Instructions for Data Reports

June 2020, v2.1 Yellow highlights indicate changes since the last version.



This document describes the different data reports that are available in the Massachusetts CAREWare system, and provides instructions on how to run them.

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Navigating to Reports

1. To navigate to the different reports, first log in to Massachusetts CAREWare.

Department of Health and Hu Health Resources and Servi	
	Login Submit
	Login
	Enter your CAREWare Username Username:

2. Click on "Reports" from the main menu.



3. This will bring up a Reports menu of different types of reports that can be run.





Downloading Reports in CAREWare 6

The process of downloading and exporting Custom Reports from CAREWare 6 is different from CAREWare 5.

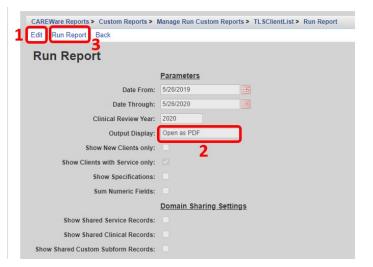
1. Click on "Reports" from the main menu. Select "Custom Reports" and then "Manage/ Run."

CAREWare Reports			
●CAREWare I	Reports	CAREWare Reports > Custom Reports	
HRSA Reports	RSR and ADR	Back	
Custom Reports	Run or manage custom reports	Custom Reports	
Performance Measures	Run or Manage Performance Measures	Manage/Run Custom Reports	Run or manage custom reports
Client Data Reports	Run reports on client information	Export Custom Reports	Export custom report definitions to a portable xml file
Financial Report	Setup and run the financial report	Import Custom Reports from an xml file	Import custom report definitions from a portable xml file
Administrative Reports	Administrative reports and options		
Permission Reports	Run and search permissons held by a user at a point in time		

2. Select the desired report and then select "Manage Run."

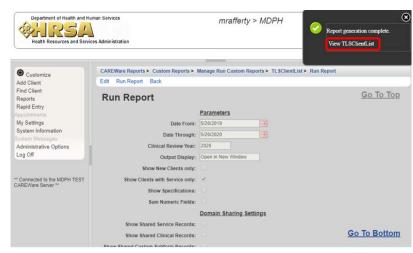
	un cusi	om Repor	ts		
Search:					
Name	CrossTab	Report Type	Description	Read Only	Date Created
TLSClientList		Demographics			7/26/2016 9:58 AM
TLSMissingClientSt		Demographics			7/26/2016 9:58 AM
TLSMissingDemogr		Demographics			7/26/2016 9:58 AM
TLSServiceDetailRe		Service			9/2/2016 8:35 AM
TLSMissingRyanWi		Demographics			9/2/2016 8:35 AM
TLSMissingAnnualF		Demographics			1/9/2019 10:32 AM
List of ISP Services		Service			1/9/2019 10:33 AM
Referral (Medical) C		Service			1/9/2019 10:33 AM
Referral (Medical) C	Yes	Service			1/9/2019 10:33 AM
Referral (Medical) T	Yes	Service			1/9/2019 10:33 AM

 Select "Run Report." Ensure that your output display is set to export correctly by selecting "edit" and then choosing either "Open as PDF" or "Download as CSV." Click "Save" and then "Run report."





 A "Report Generation Complete" box will appear in the top right corner. Select "View [Report Name]."



 The report will open as a new tab. Hover your mouse over the Download icon to download the report.

150a20a3-3494-4225-bda4-ea87b6519182/TLSClientList.pdf				1/2			C 💽 👼 Download
TLSClientList							
Data Scope: Report Start Date: Report End Date:	MDPH 05/26/2019 05/26/2020						
Name;	Gender		Bace/Ohnicity:		Enri Status;	Last Bervice;	
addclent, mgh	Male	08/01/2019		12/01/2019		12/13/2019	
Alcke, Chermont	Male	12/23/1955		12/12/2019		64/14/2020	
asd, and	Male		Not Specified	06/01/2018		09/05/2019	
ASOCC. Test	Transgender MF	01/01/1960		02/11/2019	Incarcerated	04/28/2020	
bet, alpha test	Female		White (non-Hispanic)		Active	12/03/2019	
Brown, Johnny	Male		Not Specified		Active	12/09/2019	
Burry, Buggz	Male	11/18/1986		05/01/2019		09/05/2019	
Burry, Bugs	Maie	12/13/2000		12/13/2019		12/13/2019	
CLTC, Test	Maie	01/01/1970		06/10/2019		06/10/2019	
Q.TC, Test	Main		White (non-Hispanic)	06/10/2019		06/10/2019	
CLTC, Test	Maie	01/01/1979		05/01/2019		06/10/2019	
Davis, Betty	Fernie		Not Specified		Active	04/14/2020	
doe, john	Male		White (non-Hispanic)	12/06/2019		12/05/2019	
Doe, John	Male		Not Specified		Active	12/13/2019	
Doubledecker-Bus, Osgood Jerzy	Main	08/22/1955			Active	12/06/2019	
Edwards, Alyssa	Main		White (non-Hispanic)	12/01/2019		12/12/2019	
elis, melosa	Female	01/10/2006		10/07/2019		12/06/2019	(÷)
fate, eipha	Female	01/01/2018		12/06/2019		12/06/2019	
fred, rogers patrick	Refused to Record	00/09/1999	Other		Active	12/06/2019	-
Goner, Bzabeth G	Fermin	02/24/2001	Asian	03/04/2019	Active	05/64/2019	+
Gomez, Adam	Fermie	01.01/1960	Not Specified		Active	01/16/2020	
Haste, Holy	Female	05/25/1964	Hispanic	10/14/2016	Active	12/13/2019	
hesa, miph	Female	04/01/2000	Hispanic		Active	12/12/2019	(-)
Jacks, Apple	Female	10/13/1993	Hispanic	06/25/2018	Active	12/03/2019	
johnson, kale	Female	09/28/1987	More than one race		Active	12/06/2019	
johnson, liist	Female	01/02/1990	Pacific Islander	12/05/2019	Active	12/06/2019	



File Explorer will open. Save under the "Data (D)" drive, under the folder for your specific agency.

€	► Thi	s PC 🕨 Data (D:) 🕨		∨ Ċ S	earch Data (D:)	 م ر
Organize 🔻 New	/ folde	r				 (
💵 This PC	^	Name	Date modified	Туре	Size	
🛛 📔 Desktop		鷆 _Custom Reports	6/3/2020 5:00 AM	File folder		
👂 📗 Documents		퉬 A Positive Place (Cooley Dickinson)	7/28/2017 11:26 AM	File folder		
🖻 🚺 Downloads		퉬 AIDS Action Committee	7/31/2017 10:44 AM	File folder		
🖻 퉲 Music		鷆 AIDS Project Worcester	11/4/2016 5:45 AM	File folder		
Pictures	≡	鷆 AIDS Support Group of Cape Cod	11/4/2016 5:47 AM	File folder		
👂 📑 Videos		鷆 Baystate Health	7/28/2017 11:26 AM	File folder		
b 📥 Local Disk (C:)		퉬 Berkshire Medical Center (Project Empo	11/4/2016 5:50 AM	File folder		
🔃 Data (D:)		鷆 Boston Medical Center	2/12/2020 9:18 AM	File folder		
v 🛖 Data rest (0.)		鷆 Brockton Neighborhood Health Center	11/4/2016 5:52 AM	File folder		
		퉬 Cape Cod Healthcare IDCS	7/31/2017 10:44 AM	File folder		
🗣 📬 Network	\sim	温 CAREWare Report Testing Folder	6/7/2018 5:00 AM	File folder		
File name:	150a20	a3-3494-4225-bda4-ea87b6519182_TLSClientList	:			
Save as type:	PDF Fil	e				 _

7. Log into the SFTP to retrieve the file. Contact us at <u>carewaremahelpdesk@jsi.com</u> or 617-385-3991 for instructions on how to log on to the SFTP.

