Creating Custom Reports

Purpose	Create, format, filter, run, and validate a CAREWare custom report that answers a defined reporting or data-quality question.
Who should do this	CAREWare administrators, data managers, report builders, or designated staff with Custom Reports permissions.
Use this setup when	A provider needs a reusable client list, detailed record report, aggregate or crosstab summary, data-quality review, or report-based export.
Main warning	Report type, date span, critical date, filters, totals, and provider scope all affect the results. Validate the report before sharing or using counts for submission.
Video walkthrough	Creating Custom Reports video

Quick path

Reports > Custom Reports > Manage/Run Custom Reports > Add

Before you begin

- Verify that the user has Run Custom Report, Add/Edit Report Definition, Add/Edit Selection, and Add/Edit Filter permissions as needed.
- Define the question first: identify the report type, output fields, quality-check fields, and the client or record criteria that define the sample.
- Use Central Administration when the report must include multiple provider domains, and confirm the selected provider scope before running it.
- Start with a short date span and a small group of known records so the first results are easier to validate.

Important

A Demographics report generally produces one row per client. Record-based report types, such as Service, Lab, or Eligibility, can produce several rows for the same client because each matching record is listed.

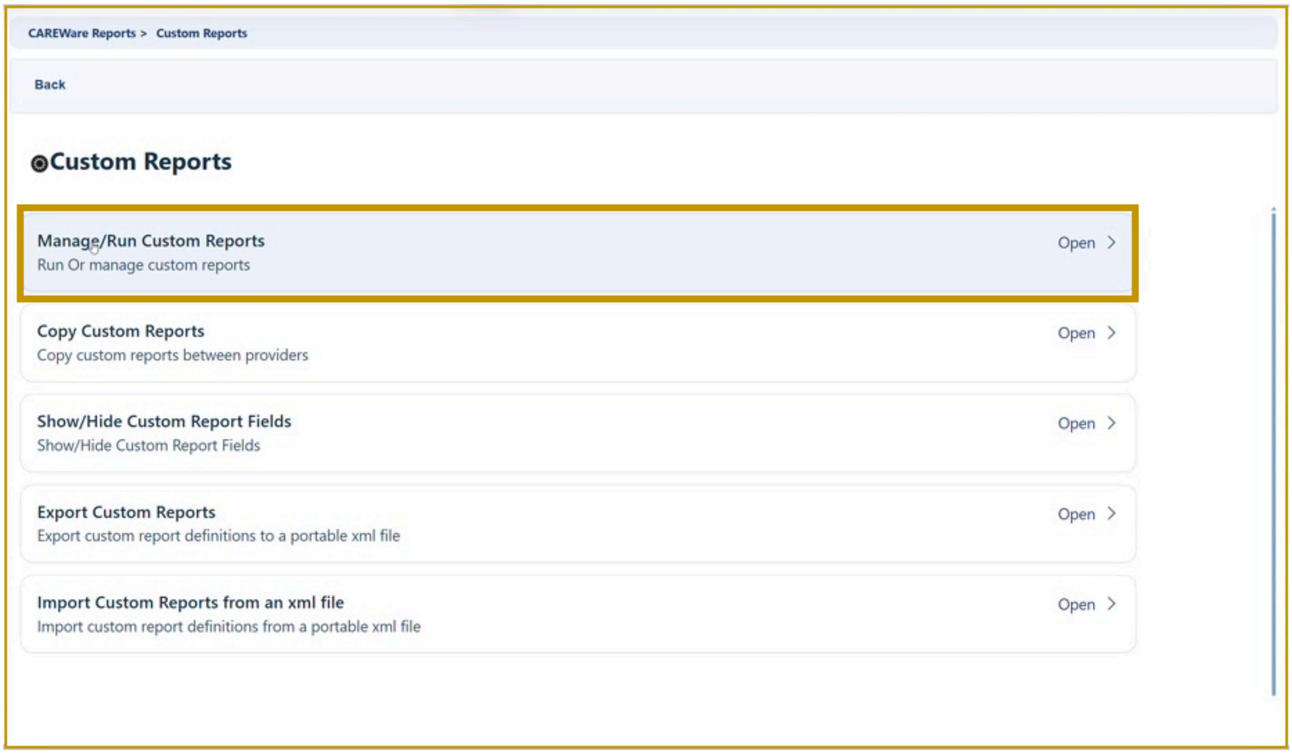
Open Custom Reports

Step 1. **Click Reports.**

Step 2. **Click Custom Reports.**

Step 3. **Open Manage/Run Custom Reports.**

Step 4. **Click Add to start a new report definition.**



Create the report definition

