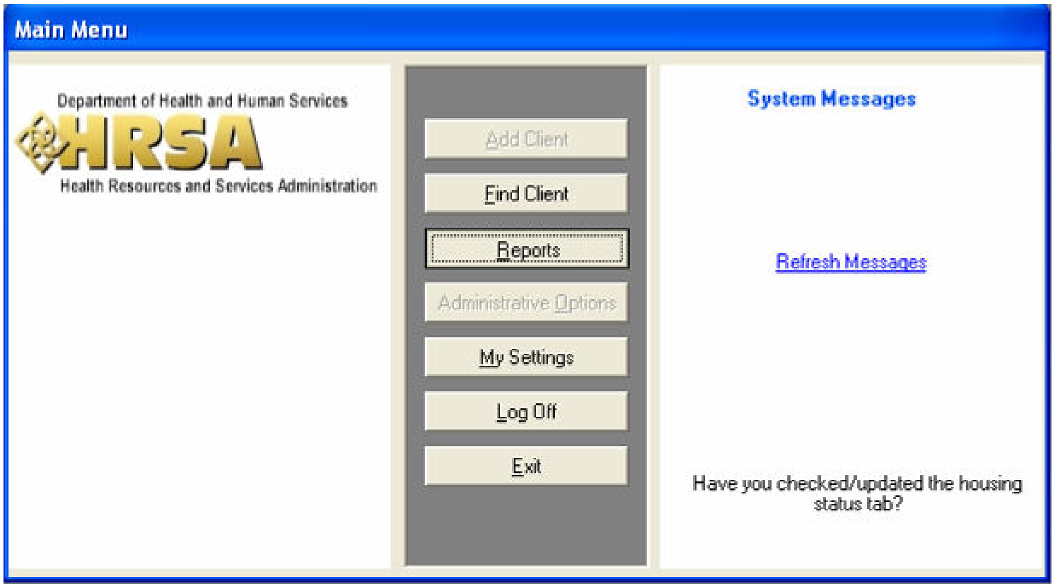
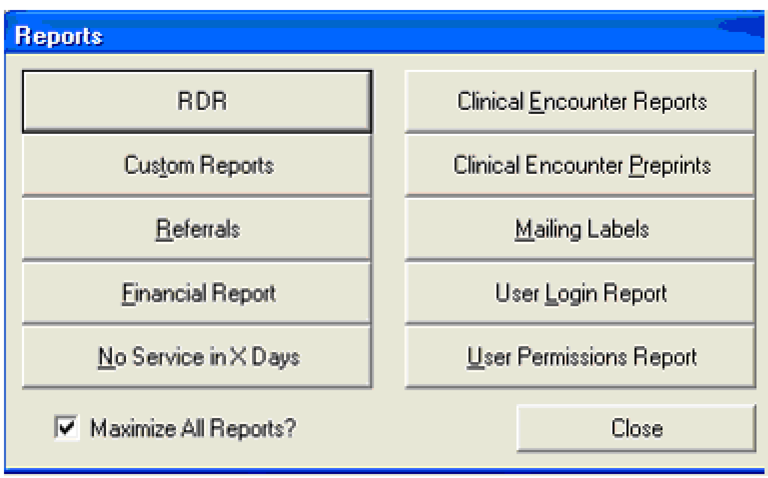
Appendix A: Reports

To access reports, select “Reports” from the main menu.



