Data Translation Module User manual

Overview

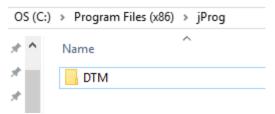
The Data Translation Module is a utility designed to parse files and create an Access database template file that can be easily imported into CAREWare through the Provider Data Import (PDI). It can process flat text files in a CSV format, or Excel files.

The translator runs as an installed service on the host computer that monitors a specified location for files. When a known file is placed into this directory, the translator will parse the file, create a PDI template file in the specified output directory, and move the original file to a completed file directory. All events are logged in an event log. There is also an optional email notification system to help with automating processing of files.

Files are parsed according to a user-defined list of field mappings. The user interface provides an easy mechanism for creating these mappings, as well as configuring the various settings the translator uses.

Setup

Once installed, open the translator interface from the Start Menu > This PC > Program Files (x86) > jProg > DTM:



This opens the main interface:

lanual Import	:	Server Status:	RUNNING	Start Service	Stop Service
Destination Folder: C:\User	s\kevin.JPROG1\Docume			files\DTM Output	
Data Sources:		Optio	Ins:		
ins_test - Matched o ins_test - With Insur	s on URN with Ins Assess D on URN without Ins Asses rance Assessment Date isurance Assessment Date	s D	Split Excel Files Create Single C Filter Clients	Before Processing Output File Set filename	1
•		•			
Enable email notification		•			
	Remove				
Enable email notification		SMTP Server:			
Enable email notification	5 100 1 2				
Enable email notification	5 100 1 2	SMTP Server: From email:	ires secure conne	ction (SSL)	
Enable email notification	5 100 1 2	SMTP Server: From email:	ires secure conne ires authentication		
Enable email notification	5 100 1 2	SMTP Server: From email:	ires authentication		
Enable email notification	5 100 1 2	SMTP Server: From email: Server requ SMTP requ	ires authentication e:		
Enable email notification	F [[[SMTP Server: From email: Server requ SMTP requ User Nam	ires authentication e:		

Options:

- Split Excel Files This option is used when translating an Excel file that has multiple worksheets.
- Create Single Output File Normally when processing, a new file is created for each file that is processed. Checking this option will add data to a single output file for all files that are processed.
- Filter Clients This is used to filter which client records are processed based on custom reports created in CAREWare.

In order to use the Data Translation Module, the application will have to be run as an administrator.

To run the application as administrator:

- 1. Right click the short cut or the *Data Translation Module.exe*.
- 2. Click Run as Administrator.

Once the Data Translation Module is running as administrator, the service can be stopped to add/edit data sources, configure CSV specifications, or adjust settings.

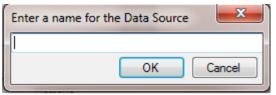
Setting up a Data Source

A **Data Source** represents where the data is coming from. This is often an EMR or some other repository containing client data. A single data source may have any number of different file specifications (See Setting up a CSV Spec).

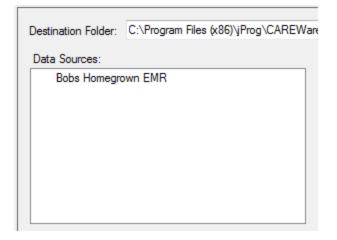
Right-click in the Data Sources box and select Add Data Source to create a new data source.

Destination Folder:	C:\Program Files (x86)\jProg\CAREWare
Data Sources:	
A	dd Data Source

Enter the name of the data source and click OK.



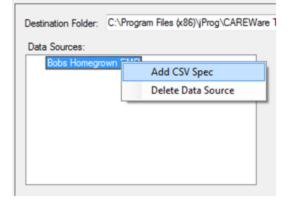
The data source will show on the list.



Setting up a CSV Spec

A **CSV Spec** represents a single file structure. Each file should contain one type of data, and each line in the file should represent a single record. You may have one file for service data, another for labs, and another for medications, etc. Each file would have a consistent data structure, and each of these structures would be created as a different CSV Spec.

Right-click on a Data Source in the list and choose Add CSV Spec.