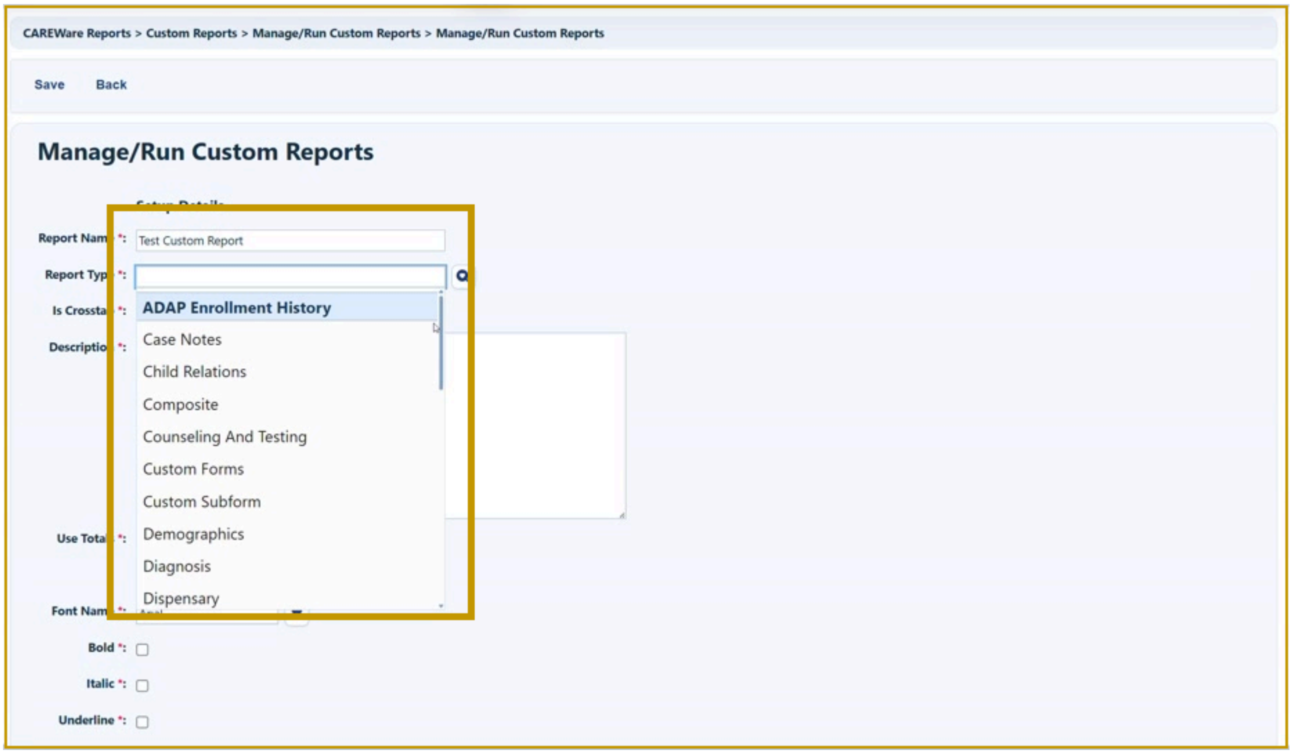
Step 5. **Enter a clear Report Name.**

Step 6. **Open Report Type and select the record type that matches the reporting question.**

Step 7. **Enter a Description that identifies the purpose, population, and important date logic.**

Step 8. **Set optional layout choices, such as Is Crosstab, Use Totals, and header or footer formatting.**

Step 9. **Click Save.**

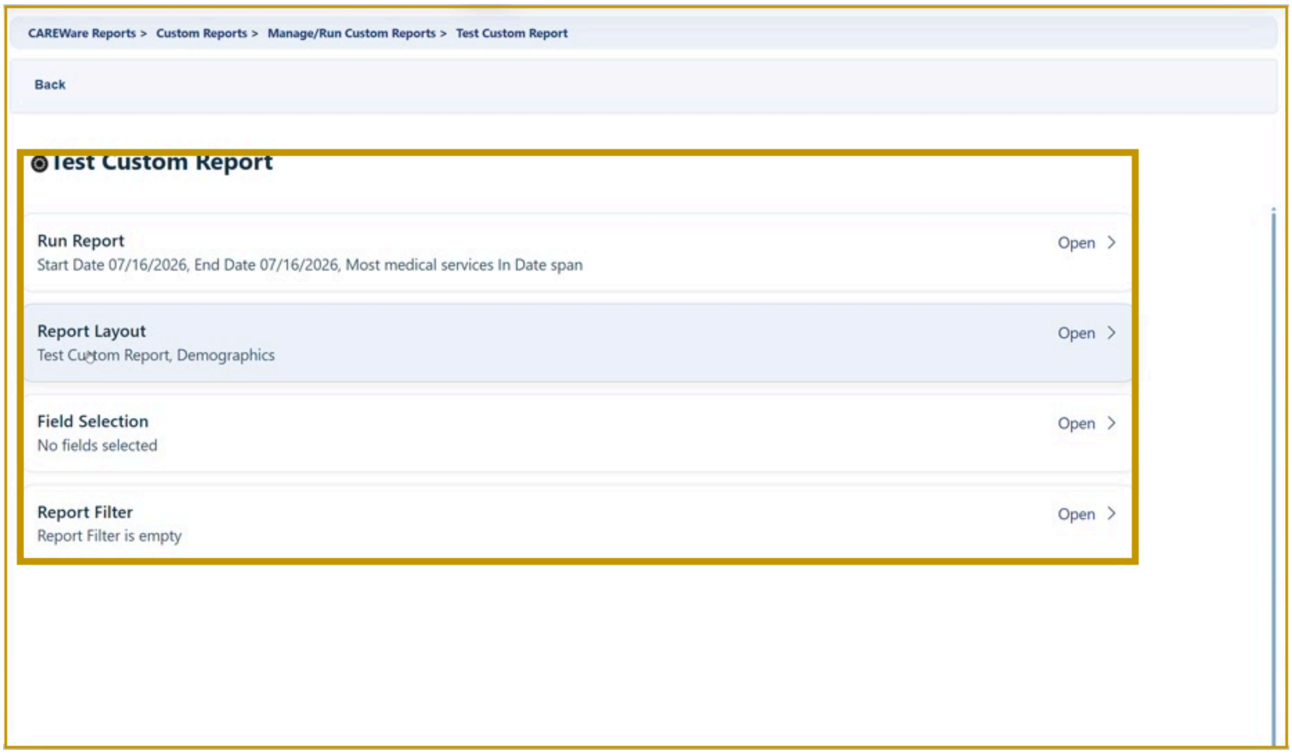


Important

The report type determines which field selections and report filters are available. Choose the report type before building fields and filters; changing it later can require the report definition to be rebuilt.

Review the report workspace

Step 10. **Confirm that the report workspace shows Run Report, Report Layout, Field Selection, and Report Filter.**



Report setup options

Option	What it does	Guidance
Report Type	Defines the record set and available fields and filters.	Match the report type to the event or client-level data being reviewed.
Is Crosstab	Produces a count or percentage table instead of a standard detail list.	The first field becomes the row, the second the column, and the third the strata.
Read Only	Prevents users from editing the report definition.	Use after testing when the definition should be protected.
Use Totals	Combines records according to Group By, Count, Sum, and other total settings.	Review grouping fields carefully so totals do not hide unexpected duplicates.
Header/Footer format	Controls the font, emphasis, size, and color of report header or footer text.	Keep report titles and specifications readable when exported to PDF or printed.

Tip

Use a durable report name that identifies the subject and purpose. Avoid temporary names such as “Test” once the report is ready for production use.

