory
- Store issuance
- Store receipts
- Subfilterfields
- Vital signs.

Each of these report types include common and unique fields and filters. Custom reports can include results for a single provider or several providers. To run a custom report for several providers, a user must be logged into Central Administration. Running a custom report requires users have sufficient permissions and enough data to generate results.

To grant permission for users to create reports in Central Administration or in a provider domain:

1. Click *Administrative Options*.
2. Click *Provider User Manager*.
3. Click *Users*.
4. Type the users name in the search field.
5. Click the user to highlight the user name.
6. Click *Manage*.
7. Click *Individual Permissions*.
8. Type custom report in the search field.
9. Check the check box under *Select* for each of the highlighted permissions.



Administrative Options > Provider User Manager > Users > KEVIN > Individual Permissions

Grant Revoke Select All Deselect All Cancel Print Page

custom report

| Select | Status | Permission | Permission Section | Permission Group |
|---|---|---|---|---|
| ☐ | Granted | Run Custom Report | Custom Reports | Reports |
| ☐ | Granted | Delete Report Definition | Custom Reports | Reports |
| ☐ | Granted | Add/Edit Selection | Custom Reports | Reports |
| ☐ | Granted | Delete Selection | Custom Reports | Reports |
| ☐ | Granted | Add/Edit Filter | Custom Reports | Reports |
| ☐ | Granted | Delete Filter | Custom Reports | Reports |
| ☐ | Revoked | Add/Edit Report Definition | Custom Reports | Reports |
| ☐ | Revoked | Custom Report Keywords | Custom Reports | Reports |
| ☐ | Revoked | Custom Report Field Setup | Custom Reports | Reports |

10. Click *Grant*.

These are the minimal permissions for creating custom reports. Additional permissions can be granted for additional report permissions as needed.

If the permissions are locked, the permissions need to be granted for the provider domain.

Administrative Options > Provider User Manager > Real-time Providers > Kevin's Clinic > Users > KEVIN > Individual Permissions

Grant Revoke Select All Deselect All Cancel Print Page

custom reports

| Select | Status | Permission | Permission Section | Permission Group |
|---|---|---|---|---|
| | Locked | Run Custom Report | Custom Reports | Reports |
| | Locked | Add/Edit Report Definition | Custom Reports | Reports |
| | Locked | Delete Report Definition | Custom Reports | Reports |
| | Locked | Add/Edit Selection | Custom Reports | Reports |
| | Locked | Delete Selection | Custom Reports | Reports |
| | Locked | Add/Edit Filter | Custom Reports | Reports |
| | Locked | Delete Filter | Custom Reports | Reports |
| | Locked | Custom Report Keywords | Custom Reports | Reports |

1. Log into CAREWare.
2. Click *Central Administration*.
3. Click *Connect*.
4. Click *Administrative Options*.
5. Click Provider *User Manager*.
6. Click *Real-Time Providers*.
7. Click the provider to highlight it.
8. Click *Manage*.
9. Click *Individual Permissions*.
10. Type custom reports in the search field.
11. Check the select box for each custom report permission.
12. Click *Grant*.

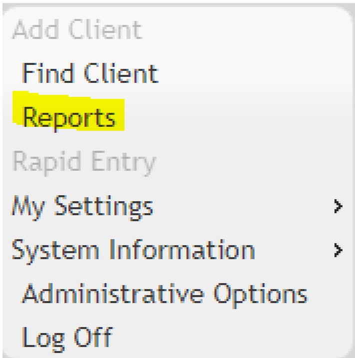
Now the permissions are granted for the provider domain and can be granted to users.

Tips for preparing to create a custom report:

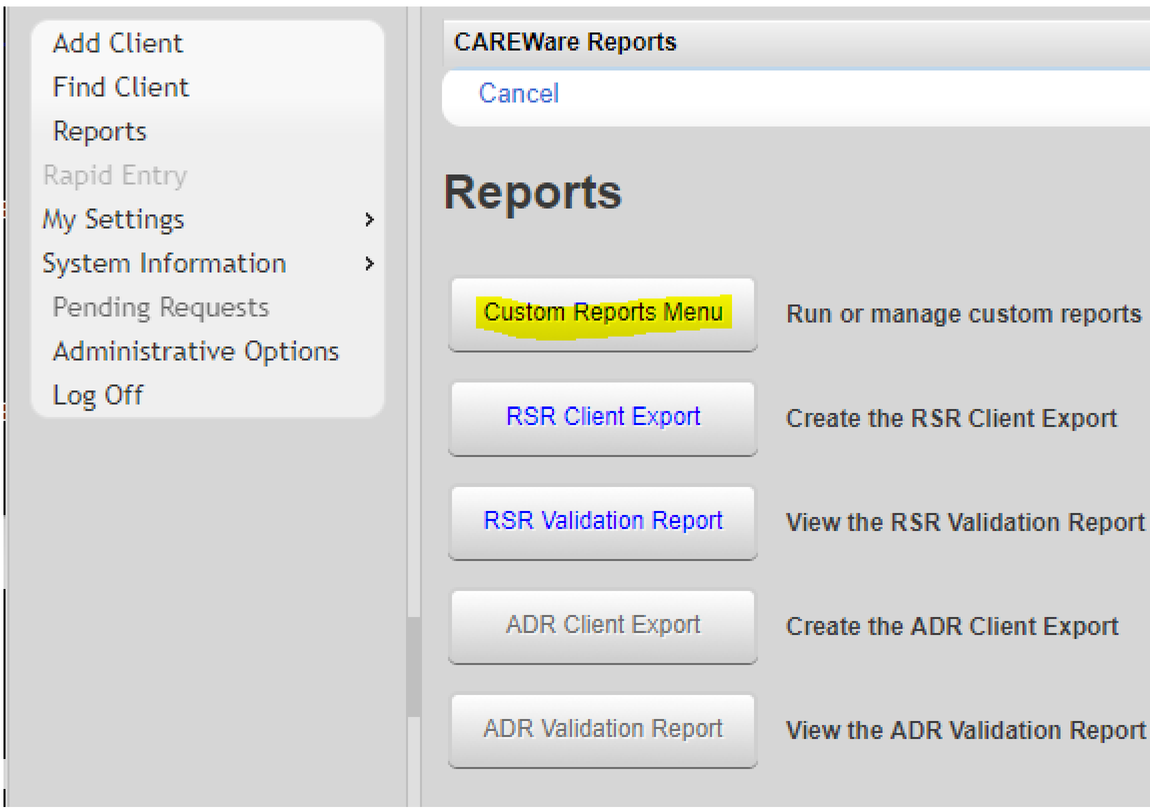
- Define the report - Make a list of the information that needs to be included in the report.
- Diagram the report – Make a list of fields that capture that information.
- Include quality check fields - Make a list of fields that confirm the data in the report is correct.
- Define the sample – Make a list of criteria that define the clients and client data in the report.

Note: Demographic reports display results per client. This makes it easier the get an unduplicated count of clients. Demographics report results only include clients that received services during the date span of the report. Other report types display a row for each record of that report type. For example, a services report type lists a row for each service record a client received. This often results in several lines for each client, providing a detailed summary.
To create a custom report:

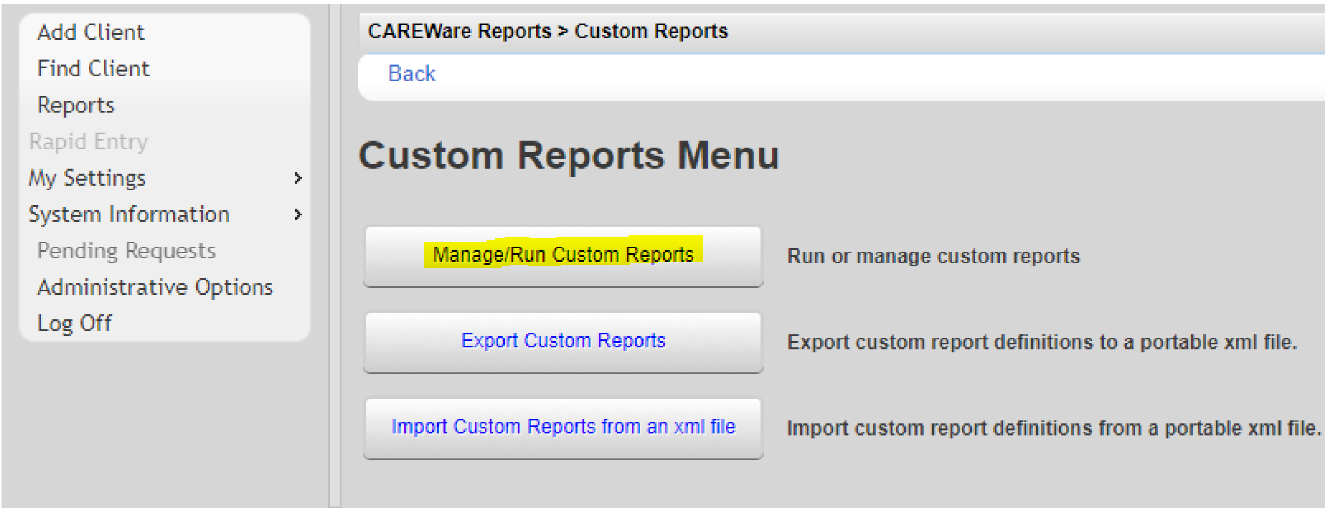
1. Log into CAREWare.
2. Click *Reports*.



