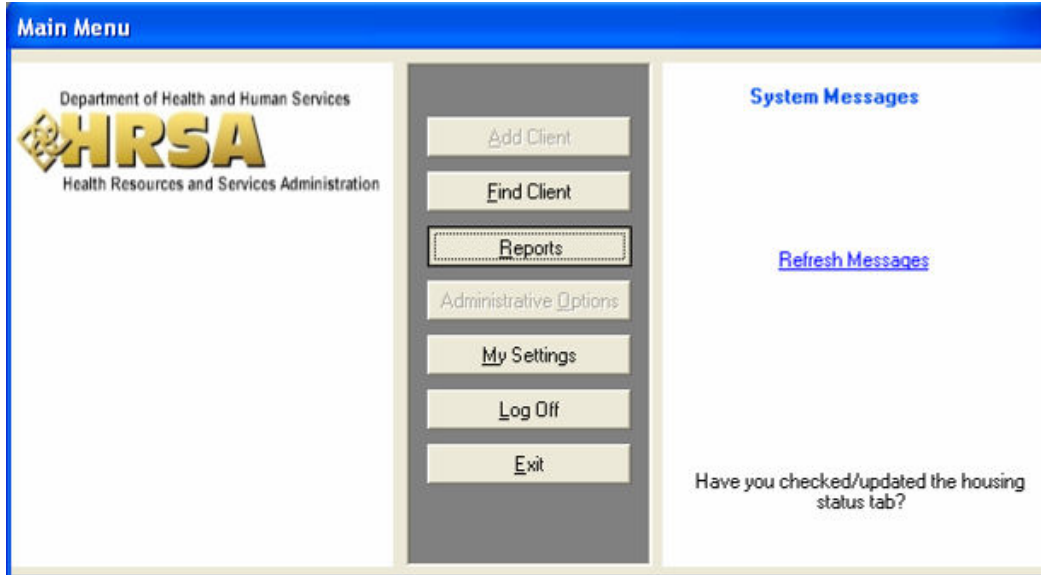


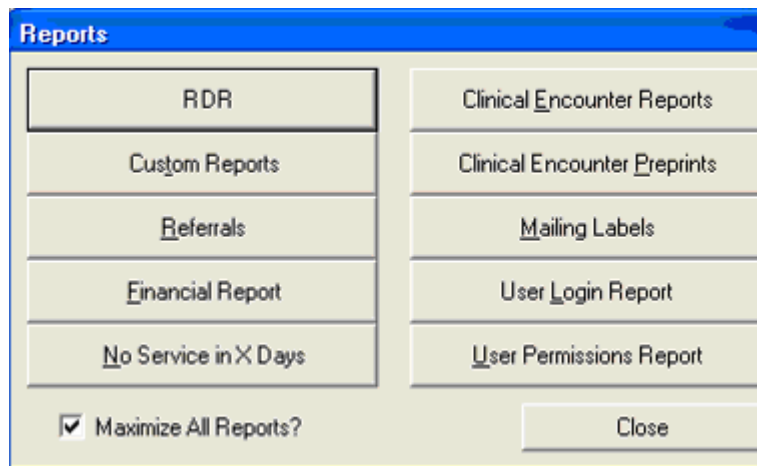
## **Appendix A: Reports**



To access reports, select "Reports" from the main menu.



Select the type of report you wish to run from the Reports menu:



# 1 - Custom Reports

Access to editing reports may be restricted. If you want a specific report to be created for you and you do not know how to do this, please contact the Database Administrator.

The “Custom Reports” screen looks something like this:

The screenshot shows the 'Custom Reports' window with a blue header. It contains several filter sections: 'View/Edit' with 'Data Scope' (checkboxes for 'Show Shared Service Records' and 'Show Shared Clinical Records'), 'Filter by Report Type' (dropdown), 'Date Span' (From: 1/1/2006, Through: 10/31/2006, and a '?' icon), and 'Clinical Review Year' (dropdown: 2006). There are also checkboxes for 'Show New Clients Only', 'Show Specifications', and 'Sum Numeric Fields'. Below these is a table of reports with columns for 'Report Name', 'Report Type', and 'Custom/Crosstab'. To the right of the table are buttons for 'Run Report', 'New Report', 'Delete Report', 'Edit Report', 'Copy Report', and 'Close'.