Instructions for Data Reports June 2020, v2.1



Custom Reports

There are several Custom Reports that are available in Massachusetts CAREWare. To get to the Custom Reports screen, go to the reports menu and click on "Custom Reports" (below, left). When running Custom Reports, the desired report (1) and date span (2) will need to be specified. When done, click "Run Report" (3) (below, right).

CAF							
۲	CAREW	are Repo	rts			CAREWare Reports > Custom Reports	
	HRSA Reports	RSR an	d ADR			Back	
\subset	Custom Report	s Run or	manage custom repo	rts		Custom Reports	
	Performance Meas	sures Run or	Manage Performance	Measures		Manage/Run Custom Reports	Run or manage custom reports
	Client Data Repo	Run rep	ports on client inform	ation		Export Custom Reports	Export custom report definitions to a portable xml file
	Financial Repo	setup a	nd run the financial r	eport			
	Administrative Rep	Admini	strative reports and o	ptions		Import Custom Reports from an xml file	Import custom report definitions from a portable xml file
	Permission Repo	Run an	d search permissons	held by a user at a po	pint in time		
						CAREWare Reports > Custom Reports	> Manage Run Custom Reports > TLSClientList > Run Report >
REWare Reports >	Custom Repor	ts > Manage Run	Custom Reports			Save Cancel	> Manage Run Custom Reports > TLSClientList > Run Report >
REWare Reports >			Custom Reports ack Help Print o	r Export		Save Cancel	> Manage Run Custom Reports > TLSClientList > Run Report >
nage Run Add	Delete Mak	e Read Only B	ack Help Printo	r Export		Save Cancel	
anage/Ru	Delete Mak	e Read Only B	ack Help Printo	r Export		3 Run Report	Parameters
age Run Add anage/Ru	Delete Mak	e Read Only Ba	ack Help Printo ts		Date Created	Save Cancel 3 Run Report 2 Date F	Parameters rom: 11/1/2017
nage Run Add anage/Ru ch: e	Delete Mak	e Read Only B	ack Help Printo	r Export Read Only	Date Created 7/26/2016 9:58 AM	Save Cancel 3 Run Report 2 Date F Date Thro	Parameters rom: 11/1/2017
Add anage/Ru anage/Ru ch: ClientList	Delete Mak	Report Type	ack Help Printo ts			Save Cancel 3 Run Report 2 Date F	Parameters rom: 11/1/2017 2019 wgh: 6/26/2019 2019
Add anage/Ru anage/Ru ch: ClientList MissingClientSt	Delete Mak	Report Type Demographics	ack Help Printo ts		7/26/2016 9:58 AM	Save Cancel 3 Run Report 2 Date F Date Thro Clinical Review	Parameters rom: 11/1/2017
Add anage Run Add anage/Ru ch: ClientList MissingClientSt MissingDemogr	Delete Mak	Report Type Demographics	ack Help Printo ts		7/26/2016 9:58 AM 7/26/2016 9:58 AM	Save Cancel 3 Run Report 2 Date F Date Thro Clinical Review	Parameters rom: 11/1/2017 ugh: 6/26/2019 Year: 2019 Play: Open in New Window 2
Add Anage Run Add Anage Run Add Anage/Ru ch: ee ClientList MissingClientSt MissingDemogr ServiceDetailRe	Delete Mak	Report Type Demographics Demographics Demographics	ack Help Printo ts		7/26/2016 9:58 AM 7/26/2016 9:58 AM 7/26/2016 9:58 AM	Save Cancel 3 Run Report 2 Date F Date Thro Clinical Review Output Dis Show New Clients	Parameters rom: 11/1/2017 uph: 6/26/2019 Year: 2019 Parameters 2019 Copen in New Window Copen in Ne
Add anage Run Add anage/Ru ee ClientList MissingClientSt MissingDemogr ServiceDetailRe MissingRyanWi	Delete Mak	e Read Only B m Report Report Type Demographics Demographics Demographics Service	ack Help Printo ts		7/26/2016 9:58 AM 7/26/2016 9:58 AM 7/26/2016 9:58 AM 9/2/2016 8:35 AM	Save Cancel 3 Run Report 2 Date F Date Thro Clinical Review Output Dis Show New Clients Show Clients with Service	Parameters rom: 11/1/2017 sugh: 6/26/2019 Year: 2019 play: Open in New Window only: □ only: ✓
Add	Delete Mak	e Read Only B B Report Type Demographics Demographics Service Demographics	ack Help Printo ts		7/26/2016 9:58 AM 7/26/2016 9:58 AM 7/26/2016 9:58 AM 9/2/2016 8:35 AM 9/2/2016 8:35 AM	Save Cancel 3 Run Report 2 Date F Date Thro Clinical Review Output Dis Show New Clients	Parameters rom: 11/1/2017 sugh: 6/26/2019 Year: 2019 play: Open in New Window only: □ only: ✓
Add Anage Run Add Anage/Ru Ch: ClientList MissingClientSt MissingDemogr ServiceDetailRe MissingRyanWi MissingAnnualF of ISP Services	Delete Mak	e Read Only B B Report Type Demographics Demographics Service Demographics Demographics	ack Help Printo ts		7/26/2016 9:58 AM 7/26/2016 9:58 AM 7/26/2016 9:58 AM 9/2/2016 8:55 AM 9/2/2016 8:35 AM 1/9/2019 10:32 AM	Save Cancel 3 Run Report 2 Date F Date Thro Clinical Review Output Dis Show New Clients Show Clients with Service	Parameters rom: 11/1/2017 rugh: 6/26/2019 Year: 2019 yop: Open in New Window yonly: □ only: ✓
Add	Delete Mak	e Read Only B Com Report Report Type Demographics Demographics Demographics Demographics Demographics Service	ack Help Printo ts		7/26/2016 9:58 AM 7/26/2016 9:58 AM 7/26/2016 9:58 AM 9/2/2016 8:35 AM 9/2/2016 8:35 AM 1/9/2019 10:32 AM 1/9/2019 10:33 AM	Save Cancel 3 Run Report 2 Date F Date Thro Clinical Review Output Dis Show New Clients Show Specificat	Parameters rom: 11/1/2017 rugh: 6/26/2019 Year: 2019 yop: Open in New Window yonly: □ only: ✓
Add Anage Run Add Anage/Ru Add Anage/Ru ClientList ClientList MissingClientSt MissingChanualF of ISP Services arral (Medical) C arral (Medical) C arral (Medical) C	Delete Mak un Custo CrossTab	e Read Only B Com Report Report Type Demographics Demographics Demographics Demographics Demographics Service Service	ack Help Printo ts		7/26/2016 9:58 AM 7/26/2016 9:58 AM 7/26/2016 9:58 AM 9/2/2016 8:35 AM 9/2/2016 8:35 AM 1/9/2019 10:32 AM 1/9/2019 10:33 AM 1/9/2019 10:33 AM	Save Cancel 3 Run Report 2 Date F Date Thro Clinical Review Output Dis Show New Clients Show Specificat	Parameters rom: 11/1/2017 nugh: 62/2019 62/2019 Image: Comparing Co
Add Anage Run Add Anage/Ru Add Anage/Ru ClientList ClientList MissingClientSt MissingChanualF of ISP Services arral (Medical) C arral (Medical) C arral (Medical) C	Delete Mak	e Read Only B PAREPORT Report Type Demographics Demographics Demographics Demographics Demographics Demographics Service Service Service	ack Help Printo ts		7/26/2016 9:58 AM 7/26/2016 9:58 AM 7/26/2016 9:58 AM 9/2/2016 8:35 AM 9/2/2016 8:35 AM 1/9/2019 10:32 AM 1/9/2019 10:33 AM 1/9/2019 10:33 AM 1/9/2019 10:33 AM	Save Cancel 3 Run Report 2 Date F Date Thro Clinical Review Output Dis Show New Clients Show Specificat Sum Numeric Fi Show Shared Service Reco	Parameters rom: 11/1/2017 uph: 62/6/2019 62/6/2019 Image: Comparing
	Delete Mak un Custo CrossTab	e Read Only B PAREPORT Report Type Demographics Demographics Demographics Demographics Demographics Demographics Service Service Service	ack Help Printo ts		7/26/2016 9:58 AM 7/26/2016 9:58 AM 7/26/2016 9:58 AM 9/2/2016 8:35 AM 9/2/2016 8:35 AM 1/9/2019 10:32 AM 1/9/2019 10:33 AM 1/9/2019 10:33 AM 1/9/2019 10:33 AM	Save Cancel 3 Run Report 2 Date F Date Thro Clinical Review Output Dis Show New Clients Show Verificat Show Specificat Sum Numeric Fil	Parameters rom: 11/1/2017 uph: 626/2019 826/2019 201 year: 2019 play: Open in New Window play: Open in New Window only:

TLS Client List

> This report provides a list of clients and various client details. It is especially helpful if you need a list of clients that have received services during a particular time period. We recommend running this report on a monthly basis, before the data submission deadline. It provides a list of clients, including the date for their last service visit. It also shows gender, date of birth, race/ethnicity, enrollment date and enrollment status.

- 1. Select TLSClientList from the list of reports and click "Manage and Run."
- 2. Modify the date range to the desired range.
- 3. Click "Save" and then "Run Report".



4. The report will look like this:

TLSClientList

Data Scope: Report Start Date: Report End Date:	MDPH 11/01/2017 06/26/2019					
Name:	Gender:	DOB:	Race/Ethnicity:	Enrl Date:	Enrl Status:	Last Service:
AA, BB	Female	11/11/1966	Not Specified	11/29/2018	Active	11/29/2018
asd, asd	Male	01/01/1970	Not Specified	06/01/2018	Active	09/05/2019
asd, asd asd	Male	10/10/1970	Not Specified	01/08/2019	Active	01/08/2019
ASGCC, Test	Transgender MtF	01/01/1960	Hispanic	02/11/2019	Incarcerated	02/11/2019
bet, alpha test	Female	07/08/1994	White (non-Hispanic)		Active	03/12/2019
Bond, James L	Male	10/07/1977	White (non-Hispanic)	03/06/2012	Active	12/20/2018
Bondtest, James	Male	05/10/1963	Black or African-American	01/30/2018	Active	01/30/2018
Brady, Thomas Greatest	Male	06/01/1980	White (non-Hispanic)	12/14/2017	Active	12/14/2017
Brady, Tom M	Transgender FtM	01/01/1975	Pacific Islander	01/30/2018	Active	06/01/2018
careware, chris	Female	01/01/1980	Hispanic	04/17/2018	Active	04/17/2018
Careware, Mass Boston	Male	06/25/2000	Hispanic	06/19/2018	Active	06/26/2018
cherry, coke	Male	06/29/1980	Hispanic	06/25/2018	Active	06/25/2018
CLTC, Test	Male	01/01/1960	White (non-Hispanic)	06/10/2019	Active	06/10/2019
CLTC, Test	Male	01/01/1970	Hispanic	06/10/2019	Removed	06/10/2019
CLTC, Test	Male	01/01/1979	Hispanic	05/01/2019	Removed	06/10/2019
cruz, trippy doo	Female	03/12/1983	Hispanic	04/11/2018	Active	04/17/2018

TLS Missing Annual Review

This report identifies clients that are missing annual review fields. MDPH requires that annual review fields (insurance, housing, household size, and income) be updated every six months. To make sure your clients' data are up to date, provider agencies should run this report routinely, using a six month (180 day) date span. Clients whose data have not been updated within this date span will appear in the report. The client's case manager will also show on the report.

- 1. Select TLSMissingAnnualReview from the list of reports.
- 2. Modify the date range to the desired range.
- 3. Click on "Run Report".

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4. The report will look like this:

TLSMissingAnnualRev	view						
Data Scope:	MDPH						
Name:	URN:	Primary Ins:	Housing Arr:	HH Size:	HH Income:	PovertyLev:	Case Manager Name (Cln. Custom):
AA, BB	B9A91111662U						
asd, asd	ADAD0101701U						HI
asd, asd asd	ADAD1010701U						
Berry, Mary	MRBR0204252U						
Bobcat, Bates	BTBB0101162U						
Bond, James L	JMBN1007771U	Medicaid		1	7900.0000	66%	Q
Bondtest, James	JMBN0510631U	Private - Employer		4	50000.0000	199%	
Bouffet, Phoebe	POBU0613704U						
Brookshire, Stacey	SABO0202732U	Medicare Part A/B		1	12000.0000	101%	
Brown, Sally	SLBO0210932U						
Canes, John	JHCN0601691U	Medicaid	Temporary	2	100000.0000	624%	
Castellano, Lisa	LSCS0628702U						
Client, Duplicate	DPCI0101011U						
Crane, Ichabod Tanytown	IHCA0112681U						
Cruz, Maria	MRCU1022672U						
Cruz, Maria	MRCU0522002U						
cruz, trippy doo	TICU0312832U	Medicare Part D	Stable/Permanent				
Damon, Matt	MTDM0303701U						
davis, samuel	SMDV0627941U						
decaprio, leonardo	LODC0423791U	Medicare Part D		2	100000.0000	624%	

TLS Missing Client Status

This report identifies clients that are either missing an enrollment status, HIV status, HIV Risk Factor, Vital status, or Date closed.