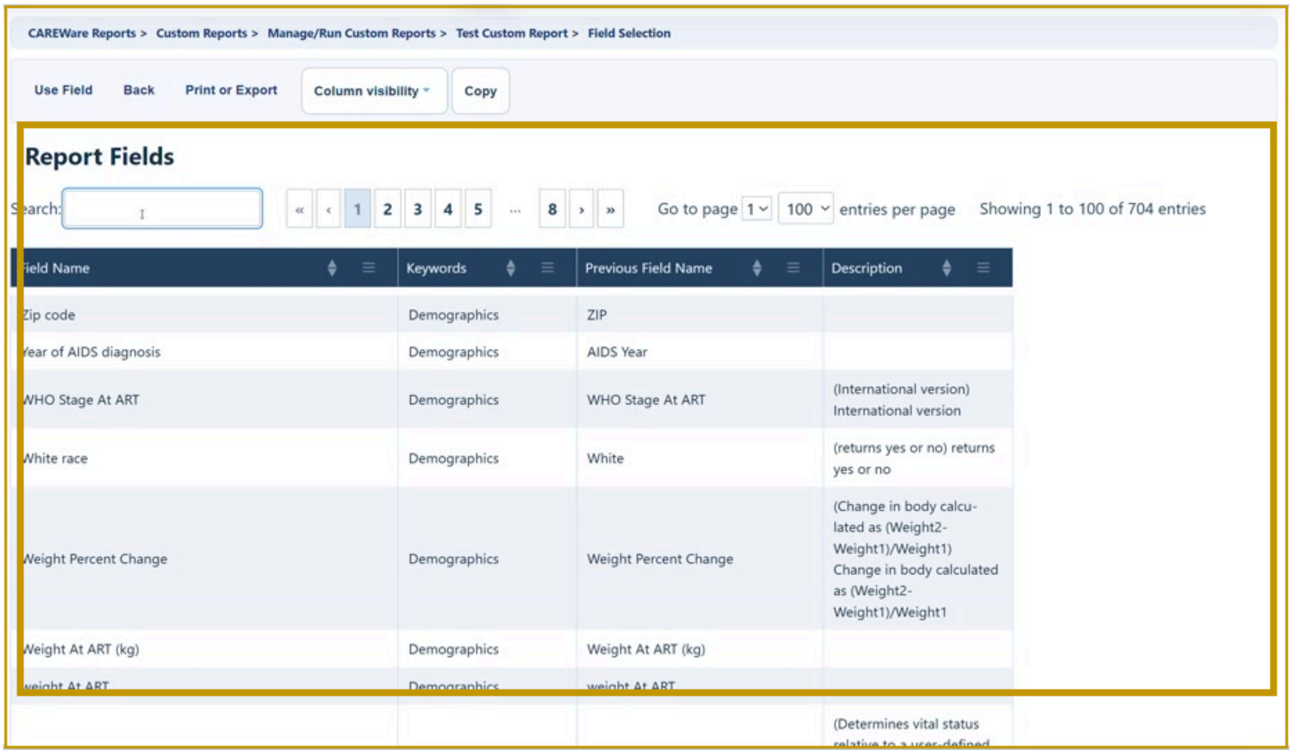
Add field selections

Step 11. **Open Field Selection.**

Step 12. **Click Add.**

Step 13. **Enter a field name or keyword in Search to narrow the list.**

Step 14. **Select the field, then click Use Field.**



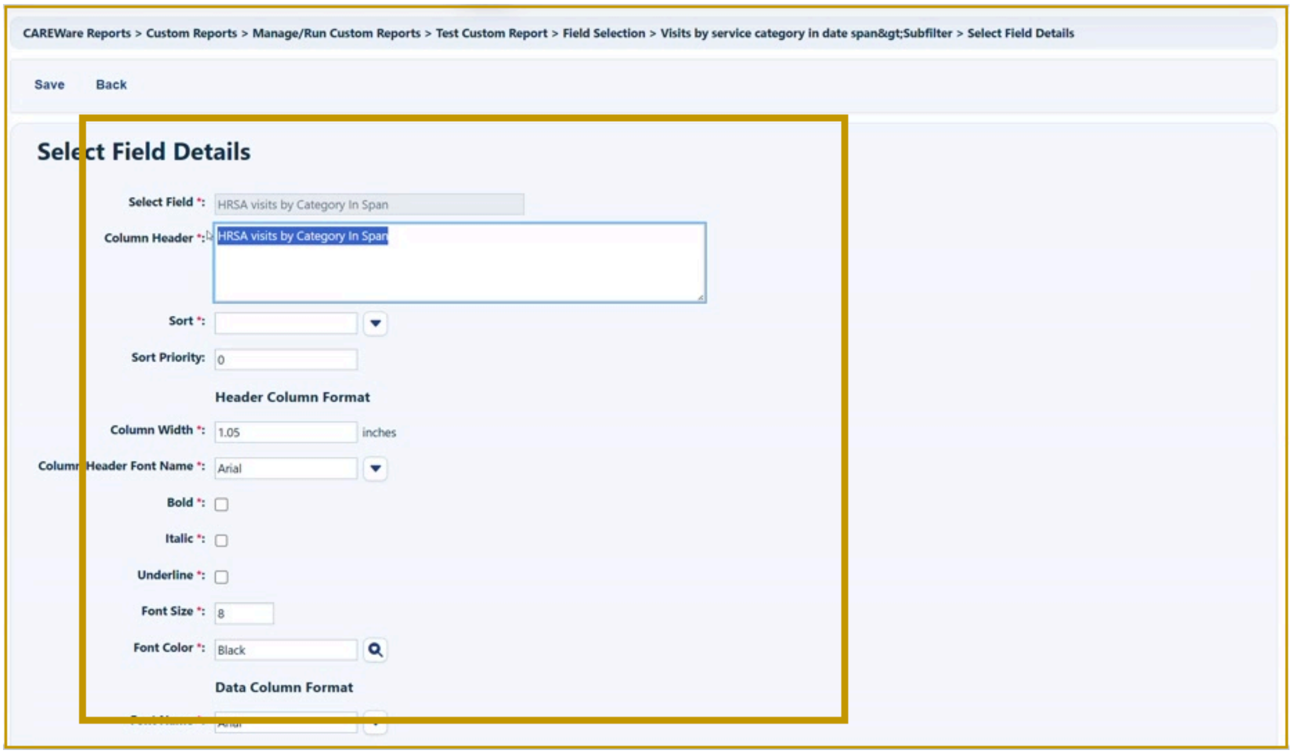
Tip

Include a stable identifier, the fields needed to answer the question, and one or more quality-check fields that help explain unexpected results.