Report Name:	Report Type:	Custom/Crosstab:
Other Public Benefits	Demographics	Custom
Julie - Caseload Contact List	Demographics	Custom
Referral outcomes by type	Service	Crosstab
Billing	Service	Custom
Billing Info	Service	Custom
Julie - QA Report	Demographics	Custom
Julie - Last Contact	Service	Custom
Julie - Last Care Plan	Service	Custom
Julie - Last Assessment	Service	Custom
Julie - Client Goals Achieved	Service	Custom

**Reports will only show clients who received a service during the date span.** So, if you enter a date span of one day and you saw two clients that day, only information on those two clients will appear.

Once you have entered the date span you want, select the report you want and click “Run Report.” **Do not double click on the report name. If you do this, CAREWare will think you are trying to edit the report.**

The report will look something like this:

## Julie - Last Contact

Data Scope: Frannie Peabody Center

### Report Criteria

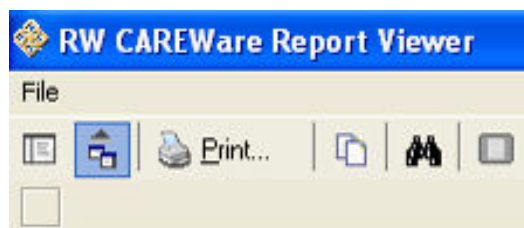
<b>Srv Category:</b>	Face-to-face Case Management
<b>OR Srv Category:</b>	Other Case Management (non face-to-face)
<b>AND CM assigned:</b>	Julie Carroll
<b>AND Srv Date:</b>	between 1/1/2006 AND 10/31/2006

Client ID:	Srv Date:
00054	10/10/2006
00129	10/10/2006
00190	9/29/2006
00323	9/27/2006
00428	10/12/2006
00438	9/29/2006
00507	10/3/2006

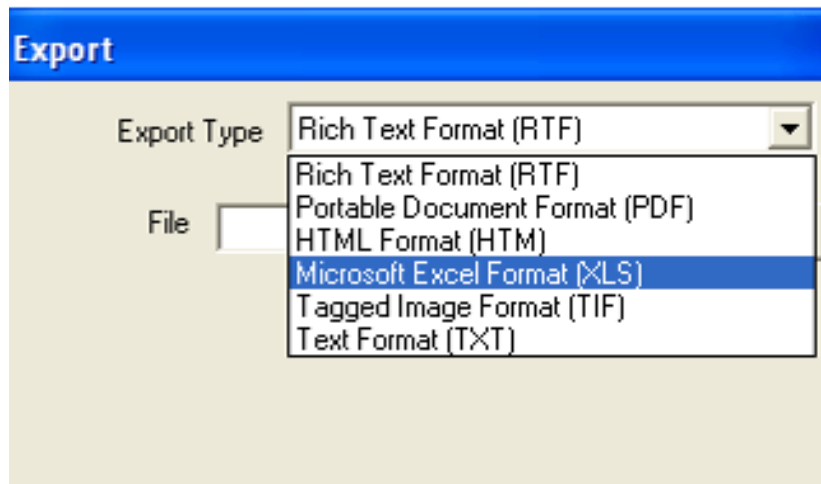
Reports in CAREWare are often formatted so that you cannot see all of the information, particularly if you are running a report with many fields. Reports cannot be reformatted in CAREWare, but they can be exported to Excel for reformatting.

