

# Instructions for Data Reports

June 2020, v2.1

*Yellow highlights indicate changes since the last version.*



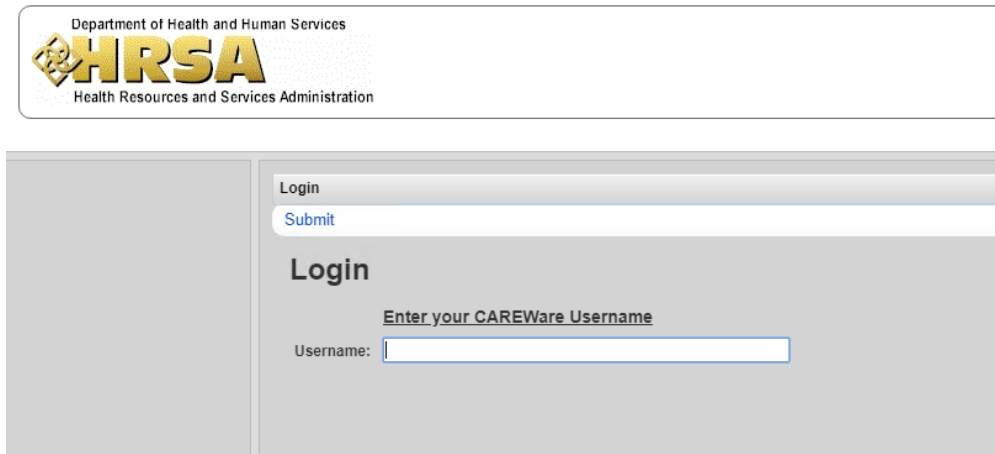
This document describes the different data reports that are available in the Massachusetts CAREWare system, and provides instructions on how to run them.

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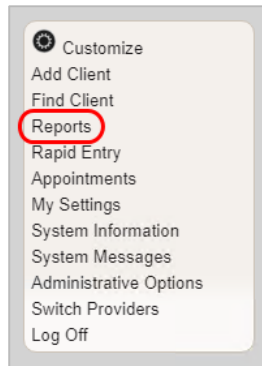
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### Navigating to Reports

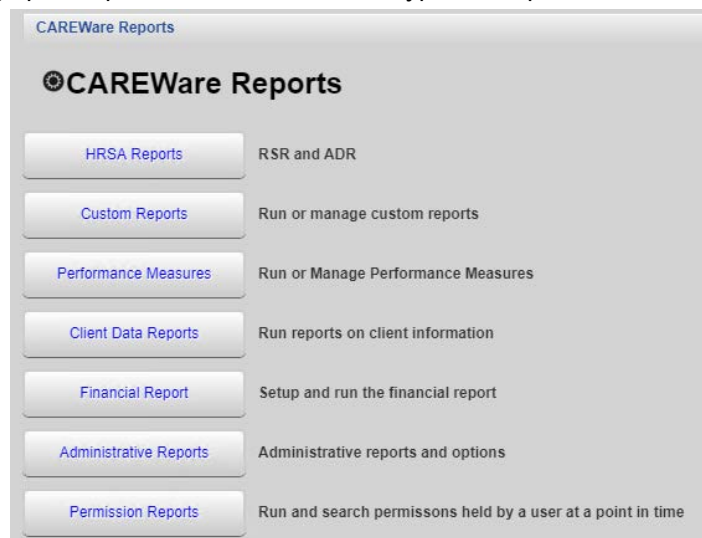
1. To navigate to the different reports, first log in to Massachusetts CAREWare.



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



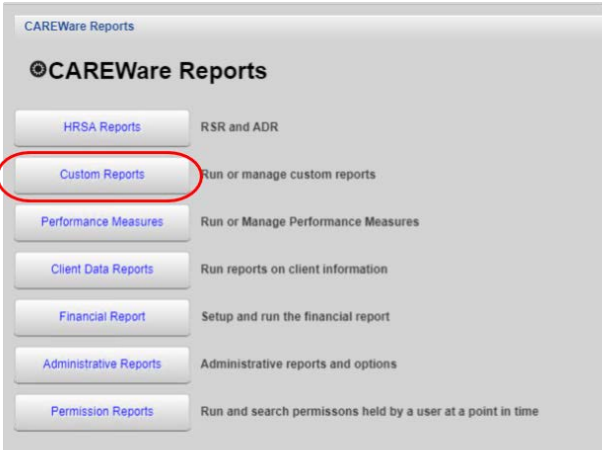
3. This will bring up a Reports menu of different types of reports that can be run.



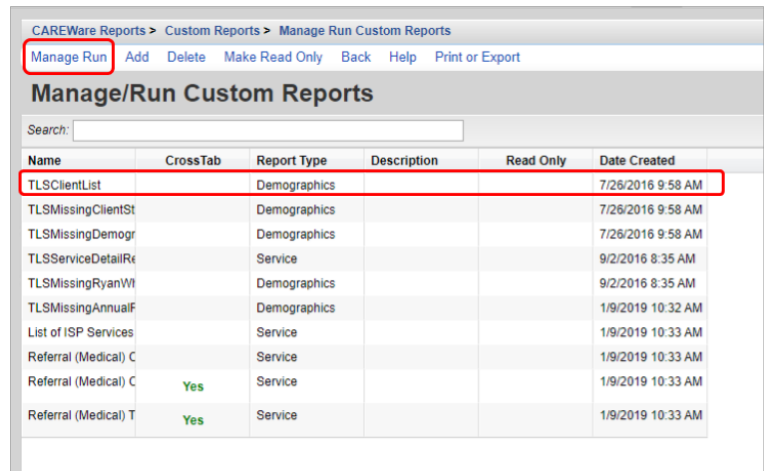
## Downloading Reports in CAREWare 6

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

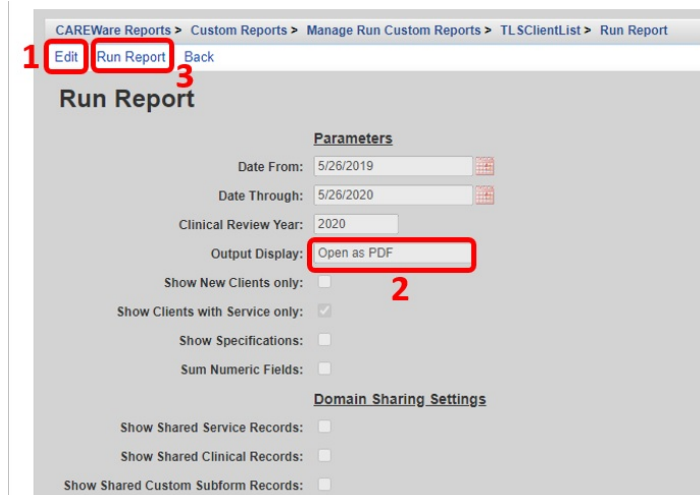
1. Click on “Reports” from the main menu. Select “Custom Reports” and then “Manage/ Run.”