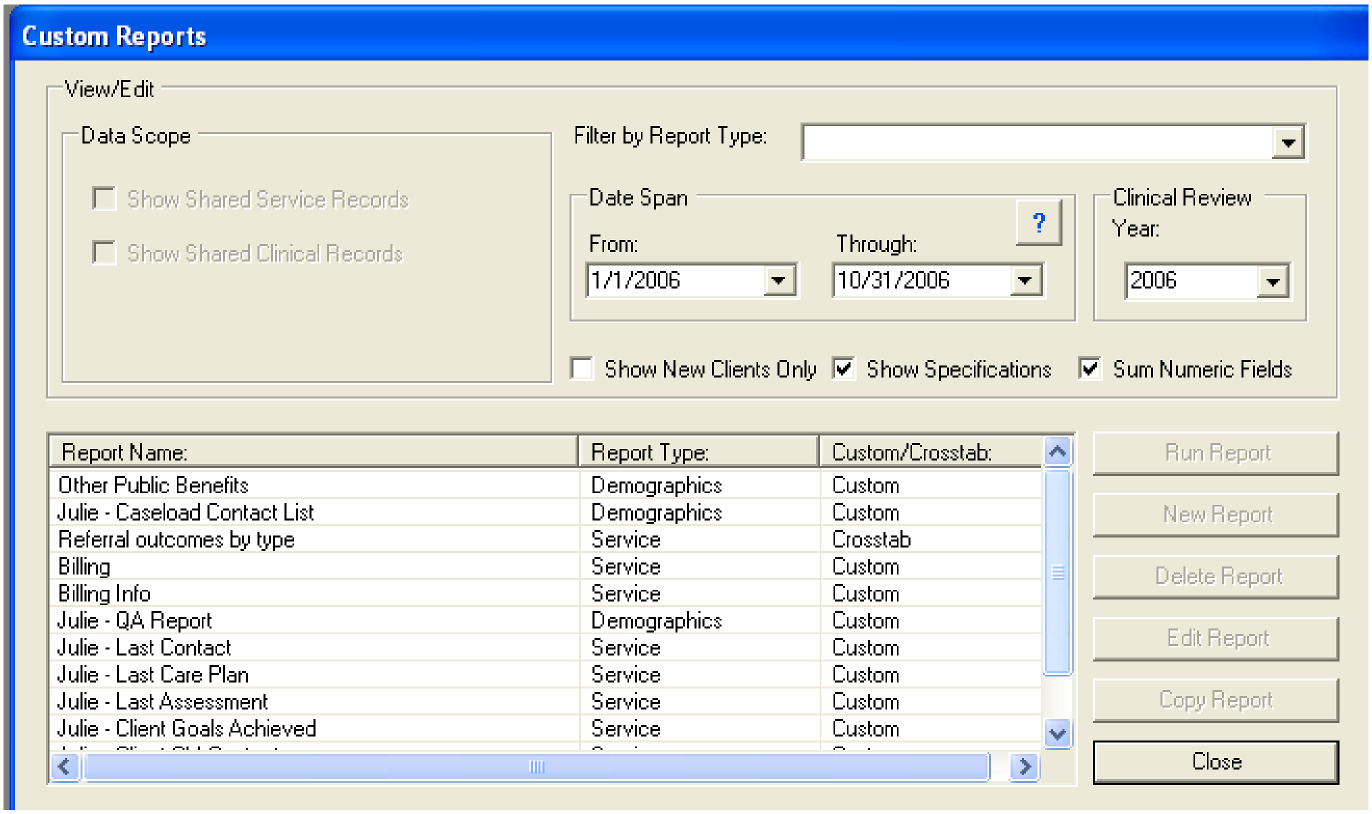
Select the type of report you wish to run from the Reports menu:



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:



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

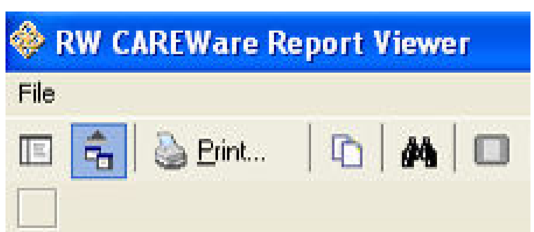
Srv Category:	Face-to-face Case Management
OR Srv Category:	Other Case Management (non face-to-face)
AND CM assigned:	Julie Carroll
AND Srv Date:	between 1/1/2006 AND 10/31/2006

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

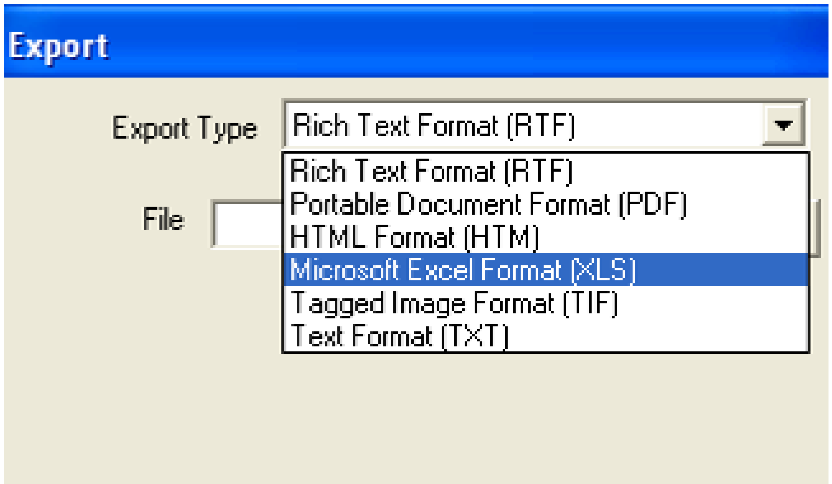
Reports in CAREWare are often formatted so that you cannot see all of the information, particularly if you are running a report with many fields. Reports cannot be reformatted in CAREWare, but they can be exported to Excel for reformatting.