### Exporting to Excel

Click the icon in the menu bar to the left of the printing icon:

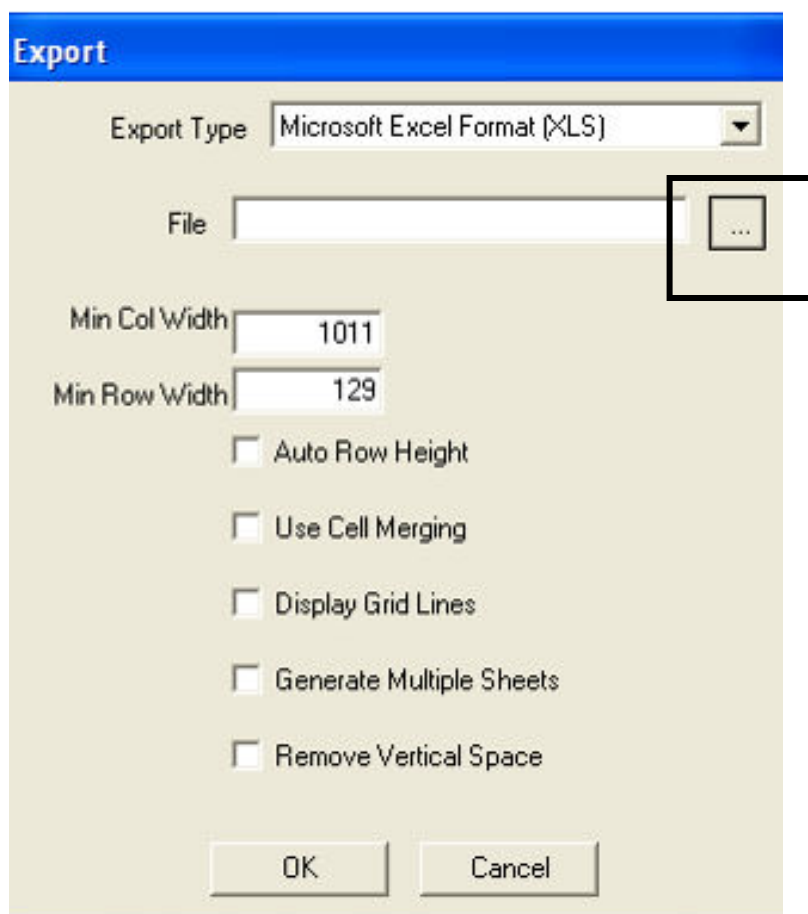


A box like the one on the next page will appear:

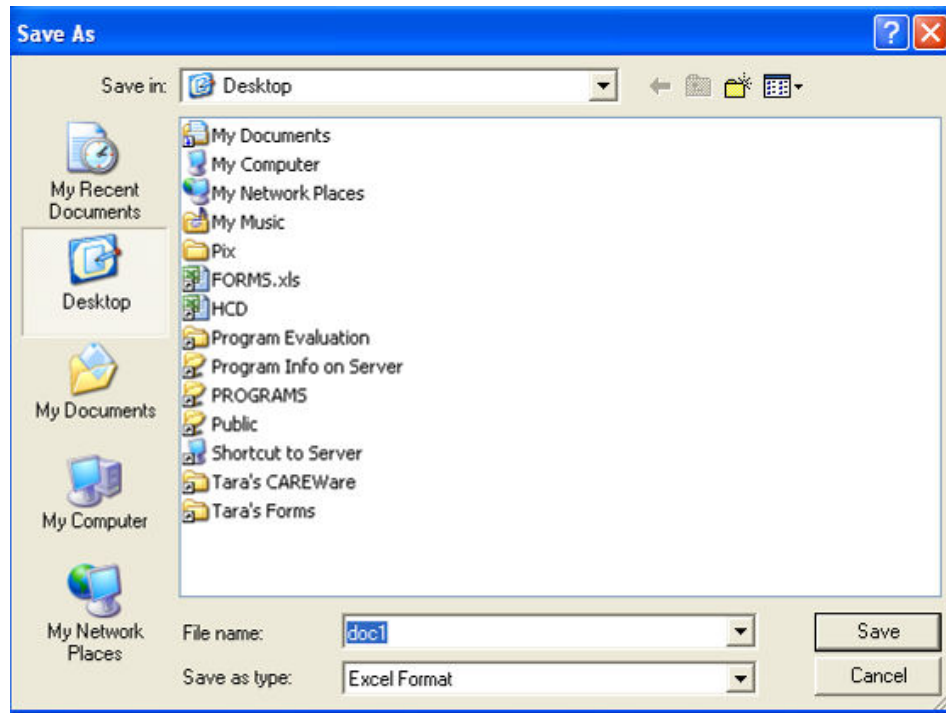


Select "Microsoft Excel Format (XLS)"

