

# Run Report

Once the report setup, field selections, and report filters are complete, the report is ready to run. Run Report includes a number of options to filter results in addition to field selections and report filters.

To Run Report:

1. Click *Run Report*.

CAREWare Reports > Custom Reports > Custom Reports > Test Custom Report

Back

## Test Custom Report

Run Report	Start Date : 10/01/2017, End Date : 09/30/2018, Report Display as : Open in New Window, Most medical services in date span
Report Setup	Test Custom Report, Demographics
Field Selection	Name, Age, Gender
Report Filter	Age >= 13 <= 49

2. Click *Edit*.
3. Click *Save*.
4. Click *Run Report*.

These are the *Run Report* options in the Central Administration domain:

CAREWare Reports > Custom Reports > Custom Reports > Test Custom Report > Run Report

Edit Selected Domains Run Report Back

**Parameters**

Date From: 10/1/2017

Date Through: 9/30/2018

Clinical Review Year: 2018

Output Display: Open in New Window

Show New Clients only:

Show Clients with Service only:

Show Specifications:

Sum Numeric Fields:

Primary Provider: Most medical services in date span

Group By Provider:

Selected Domains: Domain Selection is required to run custom reports

These are the Run Report options in a provider domain:

CAREWare Reports > Custom Reports > Custom Reports > Test Custom Report > Run Report

Edit Run Report Back

**Parameters**

Date From: 1/1/2018

Date Through: 11/12/2018

Clinical Review Year: 2018

Output Display: Open in New Window

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:

## Parameters:

- 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 custom 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 that is included in the report results.

## Domain Sharing Settings:

- Show Shared Service Records – Includes services from other providers.
- Show Shared Clinical Record – Includes encounter records from other providers.
- Show Shared Custom Subform Records – Includes subform records from other providers.
- Show Shared Case Notes – Includes case notes from other providers.

The report results are based on the Report Type, Date From, Date Through, Critical Date, Parameters, Domain Sharing Settings, 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*.

These are the Critical Dates by report type.

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	Referral 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* are 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 are included.

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

Ex: Date of last service shows the client's last service date, even if that date is prior to the *Date From* of the report.

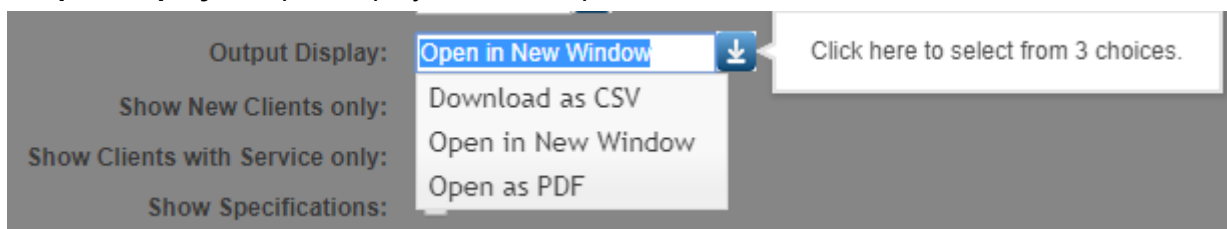
**Date From and Date Through:** The date from and date through fields establish the date span of the report. For critical dates, the date span of the report limits the results to within that span. In a services report type, the service date must be between the date from and date through to be included in the report. For other fields and filters, data may appear outside of that range. A client's last primary insurance assessment may have been in the previous year of that services report.

Example: In a Demographics report type, clients with services during the date span set appear in the report. The service date is a critical date for a Demographics report type. A field can be added for viral load tests to list test dates a year or more prior to the Date From value. The lab date is not a critical date for a Demographics report type. A filter can be added to filter for only clients that received at least one Outpatient Ambulatory Health Service 24 months through 12 months prior to the Through Date of the report. In this case, clients who have at least one of any service during the date span appear in the report and those clients have to have at least one Outpatient Ambulatory Health Service at least twenty-four months and no more than twelve months prior to the Through date to appear in the report.