- 1. Select TLSMissingClientStatus from the list of reports.
- 2. Modify the date range to the desired range.
- 3. Click on "Run Report".
- 4. The report will look like this:

TLSMissingClientStatus							
Data Scope: Report Start Date: Report End Date:	MDPH 11/01/2017 11/11/2019						
Name:	Enrl Date:	<u>Enrl Status:</u>	HIV Status:	<u>HIV Risk</u> Factor:	<u>Vital</u> <u>Status:</u>	HIV Date:	AIDS Date:
AA, BB	11/29/2018	Active	Unknown	Not Specified	Alive		
asd, asd	06/01/2018	Active	Unknown	Not Specified	Alive		
asd, asd asd	01/08/2019	Active	Unknown	Not Specified	Alive		
ASGCC, Test	02/11/2019	Incarcerated	CDC defined AIDS	MSM and IDU	Deceased	02/11/2019	02/11/2019
bet, alpha test		Active	Unknown	Not Specified	Alive		
Bond, James L	03/06/2012	Active	Unknown	Transfusion	Alive		
Brady, Tom M	01/30/2018	Active	HIV-positive (not AIDS)	Not Specified	Alive		
Bunny, Buggz	05/01/2019	Active	HIV-negative (affected)	MSM	Alive		
Careware, Mass Boston	06/19/2018	Active	CDC defined AIDS	MSM and IDU	Deceased	06/26/2018	06/26/2018
CLTC, Test	06/10/2019	Active	HIV-positive (not AIDS)	Not Specified	Alive	06/03/2019	
CLTC, Test	06/10/2019	Removed	CDC defined AIDS	MSM and IDU	Deceased	06/10/2019	06/10/2019
CLTC, Test	05/01/2019	Removed	HIV-negative (affected)	MSM and IDU	Deceased		
Doe, Jim	06/26/2018	Active	HIV-positive (AIDS status	Not Specified	Alive		
Duck, Donald	02/20/2018	Active	Unknown	Not Specified	Alive		
Gomez, Adam	04/17/2018	Active	CDC defined AIDS	Not Specified	Alive		04/17/2018
Guy, Some Weird	06/07/2019	Active	CDC defined AIDS	Not Specified	Alive	01/23/2019	06/03/2019
hernandez, travis	06/26/2018	Active	HIV-negative (affected)	MSM and IDU	Alive		



TLS Missing Demographics

This report shows clients that are missing demographic information such as gender, race, and address.

- 1. Select TLSMissingDemographics from the list of reports.
- 2. Modify the date range to the desired range.
- 3. Click on "Run Report".
- 4. The report will look like this:

TLSMissingDemographics

Data Scope: Report Start Date: Report End Date:	MDPH 11/01/20 11/11/20						
Name:	Gender:	Hisp.:	Race:	Address:	City:	County:	State:
AA, BB	Female	No	Not Specified				
asd, asd	Male	No	Not Specified				
asd, asd asd	Male	No	Not Specified				
bet, alpha test	Female	No	White	33 Farnsworth	Boston		Massachusetts
CLTC, Test	Male	Yes	More than one race	44 Farnsworth St	Boston		Massachusetts
Duck, Donald	Male	No	Not Specified				
Gomez, Adam	Male	No	Not Specified				
Lopez, Carla	Female	Yes	Not Specified	123 Oak St	Boston		Massachusetts
Mercado, Rosa M	Female	No	Pacific Islander	24 Arbroth St	Dor	Essex	Massachusetts
Mouse, Minnie	Female	No	Not Specified				
Obi, first j	Female	No	More than one race	no 1 Dr street worcester	worcseter		Massachusetts
Patrick, Bird Saint	Unknown	No	Pacific Islander	44 sesame street	New York	Coos	New Hampshire
Roshan, Andrew	Transgender FtM	No	Not Specified				
S, B	Female	Yes	More than one race				

TLS Missing Ryan White Eligibility

This report shows a list of clients that are not eligible for receiving Ryan White services. If your agency receives funding through the MA Department of Public Health and submits RSR report to HRSA, we recommend running this report before you submit the RSR to make sure it includes all of your Ryan White eligible clients. That way all of your eligible clients will be reported to HRSA.

- 1. Select TLSMissingRyanWhiteEigibility from the list of reports.
- 2. Modify the date range to the desired range.
- 3. Click on "Run Report".
- 4. The report will look like this:

${\sf TLSM} is sing Ry an White Eligibility$

Data Scope: Report Start Date: Report End Date:	MDPH 03/05/201 11/11/2019	-					
Name:	Gender:	DOB:	Race/Ethnicity:	Enrl Date:	Enrl Status:	Is RW Eligible?:	Last RW
							Service:
asd, asd	Male	01/01/1970	Not Specified	06/01/2018	Active	No	09/05/2019
asd, asd asd	Male	10/10/1970	Not Specified	01/08/2019	Active	No	01/08/2019
bet, alpha test	Female	07/08/1994	White (non-Hispanic)		Active	No	03/12/2019
Bond, James L	Male	10/07/1977	White (non-Hispanic)	03/06/2012	Active	No	12/20/2018
Bouffet, Phoebe	Transgender MtF	06/13/1970	More than one race		Active	No	06/05/2017
Brady, Tom M	Transgender FtM	01/01/1975	Pacific Islander	01/30/2018	Active	No	06/01/2018



TLS Service Detail Report

This report displays a list of services that clients have received. It includes the client name, service date, category and subservice for each service provided. The quantity field shows the number of units for each subservice.

- 1. Select TLSServiceDetailReport from the list of reports.
- 2. Modify the date range to the desired range.
- 3. Click on "Run Report".
- 4. The report will look like this:

TLSServiceDetailReport

Data Scope: Report Start Date: Report End Date:	MDPH 03/05/2017 11/11/2019					
Name:	Srv Date:	Qty:	Unit Price:	Category:	Subservice:	Service Total:
AA, BB	11/29/2018	1	0	Medical Case Management	MCM Linkage to medical care	0
AA, BB	11/29/2018	1	0	Non CARE Act Service	CLTC Intake/Initial Assessment	0
AA, BB	11/29/2018	2	0	Non CARE Act Service	CLTC Referrals (non medical)	0
asd, asd	09/05/2019	1	0	Non CARE Act Service	CLTC Linkage to Health	0
asd, asd	09/05/2019	1	0	Non CARE Act Service	CLTC Linkage to MAT	0
asd, asd	12/20/2018	2	0	Medical Case Management	MCM ISP/Care Plan	0
asd, asd	12/13/2018	1	0	Medical Case Management	MCM ISP/Care Plan	0
asd, asd	06/01/2018	1	0	Medical Case Management	MCM Acuity assessment	0
asd, asd	06/01/2018	3	0	Medical Case Management	MCM Referrals (non medical)	0
asd, asd	06/01/2018	1	0	Non CARE Act Service	ARCH Acuity Reassessment	0
asd, asd	05/15/2018	1	0	Medical Case Management	MCM Referrals (non medical)	0
asd, asd	11/16/2017	1	0	Medical Case Management	MCM Referrals (non medical)	0
asd, asd asd	01/08/2019	1	0	Medical Case Management	MCM Acuity Reassessment	0

Care Access Service Detail Report

This report displays a list of services that Care Access clients have received. It includes the client name, service date, category and subservice for each service provided. The quantity field shows the number of units for each subservice.

- 1. Select TLSServiceDetailReport_CareAccess from the list of reports.
- 2. Modify the date range to the desired range.
- 3. Click on "Run Report".
- 4. The report will look similar to the screenshot above, but will only show Care Access clients



Viral Suppression \leq 199

This report returns a list of clients whose last Viral Load lab value was \leq 199.