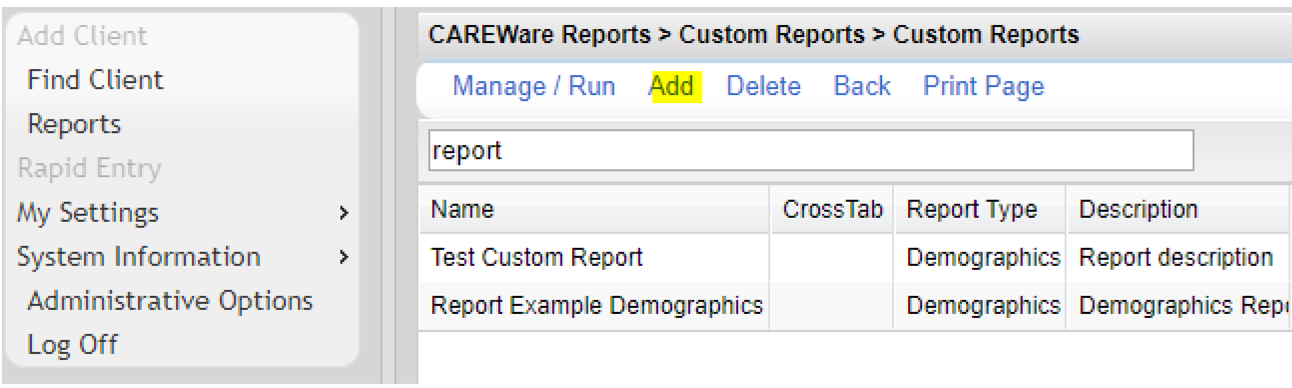

3. Click *Custom Reports Menu*.



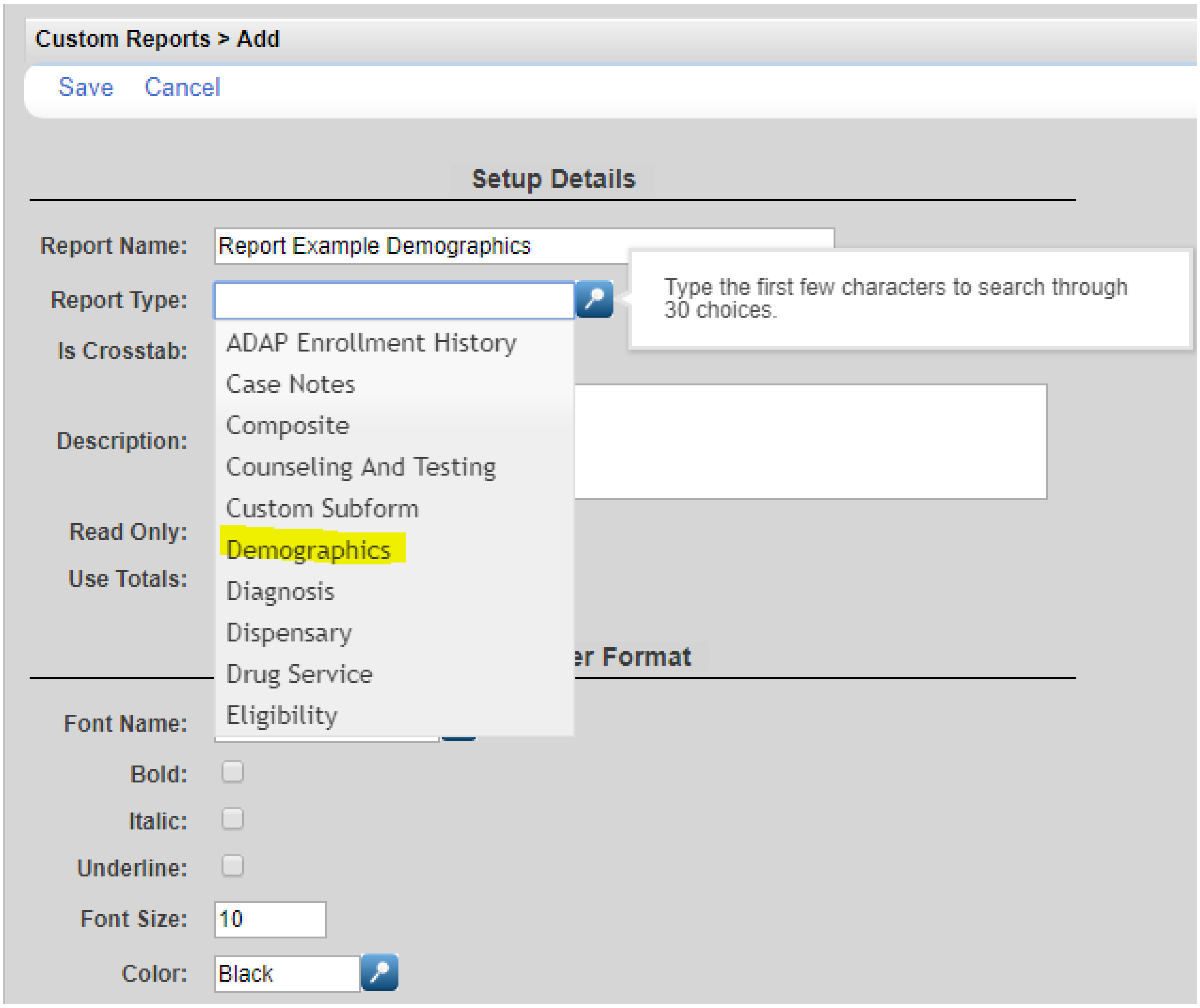
4. Click *Manage/Run Custom Reports*.



