Create Client List

Purpose	Create a list of clients based on results from a performance measure.
Who should do this	CAREWare users who review performance measure results or update client records.
Use this guide when you need to	See which clients are in or out of the numerator or denominator, print a list, or open client records for review.
Main warning	Choose the correct As of Date, measure section, output format, and providers before creating the list.

Quick path
Reports > Performance Measures > Create Client List > Select a measure > Edit settings > Create Client List

Important The As of Date is the report end date. CAREWare uses it to decide which client records qualify for the results.

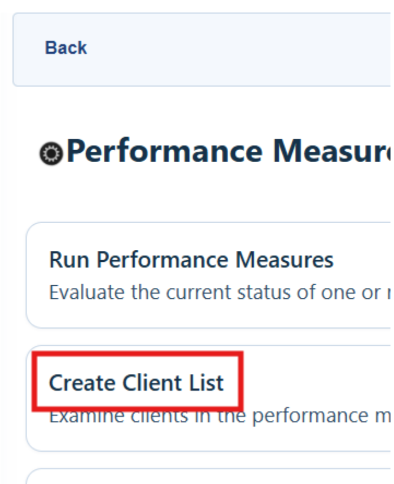
Create a client list

Create Client List turns performance measure totals into a client-level list. You can use the list to review records, update client data, and run the measure again to check the results.

Step 1. Click *Reports*.

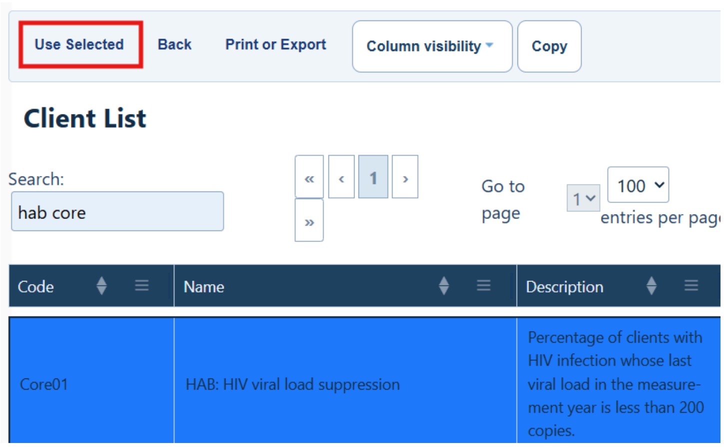
Step 2. Click *Performance Measures*.

Step 3. Click *Create Client List*.



Step 4. Click a performance measure to highlight it.

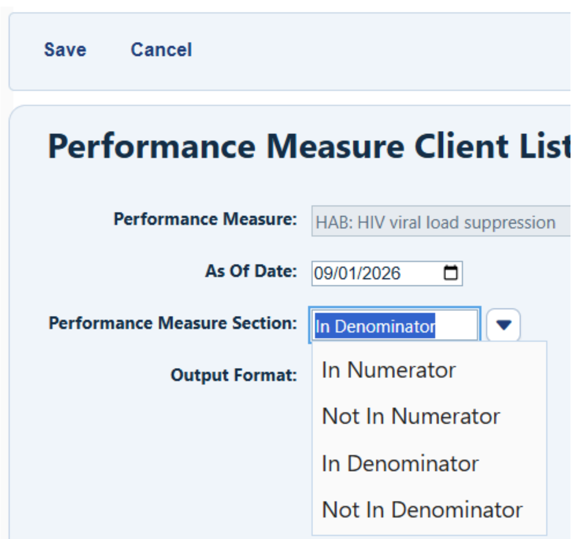
Step 5. Click *Use Selected*.



Step 6. Click *Edit*.

Step 7. Select an *As of Date*. This date acts as the end date for the report.

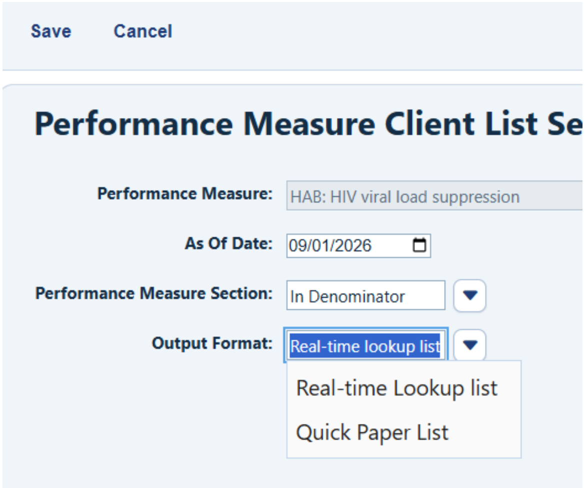
Step 8. Select a *Performance Measure Section*.



Performance Measure Sections

Section	Clients included
In Numerator	Clients who meet the measure.
Not In Numerator	Clients who do not meet the measure.
In Denominator	Clients included in the population measured.
Not In Denominator	Clients not included in the population measured.

Step 9. Select an *Output Format*.



Output Formats

Format	Use it to
Real-Time Lookup list	Open client records for review or updates.
Quick Paper List	Create a printable client list.

Step 10. Click *Save*.

Step 11. Click *Create Client List*.

Using the Real-Time Lookup List

To review or edit a client record, select the client and click Go To Client. CAREWare marks the record in the Viewed column. After you update records, run the performance measure again to see whether the results changed.

How to confirm it worked

- The client list opens for the performance measure and section you selected.
- The list shows the expected provider or providers and the correct As of Date.
- For a real-time lookup list, you can select a client and use Go To Client.

Troubleshooting and common questions

Why are expected clients missing from the list?

Check the As of Date, selected providers, and performance measure section. Each setting changes which clients appear.

How do I print the list?

Select Quick Paper List as the output format. You can also use Print or Export when that option appears on the list.

How do I check updated results?

Update the client records, then run the performance measure again.

Related References

Document	Use it for
Run Performance Measures	Run a measure and review its totals and percentages.
Performance Measure Groups	Review results for a group of performance measures.