- 1. Select Viral Load Suppression \leq 199 from the list of reports.
- 2. Modify the date range to the desired range.
- 3. Click on "Run Report".
- 4. The report will look like this:

e			
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1	· · · · 2		3
2 Viral Load Supp	ression <=1	99	
Data Scope:	NDPH		
Name:	Last VL Lab Date:	Last VL Operator	
	Lub Dutor	operation	Value:
asd, asd	6/1/2018	=	199
Bondtest, James	1/30/2018	>	50
Careware, Mass Boston	6/26/2018	=	10
cherry, coke	6/25/2018	<	20
colon, maria	6/25/2018	=	50
Foley, Patricia Ann	1/30/2018	<	20
Jacks, Apple	6/25/2018	<	20
Mele, Jane	1/30/2018	<	20
Mercado, Rosa M	1/30/2018	<	20
Pepe, Juan DeLaLuma	1/30/2018	<	20
Testing, Elmo	6/25/2018	<	20

Viral Suppression ≥ 200

- 1. This report returns a list of clients whose last Viral Load lab value was \geq 200.
- 2. Select Viral Load Suppression \geq 200 from the list of reports.
- 3. Modify the date range to the desired range.
- 4. Click on "Run Report".
- 5. The report will look like this:

Multiple Performance Measures Report 9/1/2018

Selection:	MDPH			
Code:	Name:	Numerator:	Denominator:	Percent:
MA02	Clients with VL >=200	0	33	0.00%



Viral Load (All Results)

This report returns a complete list of viral loads for each client. Run this for at least a two-year time period to capture a history of values over time.

- 1. Select Viral Load List (All Results) from the list of reports.
- 2. Modify the date range to the desired range.
- 3. Click on "Run Report".
- 4. The report will look like this:

File			
	💾 View As PDF 🍓 Print 🗅 🏘 🛽		Q 100 % ▼ 1/2 © Backward Ø Forward
] 3] 4] 5] 6 [7]
	Viral Load List (A		
1		an Results)	
-	Data Scope:	MDPH	
-	Dua scope.		
1	Name:	Lab Date:	Lab Result:
-	Von Trapp, Maria	9/6/2016	400
-	Smith, Granny	9/6/2016	75
1	Saruman, Manycolors	9/6/2016	0
- 2	Simon, Simple S	9/6/2016	20
1	Snow, Jon	9/6/2016	20
-	Gemini, Raja	9/6/2016	20
-	Test1, Test1	5/30/2017	10000
1	Affleck, Ben	6/5/2017	1
3	asd, asd	4/12/2018	4660
	Mele, Jane	1/30/2018	20
-	Mercado, Rosa M	1/30/2018	20
1	Foley, Patricia Ann	1/30/2018	20
- 4	Pepe, Juan DeLaLuma	1/30/2018	20
-	Bondtest, James	1/30/2018	50
-	asd, asd	6/1/2018	199
-	asd, asd	5/31/2018	12
1	asd, asd	5/9/2018	260
5	Martinez, Marla	9/6/2016	20
-	OGallagher, Caitin	9/6/2016	20
-	Smith. Test	5/2/2017	10000
_			<u>/</u>



Referral (Medical/Non-Medical) Completion

This report shows the status of medical and non-medical referrals by client. Data entry reminder: make sure to fill in the "Status" and the "Confirmation of referral date".

- 1. Select Referral (Medical/Non-Medical) Completion from the list of reports.
- 2. Modify the date range to the desired range.
- 3. Click on "Run Report"
- 4. The report will look like this:

Referral (Medical) Completion (Agency)							
Data Scope:	MDPH						
Report Start Date:	03/05/2017						
Report End Date:	11/11/2019						
Name:	Srv Short Name:	Linkage Type (Srv. Custom):	Srv Date:				
AA, BB	MCM Linkage to medical care	HCV	11/29/2018				
Johson, James	MCM Linkage to medical care	HIV	01/10/2019				
				Number of Records : 2			
				(Count is unduplicated across providers)			
* - Restricted Field							

Referral (Medical/Non-Medical) Completion Percentage

This report generates the percentage of closed, open, or blank (not specified) for medical and nonmedical referrals in aggregate.

- 1. Select Referral (Medical/Non-Medical) Completion Percentage from the list of reports.
- 2. Modify the date range to the desired range.
- 3. Click on "Run Report.
- 4. The report will look like this:

Referral (Medical) Completion Percentage

Data Scope:	MDPH		
Report Start Date:	03/05/2017		
Report End Date:	11/11/2019		
Linkage Status (Srv. Cus	stom)Crosstab		
Linkage Status (Srv. Custom)) <u>:</u> <u>Total:</u>	<u>Col. %:</u>	
Not Specified	138	96.5	
Closed	1	0.7	
Open	4	2.8	
Total:	143	100.0	
		Number of Re	cords : 4
		(Count is unduplicated across p	providers)
* - Restricted Field			



Referral (Medical/Non-Medical) Type Percentage

This report generates the percentage of medical and non-medical referrals by type (e.g., legal, mental health, transportation, etc.) in aggregate.

- 1. Select Referral (Medical/Non-Medical) Type Percentage from the list of reports.
- 2. Modify the date range to the desired range.
- 3. Click on "Run Report".
- 4. The report will look like this

Data Scope:	MDPH	
eport Start Date:	03/05/2017	
Report End Date:	11/11/2019	
inkage Type (Srv. Custo	n)Crosstab	
<u>.inkage Type (Srv. Custom):</u>	Total:	<u>Col. %:</u>
lot Specified	138	96.5
ICV	4	2.8
IV	1	0.7
Fotal:	143	100.0
		Number of Records
		(Count is unduplicated across provid

Changes in Acuity

This report can be used to identify changes in Acuity scores over time for individual clients. Run this report for a two-year time period to see a history of values. The report is sorted by case manager name.

- 1. Select Referral (Medical/Non-Medical) Type Percentage from the list of reports.
- 2. Modify the date range to the desired range.
- 3. Click on "Run Report".
- 4. The report will look like this:

4 Changes in Acuity (Agency)

Data Scope:	MDPH				
Name:	Srv Date:	Srv Short Name:	Total Acuity Score:	Level of Acuity:	Case Manager Name (Cln. Custom):
Bond, James L	3/18/2017	MCM Acuity Reassessment	30	High (29-42)	Q
Bond, James L	9/28/2016	MCM Acuity Reassessment	15	Moderate (15-28)	Q
asd, asd	6/1/2018	MCM Acuity assessment	8	Basic (1-14)	н
asd, asd	6/1/2018	ARCH Acuity Reassessment	2	High (29-42)	н
Affleck, Ben	9/7/2016	MCM Acuity Reassessment			
Bouffet, Phoebe	6/5/2017	MCM Acuity Reassessment	13	High (29-42)	
Brady, Thomas Greatest	6/5/2017	MCM Acuity Reassessment			
Brady, Tom M	6/1/2018	ARCH Acuity Reassessment	7	High (29-42)	
Brady, Tom M	1/30/2018	ARCH Acuity Reassessment			
Breeze, Yolanda	9/7/2016	MCM Acuity Reassessment			
Carter, Lisa Marie	9/7/2016	MCM Acuity Reassessment			
cherry, coke	6/25/2018	MCM Acuity assessment			
Claus, Michael	9/7/2016	MCM Acuity Reassessment			
Cleveland, Brown Indian	12/6/2016	MCM Initial acuity as essment			
Core, Olivia	9/6/2016	MCM Acuity Reassessment			
Dee, Mark	9/6/2016	MCM Acuity Reassessment			
Duck, Donald	9/7/2016	MCM Acuity Reassessment			



List of ISP Services

This report returns a list of ISP/Care plans within the report period, along with client information. This report is sorted by Case Manager name.