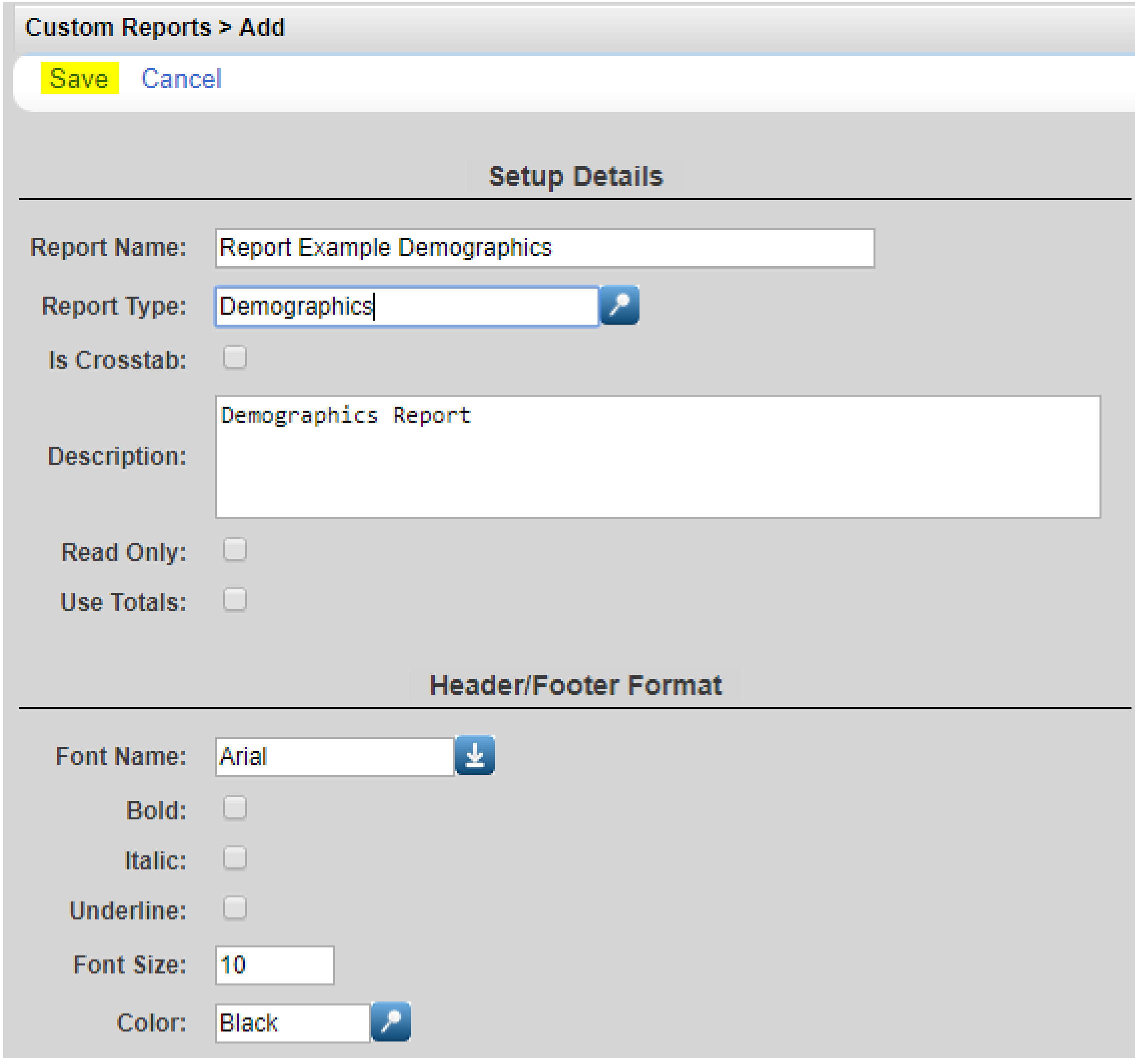

5. Click *Add*.



6. Enter a *Report Name*.
7. Click the spy glass to select from the list of *Report Types*.

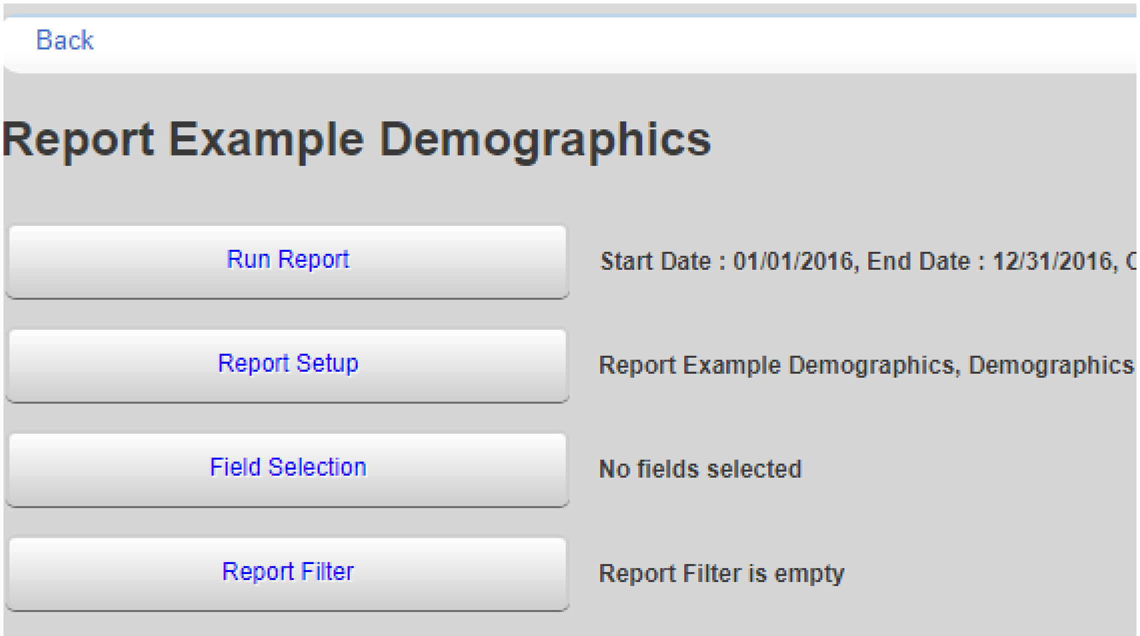



The report type will determine which field and filter options will be available for the custom report. Click [here](here) to review the fields and filters by report type.



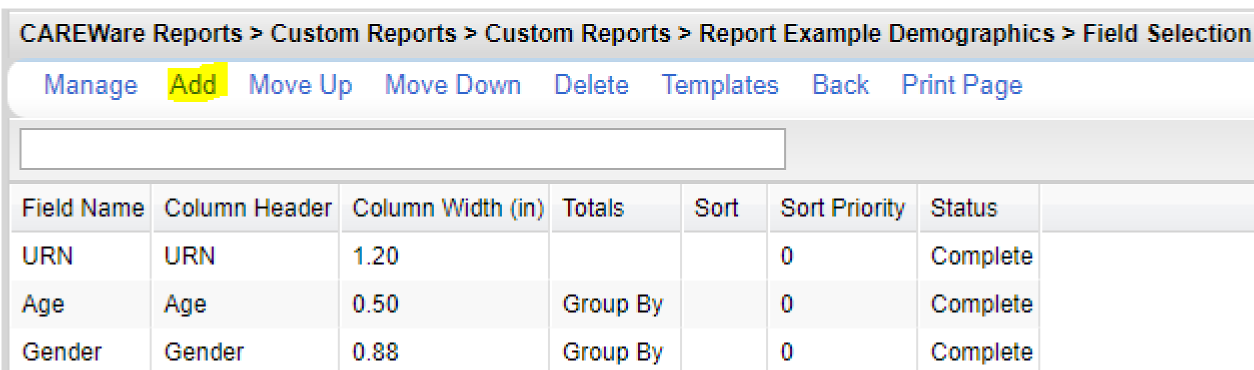

8. Complete the *Setup Details*.
9. Click *Save*.

- Is Crosstab – See Crosstabs below.
- Read Only – Checking this box eliminates the option for editing the custom report.
- Use Totals – Checking this box combines multiple records into single rows based on criteria such as *Group By*, *Count*, and *Sum*.
- Font Name – Displays the font for the *Header/Footer*.
- Bold – Checking *Bold* sets the *Header/Footer* text as bold.
- Italic – Checking Italic set the *Header/Footer* text in italics.
- Font Size – Sets the font size for the *Header/Footer*.
- Color – Sets the color of the *Header/Footer*.




Once the *Report Setup* is complete, *Field Selections* will need to be added to define the report.

1. Click *Field Selection*.
2. Click *Add*.




| Field Name | Column Header | Column Width (in) | Totals | Sort | Sort Priority | Status |
|---|---|---|---|---|---|---|
| URN | URN | 1.20 | | | 0 | Complete |
| Age | Age | 0.50 | Group By | | 0 | Complete |
| Gender | Gender | 0.88 | Group By | | 0 | Complete |

- Manage – Accessing the options to view and edit the field selection.
- Add – Used to add new field selections to the report.
- Move Up/Down – Used to change the order of fields in the list.
- Delete – Used to delete a field selection from the list.
- Templates – Used to add a field selection template. This will replace any fields already listed with the field selections in the template selected.
- Back – Returns to the previous screen.
- Print Page – Used to print the current screen.

Enter a name in the search field to limit the list to field selections similar to the information needed for the report. In this example, age is selected. Several options listed include age in the name of the field.

