Custom Report Run Report

Purpose	Run an existing CAREWare custom report, set date and provider parameters, choose an output, and validate the results before use.
Who should do this	CAREWare administrators, data managers, report builders, or designated staff with permission to run custom reports.
Use this setup when	A custom report definition already exists and must be run for one or more providers, exported, reviewed, or saved for reuse.
Main warning	Report type, date span, critical date, optional run settings, provider scope, permissions, and sharing settings can change the results. Validate the output before using counts or sharing data.
Video walkthrough	Custom Report Run Report Video

Quick path

Reports > Custom Reports > Manage/Run Custom Reports > select report > Manage/Run > Run Report

Before you begin

- Confirm that the report definition has complete field selections and report filters and that the user has Run Custom Report permission.
- Identify the reporting period, the provider domains to include, and whether shared records are allowed in the output.
- Start with a short date span and a small group of known records so the first results are easier to validate.
- Use Show Specifications during validation so the output records the report criteria and critical-date information.

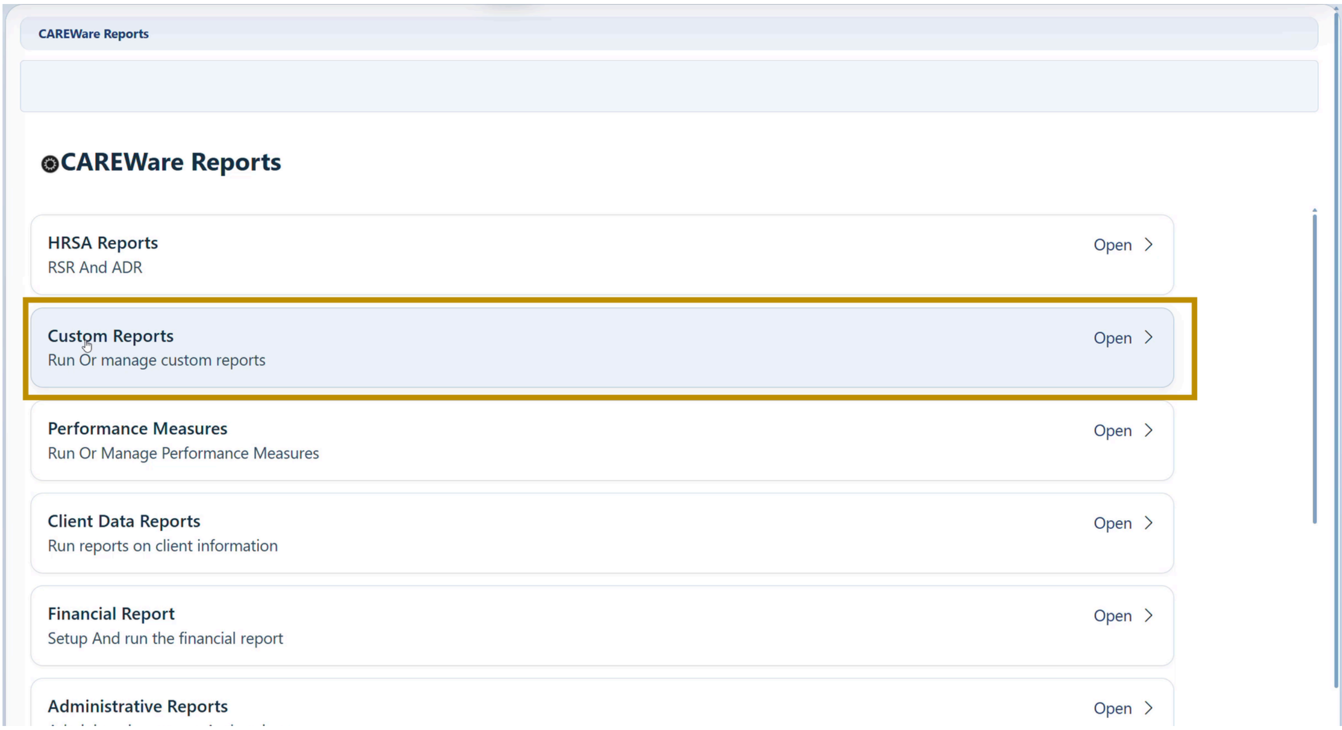
Important

Run Report settings apply the date range, provider scope, and output choices at runtime. Field selections, filters, totals, crosstab settings, and report layout are maintained in the Creating Custom Reports workflow.