- 1. Select List of ISP Services from the list of reports.
- 2. Modify the date range to the desired range.
- 3. Click on "Run Report".
- 4. The report will look like this:

List of ISP Services

Data Scope: Report Start D Report End Da		MDPH 03/05/2017 11/11/2019			
First Name:	Last Name:	Srv Date:	Srv Short Name:	Case Manager Name (Cln. Custom):	
asd	asd	12/20/2018	MCM ISP/Care Plan	н	
asd	asd	12/13/2018	MCM ISP/Care Plan	н	
asd	asd	12/20/2018	MCM ISP/Care Plan	н	
James	Bond	12/20/2018	MCM ISP/Care Plan	Q	
					Number of Records : 4
					(Count is unduplicated across providers)
* - Restricted F	ield				

Aggregate Housing Counts (6 months)

This report returns aggregated counts and percentages for the last housing status entered.

- 1. Select Aggregate Housing Counts (6 months) from the list of reports.
- 2. Set the date range to a 6 month span. **Important**: you must run this report for a 6 month time frame. The report will not be accurate if another time period is used.
- 3. Click on "Run Report".
- 4. The report will look like this:

Aggregate Housing Counts (6 months)

Data Scope: MDPH

Last Housing Arr In SpanCrosstab

Last Housing Arr In Span:	Total:	Col. %:
NotSpecified	12	52.2
Stable/Permanent	6	26.1
Temporary	2	8.7
Unstable	3	13.0
Total:	23	100.0

Number of Records: 5



Aggregate Housing Counts (12 months)

This report returns aggregated counts and percentages for the last housing status entered.

- 1. Select Aggregate Housing Counts (12 months) from the list of reports.
- 2. Set the date range to a 12 month span. **Important**: you must run this report for a 12 month time frame. The report will not be accurate if another time period is used.
- 3. Click on "Run Report".
- 4. The report will look like this:

Aggregate Housing Counts (12 months)

Data Scope: MDPH

Last Housing Arr In SpanCrosstab

Last Housing Arr In Span:	Total:	Col. %:
Last nousing An in span:	i otal:	COI. %:
Not Specified	19	52.8
Stable/Permanent	12	33.3
Temporary	1	2.8
Unstable	4	11.1
Total:	36	100.0

Number of Records: 5

Aggregate Insurance Counts

This report returns aggregated counts and percentages of the last primary insurance entered within the date span of the report.

- 1. Select Aggregate Insurance Counts from the list of reports.
- 2. Modify the date range.
- 3. Click on "Run Report".
- 4. The report will look like this:

Aggregate Insurance Counts

Data Scope: MDPH

Last Primary Insurance In SpanCrosstab

Last Primary Insurance In Span:	Total:	Col. %:
Medicaid	10	50.0
Medicare (unspecified)	1	5.0
Medicare Part A/B	2	10.0
Medicare Part D	4	20.0
Private - Employer	1	5.0
Private - Individual	2	10.0
Total:	20	100.0

Number of Records: 7



Aggregate Poverty Level Counts

This report returns aggregated counts and percentages of the last poverty level entered within the date span of the report.

- 1. Select Aggregate Poverty Level Counts from the list of reports.
- 2. Modify the date range.
- 3. Click on "Run Report".

Data Scope:

4. The report will look like this:

Aggregate Poverty Level Counts

MDPH

Poverty Level:	Number of Clients:
	102
0%	6
139-200%	83
201-250%	4
251-400%	10
401-500%	1
Below 100%	1
More than 500%	7

Number of Records 8

MCM Last Acuity Reassessment and Referral Info

This report generates last acuity reassessment (MCM, Care Access and ARCH) and referral information.

- 1. Select MCM Last Acuity Reassessment and Referral Info from the list of reports.
- 2. Modify the date range.
- 3. Click on "Run Report".
- 4. The report will look like this:

MCM Last Acuity Reasesesment and Referral Info

Data Scope:	ME	PH										
Name:	Intake Date:	ISP:	Initial Acuity Assessme nt:	Acuity Reassess ment:	Care Access Acuity Reassess ment:	Acuity Score:	ARCH Initial Acuity:	ARCH Acuity:	Case Manager Name:	Next Acuity Assessme nt:	Date of Last Referral (Non- medical):	Last Referral Status (Non- Medical):
AA, BB												
Bond, James L		12/20/2018							Q			
Brady, Tom M								6/1/2018			6/1/2018	Open
careware, chris												
Careware, Mass Boston												
cherry, coke												
cruz, trippy doo												
Doe, Jim												
Gomez, Adam												
hernandez, travis												
Jacks, Apple			6/25/2018								6/25/2018	Open
S, B												
confinen inco												



No Service in X Days Reports

No Service in X Days reports list clients who have not received a service in a specified service category or specified subservice within a certain range of days.

Missing Acuity Reassessment in 6 months (OHA Funded MCM Services Only)

MDPH requires that OHA-funded medical case management clients have an acuity assessment every six months.

1. From the Reports menu, click on "Client Data Reports," then click "Clinical Encounter Reports."

CAREWare Reports		CAREWare Reports > Client Data	Reports
●CAREWare F	Reports	eclient Data Rep	ports
HRSA Reports	RSR and ADR	Clinical Encounter Reports	Run clinical encounter reports
Custom Reports	Run or manage custom reports	Clinical Encounter Preprints	Run clinical encounter preprints for selected clients
Performance Measures	Run or Manage Performance Measures	Multiple Client Case Note Report	Configure and run the report
Client Data Reports	Run reports on client information	Service Detail Report	List details of services provided to clients within a specified range of dates
Financial Report	Setup and run the financial report	Referrals Report	List details of referrals provided to clients
Administrative Reports	Administrative reports and options		
Permission Reports	Run and search permissons held by a user at a point in time		

2. On the following page, click "No Service in X Days Report."

ck	
Clinical Encounter	Reports
Clients with no encounter in X days	Clients who have not had an encounter in the last specified number of days
No Service in X Days Report	List clients who have not received a service in a specified category or a particular subservice within the specified number of days
Clients with no test in X days	Clients who have not had the specified screening test in the specified number of days
Clients with last selected lab result	Clients whose last selected lab result was less than or greater than the specified result
ARV Ingredient Report	Displays ARV ingredient counts for active HIV-positive clients on the specified date
Clients with no Hepatitis vaccinations	Clients who have not had a vaccination for a specified hepatitis virus
Clients ever diagnosed with Hepatitis	Clients ever diagnosed with Hepatitis
lients with no Pneumovax in X months	Clients who have not had a Pneumovax immunization in a specified number of months



- 3. Click on Subservice Type and enter the subservice. To identify clients without a reassessment, type "MCM Acuity Reassessment" or "MCM Care Access Acuity Reassessment" into the subservice.
- 4. Set Number of Days and click "Run".