Click on the box with the ellipsis in the next line:

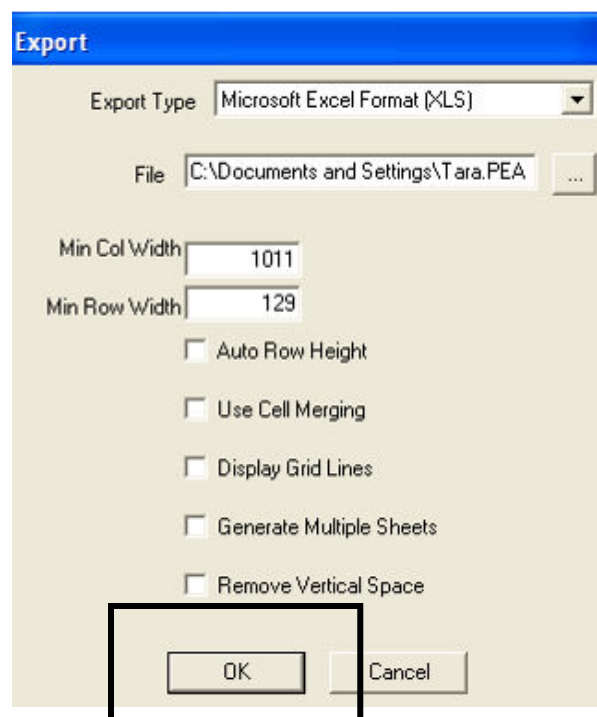


A box like the one below will appear:



Browse to the location where you want to save your export Excel report, and type the name you want to give the report in the box labeled “File Name.” Then click “Save.”

You will return to the Export box. Click “OK.”



## 2 - Financial Report

---

This is an easy to generate report that includes the number of clients and units of service for each service and/or subservice, the amount expended for each service category over the date range selected (assuming unit cost service data is entered with each service record entry) and receipt of payments, if any.

- The financial report can be restricted by funding source of interest, or include all sources of funding.
- Check “Include Subservice Detail” to divide the figures by subservices within each service category. Check “Include Provider Information” to list the contact information for the agency at the top of the report.

A portion of a financial report, with the subservice option selected, is shown below. The right-hand column, the amount not received, is calculated from the service screen and any payments entered.

**RW CAREWare 4.0 - Financial Report**

Data Scope:

Domains:

Arkansas Department of Health
-------------------------------

Group By Providers

Date Selection:

Year: 2005 -OR- From: Through:

Funding Source	RW Funded?
RW Title I	Yes
RW Title II	Yes
RW Title III	Yes
PEPFAR	No
Funding Source	No
Testing	No
Test source I	No
1231	No

Include Subservice Detail     Include Provider Information

Run Report    Close

A sample report (with the options as checked above) looks like this:



## Financial Report

Saturday, January 01, 2005 through Saturday, December 31, 2005

### Report Criteria

**Provider(s):** Arkansas Department of Health  
**Funding Sources:** RW Title II, RW Title III  
**Group By Providers:** True  
**Include subservice detail:** True  
**Include provider detail:** True

### Arkansas Department of Health

**Phone:** (501)661-2466

**Address:** 4815 West Markham

Little rock, Arkansas 72205

<b>Ambulatory/Outpatient Medical Care</b>	<b>Clients:</b>	<b>Units:</b>	<b>Total:</b>	<b>Amount Received:</b>	<b>Not Received:</b>
Chest Xray	4	4	\$225.00	\$0.00	\$225.00
Ambulatory/Outpatient Medical Care Totals	4	4	\$225.00	\$0.00	\$225.00