Note: The Data Source name will appear as the provider name in the exp_provider table in the PDI template created as the output file. To change the name of the Data Source, locate the Data Source folder in the DTM folder. The default location is: C:\Program Files (x86)\jProg\DTM\Data Sources\Example Data Source. In this example, there will be a folder in that file folder path called Bob Homegrown EMR. Changing the name of that folder will change the name of the Data Source.

Enter the name of the CSV Spec.

Enter a name for the	e CSV Spec	X
ClientServices		
	ОК	Cancel

You can create any number of CSV Specs for a given Data Source.

Destination Folder:	C:\Program Files (x86)\jProg\CAREWa
Data Sources:	
Bobs Homegro	wn EMR
ClientServi	ices
ClientMedi	cations
Labs_Scre	enings
	-

Configuring a CSV Spec

Each CSV Spec will be configured to parse a single known file structure. In order to configure the CSV Spec, you must have a sample CSV file.

IMPORTANT: The structure of files that are being processed must be consistent and must match the sample file!

Right-click the CSV Spec you want to configure and choose Edit CSV Spec.

Destination Folder:	C:\Program Files (x86)\jProg\CAREWa
Data Sources:	
Bobs Homegro	
Client Servi Client Medi	Edit CSV Spec
Labs_Scre	

This opens the CSV Spec Editor.

🖳 Client Se	ervices	
-Source File	Settings	
File	Source Folder:	
Fil	le Search Filter: 📫	File Uses Header
Sam	ple Source File: No	sample file <u>change</u>
-Field Mappir	ngs:	
Required	Source File Position	Source File Header or Example PDI Template Field

File Source Folder - The translator will monitor this location for files to process with this spec.

File Search Filter - Only files with this string in the file name will be processed. * is a wildcard, so *.* would process all files, while *services* would only process files with "services" anywhere in the file name.

File Uses Header - Check this if the first row of the file is header info instead of real data.

Sample Source File - This is used to take a sample of the source data that the translator will use to parse out the available columns in the source file (It is advisable to use column headers in the sample file!). Clicking *change* opens a file browser dialog to select the file.

Once the sample file is set, the CSV Spec Editor will show all the fields in the sample file.

🖳 Labs_Screeni	ings			
- Source File Settin	ngs			
File Source Folder: E:\IncomingFiles File Search Filter: ************************************				
Field Mappings:				
Required	Source File Position	Source File Header or Example	PDI Template Field	
	0	ClientLastName	<double click="" set="" to=""></double>	
	1	ClientFirstName	<double click="" set="" to=""></double>	
	2	ClientDOB	<double click="" set="" to=""></double>	
	3	ClientGender	<double click="" set="" to=""></double>	
	3 ClientGender <double click="" set="" to=""> 4 TestCode <double click="" set="" to=""></double></double>			
	5	TestDate	<double click="" set="" to=""></double>	
	6	TestResult	<double click="" set="" to=""></double>	

In this example, the translator will monitor the E:\IncomingFiles directory for any files with "labs" in the file name. The sample file is set; here is a view of the contents of the sample file:

ClientLastName,ClientFirstName,ClientDOB,ClientGender,TestCode,TestDate,TestResult DOE,JOHN,1/1/1990,1,CD4,2/25/2014,0 DOE,JOHN,1/1/1990,1,ViralLoad,2/25/2014,344

The first row is a header row, so the *File Uses Header* is checked. The Field Mappings table shows all the fields that are in the sample file. The *Required* column allows a user to flag the field as required, so that a record without a value for that field will be flagged as an error during translation.

The next step is to map each field in the sample file to an available PDI Template Field.

Double clicking on a row opens the PDI Field Matcher.

This shows all available fields that the PDI can process (Note: This list is very long, so it's advisable to use the Filter box to help find specific fields). Double click on the appropriate field to map it to the incoming field. Do this for all fields in the incoming file.