Open the custom report

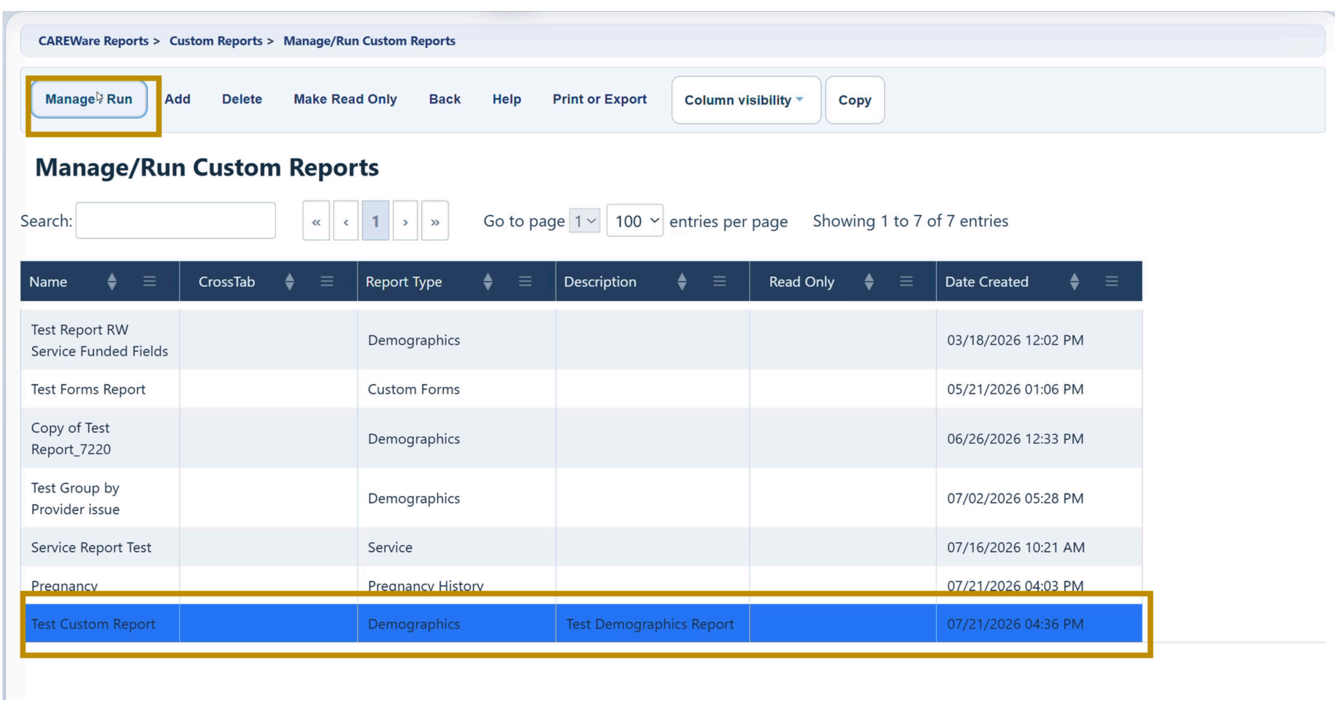
Step 1. Click Reports.

Step 2. Click Custom Reports.



Step 3. Open Manage/Run Custom Reports.

Step 4. Select the report, then click Manage/Run.

