

# Creating Custom Reports

Custom reports can be used to create unique reports tailored to the provider's 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
<input type="checkbox"/>	Granted	Run Custom Report	Custom Reports	Reports
<input type="checkbox"/>	Granted	Delete Report Definition	Custom Reports	Reports
<input type="checkbox"/>	Granted	Add/Edit Selection	Custom Reports	Reports
<input type="checkbox"/>	Granted	Delete Selection	Custom Reports	Reports
<input type="checkbox"/>	Granted	Add/Edit Filter	Custom Reports	Reports
<input type="checkbox"/>	Granted	Delete Filter	Custom Reports	Reports
<input type="checkbox"/>	Revoked	Add/Edit Report Definition	Custom Reports	Reports
<input type="checkbox"/>	Revoked	Custom Report Keywords	Custom Reports	Reports
<input type="checkbox"/>	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
<input type="checkbox"/>	Locked	Run Custom Report	Custom Reports	Reports
<input type="checkbox"/>	Locked	Add/Edit Report Definition	Custom Reports	Reports
<input type="checkbox"/>	Locked	Delete Report Definition	Custom Reports	Reports
<input type="checkbox"/>	Locked	Add/Edit Selection	Custom Reports	Reports
<input type="checkbox"/>	Locked	Delete Selection	Custom Reports	Reports
<input type="checkbox"/>	Locked	Add/Edit Filter	Custom Reports	Reports
<input type="checkbox"/>	Locked	Delete Filter	Custom Reports	Reports
<input type="checkbox"/>	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.

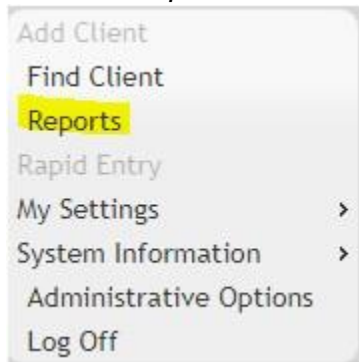
Tips for preparing to create a custom report:

- 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.

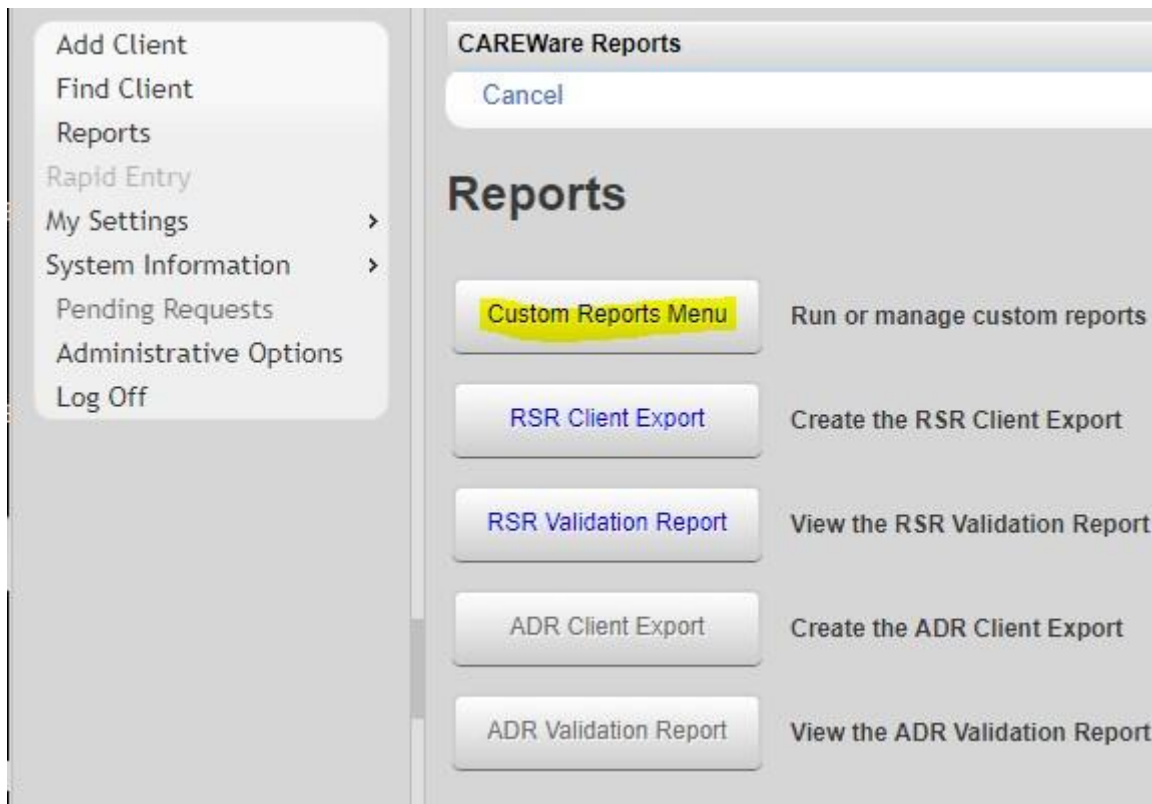
Note: Demographic reports display results per client. This makes it easier to get an unduplicated count of clients. Other report types display a row for each record of that report type. For example, a services report type lists a row for each service record a client received. This often results in several lines for each client, providing a detailed summary.