PDI Field Matcher			
Source File Element: Source File Position: 0	Source File Header or Example Va	alue: pat_mm_id	<u>Esc - Ca</u>
Match Type: <mark>Standard Match</mark> ▼			Save
PDI Template Fields:			
lient			
ent	Field:	DataType:	Max Field Length:
able:	Field: ADAPAppDate	Data Type: Date	Max Field Length: NA
ent able: xp_client			_
ent able: xp_client xp_client	ADAPAppDate	Date	NA
ent able: xp_client xp_client xp_client	ADAPAppDate AIDSDate	Date Date	NA NA
able: xp_client xp_client xp_client xp_client xp_client	ADAPAppDate AIDSDate AIDSDateEstimated	Date Date Boolean	NA NA NA
ent able: xp_client xp_client xp_client xp_client xp_client	ADAPAppDate AIDSDate AIDSDateEstimated cln_asian_subgroup	Date Date Boolean String	NA NA NA 50
ent able: xp_client xp_client xp_client xp_client xp_client xp_client	ADAPAppDate AIDSDate AIDSDateEstimated cln_asian_subgroup cln_birth_gender	Date Date Boolean String String	NA NA NA 50 20
-	ADAPAppDate AIDSDate AIDSDateEstimated cln_asian_subgroup cln_birth_gender City	Date Date Boolean String String String	NA NA NA 50 20 30

Labs_Screen	ings					
Source File Settings						
File Source Folder: E:\IncomingFiles						
File Se	File Search Filter: "labs* ☑ File Uses Header					
Tem	plate File:	Client Labs	_sample.csv <u>ch</u>	ange		
Field Mappings:						
Required	Source Fi	le Position	Source File Heade	r or Example	PDI Template Field	
	0		ClientLastName		Table: exp_client; F	ield: LastName;
	1		ClientFirstName		Table: exp_client; F	ield: FirstName; T
	2		ClientDOB		Table: exp_client; R	ield: DOB; Type:
	3		ClientGender		Table: exp_client; F	ield: Gender; Typ
	4		TestCode		Table: exp_test; Fiel	ld: TestDefinition;
	5		TestDate		Table: exp_test; Fiel	ld: TestDate; Typ
	6		TestResult		Table: exp_test; Fiel	ld: Result; Type:

Once the configuration is complete, click the Start Service button on the main interface to start the service.

anual Import Destination Folder: C:\User					
Destination Folder: C:\User		Server Status:	RUNNING	Start Service Stop Se	ervice
	s\kevin.JPROG1\Doci	uments\Document	s\Test 101 import f	files\DTM Output	
Data Sources:		Optic	ons:		
ins_test - Matched ins_test - With Insu	s on URN with Ins Asses on URN without Ins As rance Assessment Date nsurance Assessment D	sess D	Split Excel Files Create Single O Filter Clients	Before Processing utput File Set filename	
•		•			
Enable email notification					
Recipient list	Remove				
		SMTP Server:			
		From email:			
		Server requ	ires secure connec	ction (SSL)	
		SMTP requ	ires authentication		
		User Nam	ne:		
	Add	Password	l:		
		Send Test Email			
				E	

Now any time a file is placed in the directory that was specified for each CSV Spec, that file will get processed. When a file is processed, an Access .mdb file will get created in the specified output directory. The file name is in the format: *datasource_filename*.mdb.

← → ∽ ↑ 🔄 > This PC → OS (C:) > Program Files (x86) → jProg > DTM > Output Folder				
🖈 Quick access	Ν	lame	Date modified	
📃 Desktop	*	Example Data Source_3 sheets test 101.mdb	4/29/2016 7:37 AM	
Documents	* [Example Data Source_ADAP Drug Imports 101.mdb	5/4/2016 3:38 PM	
Downloads	÷ [Example Data Source_Drug Payment Test Import 101.mdb	4/4/2016 11:07 AM	
Pictures		Example Data Source_FileTranslation.mdb	4/14/2016 9:37 AM	
	*	Example Data Source_ins_test Test 101.mdb	4/29/2016 7:54 AM	
CAREWare	l.	Example Data Source_Test 3 sheets.mdb	4/29/2016 7:47 AM	

The log files are located at: C:\Program Files (x86)\jProg\DTM\Logs by default. The log file will show all events.