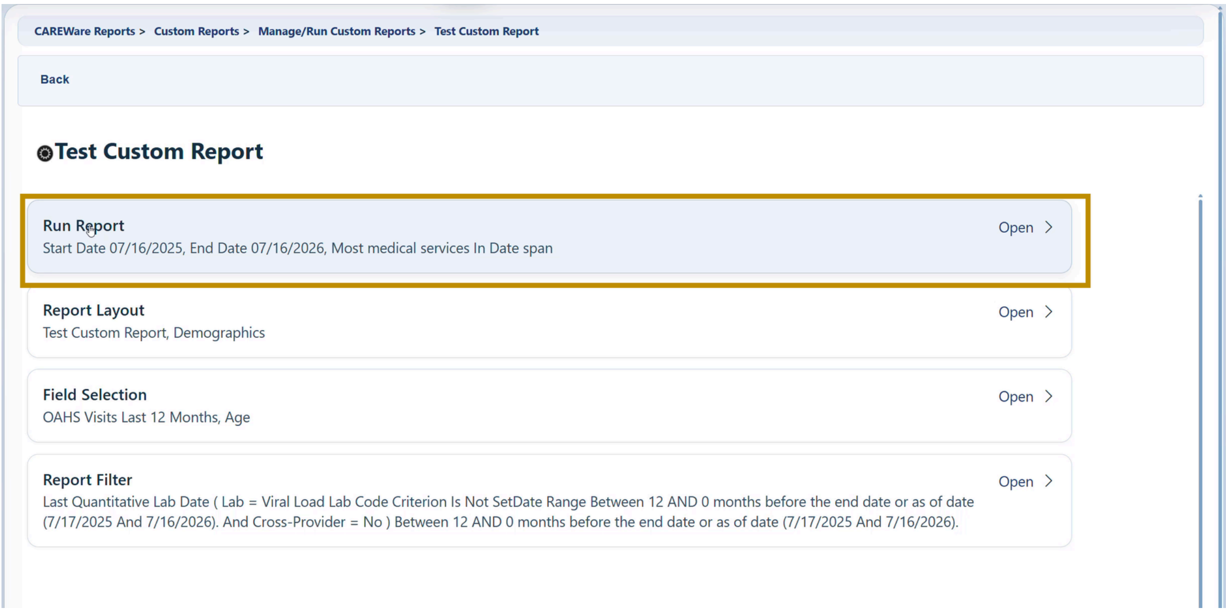


Tip

Use a report name and description that clearly identify the population and date logic. When several reports have similar names, review Report Type and Description before running the report.

Open Run Report

Step 5. Open Run Report from the report workspace.