To create a custom report:

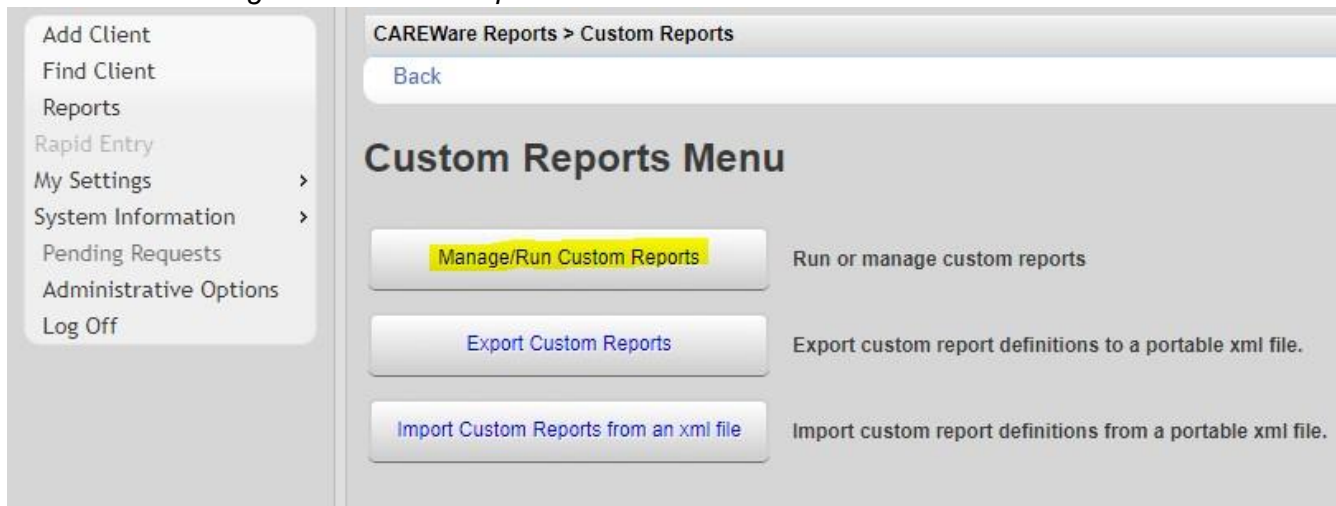
1. Log into CAREWare.
2. Click *Reports*.