Exporting to Excel

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

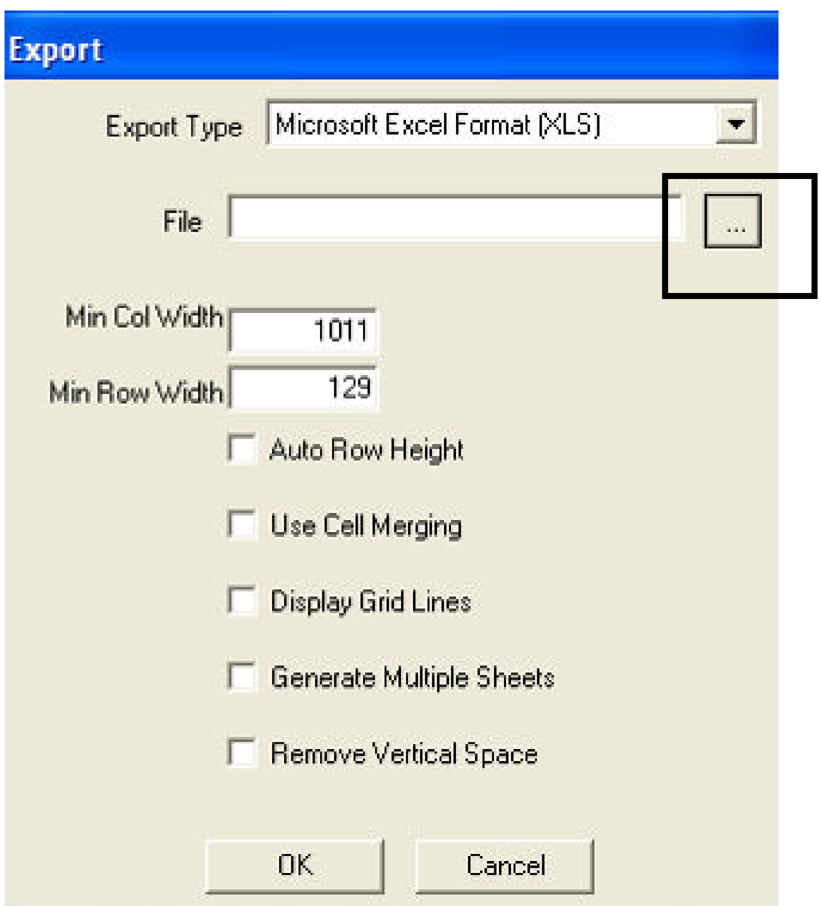


A box like the one on the next page will appear:

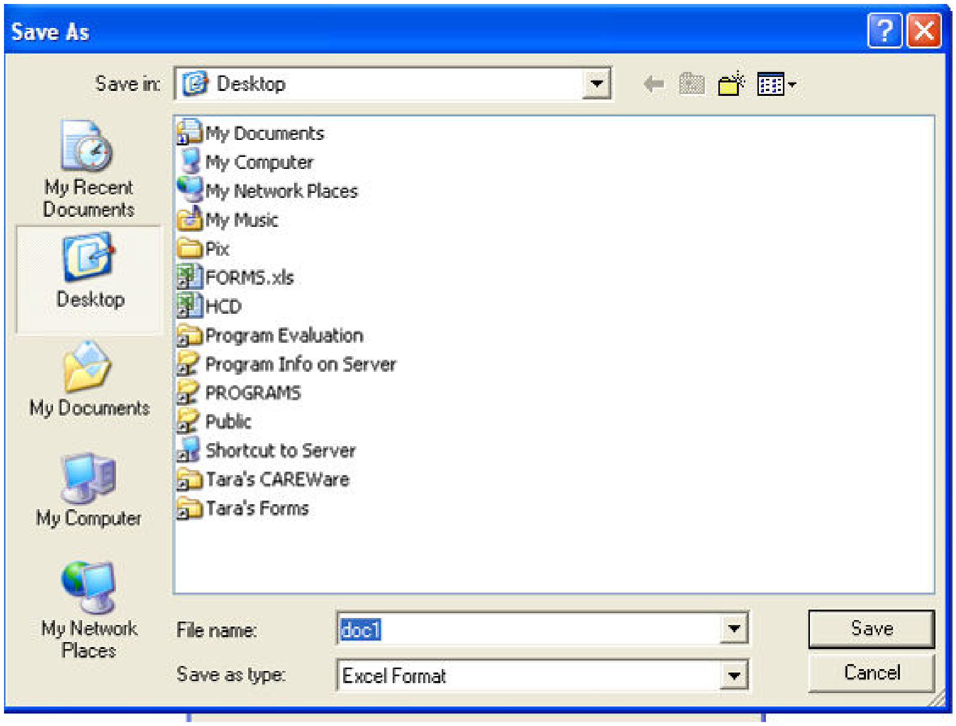


Select “Microsoft Excel Format (XLS)”

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

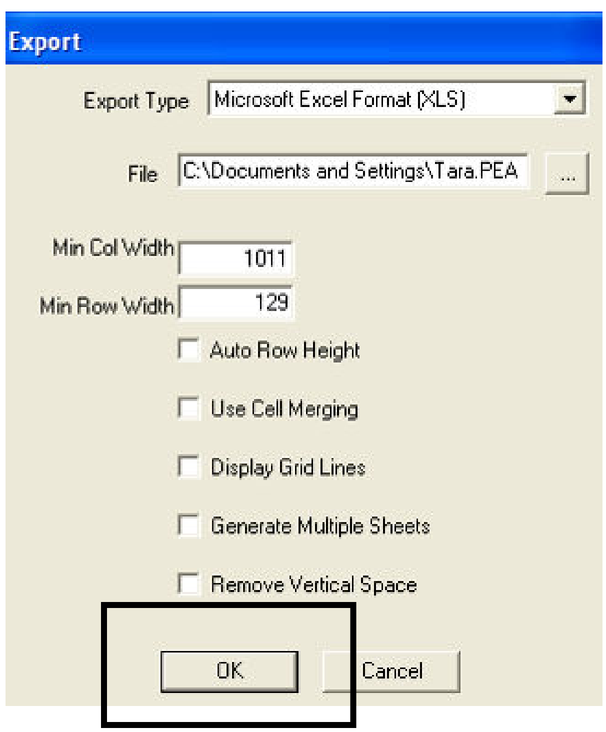


A box like the one below will appear:



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."