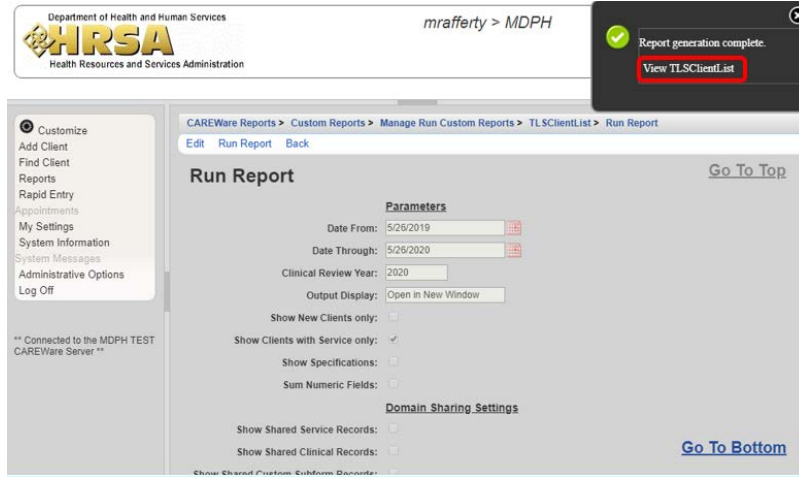
2. Select the desired report and then select “Manage Run.”



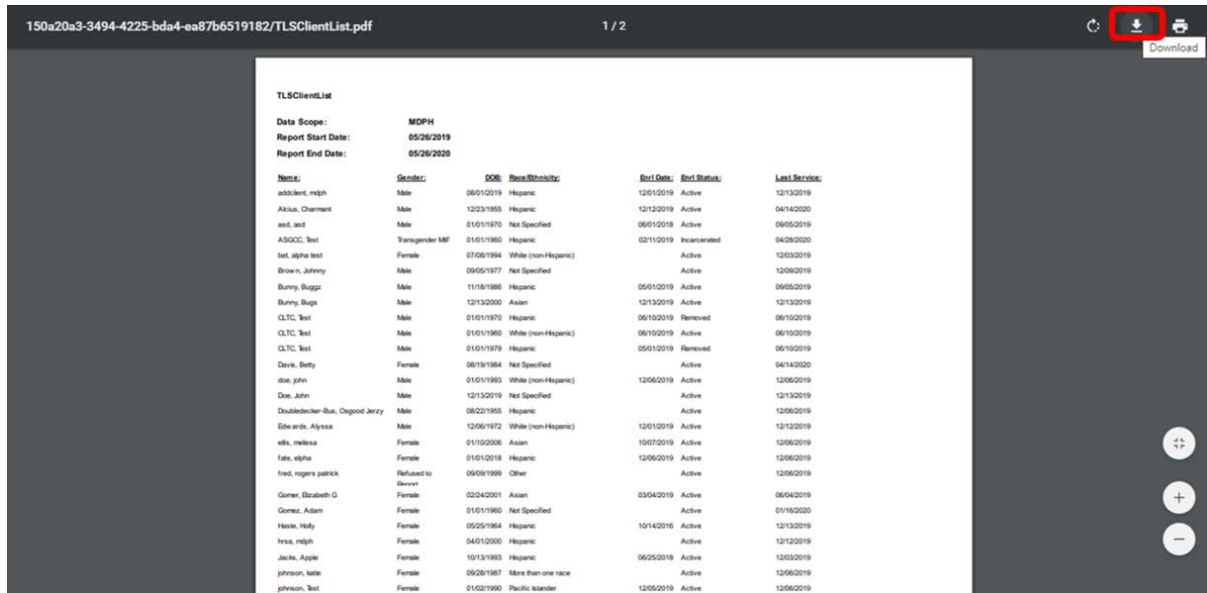
3. Select “Run Report.” Ensure that your output display is set to export correctly by selecting “edit” and then choosing either “Open as PDF” or “Download as CSV.” Click “Save” and then “Run report.”



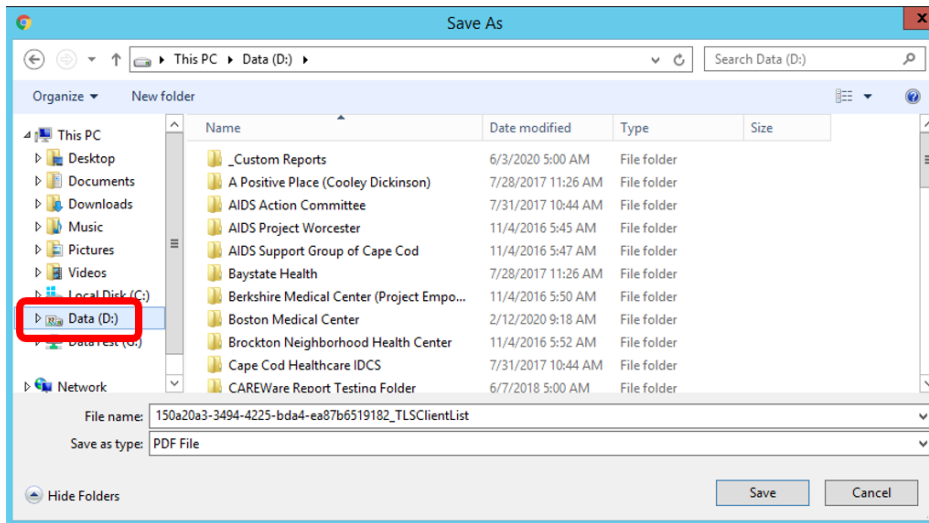
4. A “Report Generation Complete” box will appear in the top right corner. Select “View [Report Name].”