> This PC → OS (C)) -> Program Files (x86) -> jProg -> DT	<mark>M → Logs</mark>
^	Name	Date modified
*	events-2016-4-27.log	4/27/2016 9:21 AM
*	events-2016-4-20.log	4/20/2016 9:24 AM
*	events-2016-4-18.log	4/18/2016 8:06 AM
*	events-2016-4-27.log - Notepad	
~	File Edit Format View Help	
Merge 887	 Event Log file for Wednesd	day, April 27, 2016
e File Input folder	4/27/2016 9:01:55 AM Co 4/27/2016 9:01:55 AM Co 4/27/2016 9:01:55 AM Co	ervice started. onverted C:\Program Fil reated: :\Program Files (x86)\; rocessing file: C:\Prog

NOTE: If the same file is processed more than once, then the result .mdb file will be overwritten with the new data.

Mapping a Constant Value

It is possible to map a PDI template field to a constant value. When this is done, a specified constant value will be entered for the mapped template field in every record that is processed. Constant values can be set for any template field, even ones that have no matching field in the source file being translated.

To map a constant value to a source field:

1.Double-click the field you want to map.

1	🖶 Grace	e Test	the Western and the		
	Source F	File Settings			
	1	File Source Folder:			
	(C:\Program Files (x86)\jP			
		File Search Filter:		Client Matching Style:	
	l l	•	File Uses Header	URN_Fields (default) -	
	:	Sample Source File: G	race Test.csv change		
1	Field Ma	ppings:			
	Require	d Source File Position	Source File Header or Example	PDI Template Field	
		0	pat_mm_id	<double click="" set="" to=""></double>	
		1	start_date	<double click="" set="" to=""></double>	
ł.		2	active_ingredient	<double click="" set="" to=""></double>	
		3	h_code	<double click="" set="" to=""></double>	
1		4	prov_name	<double click="" set="" to=""></double>	
J		5	hv_discrete_dose	<double click="" set="" to=""></double>	
1		6	dose	<double click="" set="" to=""></double>	

- 2. Click the drop down menu for *Match Type*.
- 3. Click Constant Value.
- 4. In the Value field, enter a value for the constant value.
- 5. Select the PDI Template field you want to map that value to from the list of template fields.
- 6. Click Save.

PDI Field Matcher				23
Source File Element:			<u>Esc - Ca</u>	and
Source File Position: NA	Source File Header or Example Va	lue: NA		
Match Type: Val	Je:			
Constant Value 🛛 👻 Tes	t <mark>er</mark>		Save	
DI Template Fields:				_
ovider _				€
Table:	Field:	DataType:	Max Field Length:	
exp_provider	prv_city	String	25	
exp_provider	prv_contact_email	String	35	
exp_provider	prv_contact_fax	String	25	
		-		- 11
exp_provider	prv_contact_name	String	30	
	prv_contact_name prv_contact_phone	String String	30 25	-
xp_provider		-		
xp_provider xp_provider	prv_contact_phone	String	25	
xp_provider xp_provider xp_provider	prv_contact_phone prv_contact_title	String String	25 30	:
xp_provider xxp_provider xxp_provider xxp_provider	prv_contact_phone prv_contact_title prv_minority_board	String String Boolean	25 30 NA	
xp_provider xxp_provider xxp_provider xxp_provider xxp_provider	prv_contact_phone prv_contact_title prv_minority_board prv_minority_clinicians	String String Boolean Boolean	25 30 NA NA	
xp_provider xxp_provider xxp_provider xxp_provider xxp_provider xxp_provider xxp_provider	prv_contact_phone prv_contact_title prv_minority_board prv_minority_clinicians prv_minority_other	String String Boolean Boolean Boolean	25 30 NA NA NA	
xp_provider xp_provider xp_provider xp_provider xp_provider xp_provider xp_provider xp_provider xp_provider xp_provider	prv_contact_phone prv_contact_title prv_minority_board prv_minority_clinicians prv_minority_other prv_minority_served	String String Boolean Boolean Boolean Boolean	25 30 NA NA NA NA	
exp_provider exp_provider exp_provider exp_provider exp_provider exp_provider exp_provider exp_provider exp_provider exp_provider exp_provider	prv_contact_phone prv_contact_title prv_minority_board prv_minority_clinicians prv_minority_other prv_minority_served prv_minority_staff	String String Boolean Boolean Boolean Boolean Boolean	25 30 NA NA NA NA NA	

The DefaultValue for prov_name is now "Tester".