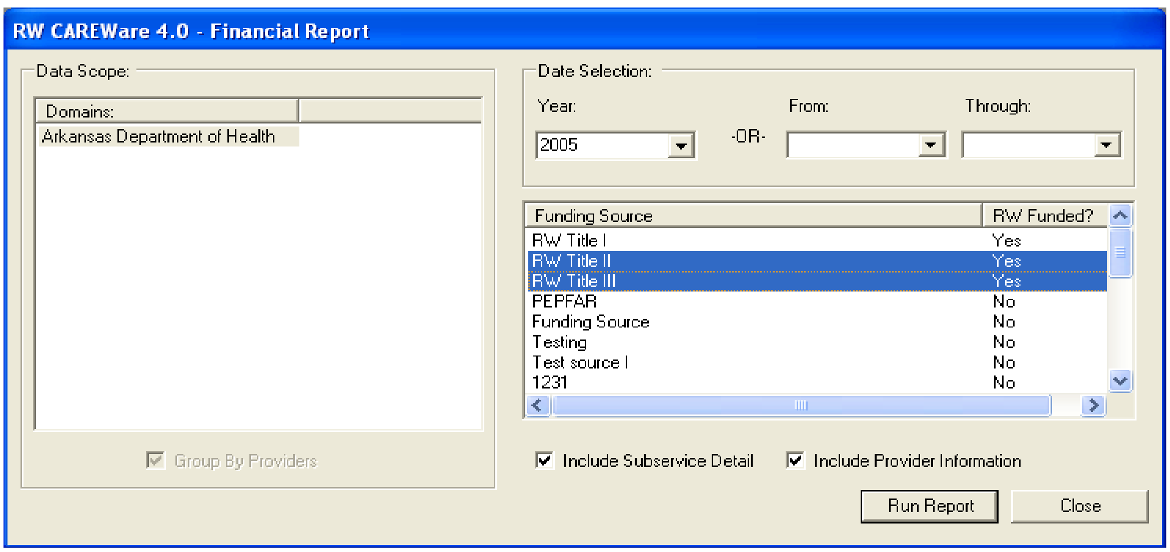


2 - Financial Report

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.



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

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

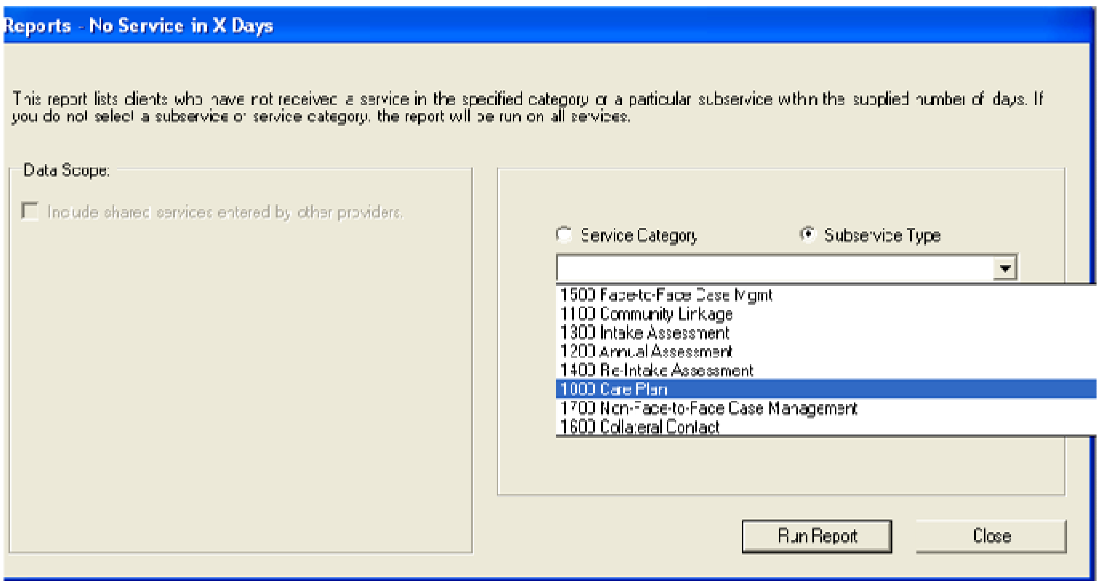
Mental Health Services	Clients:	Units:	Total:	Amount Received:	Not Received:
Competency evaluation	3	3	$270.00	$0.00	$270.00
Emotional Support	1	1	$800.00	$0.00	$800.00
Mental Health Services Totals	4	4	$1,070.00	$0.00	$1,070.00