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



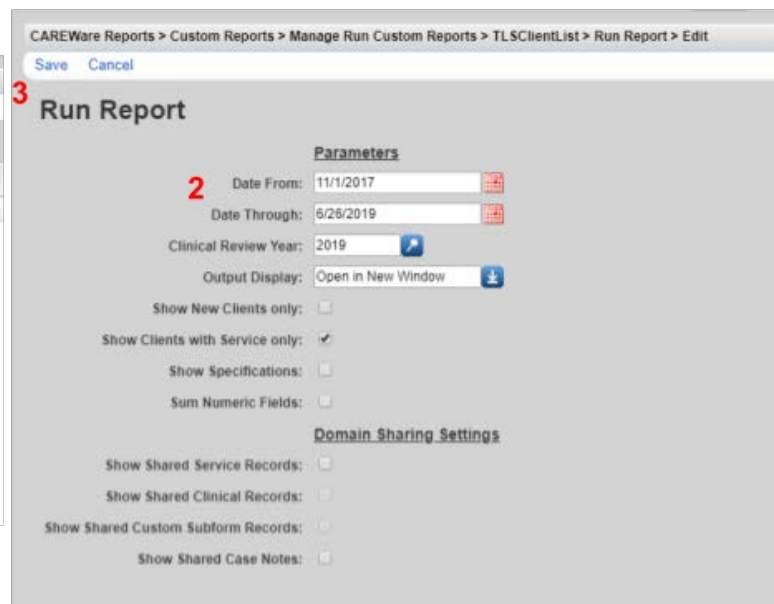
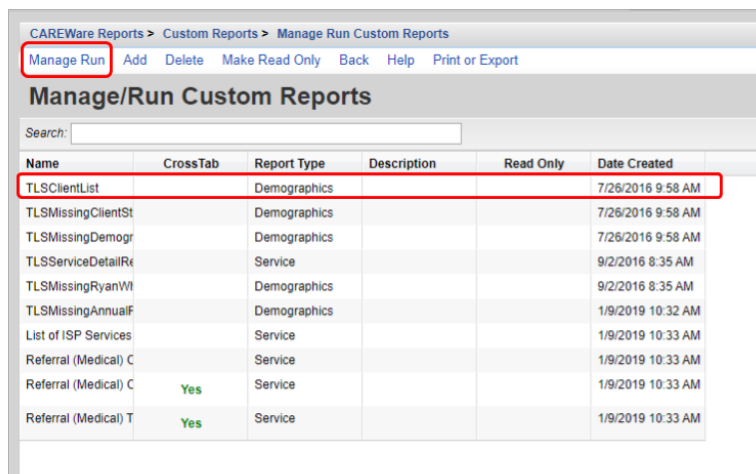
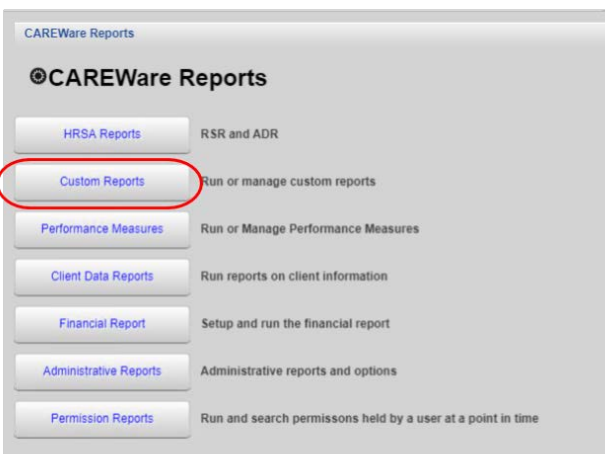
6. File Explorer will open. Save under the “Data (D)” drive, under the folder for your specific agency.



7. Log into the SFTP to retrieve the file. Contact us at [carewaremahelpdesk@jsi.com](mailto:carewaremahelpdesk@jsi.com) or 617-385-3991 for instructions on how to log on to the SFTP.

## 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).



### TLSCient 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 TLSCientList 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: MDPH  
Report Start Date: 11/01/2017  
Report End Date: 06/26/2019

<u>Name:</u>	<u>Gender:</u>	<u>DOB:</u>	<u>Race/Ethnicity:</u>	<u>Enrl Date:</u>	<u>Enrl Status:</u>	<u>Last Service:</u>
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 FIM	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".

4. The report will look like this:

**TLSMissingAnnualReview**

Data Scope:		MDPH					
Name:	URN:	Primary Ins:	Housing Arr:	HH Size:	HH Income:	PovertyLev:	Case Manager Name (Cin. Custom):
AA, BB	B9A91111862U						
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 Tarytown	IHCA0112681U						
Cruz, Maria	MRCU1022672U						
Cruz, Maria	MRCU0622002U						
cruz, trippy doo	TICU0312832U	Medicare Part D	Stable/Permanent				
Damon, Matt	MTDM0303701U						
davis, samuel	SMDV0627941U						
decaprio, leonardo	LDDC0423791U	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 TLSSMissingClientStatus 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:		MDPH					
Report Start Date:	11/01/2017						
Report End Date:	11/11/2019						
Name:	Enrl Date:	Enrl Status:	HIV Status:	HIV Risk Factor:	Vital Status:	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 unknown)	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: MDPH  
Report Start Date: 11/01/2017  
Report End Date: 11/11/2019

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:

#### TLSMissingRyanWhiteEligibility

Data Scope: MDPH  
Report Start Date: 03/05/2017  
Report End Date: 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 MIF	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: MDPH  
 Report Start Date: 03/05/2017  
 Report End Date: 11/11/2019

<u>Name:</u>	<u>Srv Date:</u>	<u>Qty:</u>	<u>Unit Price:</u>	<u>Category:</u>	<u>Subservice:</u>	<u>Service Total:</u>
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 Insurance	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

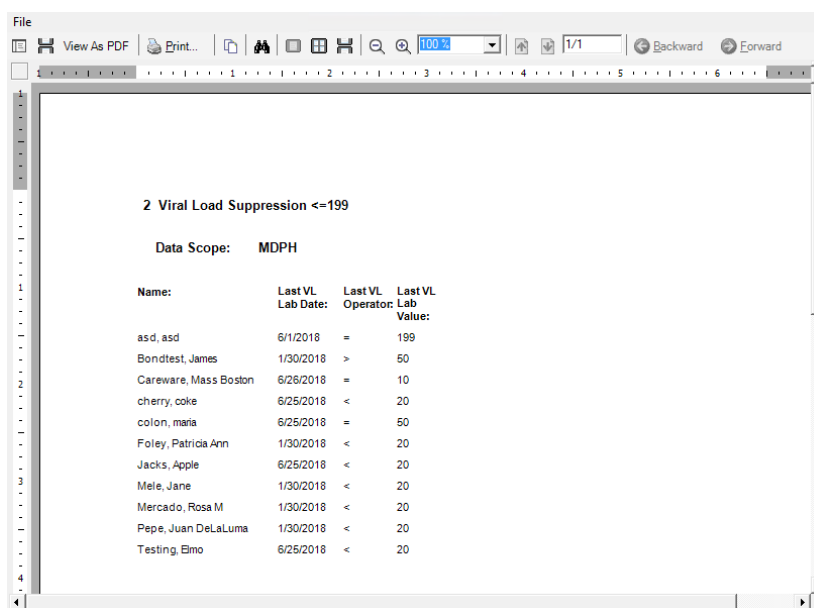
This report displays a list of services that Care Access clients have received. It includes the client name, service date, category and subservice for each service provided. The quantity field shows the number of units for each subservice.

