

User Group Report

Purpose	Run the User Group Report to identify users who logged in during a selected date span and review the user groups, account status, provider, and login information recorded for those users.
Who should do this	CAREWare administrators, security or privacy staff, data managers, and designated support staff with access to Administrative Reports.
Use this setup when	Reviewing user access history, confirming group membership during an audit period, or checking activity for active and retired accounts.
Main warning	The report includes users who logged in during the selected period. Provider and status filters can exclude records, and the group shown reflects the user group recorded at the time of login.
Video walkthrough	User Group Report Video

Quick path

Reports > Administrative Reports > User Group Report

Before you begin

- Log into Central Administration when the report must include more than one provider.
- Define the date span and the provider domains that must be reviewed.
- Decide whether the report should include all users or be limited to Active or Retired accounts.
- Review [Manage User Groups](#) when group names, permissions, or current assignments need confirmation.

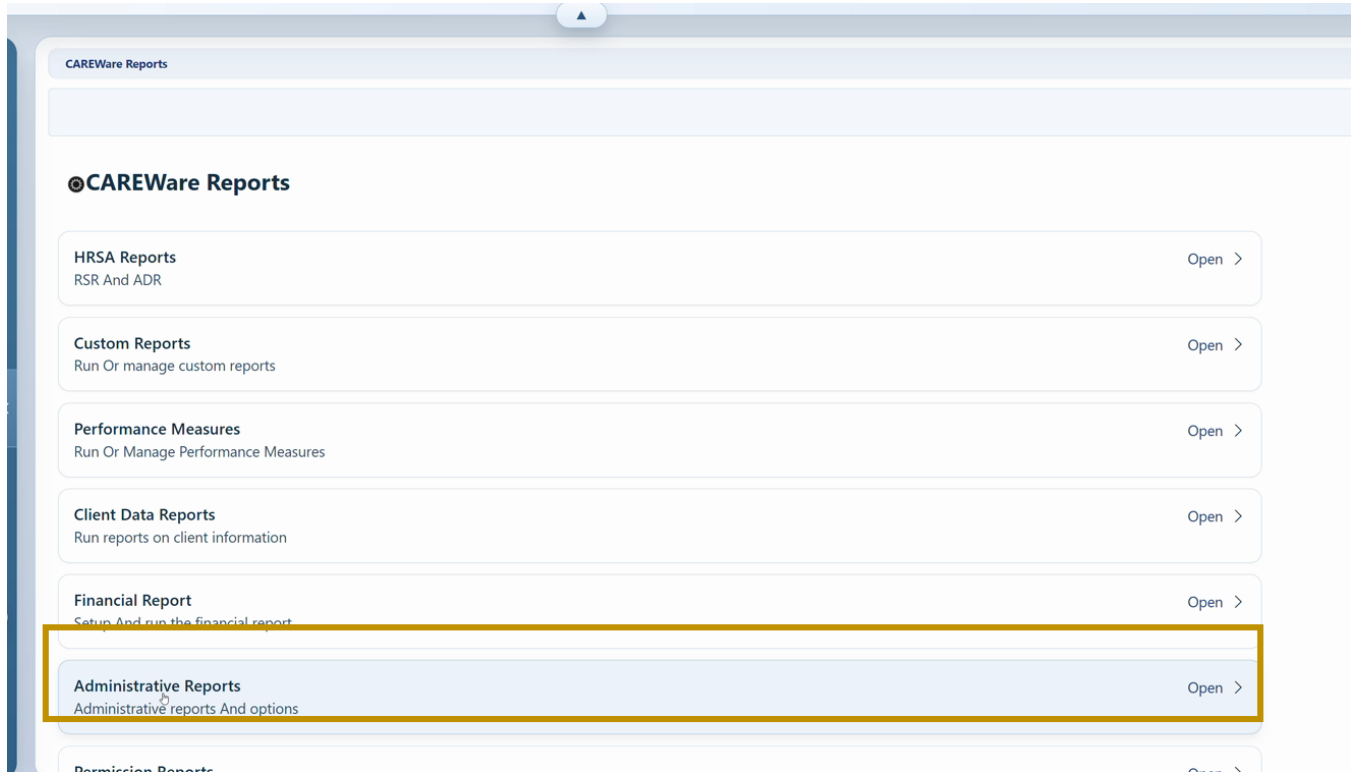
Important

The User Group Report is an administrative audit report, not a custom report definition.