Format and order each field

Step 15. **Edit the Column Header, Total, Sort, Sort Priority, width, and display formatting as needed.**

Step 16. **Click Save, then repeat for each field. Use Move Up or Move Down to set the final column order.**



Common field settings

Setting	What it controls
Column Header	The label displayed in the report output.
Total	A grouping or calculation such as Group By, Count, or Sum.
Sort	Ascending or descending order for the field.
Sort Priority	The sequence in which multiple sorted fields are applied.
Column Width	The displayed width of the report column.
Field Justification	Left, center, or right alignment of the field values.

Warning

Selecting a Field Selection template can replace the fields already listed in the report. Export or document the current definition before applying a template to an established report.

Configure a field subfilter

Some field selections include a Subfilter that defines the records used to calculate or display that field.

Step 17. **Select a field that includes a Subfilter option.**

Step 18. **Complete each required subfilter criterion, such as service category, date option, or provider.**

Step 19. **Continue through the field setup and click Save.**

Step 20. **Review the field summary to confirm the subfilter description is correct.**

> **Important**
> A field subfilter controls how that field is calculated. A Report Filter controls which rows or clients are included in the report. Review both when a result is unexpectedly high, low, or blank.

For a focused walkthrough, see [Creating a Subfilter].

Create a numeric grouping

Numeric fields can be grouped into labeled ranges. The video demonstrates this with Age.

Step 21. Open the numeric field and select Number Format.

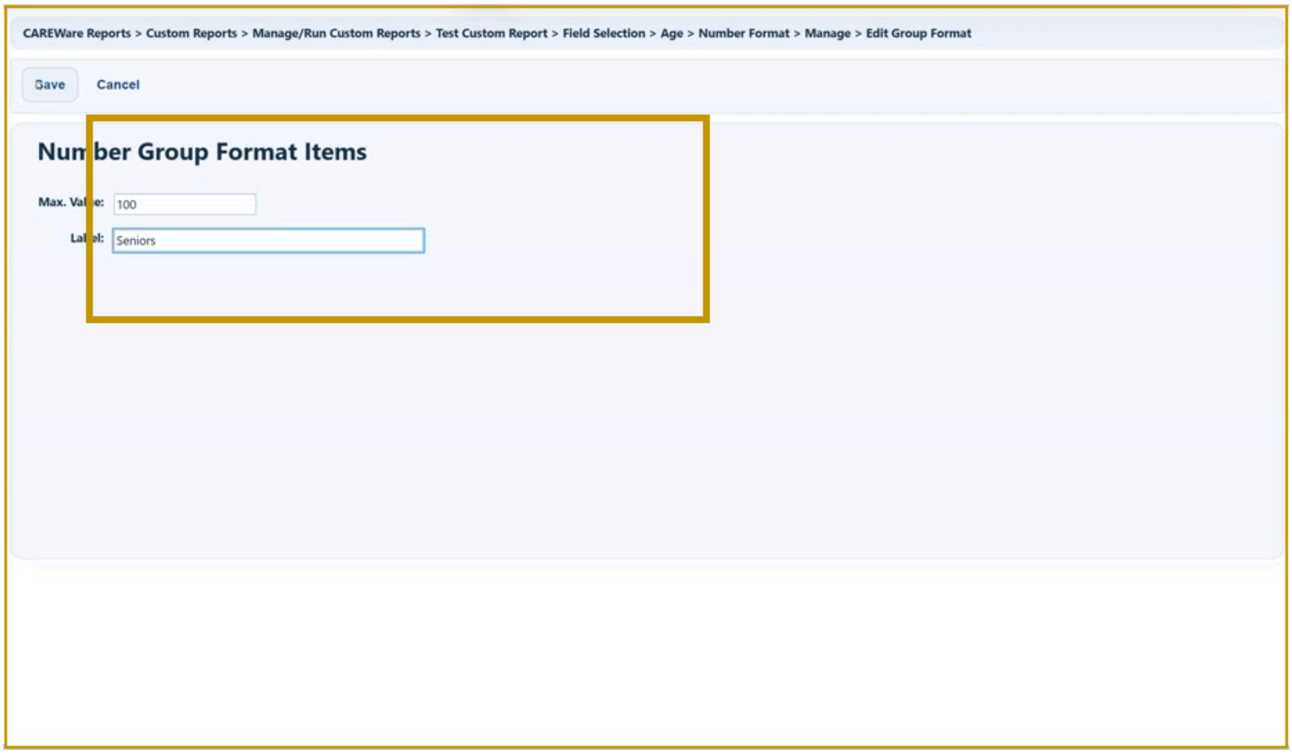
Step 22. Click Add and enter a Group Description.

Step 23. Open Number Items and click Add.

Step 24. Enter the Max. Value and the label for the range.

Step 25. Repeat until all required ranges are defined.

Step 26. Save the group and apply the number-format template to the field.