3. Click *Custom Reports Menu*.



4. Click *Manage/Run Custom Reports*.



5. Click *Add*.

CAREWare Reports > Custom Reports > Custom Reports

Manage / Run **Add** Delete Back Print Page

report

Name	CrossTab	Report Type	Description
Test Custom Report		Demographics	Report description
Report Example Demographics		Demographics	Demographics Rep


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

Custom Reports > Add

Save Cancel

**Setup Details**

Report Name: Report Example Demographics

Report Type:   Type the first few characters to search through 30 choices.

Is Crosstab: ADAP Enrollment History  
Case Notes  
Composite  
Counseling And Testing  
Custom Subform

Description:

Read Only: **Demographics**

Use Totals: Diagnosis  
Dispensary  
Drug Service


Font Name: Eligibility

Bold:

Italic:

Underline:

Font Size: 10

Color: Black 

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

Custom Reports > Add


Save Cancel

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**Setup Details**

---

Report Name:

Report Type:  

Is Crosstab:

Description:


Read Only:

Use Totals:

---

**Header/Footer Format**

---


Font Name:  

Bold:

Italic:

Underline:

Font Size:

Color:  

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*.

Back

## Report Example Demographics

Run Report      Start Date : 01/01/2016, End Date : 12/31/2016, C

Report Setup      Report Example Demographics, Demographics

Field Selection      No fields selected

Report Filter      Report Filter is empty

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

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

CAREWare Reports > Custom Reports > Custom Reports > Report Example Demographics > Field Selection

Manage Add Move Up Move Down Delete Templates Back Print Page

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	



Custom Reports > Report Example Demographics > Field Selection > Age > View > View

Save Cancel

Select Field: Age

Column Header: Age

Total: [ ] [v]

Sort: [ ] [v]

Sort Priority: 0

**Header Column Format**

Column Width: 0.5

Column Header Font Name: Arial

Bold:

Italic:

Underline:

Font Size: 8

Font Color: Black [v]

**Data Column Format**

Font Name: Arial [v]

Bold:

Italic:

Underline:

Font Size: 8

Font Color: Black [v]

Field Justification: Left [v]

**Select Field** – Name of field selection.

**Column Header** – uses the select field by default. Can be edited for the report.

**Total** – calculations for the field (i.e. Count will display the number of results for that field.)

**Sort** – orders the results in alphabetical or numeric order.

**Sort Priority** – Sets each field in priority order for sorting. A one here would set this field to be sorted first, a two would sort it second.

**Column Width** - Displays the width of the column.

**Column Header Font Name** - Displays the font for the header.

**Bold** – Checking *Bold* sets the column header as bold.

**Italic** – Checking *Italic* sets the column header as italic.

**Underline** – Checking *Underline* underlines the column header.

**Font Size** – Displays the font size of the column header.

**Font Color** – Displays the font color of the column header.

**Font Name** - Displays the font for the results.

**Bold** - Checking *Bold* sets the results as bold.

**Italic** – Checking *Italic* sets the results as italic.

**Font Size** - Displays the size of the font for the results.

**Font Color** – Displays the color of the font for the results.

**Field Justification** – sets the results to the left, center, or right side of the column space.

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*.

Custom Reports > Report Example Demographics > Field Selection > Age

Back

## Age

View Select Field Age

Number Format No format chosen

2. Click *Add*.

Custom Reports > Report Example Demographics > Field Selection > Age > Number Format

Use Selected Template Remove Template Manage Add Delete Back Print Page

Template	Mapped	Total Items
PovGroup		4
PovGrp2	X	3
PovGrp2	X	3

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

Custom Reports > Report Example Demographics > Field Selection > Age > Number Format > Add

Save Cancel

Group Description: Age Ranges Example

Current Select Field only:

4. Click *Number Items*.

Custom Reports > Report Example Demographics > Field Selection > Age > Number Format > Manage

Back

## Manage

View Group Age Ranges Example

Number Items 0 total number items setup

5. Click *Add*.

Custom Reports > Report Example Demographics > Field Selection > Age

View Add Delete Back Print Page

Max. Value	Label
	Centenarians
2	Infants
13	Children
25	Youths
65	Adults
99	Seniors

The Max Value is set for each labeled number range. In this case, Children are ages three through thirteen.