Source File	e Settings		
File	e Source Folder:		_
C	\Program Files <mark>(</mark> x86)\jP	rog\DTM\Grace Test Imports	
File	e Search Filter:		Client Matching Style:
**	,	File Uses Header	URN_Fields (default) 🗸
Field Mapp	bings:		
	-	Source File Header or Example	PDI Template Field
	-	Source File Header or Example pat_mm_id	PDI Template Field <double click="" set="" to=""></double>
Required	Source File Position	•	
Required	Source File Position	pat_mm_id	<double click="" set="" to=""></double>
Required	Source File Position 0 1	pat_mm_id start_date	<double click="" set="" to=""> <double click="" set="" to=""></double></double>
	Source File Position 0 1 2	pat_mm_id start_date active_ingredient	<double click="" set="" to=""> <double click="" set="" to=""> <double click="" set="" to=""></double></double></double>

NOTE: To add a constant value for a field that is not in the source file:

- 1. Right click on an open spot in the bottom of the list of mapped fields.
- 2. Click Add Mapping.
- 3. Click the drop down arrow for Match Type.
- 4. Select Constant Value.
- 5. In the Value field, enter a value for the constant value.
- 6. Select the PDI Template field you want to map that value to from the list of template fields.
- 7. Click Save.

The new mapping will be added to the list without a source file position or source file header, since this field will be added in addition to the columns in the import file.

Manual Import

The Data Translation Module manual import feature allows users to manually complete the translation process by selecting a CSV specification and an import file.

1. Select a CSV Spec.

🚪 Data Translation N	Module v2.0.6			_	
Manual Import		Server Status:	STOPPED	Start Service	Stop Service
Destination Folder:	:\Program Files (x86)\CARE	Ware\RW CAREW	are Business Tier 8	95\PDIFiles	
Data Sources:		Optio	ons:		
Drug Paymer Drug Service Insurance Medications		ר נ	Split Excel Files I Create Single Ou	Before Processing itput File	
Services Default Tester Eligibility Stat Services Enable email notifi		•	Filter Clients	<u>Set filename</u>	
Recipient list	Remove	01170.0			
		SMTP Server:			
		From email:		(0.01)	
			ires secure connect	tion (SSL)	
		User Nam	ires authentication		
	Add	Password			
	Add				
		Send Test Email			
					Exit

Note: If a user clicks *Manual Import* before selecting a CSV Spec, a quality check message will appear.

estination Folder: C:\Prog	ram Files (x86)\CAREWare\RV	V CAREWare	Business Tier	895\PDIFiles	
Data Sources:		Options	:		
 ADAP 				s Before Processing	I
			Create Single (Filter Clients	Set filename	
	Data Translation Modul	le		×	
Enable email notification	Select a CSV Spec to us	se for proces	sing the file		
Recipient list					
Recipient list		[ОК		
Recipient list		erver requires	OK secure conne	ection (SSL)	
Recipient list	🗆 s	MTP requires			
Recipient list	s		secure conne		

- 2. Select an import file that matches the CSV Specifications.
- 3. Click Open.