Important

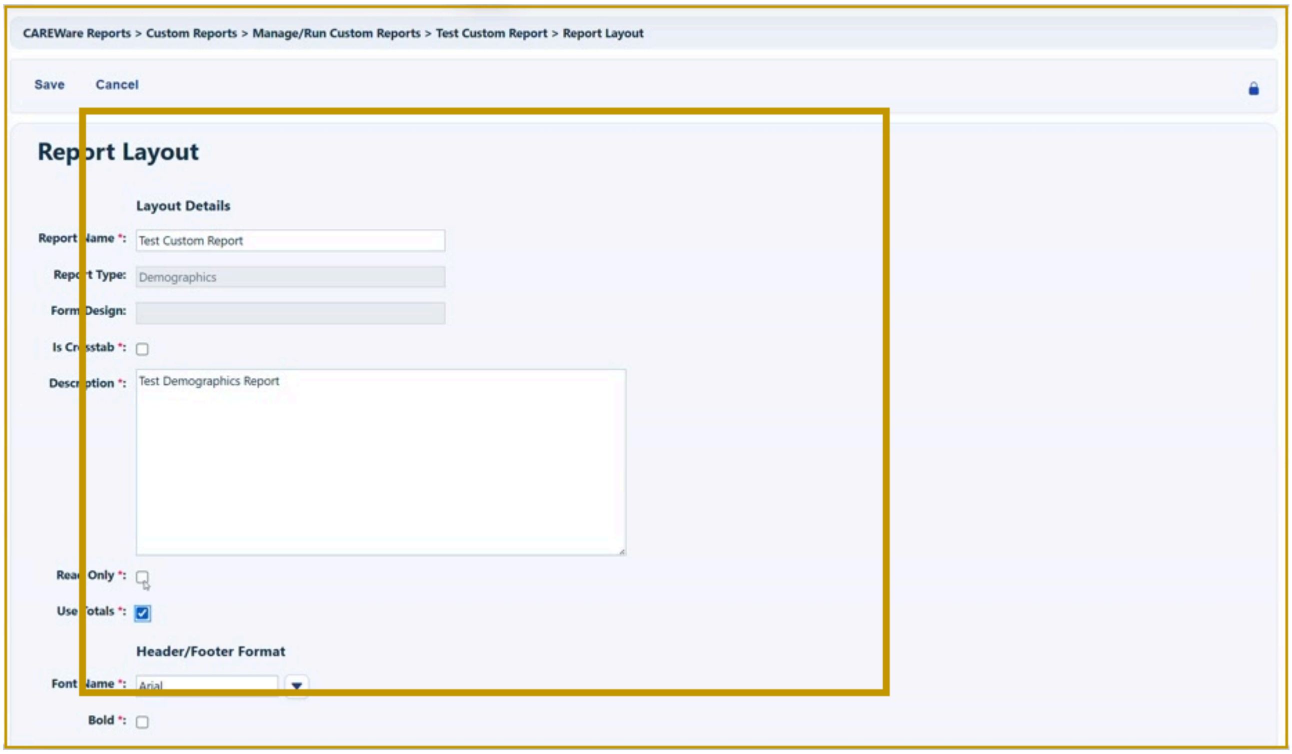
Each Max. Value closes one range and the next range begins above it. Test boundary values and confirm the ranges cover every expected value without gaps or unintended categories.

Review the report layout

Step 27. Open Report Layout.

Step 28. Confirm the report name, report type, crosstab setting, description, Read Only setting, and Use Totals setting.

Step 29. Save any changes, then return to the report workspace.

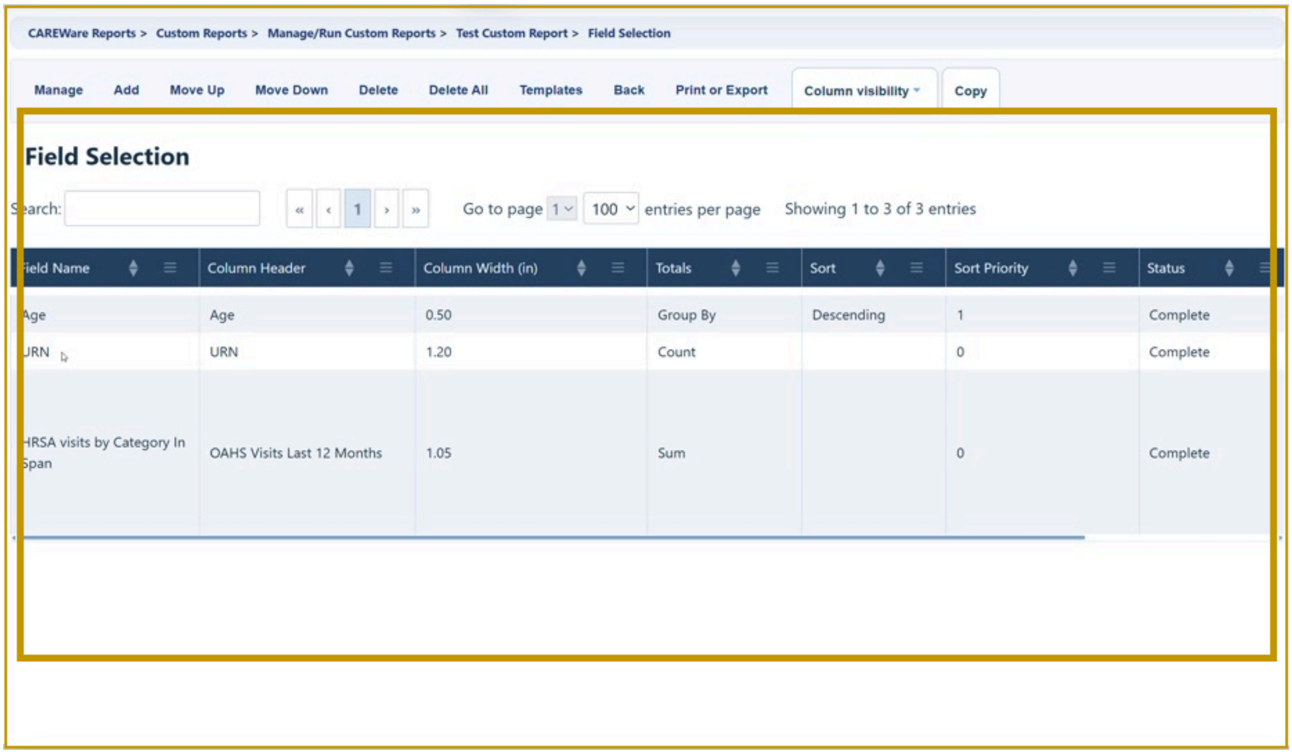


Tip

Use Crosstab for counts or percentages by category. Use a standard detail report when staff must review individual client or record values.