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

Custom Reports > Report Example Demographics > Field Selection > Age

Save Cancel

Max. Value:

Label:

These ranges are saved as a template for number formats.

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

Custom Reports > Report Example Demographics > Field Selection > Age > Number Format

Use Selected Template Remove Template Manage Add Delete Back Print Page

Template	Mapped	Total Items
adhere1	X	3
adhere1	X	3
Age Ranges Example		6
Age1020	X	3

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

CAREWare Reports > Custom Reports > Custom Reports > Report Example Demographics > Field Selection > Age

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## Age

View Select Field Age

Number Format Age Ranges Example

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*.


Custom Reports > Report Example Demographics > Report Filter > Age > View Criterion > Edit

Save Cancel

Parent:

Field Name: Age

Is Not:

=:   Click here to select from 6 choices.

Null:

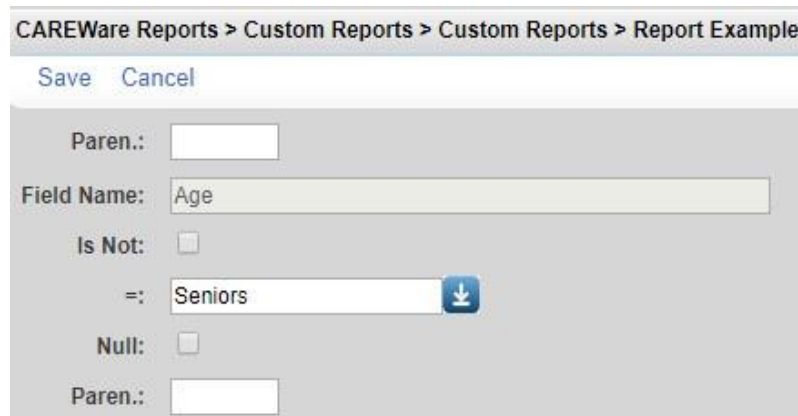
Parent:

- Infants
- Centenarians
- Children
- Youths
- Adults
- Seniors

3. Click Save.



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



- 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.

<u>Last Name:</u>	<u>First Name:</u>	<u>Age:</u>	<u>Gender:</u>	<u>HRSA visits by Category In Span:</u>	<u>Hisp.:</u>
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*.

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

[Back](#)

## Test Custom Report


<b>Run Report</b>	Start Date : 01/01/2016, End Date : 12/31/2017
<a href="#">Report Setup</a>	Test Custom Report, Demographics
<a href="#">Field Selection</a>	Last Name, First Name, Age, Gender
<a href="#">Report Filter</a>	HRSA visits by Category In Span ( S OR Hisp. = Yes AND Age >= 13 <= 49

2. Click Edit.

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

**Edit** Selected Domains Run Report Back

### Parameters


Date From:	01/01/2016	
Date Through:	12/31/2017	
Clinical Review Year:	2017	
Output Display:	Open in New Window	


3. Complete the parameters for the report.


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


Save Cancel

### Parameters

Date From: 01/01/2016 

Date Through: 12/31/2017 

Clinical Review Year: 2017 


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:

Kevin's Clinic

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 provider's 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	
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* 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.