<b>Mental Health Services</b>	<b>Clients:</b>	<b>Units:</b>	<b>Total:</b>	<b>Amount Received:</b>	<b>Not Received:</b>
Competency evaluation	3	3	\$270.00	\$0.00	\$270.00
Emotional Support	1	1	\$800.00	\$0.00	\$800.00
Mental Health Services Totals	4	4	\$1,070.00	\$0.00	\$1,070.00

### 3 - No Service in X Days

The “No Service in X Days” report allows you to run a report to see which clients have not had a certain type of service in a certain period of time. For instance, you can run a report to see which clients have not had a “care plan” service in the last 90 days (and therefore need a new one).

To do this, select “No Service in X Days” from the “Reports” menu.

The screen will look like this:

Reports - No Service in X Days

This report lists clients who have not received a service in the specified category or a particular subservice within the supplied number of days. If you do not select a subservice or service category, the report will be run on all services.

Data Scope:

Include shared services entered by other providers.

Service Category     Subservice Type

1500 Face-to-Face Case Mgmt  
1100 Community Linkage  
1300 Intake Assessment  
1200 Annual Assessment  
1400 Re-Intake Assessment  
1000 Care Plan  
1700 Non-Face-to-Face Case Management  
1600 Collateral Contact

Run Report    Close

You can select a service category or sub-service type. Then set the number of days and click “Run Report.”

Reports - No Service in X Days

This report lists clients who have not received a service in the specified category or a particular subservice within the supplied number of days. If you do not select a subservice or service category, the report will be run on all services.

Data Scope:

Include shared services entered by other providers.

Service Category     Subservice Type

1000 Care Plan

Number of Days:  
90

Run Report    Close

## 4 - Clinical Encounter Reports and Pre-Prints

### Clients with no screenings in X days

This report produces a list of clients who have not had a particular screening test in a specified number of days. **Only screenings that have been marked as “Active” in Screenings Setup will appear on the pulldown list below.** To run reports on inactivated screenings, they must be reactivated temporarily.

You will get the clients’ names, CAREWare-assigned Unique Record Numbers (URN), the date they last had that screening (if any) and the provider where the screening was given.

<b><u>Clients who have not had a PPD within last 180 days.</u></b>				
<b>Data Scope: Arkansas Department of Health</b>				
<b>Report Criteria</b>				
<b>Provider:</b>	Arkansas Department of Health			
<b>The client:</b>	has not had a PPD screening at the provider in the last 180 days.			
<b>Or the client:</b>	has not had a PPD screening at the provider.			
<b>Client enrollment status:</b>	is active or unknown			
<b>Name:</b>	<b>URN:</b>	<b>Last Screening Result:</b>	<b>Last Screening Date:</b>	<b>DomainName:</b>
A A	A9A90223041U			Arkansas Department of Health
Bean, Bertha	BRBA0819802U			Arkansas Department of Health

## Clients with no hepatitis vaccinations

Generates a report of clients who have not been vaccinated for hepatitis A or hepatitis B, depending on the option you select below:

**Clinical Encounter Report Setup**

Data Scope:

Include shared data from other providers?

Encounter Reports:

- Clients with no encounter in X days
- ARV Ingredient Count
- Clients with no screenings in X days
- Clients with no Hepatitis Vaccinations
- Clients with no Syphilis test in X days
- Clients with no Pneumovax in X months
- Clients with last selected Lab Results
- Clients ever diagnosed with Hepatitis
- Empty Encounter Report

Report Specifications

Clients without the specified Hepatitis Vaccination.

- Hepatitis A
- Hepatitis B

Run Report Close

Hepatitis A and B reports are run separately because the hepatitis A vaccine requires two visits, whereas the hepatitis B vaccine requires three. The hepatitis A report will give you a list of clients who have had only the first dose of the Hep A vaccine, or no vaccine at all.

The hepatitis B report will give you a list of clients who have had only the first dose, first and second, or no vaccine at all.