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:



2 Viral Load Suppression <=199

Data Scope: MDPH

Name:	Last VL Lab Date:	Last VL Operator:	Last VL Lab 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, mania	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, Bmo	6/25/2018	<	20

### Viral Suppression $\geq 200$

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

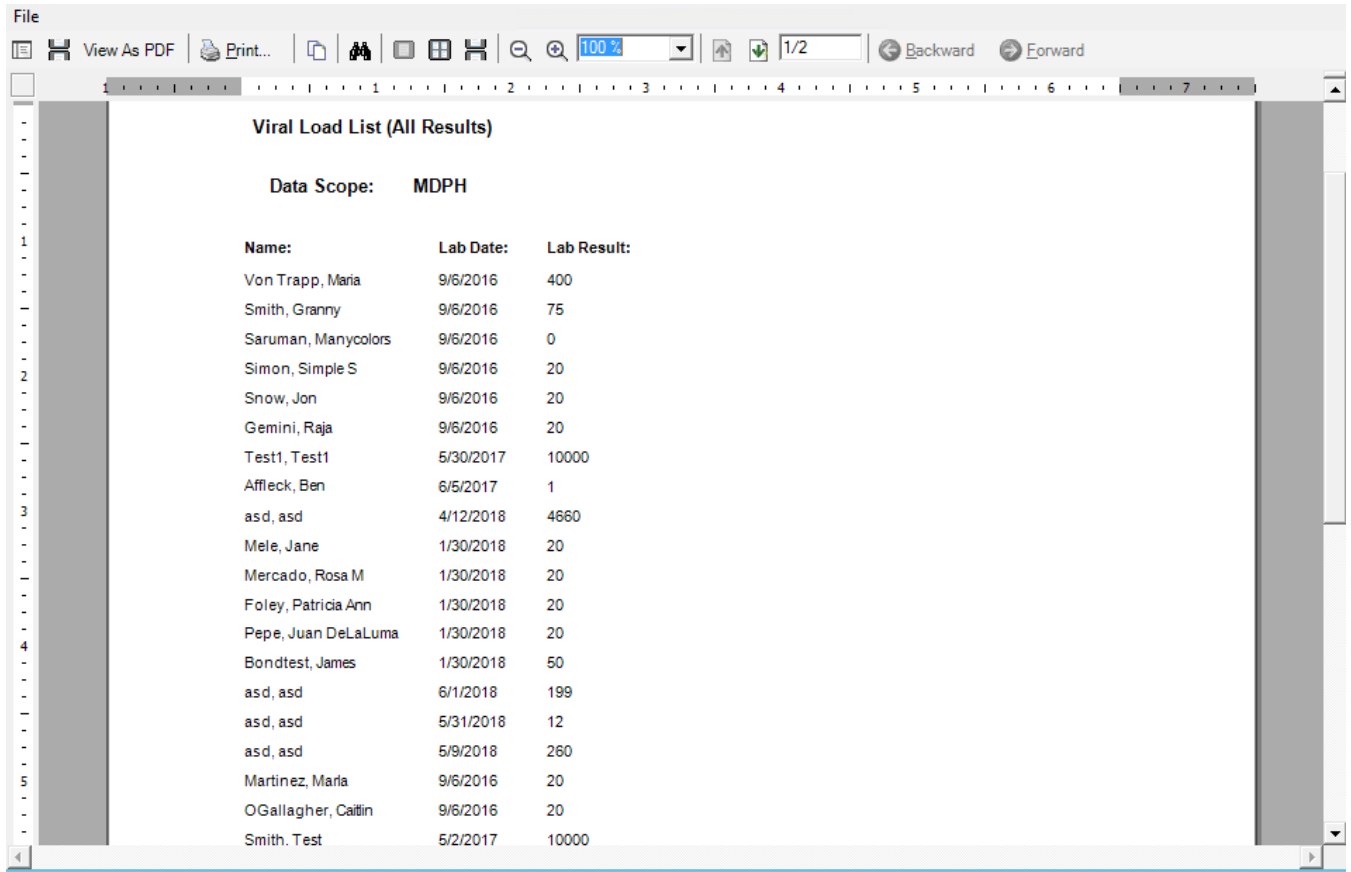
Selection: MDPH

<u>Code:</u>	<u>Name:</u>	<u>Numerator:</u>	<u>Denominator:</u>	<u>Percent:</u>
MA02	Clients with VL $\geq 200$	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:



The screenshot shows a web browser window displaying a report titled "Viral Load List (All Results)". The browser's address bar shows "100%" zoom and "1/2" pages. The report content includes a "Data Scope: MDPH" and a table with three columns: "Name:", "Lab Date:", and "Lab Result:". The table lists 20 rows of patient data.

Name:	Lab Date:	Lab Result:
Von Trapp, Maria	9/6/2016	400
Smith, Granny	9/6/2016	75
Saruman, Manycolors	9/6/2016	0
Simon, Simple S	9/6/2016	20
Snow, Jon	9/6/2016	20
Gemini, Raja	9/6/2016	20
Test1, Test1	5/30/2017	10000
Affleck, Ben	6/5/2017	1
asd, asd	4/12/2018	4660
Mele, Jane	1/30/2018	20
Mercado, Rosa M	1/30/2018	20
Foley, Patricia Ann	1/30/2018	20
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
asd, asd	5/9/2018	260
Martinez, Maria	9/6/2016	20
OGallagher, Caitlin	9/6/2016	20
Smith, Test	5/2/2017	10000

### 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

<u>Name:</u>	<u>Srv Short Name:</u>	<u>Linkage Type (Srv. Custom):</u>	<u>Srv Date:</u>
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

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### Referral (Medical/Non-Medical) Completion Percentage

This report generates the percentage of closed, open, or blank (not specified) for medical and non-medical 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. Custom) Crosstab**

<u>Linkage Status (Srv. Custom):</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 Records : 4**  
(Count is unduplicated across providers)

\* - Restricted Field

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### 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

#### Referral (Medical) Type Percentage

**Data Scope:** MDPH  
**Report Start Date:** 03/05/2017  
**Report End Date:** 11/11/2019  
**Linkage Type (Srv. Custom):** Crosstab

Linkage Type (Srv. Custom):	Total:	Col. %:
Not Specified	138	96.5
HCV	4	2.8
HIV	1	0.7
<b>Total:</b>	<b>143</b>	<b>100.0</b>

**Number of Records : 4**

(Count is unduplicated across providers)

\* - Restricted Field

### 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)	HI
asd, asd	6/1/2018	ARCH Acuity Reassessment	2	High (29-42)	HI
Affleck, Ben	9/7/2016	MCM Acuity Reassessment			
Bouffet, Phoebe	6/5/2017	MCM Acuity Reassessment	13	High (29-42)	
Brady, Thomas Grestest	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 assessment			
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: MDPH  
Report Start Date: 03/05/2017  
Report End Date: 11/11/2019