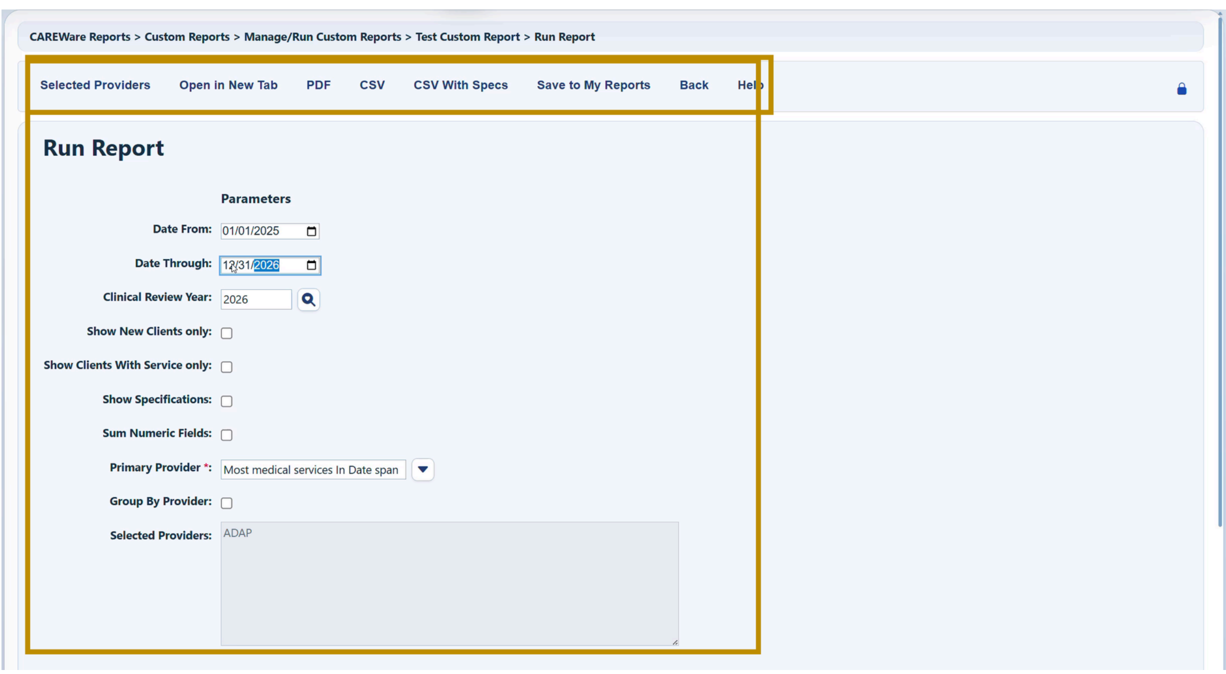


Set the reporting period and options

Step 6. Enter Date From and Date Through.

Step 7. Enter the Clinical Review Year when annual custom-review fields or filters are included.

Step 8. Select any optional run settings needed for this output.



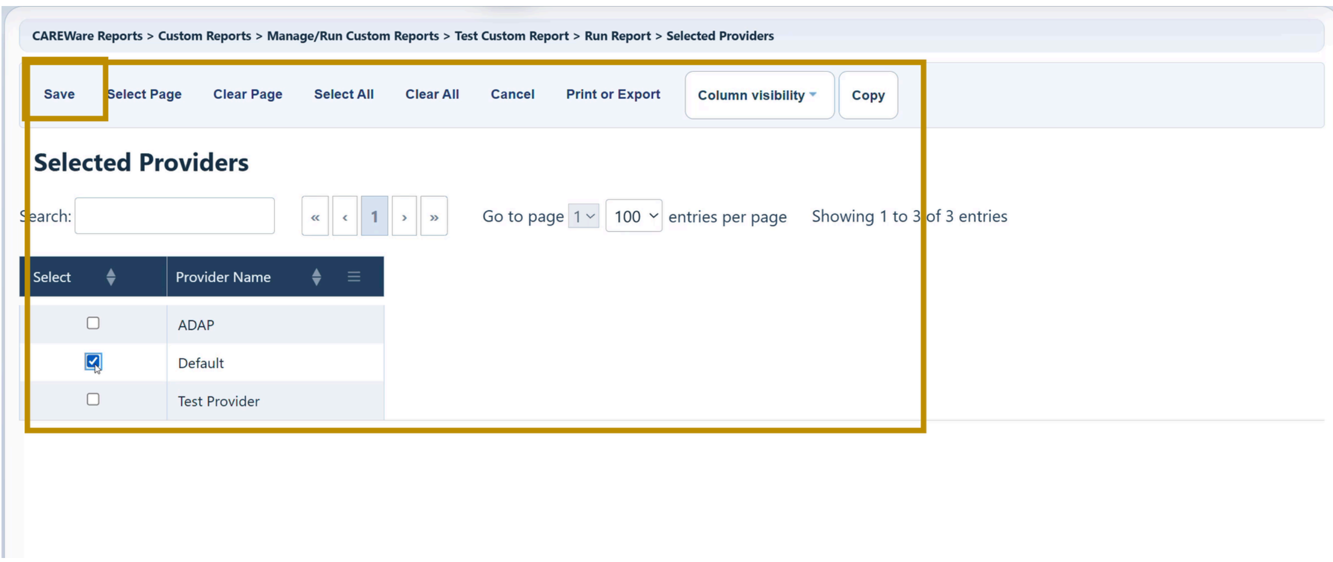
Important

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

Choose the provider scope

Provider-scope guidance

Provider Scope	Description
Primary Provider	Assigns one provider using the selected calculation, such as most medical services in the date span.
Group By Provider	Changes the report presentation; it does not replace validation of shared or duplicate records.
Selected Providers	Determines the provider domains searched by the report.