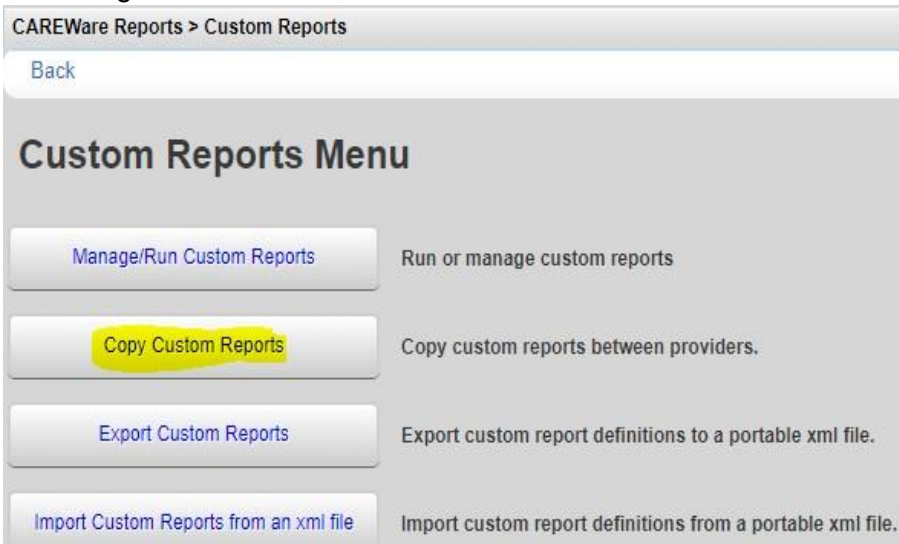
Some fields and filters will display dates or records prior to the *Date From*.

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.

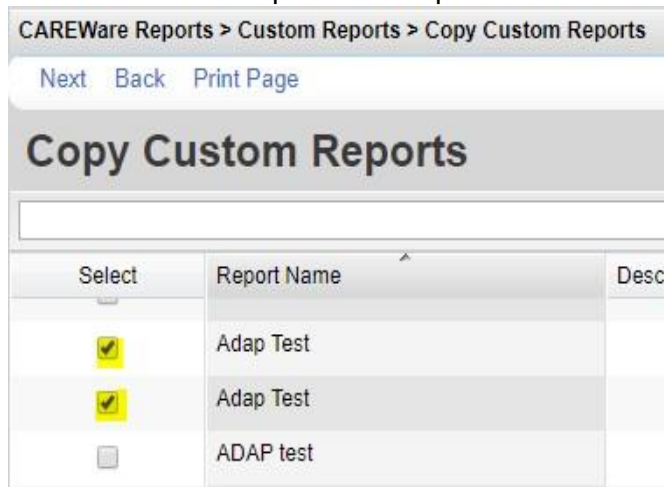
A custom report is visible in the domain the custom report is created in. Another provider can be granted access to the custom report by copying the custom report to that provider.

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*.

CAREWare Reports > Custom Reports > Copy Custom Reports > Next

[Finish](#) [Back](#) [Print Page](#)

## Next

Select	Provider Name
<input checked="" type="checkbox"/>	AIDS R Us
<input checked="" type="checkbox"/>	Johns AIDS Services
<input type="checkbox"/>	Kevin's Clinic
<input type="checkbox"/>	Ryan White AIDS Care and Treatment Clinic
<input type="checkbox"/>	The Best ADAP Program

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.


CAREWare Reports > Custom Reports > Custom Reports > Age Cross Tab > Report Setup > Edit

Save Cancel

**Setup Details**

---

Report Name:

Report Type:  

Is Crosstab:

Description:

Read Only:

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

<u>AgeGroup:</u>	<u>Total:</u>	<u>Col. %:</u>
< 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.

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

<u>Race:</u>	<u>Total:</u>	<u>Col. %:</u>	<u>Female:</u>	<u>Male:</u>	<u>Transgender FtM:</u>	<u>Transgender MtF:</u>
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)

13 - 24

<u>Race:</u>	<u>Total:</u>	<u>Col. %:</u>	<u>Female:</u>	<u>Male:</u>	<u>Transgender FtM:</u>	<u>Transgender MtF:</u>
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.