First Name:	Last Name:	Srv Date:	Srv Short Name:	Case Manager Name (Clin. Custom):
asd	asd	12/20/2018	MCM ISP/Care Plan	HI
asd	asd	12/13/2018	MCM ISP/Care Plan	HI
asd	asd	12/20/2018	MCM ISP/Care Plan	HI
James	Bond	12/20/2018	MCM ISP/Care Plan	Q

Number of Records : 4

(Count is unduplicated across providers)

\* - Restricted Field

### 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. %:
Not Specified	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. %:
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”.
4. The report will look like this:

#### Aggregate Poverty Level Counts

Data Scope: 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 Reasesement and Referral Info

Data Scope: MDPH

Name:	Intake Date:	ISP:	Initial Acuity Assessment:	Acuity Reassessment:	Care Access Acuity Reassessment:	Acuity Score:	ARCH Initial Acuity:	ARCH Acuity:	Case Manager Name:	Next Acuity Assessment:	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												
...												

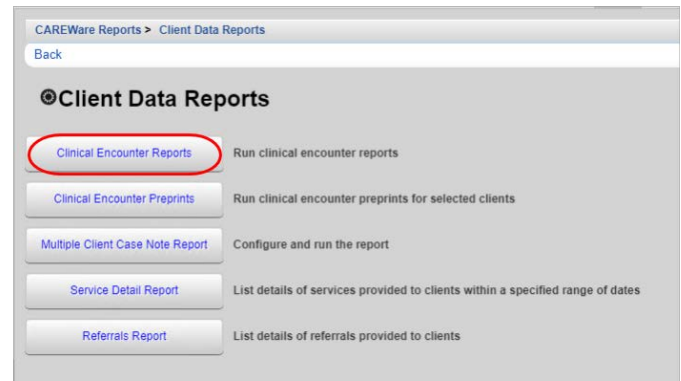
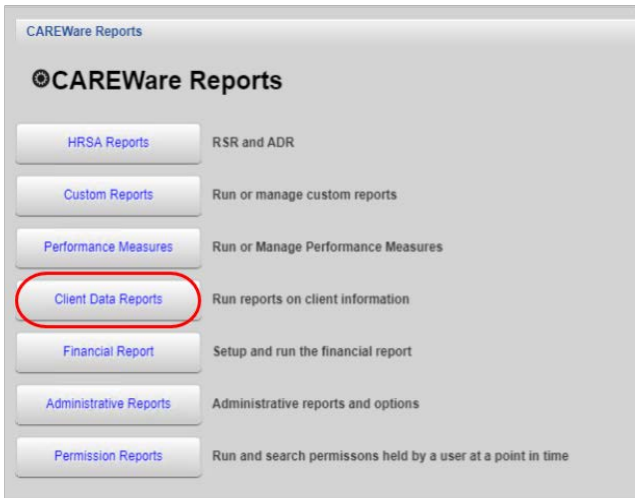
## No Service in X Days Reports

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.

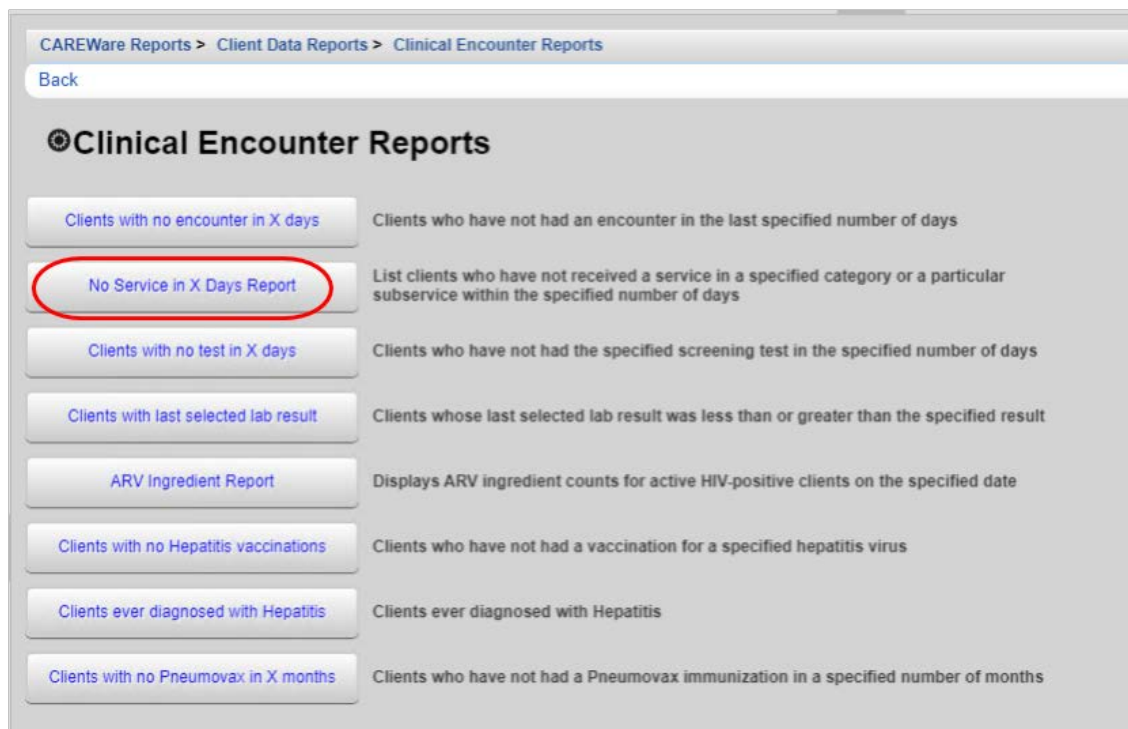
## Missing Acuity Reassessment in 6 months (OHA Funded MCM Services Only)