Review totals, sorting, and field order

Step 30. **Return to Field Selection and confirm the column order, widths, totals, sorting, and status for every field.**



Using totals safely

- Use Group By for fields that define the distinct rows in the output.
- Use Count to count matching records or identifiers and Sum only for numeric values that should be added.
- Run the report once without totals when necessary to understand which source records are being combined.
- Confirm whether the resulting count is duplicated by client, by record, or unduplicated across providers.

Warning

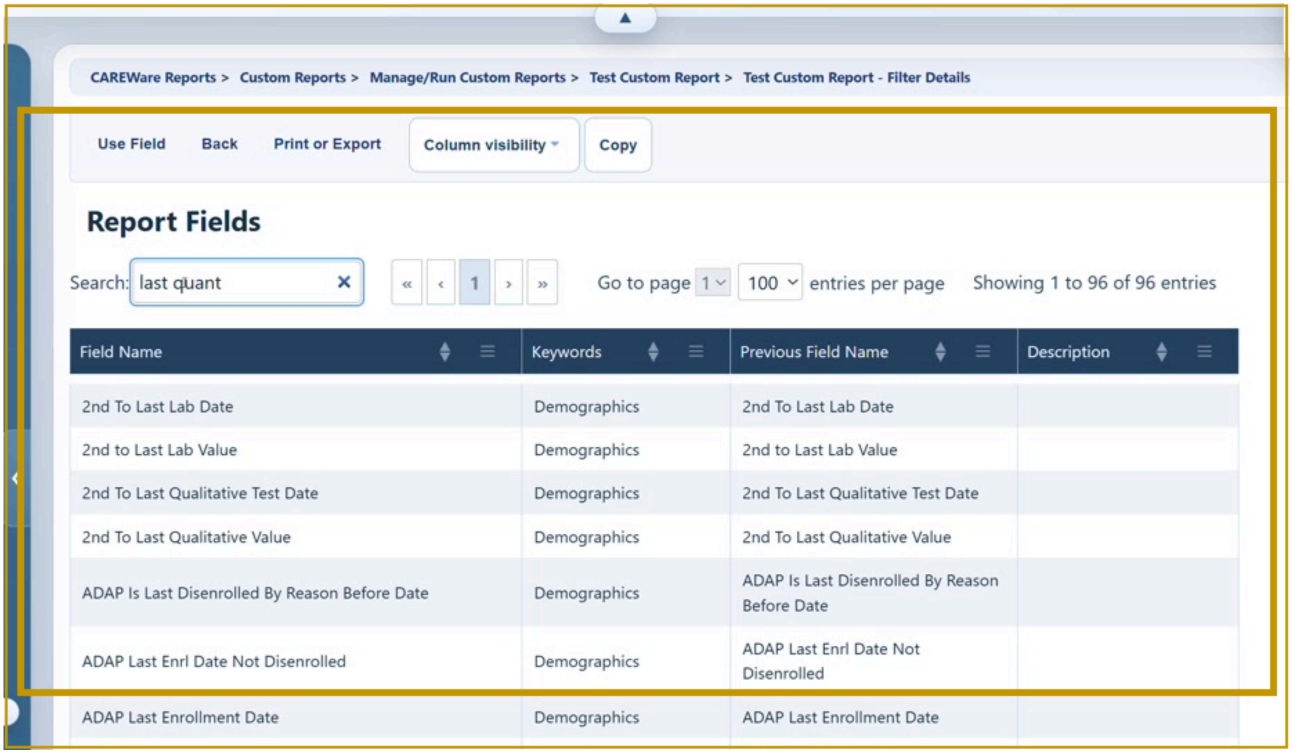
A report can look correct while using the wrong level of detail. Compare totals with a small known sample and inspect the underlying record rows before relying on an aggregate count.

Add report filters

Step 31. **Open Report Filter and click Add.**

Step 32. **Search for the field that defines the population or record criteria.**

Step 33. **Select the field and click Use Field.**



Tip

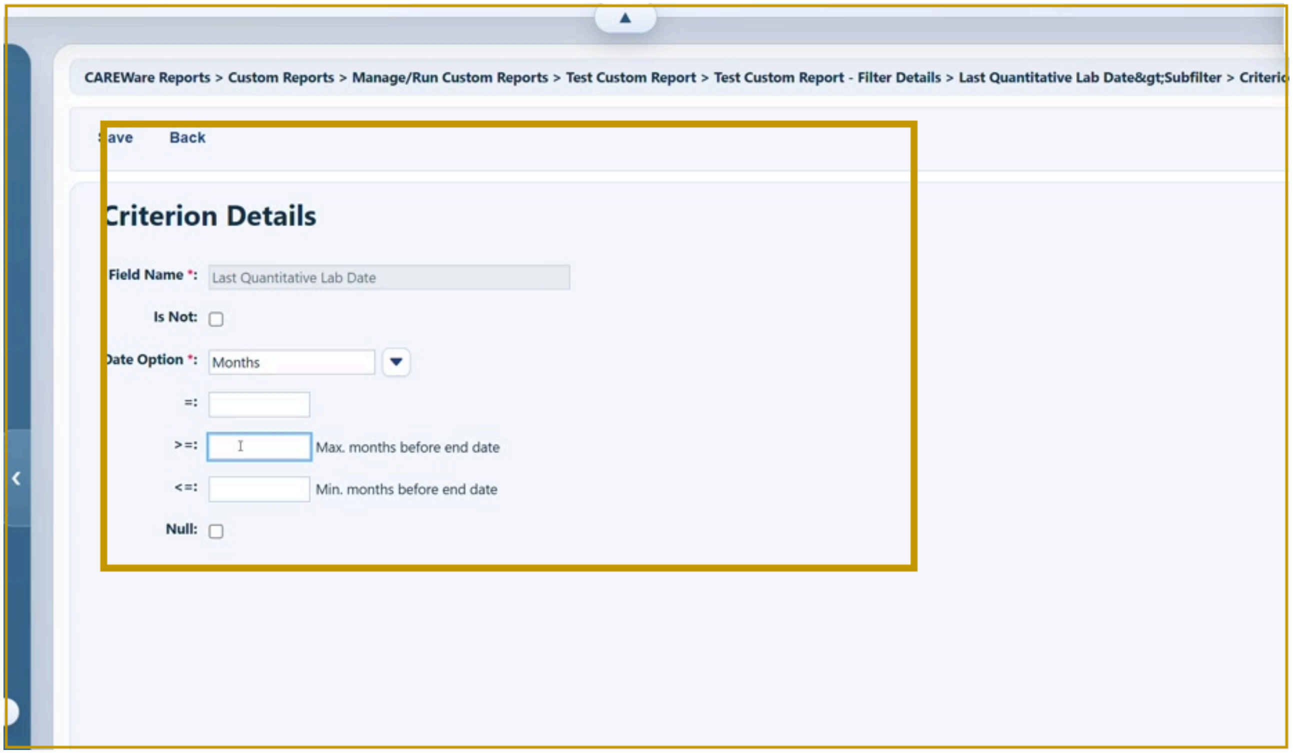
Use the report filter to define who or what is included. Do not add a filter merely to display a field; add the field under Field Selection instead.