Warning

To include several provider domains, run the report from Central Administration. [Cross-provider report-field permissions](), [provider sharing](), [client sharing](), subfilters, and domain sharing settings can determine whether shared records are included.

Choose an output and run the report

Step 9. **Choose Open in New Tab, PDF, CSV, or CSV With Specs.**

Step 10. **Wait for the report-generation message, then open or save the output.**

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, filters, or subfilters.
Clinical Review Year	Selects the annual custom-review year when annual review fields or filters are used.
Show New Clients only	Limits results to clients with an enrollment date within the 12 months before Date Through.
Show Clients with Service only	Requires a service within the run date span; non-Demographics or non-Service reports must also meet the report type critical-date requirement.
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 for clients served by several providers using the selected calculation.
Group By Provider / Selected Providers	Controls provider grouping and the provider domains included in the report.

Tip

Run the report in a new tab before exporting. Confirm the results first, then choose PDF for a formatted view or CSV for detailed review and data reconciliation.

Review and validate the output

Step 11. Review the report title, Data Scope, Report Start Date, Report End Date, columns, categories, totals, and Number of Records.

Step 12. Compare the output with known clients or records and revise the report definition or run settings when necessary.

Test Custom Report (OAHS Visits Last 12 Months by Age)

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

OAHS Visits Last 12 Months by Age

OAHS Visits Last 12 Months:	Total:	Col. %:	Adults:	Children:
0	2	100.0	1 (50.0%)	1 (50.0%)
0	2	100.0	1 (50.0%)	1 (50.0%)
Total:	2	100.0	2 (100.0%)	2 (100.0%)

Number of Records : 3

(Count is unduplicated across providers)

** - Restricted Field*

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

How to confirm it worked

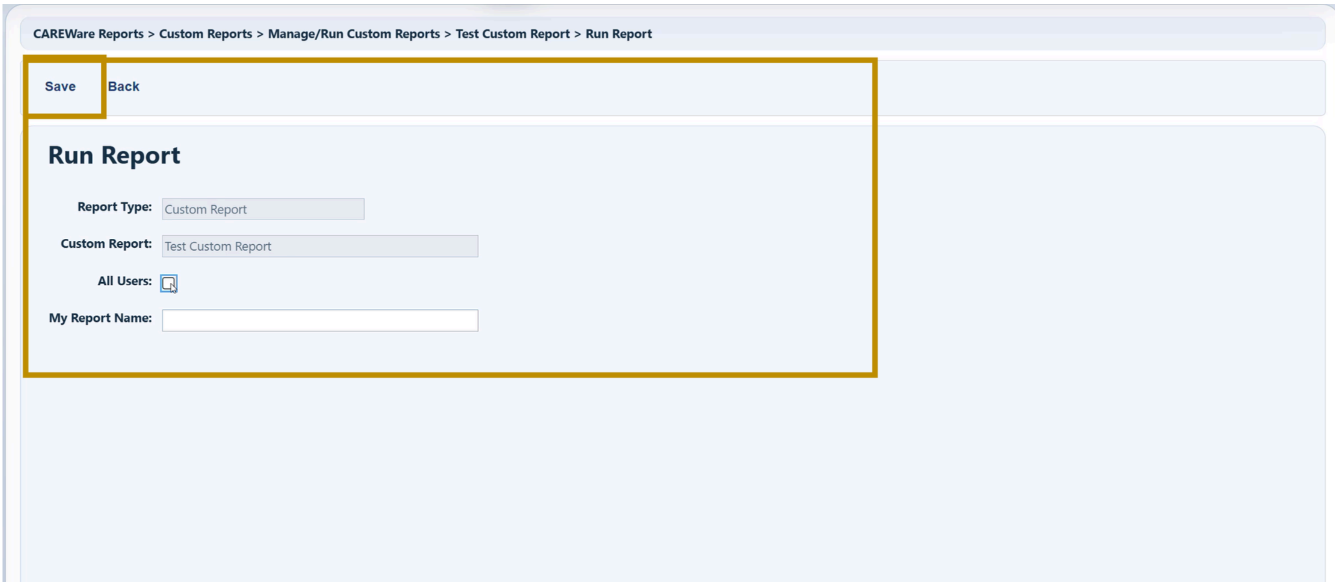
- The output uses the intended report date span and provider Data Scope.
- Known clients or records are included or excluded exactly as the report filters and run settings require.
- Totals, crosstab percentages, and record counts agree with a small validated sample.
- Show Specifications accurately describes the criteria and critical-date behavior when selected.