3 - No Service in X Days

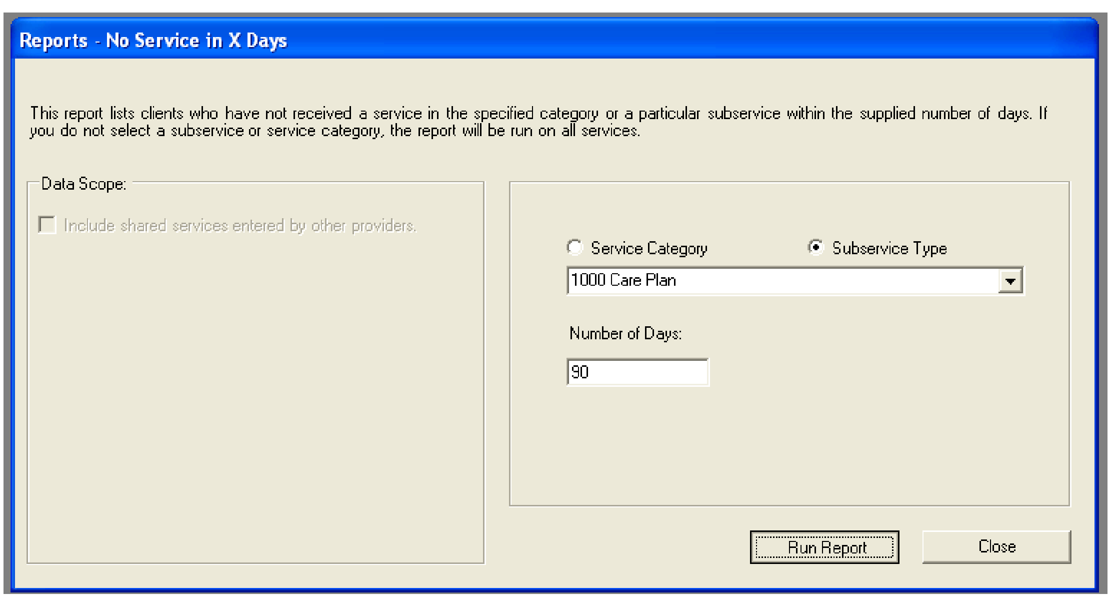
The “No Service in X Days” report allows you to run a report to see which clients have not had a certain type of service in a certain period of time. For instance, you can run a report to see which clients have not had a “care plan” service in the last 90 days (and therefore need a new one).

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

The screen will look like this:



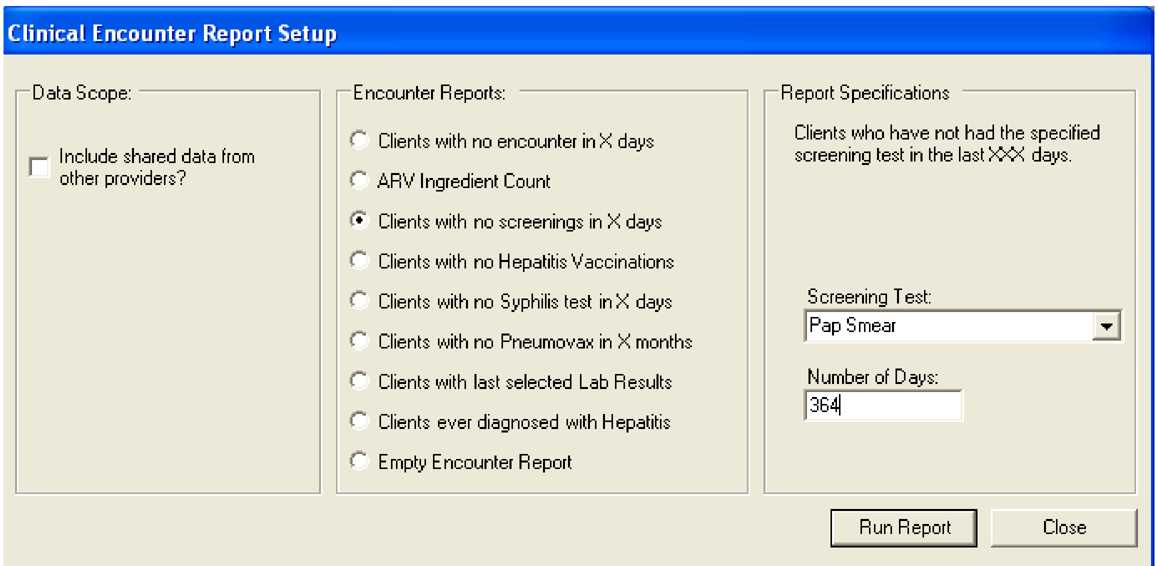
You can select a service category or sub-service type. Then set the number of days and click “Run Report.”