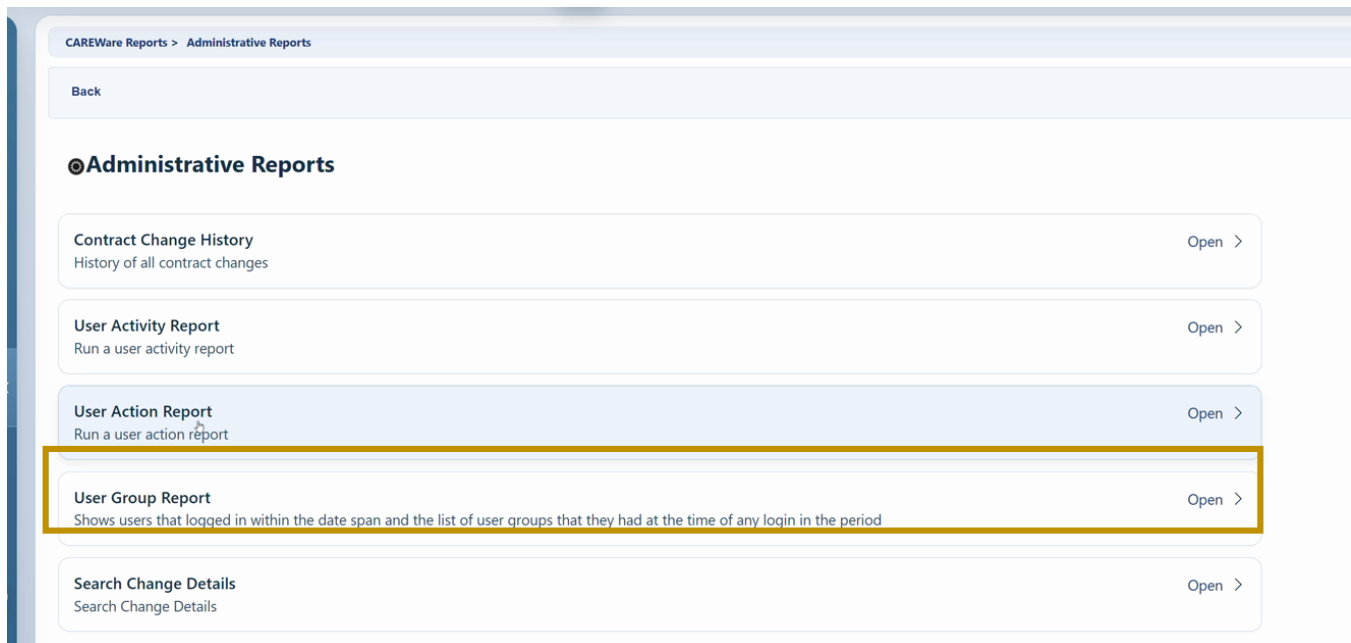
Open the User Group Report

Step 1. Click Reports.

Step 2. Click Administrative Reports.



Step 3. Click User Group Report.



Select the provider scope

Step 4. In Central Administration, click Provider Filter.

Step 5. Select each provider that should be included. Use Select Page or Select All when appropriate.

Step 6. Click Save.

The screenshot shows the 'Selected Providers' section of the 'Select options for User Group Report' page. At the top, there is a navigation bar with the breadcrumb 'CAREWare Reports > Administrative Reports > Select options for User Group Report > Selected Providers'. Below this is a toolbar with buttons: 'Save' (highlighted with a yellow box), 'Select Page', 'Clear Page', 'Select All', 'Clear All', 'Cancel', 'Print or Export', 'Column visibility', and 'Copy'. The main area is titled 'Selected Providers' and includes a search bar, pagination controls (showing 1 to 4 of 4 entries), and a table of providers.

Select	Provider Name
☐	ADAP
☐	Central Administration
☒	Default
☐	Test Provider

Important

The provider filter controls which provider domains are searched. Confirm the selected providers before running or exporting the report.

Set the date span

Step 7. Set the From date.

Step 8. Set the Through date.

The screenshot shows the 'Select options for User Group Report' page. At the top, there is a navigation bar with the breadcrumb 'CAREWare Reports > Administrative Reports > Select options for User Group Report'. Below this is a toolbar with buttons: 'Run Report', 'Provider Filter', 'CSV', 'Help', and 'Cancel'. The main area is titled 'Select options for User Group Report'. A date picker is open, showing the 'From' date as '07/10/2026' and the 'Through' date as 'July 2026'. The date picker is highlighted with a yellow box. The date picker shows a calendar for July 2026, with the 10th and 24th highlighted. The 'Status Label' field is also visible.

Set the status and run the report

Step 9. Select Active or Retired in Status Label when the results should be limited. Leave the filter unset to review both statuses.

Step 10. Click Run Report.

CAREWare Reports > Administrative Reports > Select options for User Group Report

Run Report Provider Filter CSV Help Cancel

Select options for User Group Report

From: 01/01/2025

Through: 07/24/2026

Selected Providers: Default

Status Label *: Retired

Review the results

Step 11. Confirm that the report title shows the intended From and Through dates.