Save the run settings to My Reports

Step 13. Click Save to My Reports from the Run Report screen.

Step 14. Select All Users when the saved report should be available to other users in the provider.

Step 15. Enter a clear My Report Name, then click Save.



Important

My Reports saves the selected report and most run settings. Date fields remain editable when the saved report is run. Share the saved report with All Users only when the provider has approved the report definition and data scope.

Output choices

Choice	Use it for
Open in New Tab	Reviewing and validating the report before exporting.
PDF	A formatted report for printing or controlled distribution.
CSV	Detailed review, reconciliation, or analysis in a spreadsheet or data tool.
CSV With Specs	A CSV output accompanied by report specifications when available.
Save to My Reports	Saving the report and run settings for repeated use by one user or all provider users.

Date-span and critical-date guidance

The report type determines which record date is compared with Date From and Date Through. Date-sensitive fields and filters may use additional date logic. Review the complete report definition when the output is unexpectedly high, low, or blank.

Report type	Critical date or behavior
Demographics	Client-level output; date-sensitive options, fields, and filters still use the run parameters.
Service	Service Date.
Lab	Test Date.
Eligibility	Eligibility Date.
Custom Subform	Custom Subform Date.
Medication	Medication Start Date / End Date.
Referrals	Referral Date.

For the complete report-type list and setup guidance, see Creating Custom Reports.

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.

Helpful validation tips

- Enable Show Specifications while testing so the report documents the filters and critical date used.
- When no results appear, remove optional run settings one at a time and test again with a known client or record.
- Before using totals, review detail rows to confirm whether the count is by client, by record, or unduplicated across providers.
- Export only the minimum data needed and review restricted-field permissions before distributing PDF or CSV output.

Troubleshooting and common questions

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 a Demographics report for a client-level list, or use totals and grouping only after reviewing the source rows.

Why do provider counts differ from another report?

Compare Selected Providers, Primary Provider, Group By Provider, data-sharing settings, cross-provider subfilters, and cross-provider report-field permissions. The same client or record may be included, excluded, or assigned differently.

Why is a field blank or marked as restricted?

Review the user's report permissions, User Group Admin (Reports) restrictions, provider permissions, and cross-provider report-field access. Re-run the report after the appropriate administrator confirms access.

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

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

Related CAREWare guides and resources

Resource	How it helps
Creating Custom Reports	Full setup guidance for report types, field selections, filters, subfilters, totals, crosstabs, permissions, and validation.
Custom Report Run Report	Official reference for run parameters, critical dates, selected domains, provider grouping, and shared data.
Creating a Subfilter	Steps for adding or editing field and report-filter subfilters.
Custom Reports for Data Quality	Downloadable report definitions for RSR, ADR, NASTAD, and other data-quality review.
My Reports	Save frequently used reports for one user or all users in the provider.
User Group Admin (Reports)	Restrict access to PII fields displayed or exported through custom reports.
Scheduled CSV Report Data Export	Schedule recurring custom-report CSV output and define provider data scope.
Form Designer Adding Custom Reports to Forms	Display custom-report results inside a custom form.
Data Sharing	Set sharing across provides
Manage User Groups	Update user level access to reports
Cross-Provider Report Field Permissions	Allow or deny shared data by individual report field