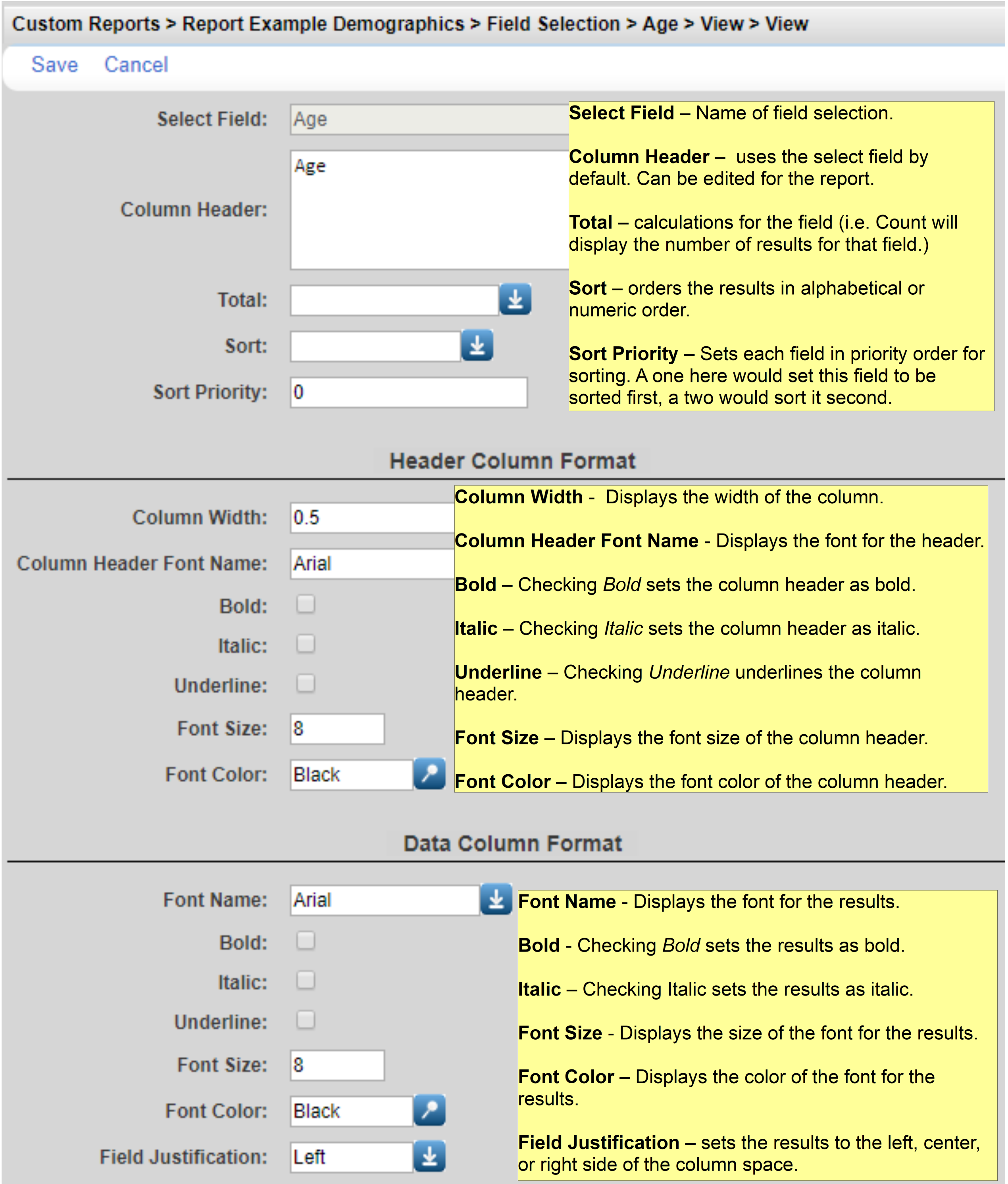
3. Click the field selection to highlight it.
4. Click *Use Field*.

**Custom Reports > Report Example Demographics > Field Selection > Add**

Use Field   Back   Print Page

age

| Field Name | Keywords | Previous Field Name | Description |
|---|---|---|---|
| Age | Demographics | Age | Client's age as of the end |
| Age at Begin Date | Demographics | Age at Begin Date | |
| Age at Enrollment | Demographics | Age at Enrollment | Client's age at enrollment |
| AgeGroup | Demographics | AgeGroup | Values: <13, 13-24, 25-44 |
| Date transferred in | Demographics | Trnsfr In Date | International version, date |
| Funding source inte | Demographics | Agency Funding | Source of funding for inter |
| Transferred in Ager | Demographics | Trnsfr In Agency | International version |
| Trnsfr Out Agency | Demographics | Trnsfr Out Agency | International version |
| Age At Date | Case Notes | Age At Date | |

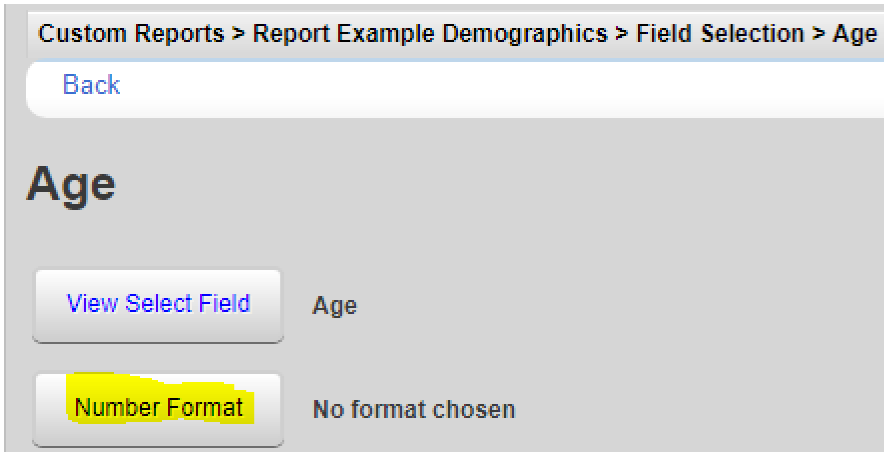



5. Complete the field selection format.
6. Click *Save*.

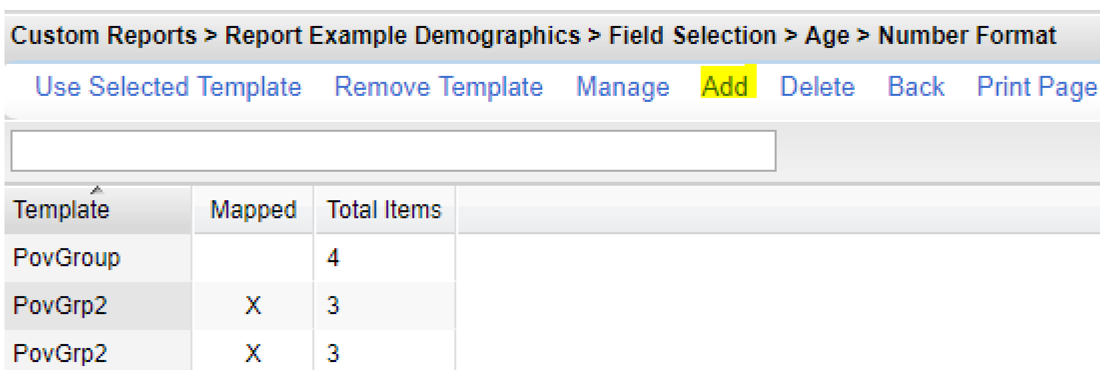
Some field selections have additional format options. In the case of Age, there are number format options.

To select additional format options for the field selection:

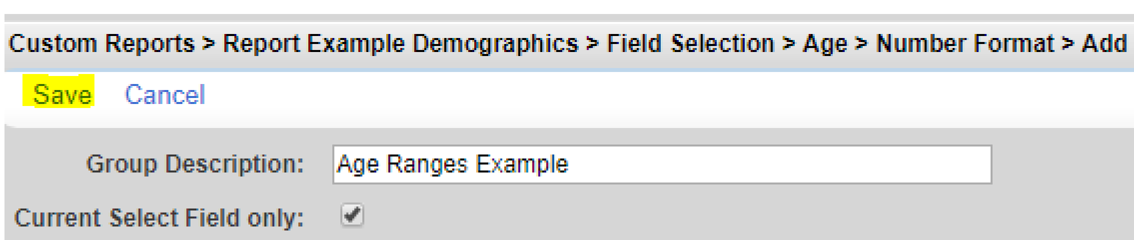
1. Click *Number Format*.