Step 12. Use Search, entries per page, and Column visibility to review the grid.

Step 13. Scroll horizontally as needed to review provider, user group, status, and last-login information.

Step 14. Click Print or Export for a formatted output, or return to the options screen and click CSV for spreadsheet data.

CAREWare Reports > Administrative Reports > Select options for User Group Report > User Group Report From 2025-01-01 through 2026-07-24

Back Print or Export Column visibility Copy

User Group Report From 2025-01-01 through 2026-07-24

Search: 100 entries per page Showing 1 to 1 of 1 entry

User Name	First Name	Last Name	Phone	Office Phone	Extension	Email	Title	Prov
CWTEMP	CW	TEMP	NA			NA		Def

Important

ACT identifies an active user account. RTD identifies a retired user account. A retired user remains in historical records so prior activity can still be audited.

User Group Report options

Option	What it does	When to use it
Provider Filter	Selects the provider domains included when the report is run from Central Administration.	Use to limit the review to the providers in scope.
From / Through	Limits results to users who logged in during the selected date span.	Use the audit, review, or investigation period.
Status Label	Limits the report to Active or Retired users.	Use when reviewing current accounts or retired-account history.
Run Report	Opens the report results in the browser grid.	Use for interactive review and validation.
CSV	Exports the report results as a downloadable CSV file.	Use for sorting, reconciliation, or controlled audit documentation.
Search	Filters the displayed result rows by matching values.	Use to locate a user, provider, group, or status after the report runs.
Column visibility	Shows or hides result columns.	Use to simplify the grid without changing the report data.
Print or Export	Opens output options for the result grid.	Use for a formatted review copy or approved distribution.

How to interpret the main result fields

Field group	What it shows	Review guidance
User identity	User name, first and last name, phone, email, title, and other user-account details.	Confirm that the row belongs to the intended CAREWare account.
Provider	The provider associated with the reported login and user-group record.	Confirm the provider is within the selected scope.
User group	The user group recorded for the user at the time of login.	Compare with current setup only after accounting for later group changes.
Status	ACT for active accounts or RTD for retired accounts.	Use the status filter to isolate one account state when needed.
Last login	The most recent login information represented in the report period.	Use with the date span to identify recent or historical account use.

How to confirm it worked

- The report title displays the intended From and Through dates.
- The providers represented in the grid match the selected provider scope.
- The account statuses match the Status Label filter.
- A known user who logged in during the period appears with the expected provider and group history.
- The exported CSV or formatted output contains the same reviewed rows and date span.

Helpful security and report-review tips

- Start with a short date span and a known user before running a broad audit.
- Use [Manage User Groups](#) to verify current group assignments; the User Group Report reflects group history at login.
- Use [User Activity Report](#) to review login and activity volume by user and provider.
- Use [User Action Report](#) when the review must identify exact actions such as running a report or editing data.
- For custom reports, review [User Group Admin \(Reports\)](#) separately. General user-group permissions and report-field restrictions are different controls.
- Export only the minimum user information needed and store the file in an approved secure location.

Warning

Do not share CAREWare accounts. Audit history is tied to the username that performed the activity, so shared accounts make access reviews and investigations unreliable.

Tip

When an unexpected group appears, compare the report date with the dates of user-group changes. A difference from the current assignment may be correct if the user logged in before the assignment changed.

Troubleshooting and common questions

Why does the report return no records?

Confirm the From and Through dates, select the correct provider domains, remove the Status Label filter, and verify that the user logged in during the period.

Why is a known user missing?

The login may fall outside the date span, the provider may not be selected, or the selected status may exclude the account.

Why does the user group differ from the current assignment?

The report shows group information recorded at the time of login. Review current assignments in [Manage User Groups](#) and compare the timing of later changes.

Why does a user appear with RTD status?

RTD means the account is retired. See [Manage Retired Users](#) for account-retirement guidance.

Why can't a user open the User Group Report?

Review the account and report permissions in [Provider User Manager](#) or [Manage Users](#).

Related CAREWare guides and resources

Resource	How it helps
Manage User Groups	Create groups, grant permissions, assign providers, and assign users.
Manage Users	Manage user accounts, provider access, permissions, and report-field restrictions.
Provider User Manager	Review provider-specific user access, permissions, groups, and account settings.
Manage Retired Users	Retire accounts while retaining historical activity for audit purposes.
User Activity Report	Review login sessions and activity counts by user and provider.
User Action Report	Identify detailed actions performed by users, including report activity and data changes.
User Group Admin (Reports)	Configure field-level restrictions for data displayed or exported through custom reports.