🔛 Data Translation Module v2.0.6	j	- 🗆 ×
Manual Import	Server Status: STOPPED	Start Service Stop Service
Destination Folder: C:\Program Files	(x86)\CAREWare\RW CAREWare Business Tie	er 895\PDIFiles
Data Sources:	Options:	
Drug Payments	^	
🖳 Open		
$\leftarrow \rightarrow \checkmark \uparrow \square \ll DTM >$	CSV files for testing v Ū	Search CSV files for testing
Organize 🔻 New folder		III 🗸 🔟
Temporary Desk	ime ins_test.csv Insurance Import file Test 3.csv	Date modified 9/25/2015 1:27 PM 6/13/2016 2:51 PM
	Insurance Import file Test 4.csv	12/15/2016 3:43 PM 2/17/2017 3:46 PM
This DC Y	goornees resemption to nest	2/11/2011/3/401101
File name:	Services Test Import 101.csv 🛛 🗸	csv files (*.csv)
		Open Cancel
	Add Password: Send Test Email	
		Exit

	e v2.0.6		_	
rocessing		Server Status: STOPP	ED Start Service	Stop Service
Destination Folder: C:\Progr	am Files (x86)\CAREW	are\RW CAREWare Busines	s Tier 895\PDIFiles	
Data Sources:		Options:		
 ADAP Default Tester Eligibility Status Services 			el Files Before Processir ingle Output File ents <u>Set filename</u>	ng
Enable email notification	Remove			
		SMTP Server:		
		From email:		
		From email: Server requires secure	connection (SSL)	
		Server requires secure		
		Server requires secure SMTP requires authent User Name:		
	Add	Server requires secure		
		Server requires secure SMTP requires authent User Name:		

The Data Translation Module will begin processing the file.

4. Verify the PDI file was created in the *Destination Folder*.

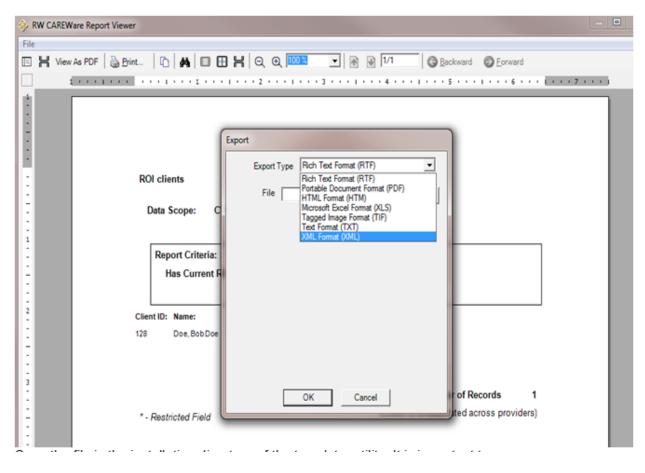
Filter Clients

This option allows the translator to only process certain clients that match a filter that can be set up in the translator. The basic idea is that a user can create a custom report in CAREWare to create a filtered list of clients. This is saved as an XML file which is supplied to the translator and configured to match a field in that file to a field in the incoming data files. During the translation, only clients who have a matching value in the report file be processed.

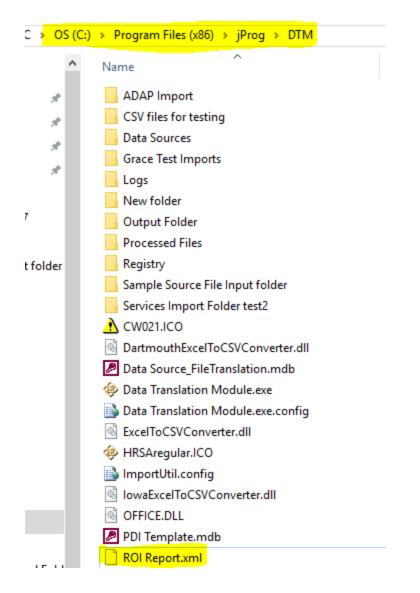
Step 1 - Create a custom report in CAREWare. This report can use any filter, and should contain at least the field that will be used to identify clients in the import files. Knowing the name of this field is an important step.

IMPORTANT NOTE: The report exporter does not export spaces in the field names. So, if your field name has a space in it, the name of the field you use in the translator will not have the spaces removed. For example, if you use the field 'Client ID', in the translator that will be 'ClientID' (no space).

Step 2 - Run the report and in the report display choose File -> Export. For the Export Type, choose **XML Format (XML)**.