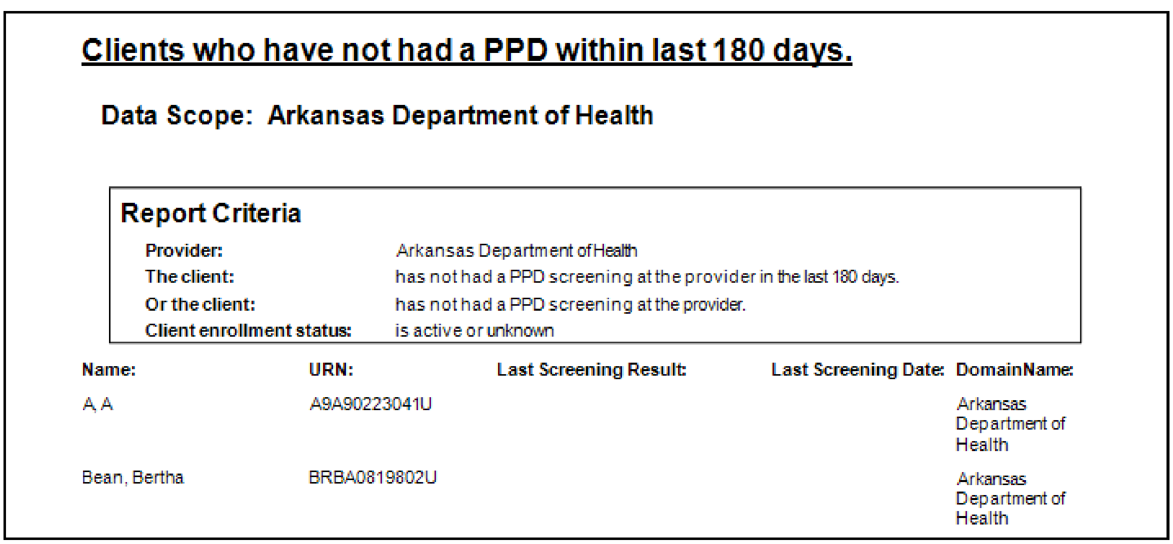
4 - Clinical Encounter Reports and Pre-Prints

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.



Clients who have not had a PPD within last 180 days.

Data Scope: Arkansas Department of Health

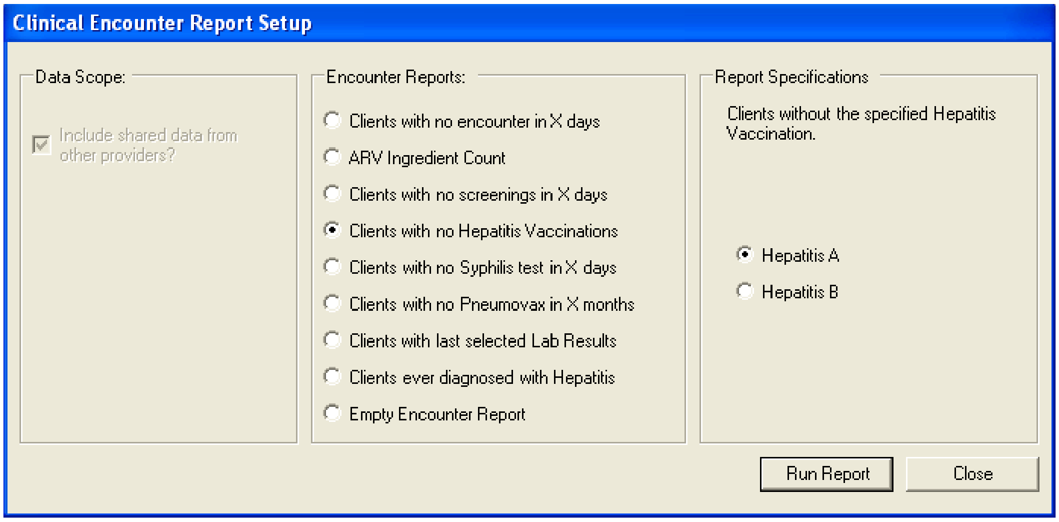
Report Criteria

Provider:	Arkansas Department of Health
The client:	has not had a PPD screening at the provider in the last 180 days.
Or the client:	has not had a PPD screening at the provider.
Client enrollment status:	is active or unknown

Name:	URN:	Last Screening Result:	Last Screening Date:	DomainName:
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:



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, Querty	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

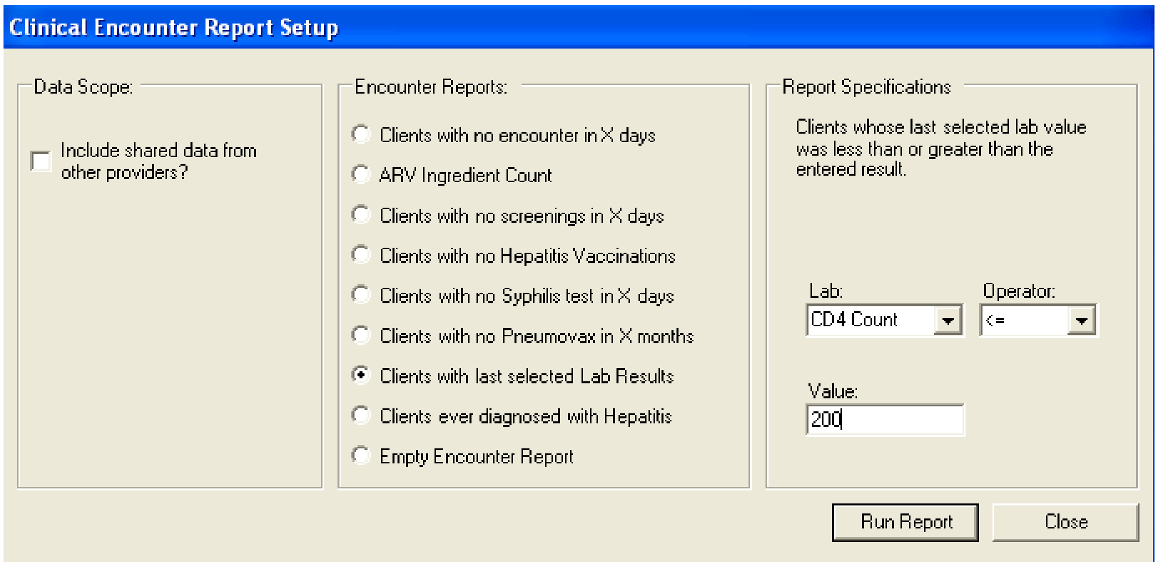
This report will give you the names, URNs, date of the last screening (if any) and the provider who administered the test.