Complete filter criteria and logic

Step 34. Choose the operator or date option and enter the required value, minimum, maximum, or date-relative range.

Step 35. Use Is Not to exclude a value and Null to include records with no value when appropriate.

Step 36. Save the filter. Repeat for additional criteria and use AND, OR, and parentheses to control the evaluation order.



Important

Parentheses change how filters using AND and OR are evaluated. Review the filter summary as a complete sentence and test the logic with known clients before using the report for official counts.

Run the custom report

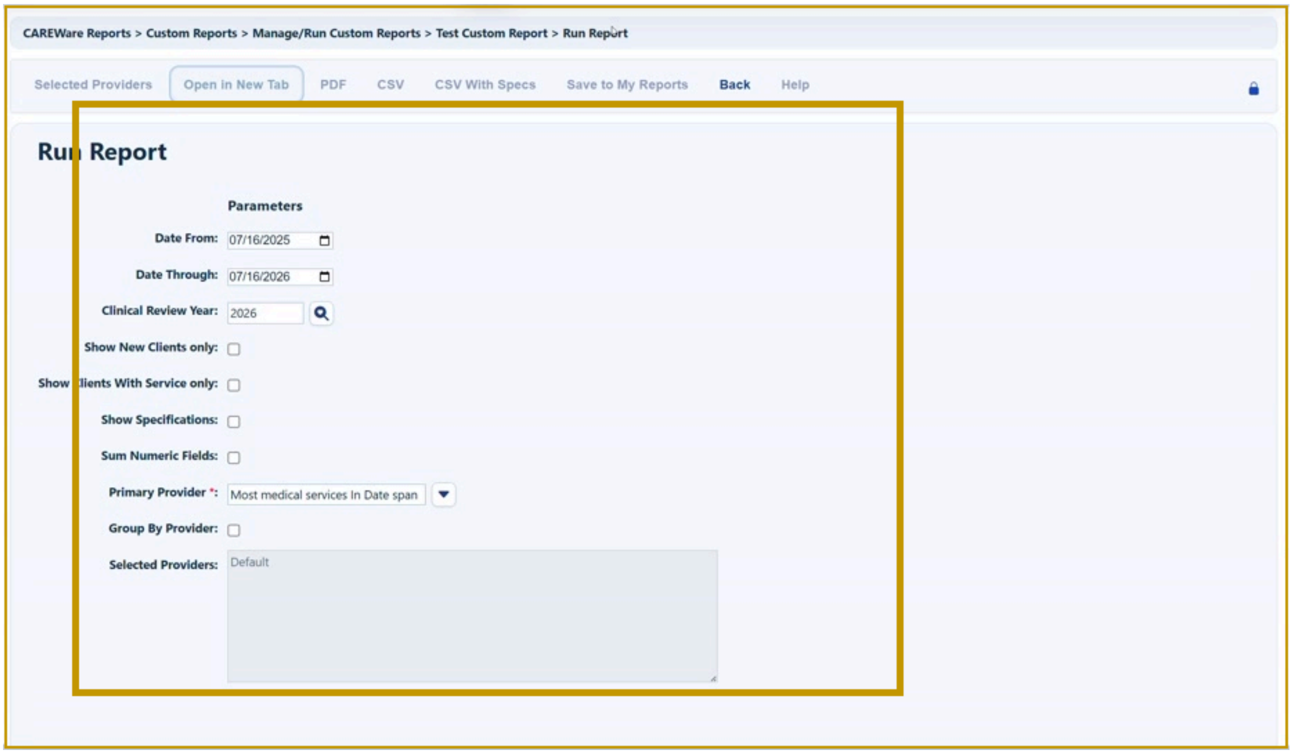
Step 37. Open Run Report.

Step 38. Enter Date From, Date Through, and Clinical Review Year when applicable.

Step 39. Select optional settings such as Show New Clients only, Show Clients with Service only, Show Specifications, or Sum Numeric Fields.

Step 40. Confirm Primary Provider, Group By Provider, and the selected provider domains.

Step 41. Choose Open in New Tab, PDF, CSV, CSV With Specs, or Save to My Reports.