**Susceptible clients without the full Hep A immunization series.**

Data Scope: Arkansas Department of Health

**Report Criteria**

Include shared data:	yes
The client:	has not tested positive for Hepatitis A
The client:	has not received the Hepatitis A immunization.
Client enrollment status:	is active or unknown

**Arkansas Department of Health - First Dose Only:**

Client Name:	URN:
Asdf, Query	QEAD0401841U
Jughead, Archie	ACJG0228641U
Squarepants, Spongebob	SOSU0125841U
Suggins, Sally	SLSG0512222U
Wallbanger, Harvey	HRWL0229481U

**Arkansas Department of Health - Clients with no Hep A Vaccination:**

Client Name:	URN:
A, A	A9A90223041U
a, a	A9A90301031U

**Clients with no syphilis test in X days**

This report will give you the names, URNs, date of the last screening (if any) and the provider who administered the test.

**Clients with no pneumovax in X months**

Produces a list of client names, URNs and last pneumovax date (if any). Specifies months rather than days because pneumovax is generally good for five years before it needs to be re-administered.

## Clients with last selected lab results

This report allows you to run a report on clients fitting certain criteria. **Only labs that have been marked as “Active” in Labs Setup will appear on the pulldown list below.** To run reports on inactivated labs, they must be reactivated temporarily. In the case below, the lab is CD4 count with a value of  $\leq 200$ , or CDC-defined AIDS.

Clinical Encounter Report Setup

<p>Data Scope:</p> <p><input type="checkbox"/> Include shared data from other providers?</p>	<p>Encounter Reports:</p> <p><input type="radio"/> Clients with no encounter in X days</p> <p><input type="radio"/> ARV Ingredient Count</p> <p><input type="radio"/> Clients with no screenings in X days</p> <p><input type="radio"/> Clients with no Hepatitis Vaccinations</p> <p><input type="radio"/> Clients with no Syphilis test in X days</p> <p><input type="radio"/> Clients with no Pneumovax in X months</p> <p><input checked="" type="radio"/> Clients with last selected Lab Results</p> <p><input type="radio"/> Clients ever diagnosed with Hepatitis</p> <p><input type="radio"/> Empty Encounter Report</p>	<p>Report Specifications</p> <p>Clients whose last selected lab value was less than or greater than the entered result.</p> <p>Lab: <input type="text" value="CD4 Count"/> Operator: <input type="text" value="&lt;="/></p> <p>Value: <input type="text" value="200"/></p>
<p><input type="button" value="Run Report"/> <input type="button" value="Close"/></p>		

The names, URNs, last lab result, date and provider are returned:

Clients with CD4 Count  $\leq 200$  at last test.

Data Scope: Arkansas Department of Health

**Report Criteria**

The client's: last CD4 Count result was  $\leq 200$ .

Client enrollment status: is active or unknown

Name:	URN:	Last Lab Result:	Last Lab Date:	Domain Name:
Ball, Foot	FOBL1022011U	90	2/4/2005	Arkansas Depart Health
Doe, John	JHDE0124561U	100	4/3/2005	Arkansas Depart Health
Everage, Edna	ENEE0229601U	200	2/19/2005	Arkansas Depart Health
Puck, Hockey	HCPC0229562U	199	1/31/2005	Arkansas Depart Health
Rodeo, Angola	AGRD0229442U	20	1/21/2005	Arkansas Depart Health

**Number of Records: 5**

### Clients ever diagnosed with hepatitis

This report will give you a list of clients ever diagnosed with hepatitis B or C. For Hep B, CAREWare will look in the Screening Labs module to see if the client was EVER HBsAb or HBsAg positive.

### Empty encounter report

This lists clients for whom clinical encounters were created, but which were not populated with any clinical data. You can specify a date range or leave it blank to see all clients with empty encounters. This is a “quality check” feature that allows you to delete mistakenly entered encounters, or populate encounters with the relevant data.

## Clinical Encounter Preprints

Clinical encounter preprints are “flow sheets” many clinics use as a snapshot of a client’s most recent clinical data. You can use them as “preprints” to be marked up during an appointment, and/or as a flow sheet to be inserted in the chart after the information from the encounter is entered into CAREWare.