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

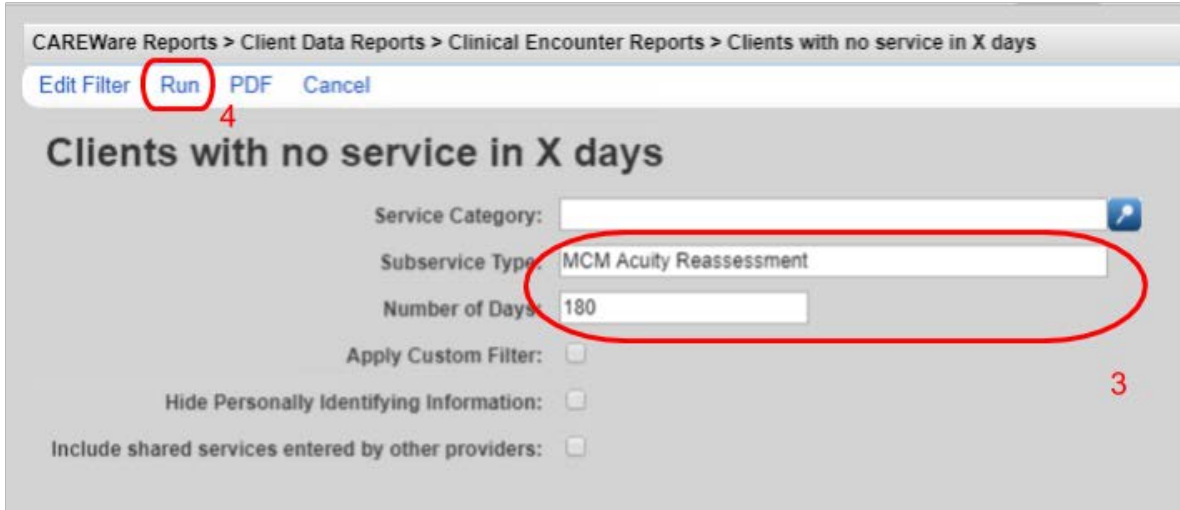
1. From the Reports menu, click on “Client Data Reports,” then click “Clinical Encounter Reports.”



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



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 Encounter Reports > Clients with no service in X days

Edit Filter **Run** PDF Cancel

**Clients with no service in X days**

Service Category:

Subservice Type: **MCM Acuity Reassessment**

Number of Days:

Apply Custom Filter:

Hide Personally Identifying Information:

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:

Clients With No Service in 180 days.

Data Scope: MDPH

Report Criteria:

Provider: MDPH  
 Service Category: Outpatient/Ambulatory Health Services  
 Subservice: Labs  
 Last qualifying service: at least 180 days ago.  
 Enrollment Status: active or unknown.

Name:	Client ID:	URN:	eURN:	Last Service Date:	Provider:
AA, BB		BSA9111862U	RHEglM/xhj		
asd, asd		ADAD0101701U	8DUOap0Ge		
asd, asd asd		ADAD1010701U	KUGHGUVWcE		
Berry, Mary		MRBR0204252U	9/WnR82ANe		
bef, alpha test		APBT0708942U	Oqj18LDsJ		
Big, Bird		BRBG0101961U	OqRgARPIE		
bla, mario A		MRBA0912751U	F9BVClIKq		
Bobcat, Bates		BTBB0101162U	x1V3O5IQX		
Bond, James L		JMBN1007771U	zkcpveBU0		
Bondlest, James	FRANKLY123	JMBN0510631U	XhP2yeQUJ		
Bouffet, Phoebe		POBU0613704U	YycaHG8Me		
Brady, Thomas Greatest		TOBA0501801U	0gP6SbqDQ		
Brady, Tom M	1234	TMBAA0101755U	snypNq7Kn		
Breeze, Yolanda		YLBEO315964U	YBqodIovi		
Brookshire, Stacey		SABO0202732U	NdNleVnUo0		
Brown, Danielle		DNBO0122552U	oOkn9LUKDJ		
Brown, James	12345	JMBO0101015U	GspthJbhK		

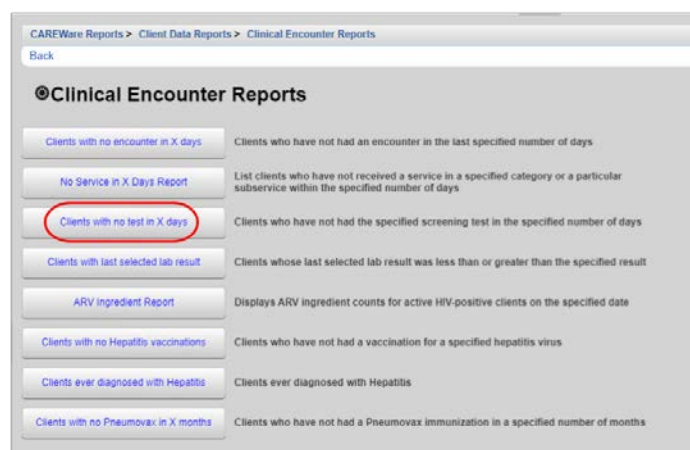
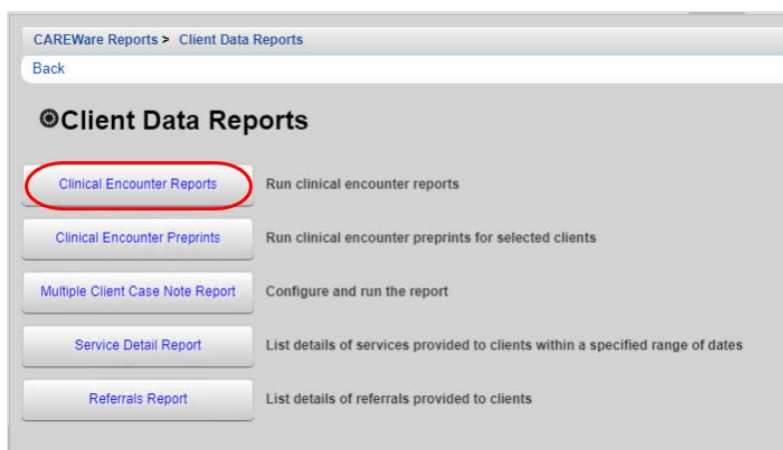
### Clinical Encounter Reports

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

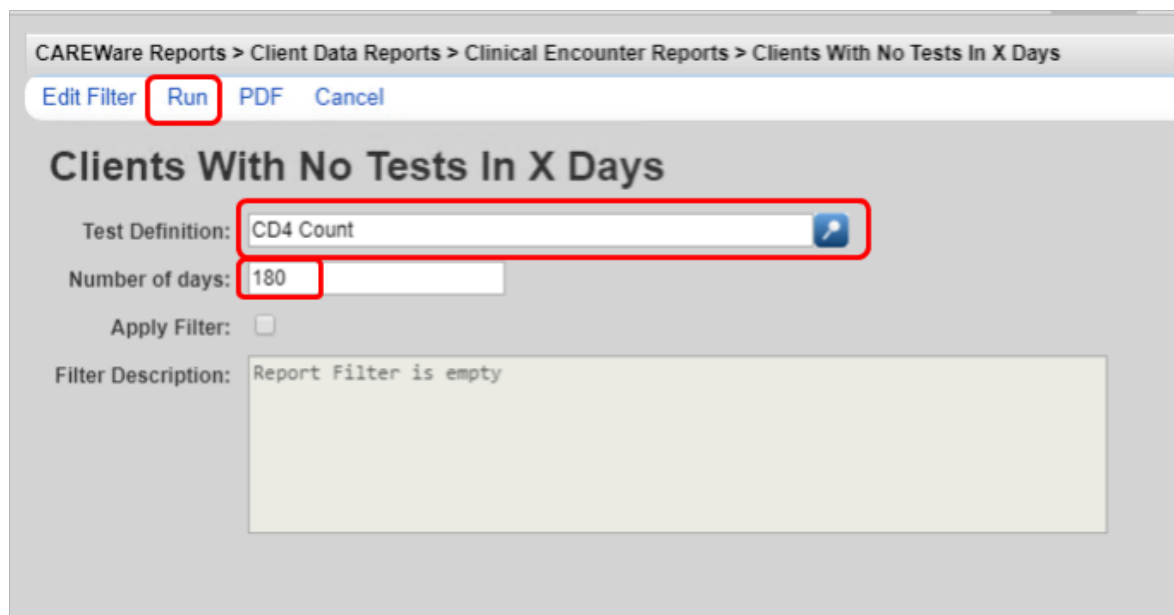
#### Report to identify clients without CD4 or viral load in the past six months