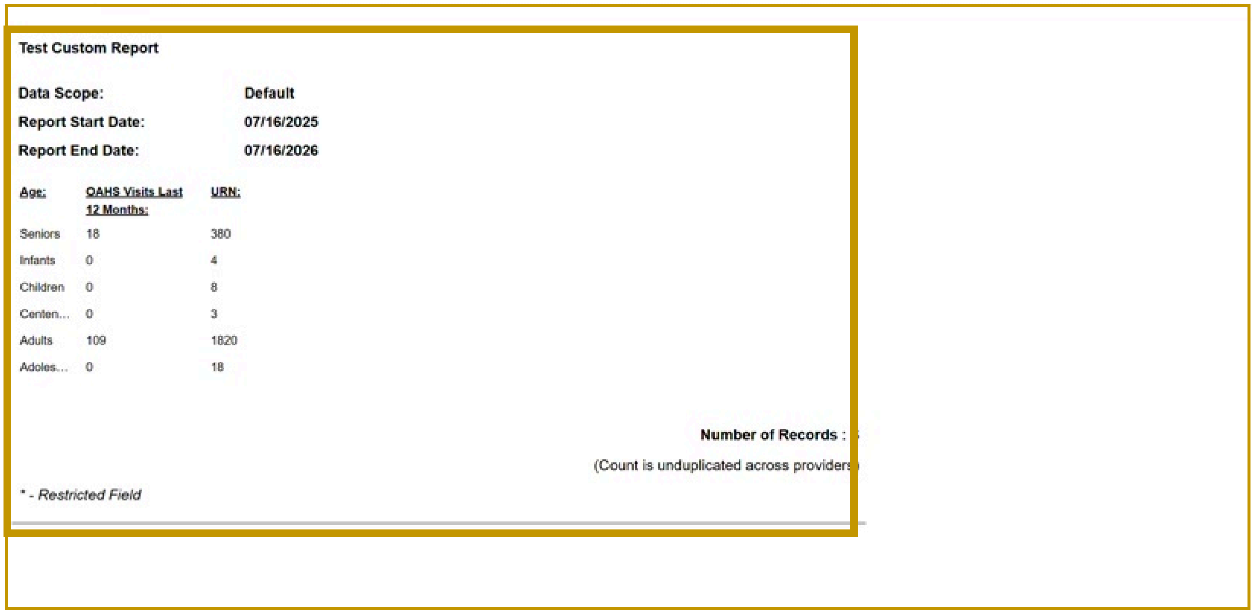
Important

To include several providers, run the report from Central Administration and verify Selected Providers. Cross-provider field permissions and data-sharing settings can also affect which shared records appear.

Review and validate the output

Step 42. Review the report title, data scope, date span, columns, categories, totals, and number of records.

Step 43. Compare the results with known client or record examples and revise fields, totals, subfilters, or report filters when necessary.



Test Custom Report

Data Scope:	Default
Report Start Date:	07/16/2025
Report End Date:	07/16/2026

Age:	OAHS Visits Last 12 Months:	URN:
Seniors	18	380
Infants	0	4
Children	0	8
Centen...	0	3
Adults	109	1820
Adoles...	0	18

Number of Records :

(Count is unduplicated across providers)

* - Restricted Field

Run Report parameters

Parameter	Effect on results
Date From / Date Through	Defines the reporting period used with the report type critical date and date-sensitive fields or filters.
Show New Clients only	Requires an enrollment date within the report date span.
Show Clients with Service only	Requires a service date within the report date span.
Show Specifications	Displays report criteria and critical-date information in the output.
Sum Numeric Fields	Adds totals for numeric output columns.
Primary Provider	Assigns a primary provider using the selected calculation for clients served by several providers.
Group By Provider	Separates the output under provider headings.
Selected Providers	Determines which provider domains are included.

Date-span and critical-date guidance

The report type critical date determines which records are evaluated against Date From and Date Through. Date-sensitive fields and filters may also use the run date span or compare values to Date Through.

Report type	Critical date or behavior
ADAP Enrollment History	ADAP Enrollment History Date
Case Notes	Case Notes Date
Custom Subform	Custom Subform Date

Report type	Critical date or behavior
Demographics	Client-level output; date-sensitive options and fields still use the run parameters.
Diagnosis	Diagnosis Date
Drug Service	Service Date
Eligibility	Eligibility Date
Insurance Assessment	Insurance Assessment Date
Lab	Test Date
Medication	Medication Start Date / End Date
Referrals	Referral Date
Relations	Service Date
Screening / Screening Lab	Test Date
Service	Service Date
Vital Signs	Vital Sign Date

The complete list is maintained in the official Custom Reports Field Descriptions guide.

Example

An Eligibility report includes eligibility records whose Eligibility Date falls within the run date span. If Show Clients with Service only is also selected, the client must also have a service during that span.

Copy, export, import, and reuse reports

- Use Copy Custom Reports in Central Administration to place a report definition in another provider domain.
- Use Export Custom Reports to save report definitions as portable XML before major changes or for transfer between environments.
- Use Import Custom Reports from an XML file to load a trusted report definition or a data-quality report supplied by jProg.
- A custom report can also support Form Designer controls or scheduled CSV report exports when those features are configured.

Warning

Copying or importing a report definition does not copy user permissions, provider data, sharing settings, or identical field availability. Run and validate the report in each destination provider.

How to confirm it worked

- The report opens without an incomplete field or filter status.
- The output contains the intended columns in the expected order and uses the correct date span and provider scope.
- Known clients or records are included or excluded exactly as the filter logic requires.
- Totals, crosstab percentages, and record counts agree with a small validated sample.
- Show Specifications accurately describes the report criteria when that option is selected.

Troubleshooting and common questions

Why is a field or filter not listed?

Confirm the Report Type, search term, Show/Hide Custom Report Fields settings, user permissions, and cross-provider report field permissions. Different report types expose different fields and filters.

Why does the report return no results?

Check Date From, Date Through, the report type critical date, report filters, field subfilters, selected providers, and whether Show New Clients only or Show Clients with Service only is selected.

Why is the same client listed more than once?

Record-based report types list one row for each matching record. Use Demographics for a client-level list, or use totals and grouping only after confirming the source rows.

Why did a template change the field list?

A Field Selection template can replace the fields already configured in the report. Restore the report from an exported custom report XML definition or rebuild the intended fields.

Why do the results change when Show Clients with Service only is selected?

That option adds a service-date requirement within the report date span. Clients who meet the main report criteria but have no service in the span are excluded.

Related CAREWare guides and resources

Resource	How it helps
Creating Custom Reports	Full reference for report types, permissions, setup, filters, critical dates, copying, and crosstabs.
Custom Report Run Report	Detailed guidance for run parameters, selected domains, shared data, and provider grouping.
Creating a Subfilter	Steps for adding and editing field or filter subfilters.
Custom Reports for Data Quality	Report definitions and examples used to identify RSR, ADR, and other data-quality issues.
Manage Providers	Provider permissions, data-sharing settings, and cross-provider report field access.
Form Designer Adding Custom Reports to Forms	Displays custom report results within a custom form.
Scheduled CSV Report Data Export	Schedules custom report output as a CSV file and defines provider data scope.