**Clinical Review Year:** This sets the year to review custom Annual Review data. This is important if the report covers more than one calendar year and there are Annual Review fields and filters included in the report.

Example: In a Demographics report type, setting the date span to 1/1/2017 through 12/31/2018, and the Clinical Review Year to 2018, the custom annual review values for 2018 appear in the results of the report. If the Clinical Review Year was set to 2017, the custom annual review values for 2017 appear, even though the 2018 values are more recent and the report covers that period.

**Output Display:** Output Display has three options.



- Download as CSV – The custom report results are downloaded as a CSV file, with a link to the file and folder location at the bottom of the screen for most browsers. This may vary based on the browser and browser settings.
- Open in New Window – The custom report results appears in a new window in the browser.
- Open as PDF – The custom report results appear in the current window in PDF format.

**Show New Clients only:** This filters the results to only include clients that have an enrollment date within the last 12 months of the Through Date.

Example: Client A has an enrollment date of 1/1/2017 and client B has an enrollment date of 1/1/2018. The custom report is run with a Date From of 1/1/2017 and a Date Through of 12/31/2018. Checking New Clients Only excludes client A with the enrollment date of 1/1/2017, even though that enrollment date is between the Date From and Date Through. Client B is included in the results.

**Show Clients with Service only:** This filters the results to only include clients that have a service date between the From and Through dates of the custom report.

- When the report type is Demographic or Service, and the *Show Clients with Service Only* box is checked, the date boxes filter for services within the date span. A client must have a service to be included.
- If the *Show Clients with Services Only* box is checked and the report type is something other than Demographic or Service, then the report requires a critical date for that report type and a service date within the span.

Example: Client A has a service date of 1/1/2018 and client B has a service date of 1/1/2019. Client A has a lab date of 1/1/2018 and client B has a lab date of 12/31/2018. The report is a Lab report type. The report is run with a Date From of 1/1/2018 and a Date Through of 12/31/2018. Unchecking *Show Clients with Service Only* produces a report with both client A and client B, because both clients have a lab date within the date span of the report. The lab date is the critical date for a Lab report type. If *Show Clients with Service Only* is checked, only client A appears in the report, because the criteria now require the client have a lab date and a service date during the date span of the report.

**Show Specifications:** This option sets the report to list the filter criteria that define the custom report at the top, including the critical date.

**Sum Numeric Fields:** This option totals numeric field columns at the end of the report.

**Primary Provider:** The Primary Provider is based on one of three possible calculations for a client.

- Most medical services in date span
- Most custom forms in date span
- Most services in date span

For clients receiving services at multiple providers, these selections are used to determine which provider is the client's primary provider domain in CAREWare.

**Group By Provider:** This option adds each provider domain name as a header and groups results by each provider domain included in the report.

**Selected Domains:** This option sets a report to be run for one or multiple provider domains.

Users have several settings to control what shared data is included in custom report results.

- Cross-Provider subfilter (Yes/No)
- [Sharing clinical data in provider setup](#)
- [Cross-Provider Report Field permissions](#)
- [Provider by Provider Sharing](#)
- [Client by Client Sharing](#)

In addition to these settings, shared data can be included or excluded from the custom report results by checking one or more of the *Domain Sharing Settings*.

**Domain Sharing Settings:** These options allow users to quickly choose whether or not shared data is included in the report results.

- Show Shared Service Records
- Show Shared Clinical Records
- Show Shared Custom Subform Records
- Show Shared Case Notes

Example: A user is running a custom report that is a Service report type. Data sharing settings are turned on for Provider A and Provider B for Provider by Provider sharing both ways. The custom report is being run for Provider A from 12/1/2018 through 12/31/2018. A client has an Outpatient Ambulatory Health Service in Provider A with a service date of 1/1/2018. The client has services from Provider B for Outpatient Ambulatory Health Services on 6/1/2018 and on 11/1/2018. If *Show Shared Service Records* is checked, all three services from both providers are included in the report. If *Show Shared Service Records* is unchecked, the client may appear to have no follow up clinical services for the rest of 2018.