Click **Setup** to determine which sets of clinical data you want to appear on the preprint.

**Clinical Encounter Report Setup**

Page 1:  
Position 1: Labs  
Position 2: Screening Labs  
Position 3: Screenings

Page 2:  
Position 1: Medications  
Position 2: Diagnoses  
Position 3: Empty

Page 3:  
Position 1: Empty  
Position 2: Empty  
Position 3: Empty

Page 4:  
Position 1: Empty  
Position 2: Empty

Limit to three encounter subreports per page.

Clear All Save Settings Cancel

- Values for positions correspond to the subtabs in the clinical encounter tab of client records. Each value you select for a position removes that value from the available list for the next position. The **Clear All** button resets all positions to empty.
- The “**Limit to three encounter subreports per page**” will print no more than **three sections positions per page, regardless of length**. If selected, and a specific subreport is long (say medications or lab tests), that section will be truncated in the report. If you want to list ALL items in the subreport, do not check the three-per-page box. One way to limit the number of items in a specific section is to inactivate a lab or screening test. Inactivating will remove that item from the list so it won’t take up unnecessary space on the encounter report.
- Click **Save Settings**. To make sure you are satisfied with the layout, run the report and view it first before printing.



- Select a date for the preprint; this is usually the day of the appointment. (Today's date is the default.) Clients can be selected singly, or multiply using **Ctrl-click** or **Shift-click**.
- Click **Print**. You'll be prompted for the number of preprints (if you are running preprints for each client with an appointment that day, this lets you verify that you've selected as many clients as you have appointments).

When producing encounter preprints, you cannot preview the report, so make sure the output looks the way you want, by testing with one client, before printing out a large number of encounter reports for multiple clients. You can preview the report only when it is being generated from within the specific client's encounter screen.

### Encounter Report

Client:	Query Asdf	Birth Date:	4/1/1984
Visit Date:	4/16/2005	Last Visit Date:	4/15/2005

**Labs**

Test:	Date of Last Test:	Prior Result:	Current Result:	Provider:
Albumin (g/dL)				
ALT (IU/L)				
AST (IU/L)				
CD4 Count (cells/mm <sup>3</sup> )	4/14/2005	400		
CD4 Percent				
Creatinine (mg/dL)				
Glucose (mg/dL)				
HDL (mg/dL)				
Hemoglobin (g/dL)				
HgA1c mg/dL <sup>2</sup>				
LDL (mg/dL)				
Platelets (cells/mm <sup>3</sup> )				
Total Cholesterol (mg/dL)				
Triglycerides (mg/dL)				
Viral Load (Copies/mL)	2/22/2005	<= 49		
WBC (x 10 <sup>3</sup> /mm <sup>3</sup> )				

**Screening Labs**

Test:	Date of Last Test:	Prior Result:	Current Result:	Titer:	Treatment:	Provider:
Chlamydia						
Cytomegalovirus (CMV)						
Cocci/Hyper						

## 5 - Mailing Labels

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The “Mailing Labels” report will allow you to run labels for clients with the “include on label report” box checked.

To run labels, select “Mailing Labels” from the “Reports” menu. The screen will look like this:

**Mailing Label Report Setup**

Select a filter type for generating mailing labels. These labels are formatted to fit Avery 5160 label sheets. Note that a client is included on this report only if the 'Include on Label Report' box on the Client screen is checked for that client.

Specific Provider: Frannie Peabody Center

All Clients

All clients whose enrollment status is 'Active'

All clients whose enrollment status is not 'Inactive/Case Closed' and vital status is not 'Deceased'

All clients who have services between: [dropdown] and [dropdown]

Only include clients with street addresses or PO box number

Sort By:  Last Name, First Name  Zip Code

Run Report Close

Select from the available filters. **You cannot filter this list to get your caseload, all clients in one county, or all clients by a certain demographic. To do that, you will have to export a custom report to Excel and do a mail merge.**

Click “Run Report” and you will get a report formatted for Avery 5160 address labels.