CAREWare Reports > Client Data Reports > Clinical En Edit Filter Run PDF Cancel	counter Reports > Clients with no service in X days
Clients with no service in)	K days
Service Category:	
Subservice Type	MCM Acuity Reassessment
Number of Days	180
Apply Custom Filter:	
Hide Personally Identifying Information:	3
Include shared services entered by other providers:	

5. The report (to identify clients who have not had an acuity reassessment in six months) will look like the picture below:

Data Scope:	MDPH					
Report Criteria:						
Provider:		MDPH				
Service Cate	egory:	Outpa	tient/Ambulatory He	alth Services		
Subservice:		Labs				
Last qualifyi service:			st 180 days ago.			
Enrollment	Status:	active	or unknown.			
Name:	Client ID:		URN:	eURN:	Last Service Date:	Provider:
AA, BB			B9A91111662U	RHEgMvXhj		
asd, asd			ADAD0101701U	8DUOap0Ge		
asd, asd asd			ADAD1010701U	KU6HGUWcE		
Berry, Mary			MRBR0204252U	9WnR82ANe		
bet, alpha test			APBT0708942U	QqI18LDsJ		
Big, Bird			BRBG0101961U	QqRgARPIE		
bla, mario A			MRBA0912751U	F9BVCltKq		
Bobcat, Bates			BTBB0101162U	x1V3Q5IQX		
Bond, James L			JMBN1007771U	zkcpxeBJ0		
Bondtest, James	FRANKLY	(123	JMBN0510631U	XhP2yeQJU		
Bouffet, Phoebe			POBU0613704U	YycaHG8Me		
Brady, Thomas Greatest			TOBA0601801U	0gP6SbqDQ		
Brady, Tom M	1234		TMBA0101755U	snypNq7Kn		
Breeze, Yolanda			YLBE0315864U	YBqodloxi		
Brookshire, Stacey			SAB00202732U	NdNeVnUo0		
Brown, Danielle			DNB00122552U	dOkn9UKDj		
Brown, James	12345		JMBO0101015U	GspthJbhK		



Clinical Encounter Reports

Clinical Encounter Reports identify clients that are missing certain encounters, such as tests or labs, within a specified number of days.

Report to identify clients without CD4 or viral load in the past six months

This report identifies clients without CD4 or viral load in the past six months.

1. From the Client Data Reports menu, click on "Clinical Encounter Reports."

CAREWare Reports > Client Data	Reports	CAREWare Reports > Client Data Repo	rts > Clinical Encounter Reports
Back		Dack	
●Client Data Rep	ports	Clinical Encounte Clients with no encounter in X days	Clients who have not had an encounter in the last specified number of days
Clinical Encounter Reports	Run clinical encounter reports	No Service in X Days Report	List clients who have not received a service in a specified category or a particular subservice within the specified number of days
Clinical Encounter Preprints	Run clinical encounter preprints for selected clients	Clients with no test in X days Clients with last selected lab result	Clients who have not had the specified screening test in the specified number of days
Multiple Client Case Note Report	Configure and run the report	ARV Ingredient Report	Displays ARV ingredient counts for active HIV-positive clients on the specified date
Service Detail Report	List details of services provided to clients within a specified range of dates	Clients with no Hepatitis vaccinations	Clients who have not had a vaccination for a specified hepatitis virus
Referrals Report	List details of referrals provided to clients	Clients ever diagnosed with Hepatitis	Clients ever diagnosed with Hepatitis
·		Clients with no Pneumovax in X months	Clients who have not had a Pneumovax immunization in a specified number of months

- 2. Click on "Clients with no tests in X days."
- 3. Select the screening test and set the Numbers of Days. Then click on "Run Report".

CAREWare Reports > Client Data Reports > Clinical Encounter Reports > Clients With No Tests In X Days	
Edit Filter Run PDF Cancel	
Clients With No Tests In X Days	
Test Definition: CD4 Count	
Number of days: 180	
Apply Filter:	
Filter Description: Report Filter is empty	

4. The report (to identify clients without CD4 or viral load in the past six months) will look like the screenshot below!



Clients who have not had a CD4 Count encounter within	last 180 days.
---	----------------

Data Scope:	MDPH					
Report Criteria:						
The client:	The client: has not had a CD4 Count screening at the provider in the last 180 days.					
Or the client:	has no	ot had a CD4 Count scre	ening at the provider.			
Client enrollm status:	ient enrollment is active or unknown. atus:					
HIV Status:	Not eq	ual to Negative or Unkn	own.			
Custom Filter	: None					
Name:	URN:	Last Screening Result:	Last Screening Date:	Provider Name:		
Bondtest, James	JMBN0510631U		1/30/2018	MDPH		
Brady, Thomas Greatest	TOBA0601801U					
Brady, Tom M	TMBA0101755U					
Brookshire, Stacey	SABO0202732U		9/9/2016	MDPH		
careware, chris	CRCR0101802U		4/17/2018	MDPH		
Careware, Mass Boston	MSCR0625001U		6/26/2018	MDPH		
Carter, Lisa Marie	LSCR0615545U		9/7/2016	MDPH		
cherry, coke	CKCE0629801U		6/25/2018	MDPH		
Claus, Michael	MCCA0926601U		9/7/2016	MDPH		
Cleveland, Brown Indian	BOCE0202921U		12/6/2016	MDPH		
CLTC, Test	TSCT0101601U					

Performance Measures

Viral Suppression

This report identifies the percentage of clients who are virally suppressed (<200) and unsuppressed (200+).

- 1. From the CAREWare Reports Menu, click on "Performance Measures"
- 2. Click "Run Performance Measures" and then select either "Clients with VL \leq 199" or "Clients with VL \geq 200"
- 3. Click "Edit" to adjust the date from which the report should run. Then click "Run."

BOADTH					
CAREWare	Reports		eports > Performance Measures > Evaluate Measures	ures	
		Evaluate Sele	cted Evaluate Group Back Print or Export		
HRSA Reports	RSR and ADR	Evalua	te Measures		
Custom Reports	Run or manage custom reports	Search:			
	ר	Code	Name	Description	Select
Performance Measures	Run or Manage Performance Measures	HAB01	Two Primary Care visits>= 3mos Apart	Percentage of clients with HIV infection who had two or more medica	
Client Data Reports	Run reports on client information	HAB02	Percentage with >=2 CD4 Counts	No. of HIV-infected clients who had at least one medical visit with a $\ensuremath{\mathfrak{g}}$	
Chem Data Neporta		HAB03	CD4<200 with PCP prophylaxis	Percentage of clients with HIV infection who had a CD4 count below	
Financial Report	Setup and run the financial report	HAB04	AIDS Clients on HAART	Percentage of clients with AIDS prescribed HAART.	
	- 2	HAB05	Percentage of pregnant women prescribed ART	Percentage of pregnant women prescribed ART.	
Administrative Reports	Administrative reports and options	MA02	Clients with VL >=200	HIV Positive Cleints with a visit in the last years (365 days) and enro	v
Permission Reports	Run and search permissons held by a user at a p	HAB15	Chlamydia Screening	Percentage of HIV-infected adult clients who had chlamydia test perf	
		HAB20	MAC prophylaxis	Percentage of clients with HIV infection who had a CD4 count below	
RDR	Manage/Run the RDR	HAB17	Hepatitis B Screening	Percentage of clients with HIV infection who have been screened for	
		HAB08	Hepatitis B Vaccination	Perentage of HIV-infected client who completed vaccination series for	



Edit Today Run Ba	
Performance	Measure Settings
	Parameters
AsOfDate:	9/1/2018
Performance Measures:	Clients with VL >=200 (MA02)

4. The report will look like the screenshot below

Multiple Performance Measures Report 9/1/2018

Selection:	MDPH			
Code:	Name:	Numerator:	Denominator:	Percent:
MA02	Clients with VL >=200	0	33	0.00%

Financial Report

Financial reports are organized by service category and show the total number of clients that have received a service, as well as the total number of units delivered for that service. This report can be used to look at clients and units of service in aggregate.