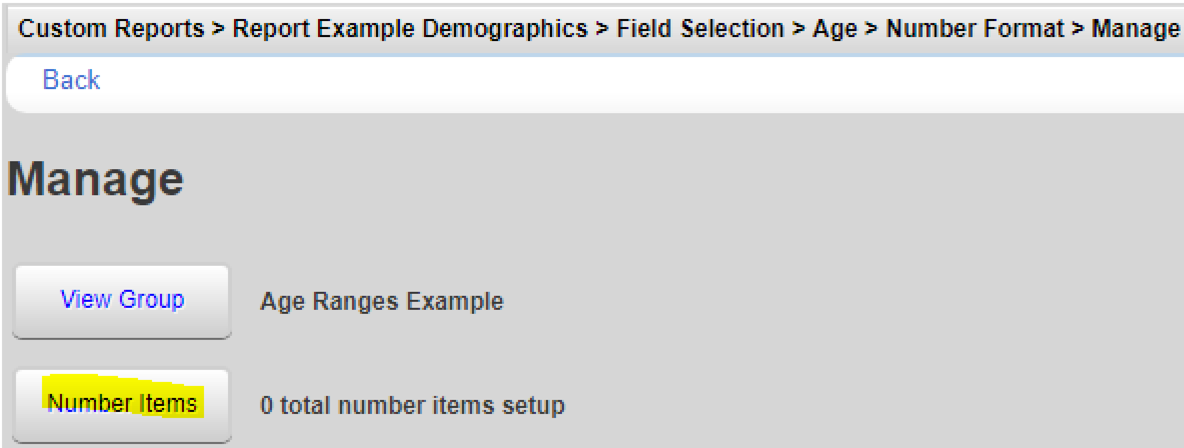

2. Click *Add*.



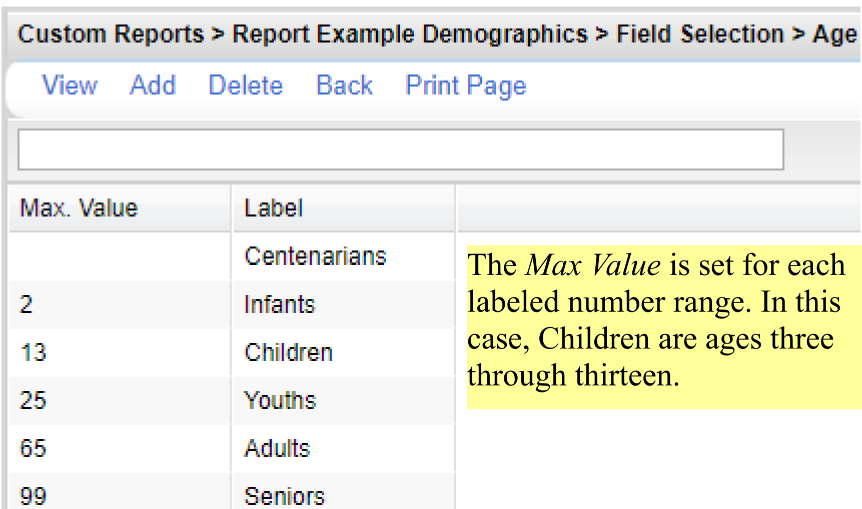

3. Enter a name for the *Group Description*.



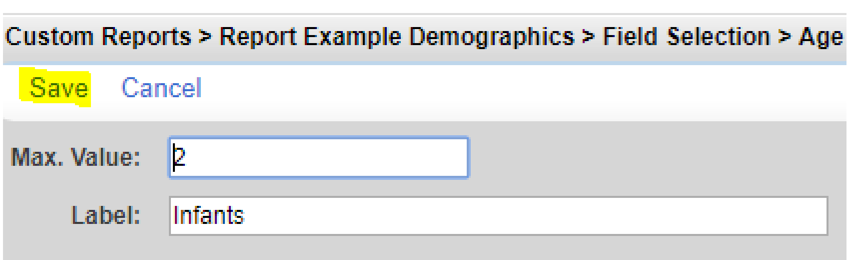
4. Click *Number Items*.




5. Click *Add*.

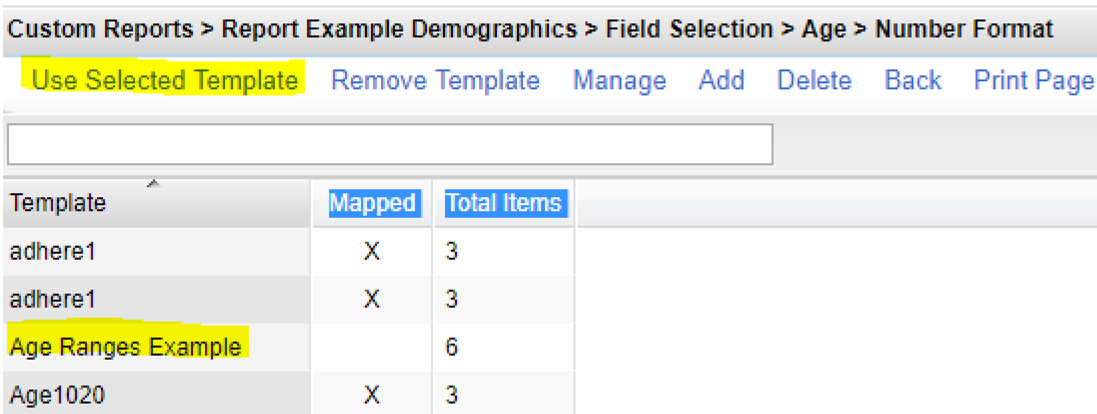



6. Enter a *Max Value*.
7. Enter that label for that value.

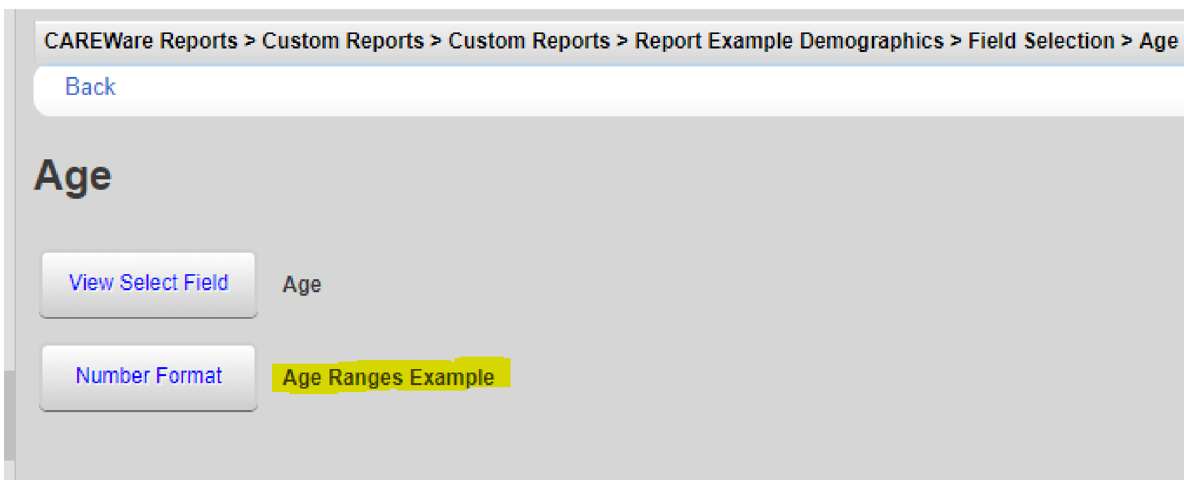


These ranges are saved as a template for number formats.