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.”



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”.



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: has not had a CD4 Count screening at the provider in the last 180 days.
- Or the client: has not had a CD4 Count screening at the provider.
- Client enrollment status: is active or unknown.
- HIV Status: Not equal to Negative or Unknown.
- Custom Filter: None

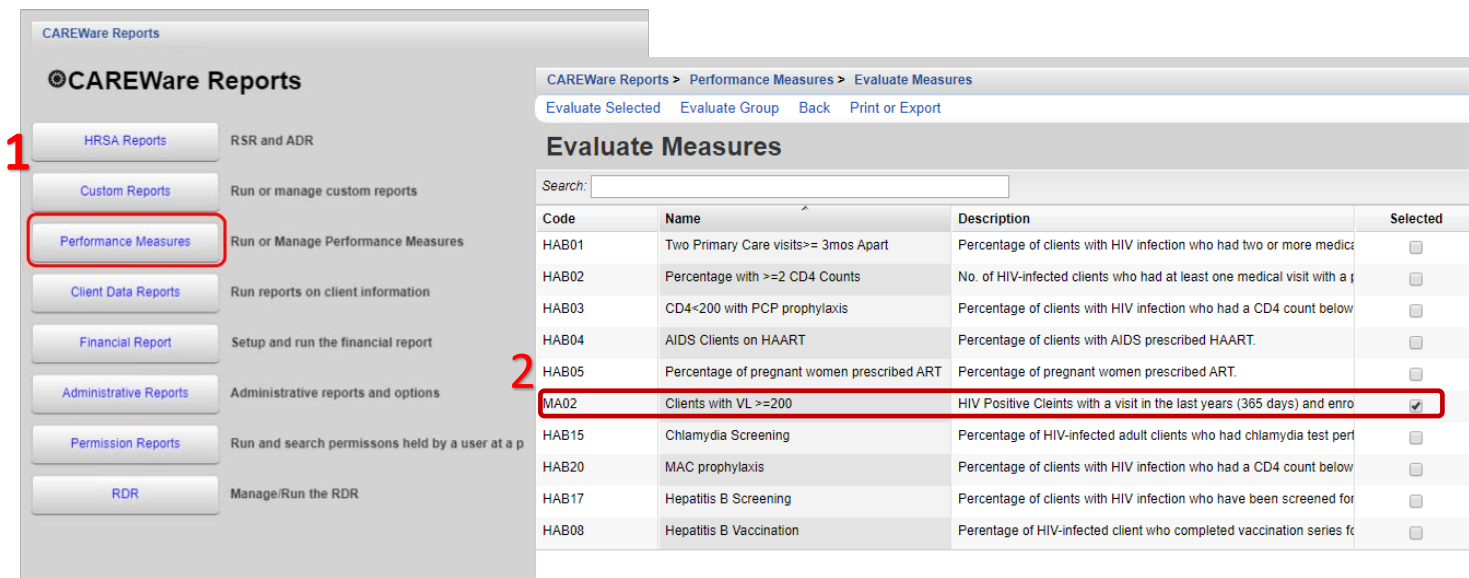
Name:	URN:	Last Screening Result:	Last Screening Date:	Provider Name:
Bondtest, James	JMBN0510631U		1/30/2018	MDPH
Brady, Thomas Greatest	TOBA0601801U			
Brady, Tom M	TMBA0101755U			
Brookshire, Stacey	SABO0202732U		9/9/2016	MDPH
careware, chris	CRCR0101802U		4/17/2018	MDPH
Careware, Mass Boston	MSCR0625001U		6/26/2018	MDPH
Carler, 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**

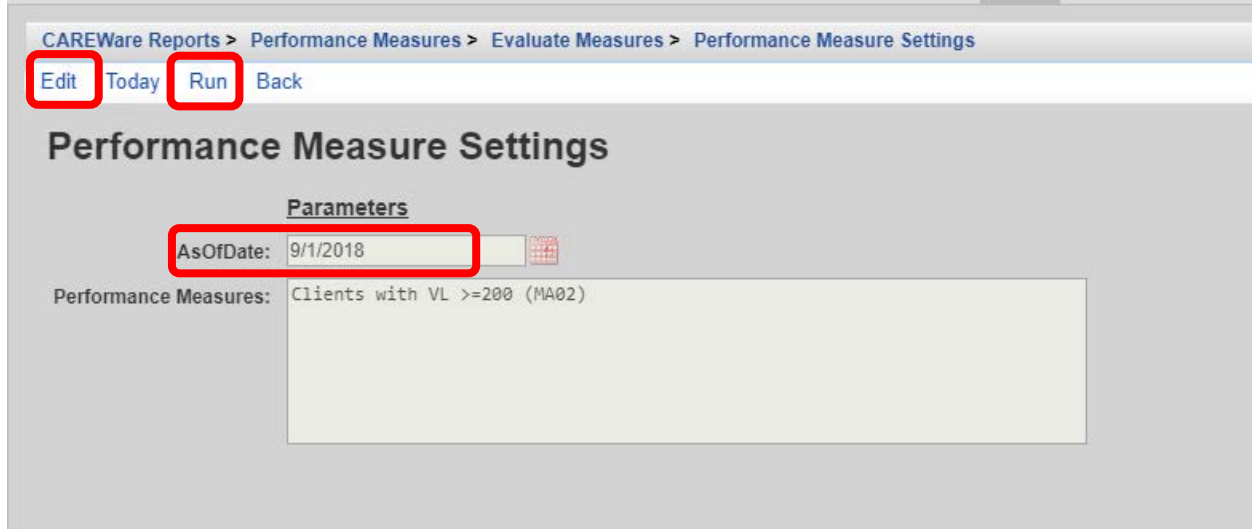
**Viral Suppression**

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 ≤ 199” or “Clients with VL ≥ 200”
3. Click “Edit” to adjust the date from which the report should run. Then click “Run.”