Save the file in the installation directory of the translator utility, It is important to remember the file name (in this example, the file name will be **ROI Report.xmI**):



Step 3 - Configure the translator to use the file. Check **Filter Clients** and click **Set filename** to set the name of the file that will be used to filter clients.

🛃 Data Translation Modu	le v2.0.3			_		\times
Manual Import		Server Status:	STOPPED	Start Service	Stop Se	rvice
Destination Folder: C:\Prog	gram Files (x86)\jProg\DTI	M\Output Folder				
Data Sources:		Optio	ns:			_
Example Data Source ADAP Tester			Split Excel Files	Before Processing		
Tester			Create Single Ou	utput File		
	Client Filter Configura	ation		× lename		
Enable email notification Recipient list	Report file name: ROI Report xml	ОК	Cancel			
			ires secure connec ires authentication	tion (SSL)		
		User Nam				
	Add	Password				
	S	end Test Email				
					Б	cit

Double-click the CSV Spec to configure the fields. Then double-click (or right-click and choose **Add Mapping**) on the source field you will use to match clients (this is the field in the incoming files).

Source File	Settings		
File	e Source Folder:	C:\Users\Roy\Desktop\Issues\Iow	a\Tester
	ile Search Filter:	trust.	ie Uses Header
	le Search Filter:	med V H	le Uses Header
	Template File:	Med Import Sample.csv chance	20
Field Mapp	ings:		
Required	Source File Posi	tion Source File Header or Example	PDI Template Field
	0	FILL DATE	Table: exp_drug_payment; Field: DrugPaymentDate; Type: Date; MaxLength: N/A
	1	FIRSTNAME	Table: exp_client; Field: FirstName; Type: String; MaxLength: 25
	2	LASTNAME	Table: exp_client; Field: LastName; Type: String; MaxLength: 40
	3	DOB	Table: exp_client; Field: DOB; Type: Date; MaxLength: N/A
m	4	ADAP ID	<double click="" set="" to=""></double>
	5	SEX	Table: exp_client; Field: Gender; Type: String; MaxLength: 20
	6	RACE	<double click="" set="" to=""></double>
	7	DOCTOR	Table: exp_drug_payment; Field: DispenserCode; Type: String; MaxLength: 38
	8	RX #	<double click="" set="" to=""></double>
	9	DRUG	<double click="" set="" to=""></double>
	10	QTY	Table: exp_drug_payment; Field: Quantity; Type: Long; MaxLength: N/A
	11	NDC	Table: exp_drug_payment; Field: NDC; Type: String; MaxLength: 11
	12	COST	Table: exp_drug_payment; Field: Total; Type: Currency; MaxLength: N/A
	NA	NA	Table: exp_drug_payment; Field: DispenseFee; Type: Currency; MaxLength: N/A; Defa
	NA	NA	Table: exp_drug_payment; Field: Duration; Type: Integer; MaxLength: N/A; DefaultValu
	NA	NA	Table: exp_drug_payment; Field: FundingCode; Type: String; MaxLength: 38; DefaultV.

On the PDI Field Matcher, choose:

Match Type: Choose the Filter Matching Field option.

Report Field: Type in the name of the field in the custom report. (*without spaces!*) **PDI Template Field**: This is the field in the resulting PDI file this value will populate.

PDI Field Matcher				x
Source File Element: Source File Position: 4	Source File Header or Example	Value: ADAP ID	<u>Esc - Ca</u>	ncel
Match Type: Report field Filter Matching Fie ClientID PDI Template Fields:	:		Save	
client				0
Table:	Field:	DataType:	Max Field Length:	*
exp_client	cln_bith_gender	String	20	
exp_client exp_client	City ClientID	String String	30 16	
exp_client exp_client	County FirstARTDate	String Date	4 NA	

That's it! Now, when the translator runs, it will check the report file and will only process an incoming record for a client if that client has a matching record in the report file. Because of the generic nature of this matching, and the versatility of the CAREWare custom report engine, this filtering can be used to filter the data on any nearly any field in CAREWare.