Clients with no pneumovax in X months

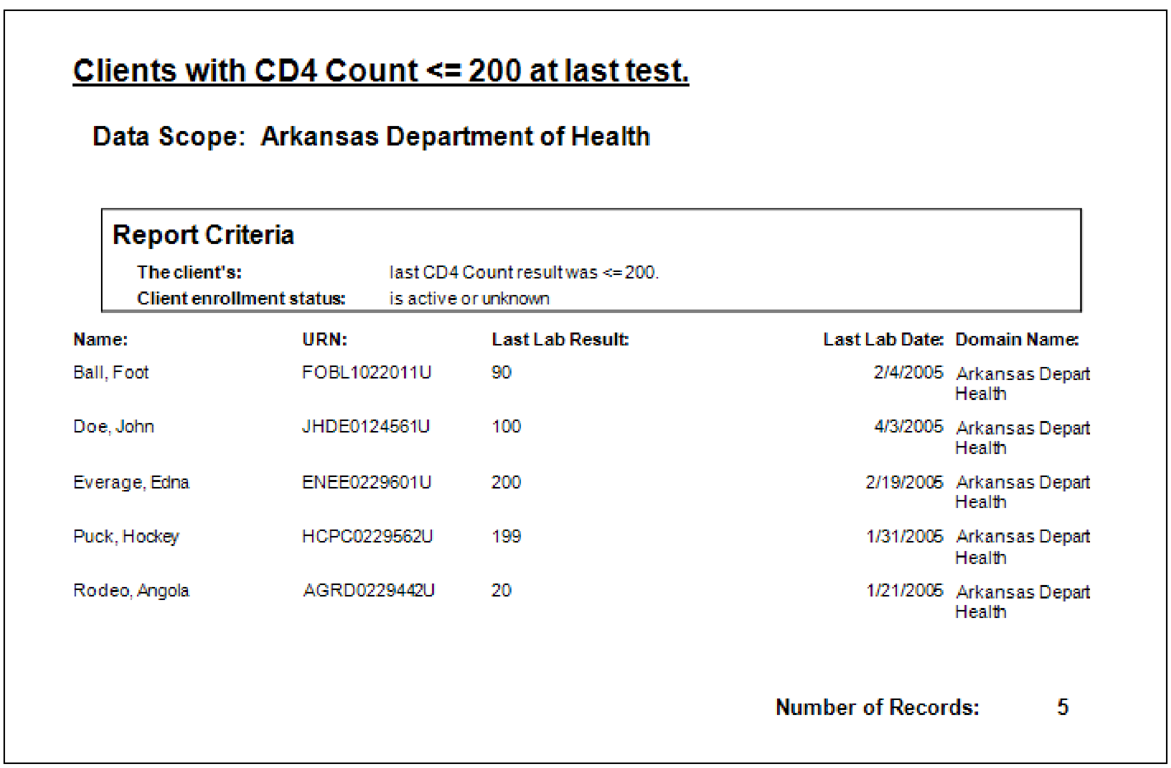
Produces a list of client names, URNs and last pneumovax date (if any). Specifies months rather than days because pneumovax is generally good for five years before it needs to be re-administered.

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 <= 200, or CDC-defined AIDS.



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



Clients with CD4 Count <= 200 at last test.

Data Scope: Arkansas Department of Health

Report Criteria

The client's: last CD4 Count result was <= 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.