1. Click the template.
2. Click *Use Selected Template*.

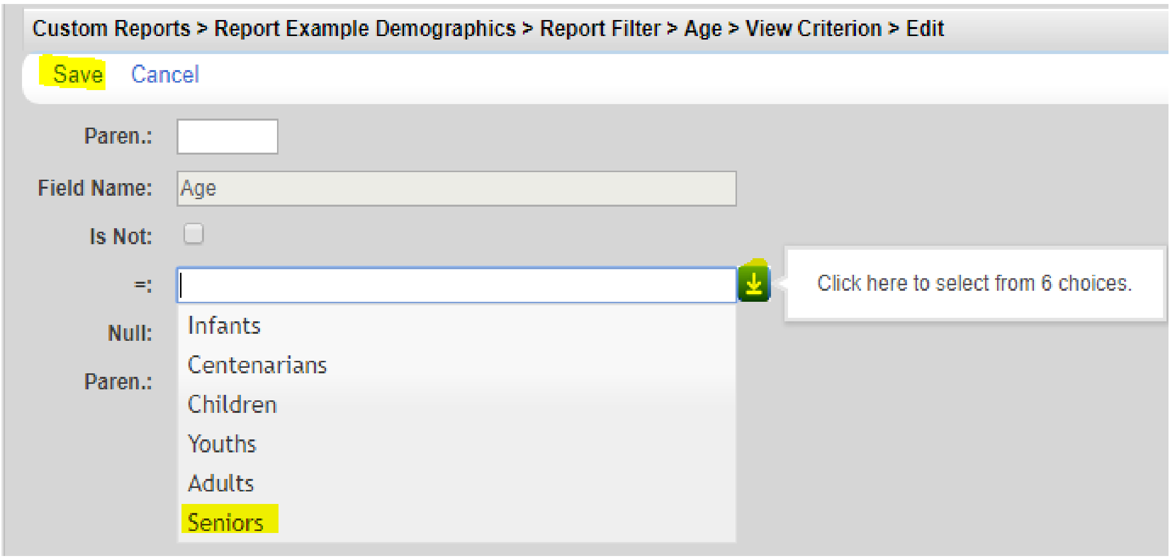



The number format template is now used for that field selection.

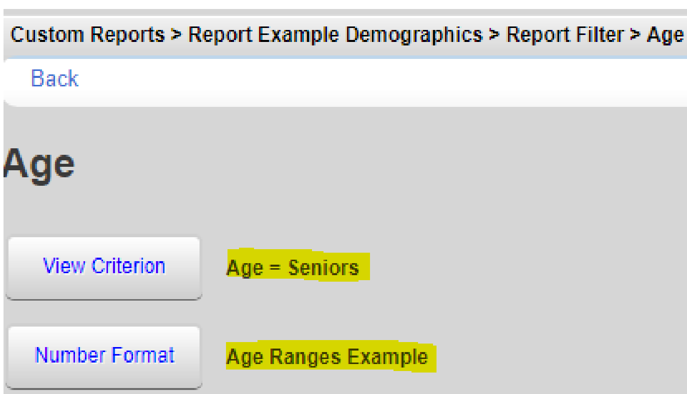


Once field selections are complete, report filters can be added to limit the results based on filter criterion.

1. Click *Report Filter*.
2. Click *Add*.




3. Click *Save*.




In this case, the results of the report are filtered for any clients that are within the age range of Seniors.

CAREWare Reports > Custom Reports > Custom Reports > Report Example

Save Cancel

Paren.:

Field Name: Age

Is Not:

=: Seniors

Null:

Paren.:

- Paren. - Opening parenthesis.
- Field Name - This is the name of the filter.
- Is Not - Used to exclude a value in a filter. In this case, if Is Not is checked, clients who are all other age groups other than Seniors would be included.
- = - Means the filter will select records that match this value.
- Null – Filters clients that have no value for this filter. In this case, the client would be missing their date of birth.
- Paren. - The closed parenthesis.

The parenthesis is used to group together filters with the same operator. In a custom report containing filters that use the operators AND and OR, the order in which these filters are calculated using those operators depends on the location of the parentheses.

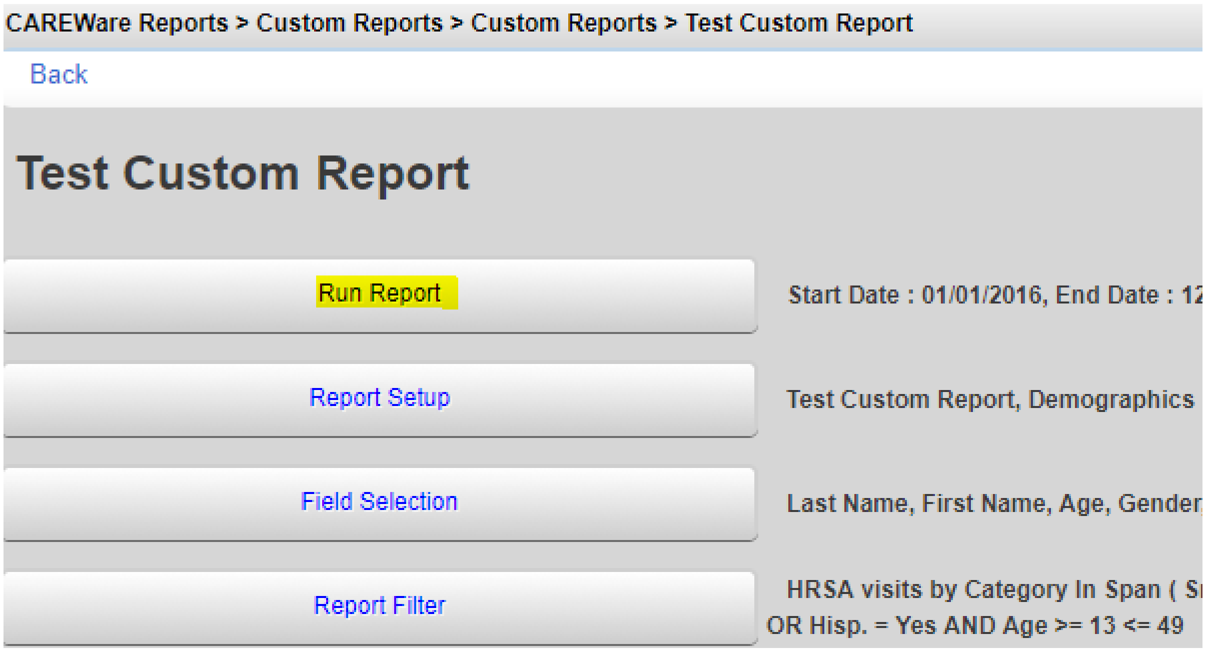
| Operator | Paren. | Field Name | Is Not | = | >= | <= | Null | Paren. |
|---|---|---|---|---|---|---|---|---|
| | | HRSA visits by Category In Span | | | 1 | | | |
| AND | (( | Age | | | 50 | 75 | | |
| AND | | Gender | | Female | | | | ) |
| OR | ( | Hisp. | | Yes | | | | |
| AND | | Age | | | 13 | 49 | | )) |

In this case, the report will select clients that are ages 13 through 25, Hispanic, and received at least one outpatient ambulatory service or clients that are ages 50 through 75, female, and received at least one outpatient ambulatory service. The double parenthesis is used to join the two groups of filters, separating those filters from the HRSA visits by Category in Span filter.

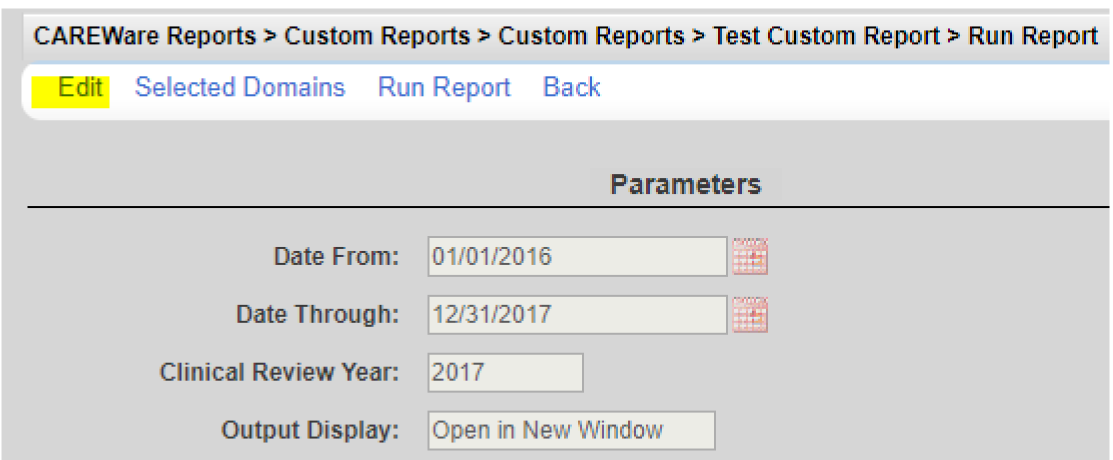
| Last Name: | First Name: | Age: | Gender: | HRSA visits by Category In Span: | Hisp.: |
|---|---|---|---|---|---|
| Babwe | Zim | 22 | Male | 1 | Yes |
| Tested | Beginingtest | 24 | Male | 1 | Yes |
| Deepwater | Jennifer | 74 | Female | 1 | No |

Once the report setup, field selections, and report filters are complete, the report is ready to run.