1. From the Reports menu, click on "Financial Report"

CAREWare	Reports
HRSA Reports	RSR and ADR
Custom Reports	Run or manage custom reports
Performance Measures	Run or Manage Performance Measures
Client Data Reports	Run reports on client information
Financial Report	Setup and run the financial report



2. Specify either the year or a date range. Click "Funding Source Filter" to add the funding source of interest. Multiple funding sources can be selected. If you check off "Include Subservice Detail" you will be able to see separate client counts and units for each subservice.

CAREWare Reports > Financial Report Settings					
Funding Source Filte Edit Filter Run PDF Help	Back				
Financial Report Settings		CAREWare Repo	rts > Financial Report	Settings > Funding Source Filter	
Begin Date:		Save Cancel			
End Date:		Funding	Source Fil	ter	
Funding Sources:	Part B, Part D	Search:			
		Select	Funding Source		
			Medicare		
			Part A		
Include Subservice Detail?:	v	ø	Part B		
Include Provider Information ?:	0		Part C		
Pull Amount Received from receipts in the date span?:			Part D		
Apply Filter:			Part D Youth		
Filter Description:	Report Filter is empty		Part F, Part A MAI		
			Part F, Part B MAI		
			RW-Related (Progra		
			State		

3. The financial report will look like the screenshot below!

Financial Report

Friday, February 1, 2019 through Wednesday, June 26, 2019

		rindaj, robindarj 1, 2010 iniciaĝi rica				
Report Criteria:						
Providers:	MDPH					
Funding Sources:	Part B, Part D					
Group By Providers:	False					
Include Subservice Detail:	True					
Receipts In Period:	False					
MDPH						
Case Management (non-med	lical)	Clients:	Units:	Total:	Amount Received:	Not Received
MC NMCM Acuity Assessment	t	1	1	\$0.00	\$0.00	\$0.0
Case Management (non-med	lical)Totals:	1	1	\$0.00	\$0.00	\$0.0
Health ed./risk reduction/pre	vention	Clients:	Units:	Total:	Amount Received:	Not Receive
MC Communication with Healt	h Care Provider	1	1	\$0.00	\$0.00	\$0.0
MC HERR Health Education/R	lisk Education Session	1	2	\$0.00	\$0.00	\$0.0
MC HIV, the Viral Cycle & Mec	lications at work	1	1	\$0.00	\$0.00	\$0.0
Health ed./risk reduction/pre	ventionTotals:	1	4	\$0.00	\$0.00	\$0.0
Medical Case Management		Clients:	Units:	Total:	Amount Received:	Not Receive
MCM Acuity assessment		1	1	\$0.00	\$0.00	S0.0
MCM Acuity Reassessment		4	4	\$0.00	\$0.00	S0.0
MCM Adherence Support (Not	Face to Face)	1	1	\$0.00	\$0.00	\$0.0
MCM HDAP linkage and recer	tification	2	2	\$0.00	\$0.00	\$0.0
MCM Initial acuity asessment		1	1	\$0.00	\$0.00	\$0.0
MCM Referrals to Partner Ser	vices	1	1	\$0.00	\$0.00	\$0.0
Medical Case ManagementT	otals:	7	10	\$0.00	\$0.00	\$0.0

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HRSA Reports

Customize	CAREWare Reports		
Add Client Find Client Reports	@CAREWare Reports		
Rapid Entry Appointments	HRSA Reports	RSR and ADR	
My Settings System Information	Custom Reports	Run or manage custom reports	
System Messages Switch Domains	Performance Measures	Run or Manage Performance Measures	
Log Off	Client Data Reports	Run reports on client information	
hange this from Central dmin -> System formation > Application otification Settings	Financial Report	Setup and run the financial report	

CAREWare can generate both an RDR and an RSR validation report. Click on "HRSA Reports" to get started.

RDR Report

The RDR is no longer required by HRSA, but is helpful if you are looking for a quick snapshot of your client population. It shows aggregate counts and percentages for a number of characteristics.

Note: The RDR is currently not working in CAREWare 6, but will be available soon.

1. From the Reports Menu, click on "RDR".

CAREWare Reports	
●CAREWare	Reports
HRSA Reports	RSR and ADR
Custom Reports	Run or manage custom reports
Performance Measures	Requires permission: 'Setup performance measures' or 'Run performance measure reports'
Client Data Reports	Run reports on client information
Financial Report	Setup and run the financial report
Administrative Reports	Administrative reports and options
Permission Reports	Run and search permissons held by a user at a point in time
RDR	Manage/Run the RDR



RSR Validation report

The RSR Validation report provides a list of all errors, warnings and alerts that are built into HRSA's Electronic Handbook (EHB). Warnings and alerts indicate areas where data may be incorrect or missing. However, not all warnings or alerts may need to be corrected. Warnings must have a comment explaining the data in the EHB.

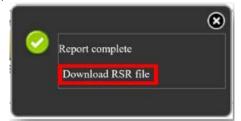
1. From the HRSA Reports menu, click on "RSR Client Report."

Back HRSA Repo	rts
RSR Client Report	Create the RSR client level data file
RSR Viewer	View RSR files
RSR Validation Report	View the RSR Validation Report
ADR Client Export	Create the ADR Client Export
ADR Viewer	View ADR files
ADR Validation Report	View the ADR Validation Report

2. Select a reporting year by clicking "Edit", add a filter by clicking "Edit Filter", and then check off "Applyfilter." Once complete, click "Run."

CAREWare Reports > HRSA Reports > RSR Settings	
Edit Edit Filter Run Help Back	
RSR Settings	
Year: 2019	
Cross Provider Labs:	
Apply Filter:	
Report Filter is empty Filter Description:	

3. Once the RSR Validation report is downloads, click "Download RSR file" in the popup window.



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4. Return to the CAREWare Reports screen and click "HRSA Reports," and then click "RSR Viewer."

Help Back	
HRSA Repo	rts
RSR Client Report	Create the RSR client level data fil
RSR Viewer	View RSR files
RSR Validation Report	View the RSR Validation Report
ADR Client Export	Create the ADR Client Export
ADR Viewer	View ADR files
ADR Validation Report	View the ADR Validation Report

5. Click "Choose File" and select the exported XML file you have saved. A message "Upload Completed Successfully" should appear.

CAREWare Reports > HRSA Reports > RSR Viewer	
View RSR File Help Back	
RSR Viewer	
RSR File Name: Choose File BSR_Export.xml	Upload Completed Successfully. ().27 KB of 5.27 KB)

6. The report should look similar to the image below. To correct an error, click "View Client List."

View Client List Back Print or Export						
RSR Viewer						
Category	Count	Percent	Viewable			
Referred to another program or service:	0	0.0%	x			
2. Removed from treatment due to violation of rules:	0	0.0%	х			
2. Incarcerated:	0	0.0%	x			
2. Relocated:	0	0.0%	х			
2. Deceased:	0	0.0%	х			
2. Missing:	4	36.4%	X			
4. Client Birth Year:						
4. (All clients)	14					
4. 1980 and before:	3	21.4%	×			
4. 1961 - 1970:	2	14.3%	x			

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7. In the new window, select a client's name and click "Go To Client," or double click the client's name. CAREWare will open the client record with any missing data automatically. Errors must be fixed before the RSR can be submitted.

Go To Client	Back	Print or Export		
2. Missing:				
Search:				
Client		Visited		
Cesar, Rex,				
Mann, Super,				
Brown, Buster,				
Tester, Beta,				