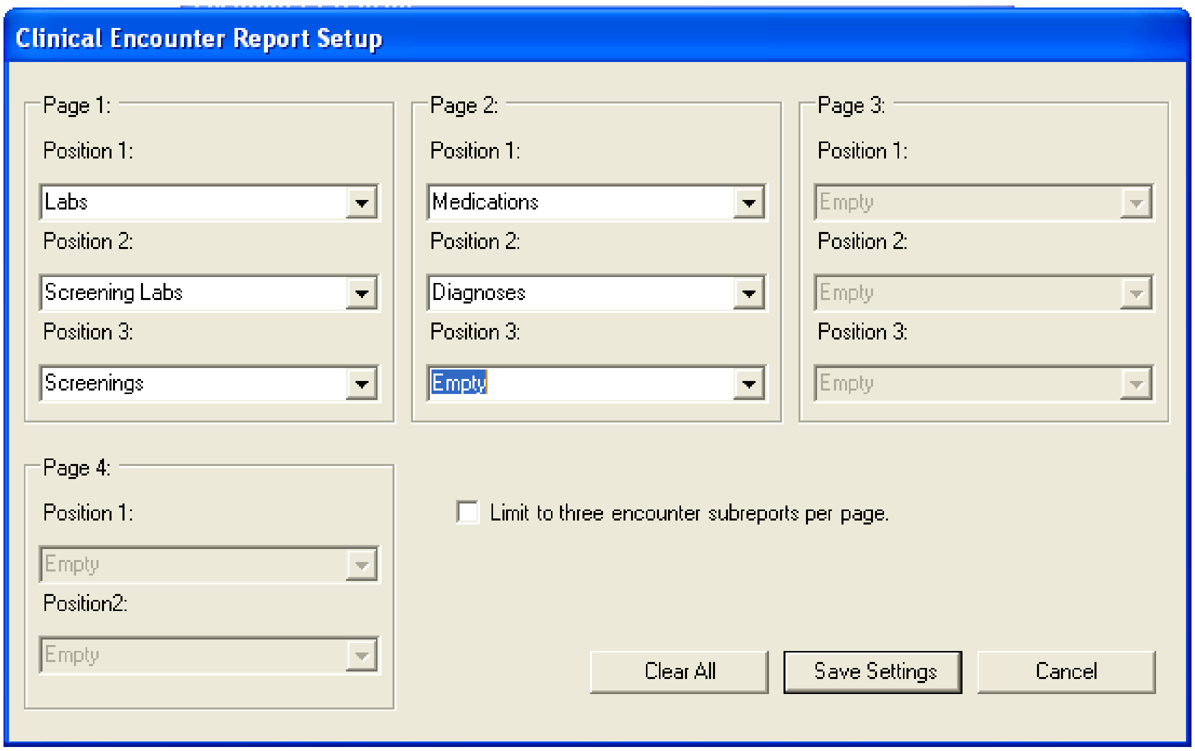
Empty encounter report

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.



- 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 thee-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:	Querty 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/mm³)	4/14/2005	400		
CD4 Percent				
Creatinine (mg/dL)				
Glucose (mg/dL)				
HDL (mg/dL)				
Hemoglobin (g/dL)				
HgA1c mg/dL²				
LDL (mg/dL)				
Platelets (cells/mm³)				
Total Cholesterol (mg/dL)				
Triglycerides (mg/dL)				
Viral Load (Copies/mL)	2/22/2005	<= 49		
WBC (x 10³/mm³)				

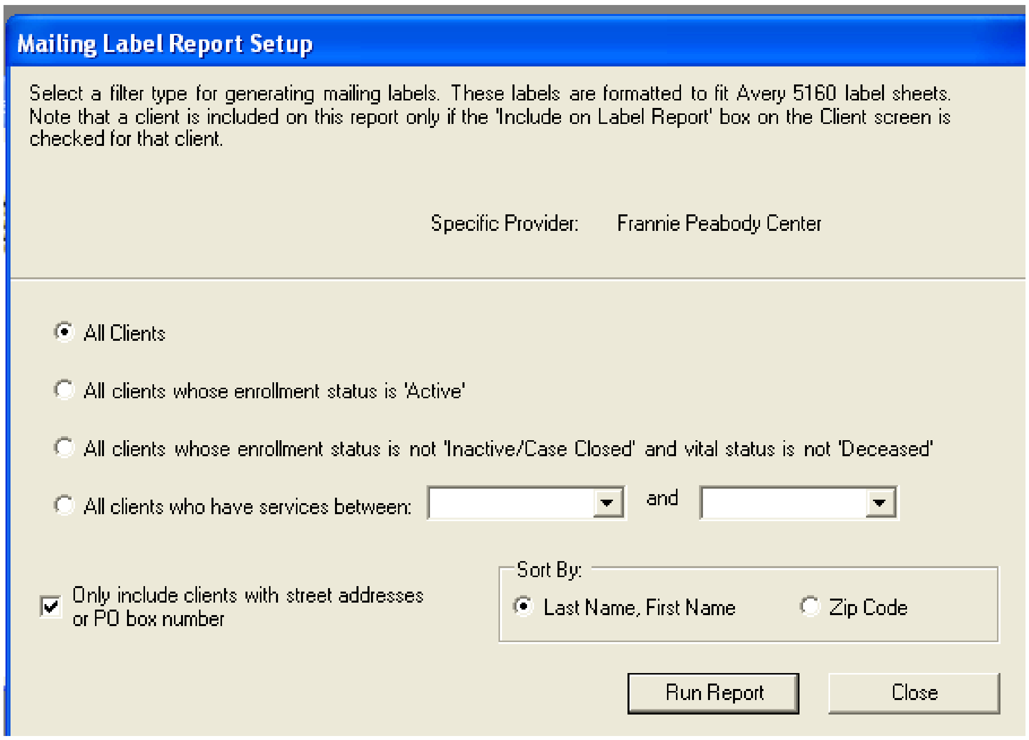
Screening Labs

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

5 - Mailing Labels

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:



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.