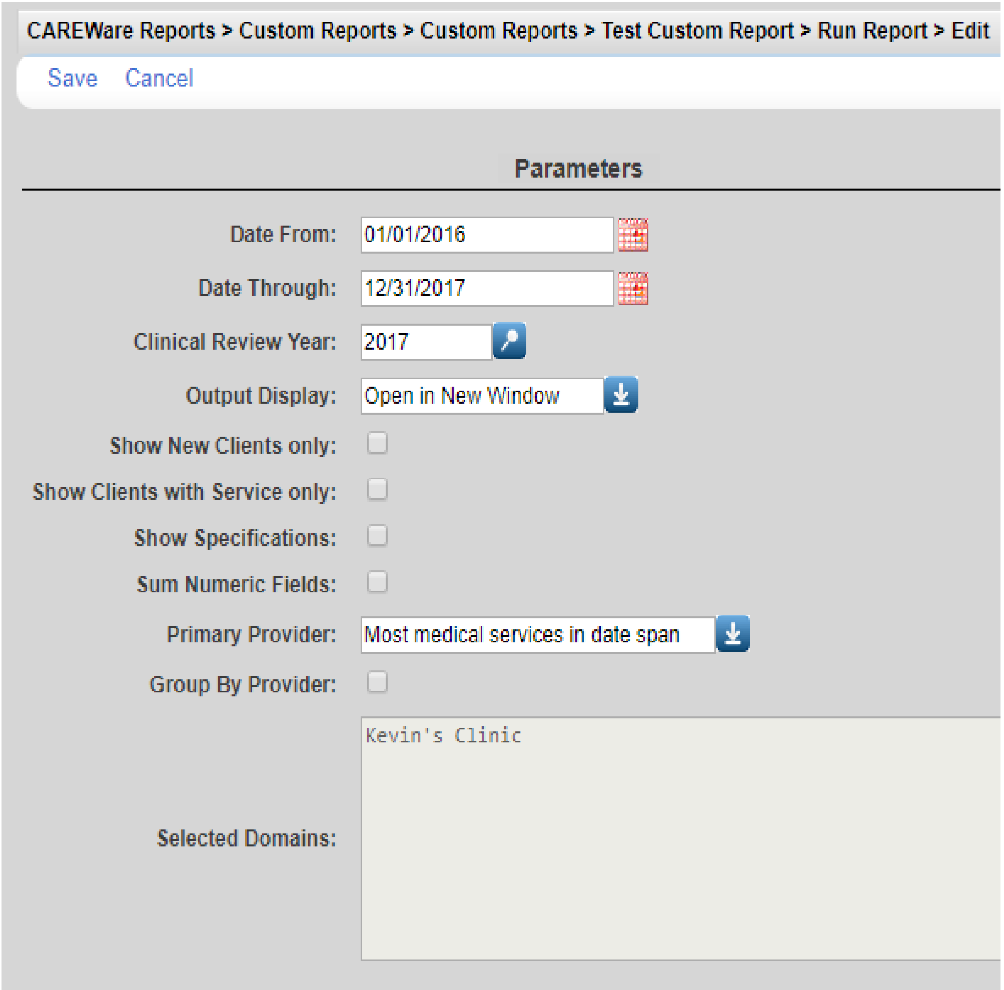
1. Click *Run Report*.




2. Click Edit.



3. Complete the parameters for the report.




4. Click *Save*.

- Date From – Data on this date or after this date is considered for the report.
- Date Through – Data on this date or before this date is considered for the report.
- Clinical Review Year – Specifies which year's annual review data to use for the report.
- Output Display – Sets how the report to display as a download as CSV, in a new window, or as a PDF.
- Show New Clients only – Includes clients with an enrollment date on or after the Date From and on or before the Date Through.
- Show Clients with Service only – Includes clients with a service date on or after the Date From and on or before the Date Through.
- Show Specifications – Displays report filter criteria in the report results.
- Sum Numeric Fields – Includes a total of numeric values in the report results.
- Primary Provider – Designates the client's primary provider based on where the client received the most medical services, most services, or most custom subforms in the date span.
- Group By Provider – Displays report results under each provider separately.
- Selected Domains – Displays the providers data will be included for.

Once the report parameters are complete the report can be run. The report results will be based on the Report Type, Date From, Date Through, critical date, and date spans included in fields and filters in the report. Date spans, calendar dates, and key dates of fields and filters are compared to the *Date Through*.

| Report Type | Critical date |
|---|---|
| ADAP enrollment history | ADAP enrollment history date |
| counseling and testing | HIV test date |
| case notes | Case notes date |
| composite | Based on report types included |
| custom subform | Custom subform date |
| demographics | At least one service visit |
| diagnosis | Diagnosis date |
| dispensary | Prescription date |
| drug service | Service date |
| eligibility | Eligibility date |
| HIVQUAL | |
| indicator | |
| immunization | Immunization date |
| insurance assessment | Insurance assessment date |
| lab | Test date |
| medication | Medication start date/end date |
| poverty level assessment | Poverty level assessment date |
| pregnancy history | Pregnancy date |
| referrals | Referal date |
| relations | Service date |
| ROI agreement | ROI Start date/End date |
| screening | Test date |
| screening lab | Test date |
| service | Service date |
| store adjustments | Adjustment date |
| store inventory | |
| store issuance | Issue date |
| store receipts | Receipt date |
| subfilterfields | |
| vital signs. | Vital sign date |

Ex: If a custom report is an Eligibility report type, only clients with an eligibility date on or after the *Date From* and on or before the *Date Through* will be included. If *Show Clients with Service Only* is checked, only clients with an eligibility date and a service date during the date span of the report will be included.

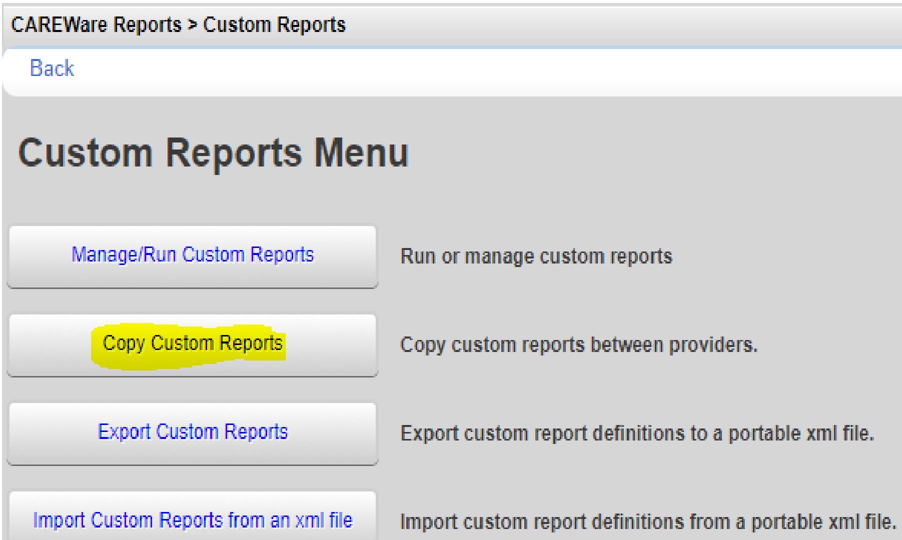
Some fields and filters will display dates or records prior to the *Date From*.

Ex: Date of last service will show the clients last service date, even if that date is prior to the *Date From* of the report.

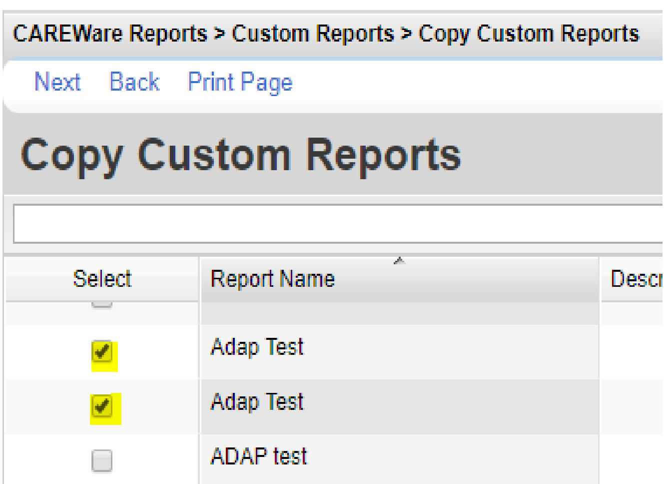
A custom report is visible in the domain the custom report is created in. Another provider can be granted access to the custom report by copying the custom report to that provider.

To copy custom reports:

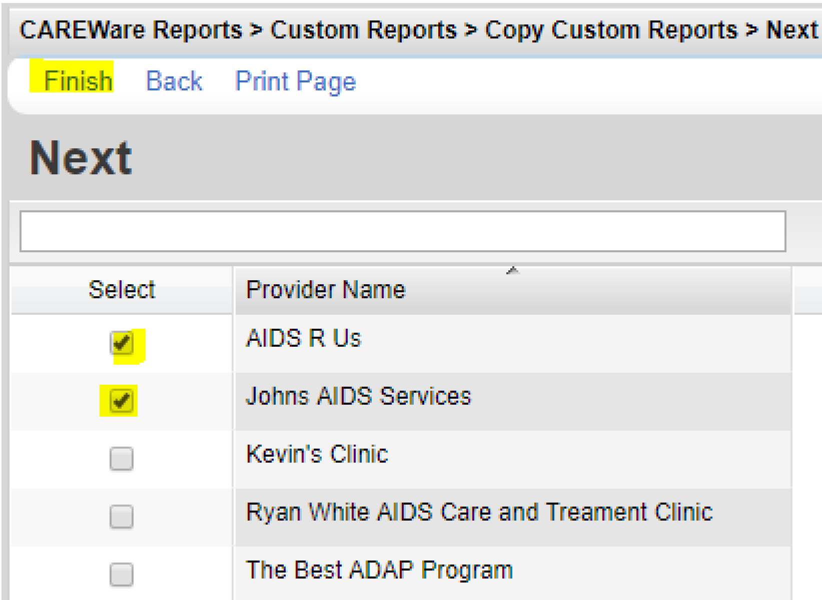
1. Log into Central Administration.




2. Click *Reports*.
3. Click *Copy Custom Reports.*
4. Check each report to be copied.

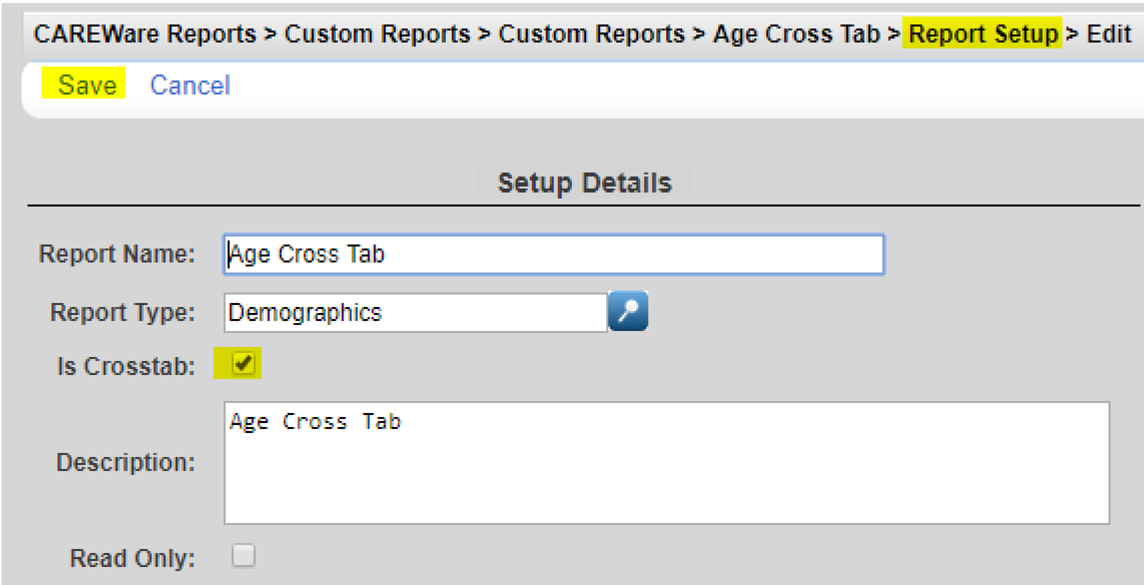



5. Click *Next.*
6. Check each provider the custom report will be copied to.
7. Click *Finish*.



The ADAP Test report will now be in the list on the AIDS R Us and Johns AIDS Services provider domains.

A Crosstab report can be used to get a count of the number of clients or a percentage of clients for a specific field value. The Crosstab report can include a column field, a row field, and be stratified by a field. To create a Crosstab report, check Crosstab in the report setup.




This is an example of a Crosstab report with a single field selection. Each age group is listed as a row with the total number of unduplicated clients in the second column under Total and the percentage in the last column. In this case, the clients included in this report all received services during 2016. No filter was needed, because the report type is demographics and a service during the date span is required for the client to be included in the report.

## Age Cross Tab

**Data Scope:** **Kevin's Clinic**

**Report Start Date:** **01/01/2016**

**Report End Date:** **12/31/2016**

**AgeGroupCrosstab**

| AgeGroup: | Total: | Col. %: |
|---|---|---|
| < 2 | 1 | 2.6 |
| 13 - 24 | 2 | 5.3 |
| 25 - 44 | 26 | 68.4 |
| 45 - 64 | 8 | 21.1 |
| 65+ | 1 | 2.6 |
| Total: | 38 | 100.0 |

The following report includes three field selections. A Crosstab report places the first field as the row, the second as the column, and the third as the strata.

CAREWare Reports > Custom Reports > Custom Reports > Age Cross Tab > Field Selection

Manage Add Move Up Move Down Delete Templates Back Print Page

## Field Selection

| Field Name | Column Header | Status |
|---|---|---|
| Race | Race | Complete |
| Gender | Gender | Complete |
| AgeGroup | AgeGroup | Complete |

The race is the row, the gender is the column, and the results are stratified by the age group.

**Age Cross Tab (Race by Gender by AgeGroup)**

**Data Scope:** Kevin's Clinic
**Report Start Date:** 01/01/2016
**Report End Date:** 12/31/2016

**< 2**

| Race: | Total: | Col. %: | Female: | Male: | Transgender FtM: | Transgender MtF: |
|---|---|---|---|---|---|---|
| Not Specified | 1 | 100.0 | 0 | 1 (100.0%) | 0 | 0 |
| Total: | 1 | 100.0 | 0 (0.0%) | 1 (100.0%) | 0 (0.0%) | 0 (0.0%) |

**Number of Records : 2**
(Count is unduplicated across providers)

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**13 - 24**

| Race: | Total: | Col. %: | Female: | Male: | Transgender FtM: | Transgender MtF: |
|---|---|---|---|---|---|---|
| Asian | 1 | 50.0 | 1 (100.0%) | 0 | 0 | 0 |
| More than one race | 1 | 50.0 | 0 | 1 (100.0%) | 0 | 0 |
| Total: | 2 | 100.0 | 1 (50.0%) | 1 (50.0%) | 0 (0.0%) | 0 (0.0%) |

**Number of Records : 3**
(Count is unduplicated across providers)

Note: While a custom report is set as a Crosstab report, only the field selections column header can be edited. Other field selection settings are accessible when Crosstab is unchecked in the Report Setup.