The screenshot shows the CAREWare Reports interface. On the left, a sidebar menu lists various report categories. The 'Performance Measures' option is highlighted with a red box and a red number '1'. The main content area shows the 'Evaluate Measures' page. At the top, there are navigation links: 'Evaluate Selected', 'Evaluate Group', 'Back', and 'Print or Export'. Below this is a search bar and a table of measures. The table has columns for 'Code', 'Name', 'Description', and 'Selected'. The row for 'MA02 Clients with VL >=200' is highlighted with a red box and a red number '2'. The 'Selected' checkbox for this row is checked.



4. The report will look like the screenshot below

### Multiple Performance Measures Report 9/1/2018

Selection: MDPH

<u>Code:</u>	<u>Name:</u>	<u>Numerator:</u>	<u>Denominator:</u>	<u>Percent:</u>
MA02	Clients with VL >=200	0	33	0.00%

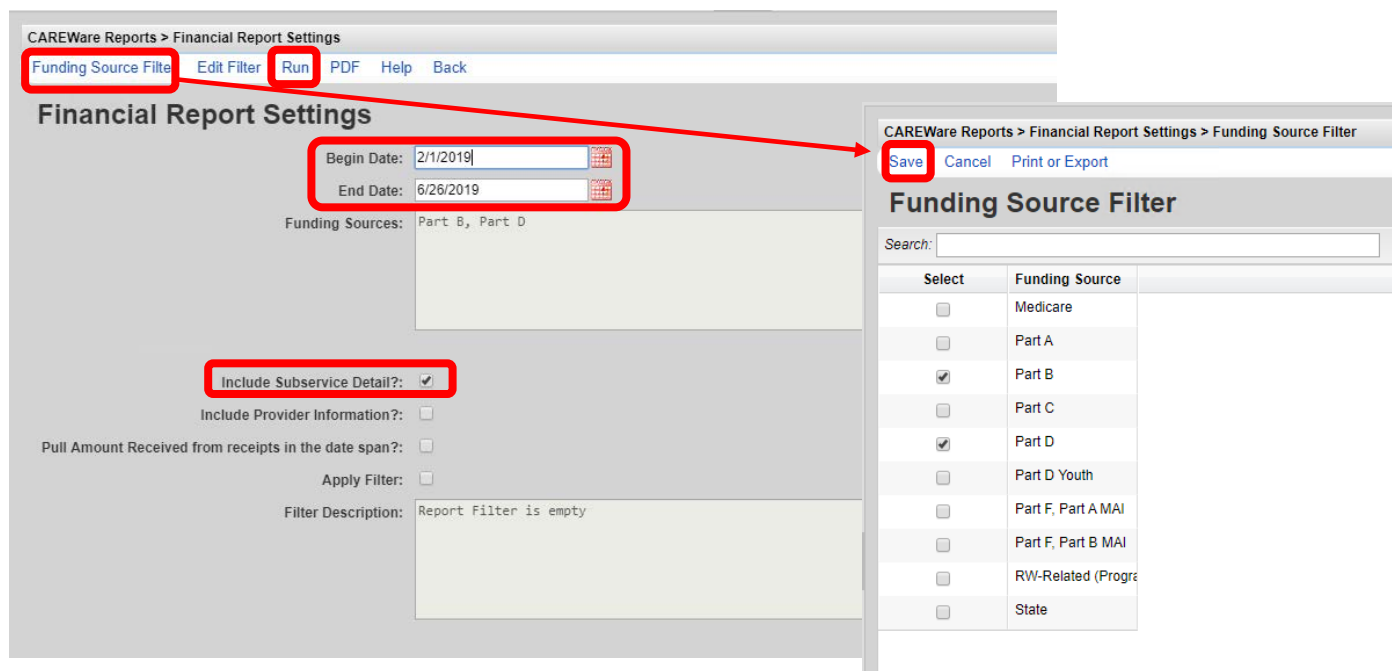
### Financial Report

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”



- 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 Filter Edit Filter Run PDF Help Back

**Financial Report Settings**

Begin Date: 2/1/2019  
End Date: 6/26/2019

Funding Sources: Part B, Part D

Include Subservice Detail?:

Include Provider Information?:

Pull Amount Received from receipts in the date span?:

Apply Filter:

Filter Description: Report Filter is empty

CAREWare Reports > Financial Report Settings > Funding Source Filter

Save Cancel Print or Export

**Funding Source Filter**

Search:

Select	Funding Source
<input type="checkbox"/>	Medicare
<input type="checkbox"/>	Part A
<input checked="" type="checkbox"/>	Part B
<input type="checkbox"/>	Part C
<input checked="" type="checkbox"/>	Part D
<input type="checkbox"/>	Part D Youth
<input type="checkbox"/>	Part F, Part A MAI
<input type="checkbox"/>	Part F, Part B MAI
<input type="checkbox"/>	RW-Related (Progr
<input type="checkbox"/>	State

- The financial report will look like the screenshot below!

**Financial Report**  
Friday, February 1, 2019 through Wednesday, June 26, 2019

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**Report Criteria:**

Providers: MDPH  
Funding Sources: Part B, Part D  
Group By Providers: False  
Include Subservice Detail: True  
Receipts In Period: False

---

**MDPH**

	Clients:	Units:	Total:	Amount Received:	Not Received:
<b>Case Management (non-medical)</b>					
MC NMCM Acuity Assessment	1	1	\$0.00	\$0.00	\$0.00
<b>Case Management (non-medical)Totals:</b>	<b>1</b>	<b>1</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Health ed./risk reduction/prevention</b>					
MC Communication with Health Care Provider	1	1	\$0.00	\$0.00	\$0.00
MC HERR Health Education/Risk Education Session	1	2	\$0.00	\$0.00	\$0.00
MC HIV, the Viral Cycle & Medications at work	1	1	\$0.00	\$0.00	\$0.00
<b>Health ed./risk reduction/preventionTotals:</b>	<b>1</b>	<b>4</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Medical Case Management</b>					
MCM Acuity assessment	1	1	\$0.00	\$0.00	\$0.00
MCM Acuity Reassessment	4	4	\$0.00	\$0.00	\$0.00
MCM Adherence Support (Not Face to Face)	1	1	\$0.00	\$0.00	\$0.00
MCM HDAP linkage and recertification	2	2	\$0.00	\$0.00	\$0.00
MCM Initial acuity assessment	1	1	\$0.00	\$0.00	\$0.00
MCM Referrals to Partner Services	1	1	\$0.00	\$0.00	\$0.00
<b>Medical Case ManagementTotals:</b>	<b>7</b>	<b>10</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>

## HRSA Reports

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

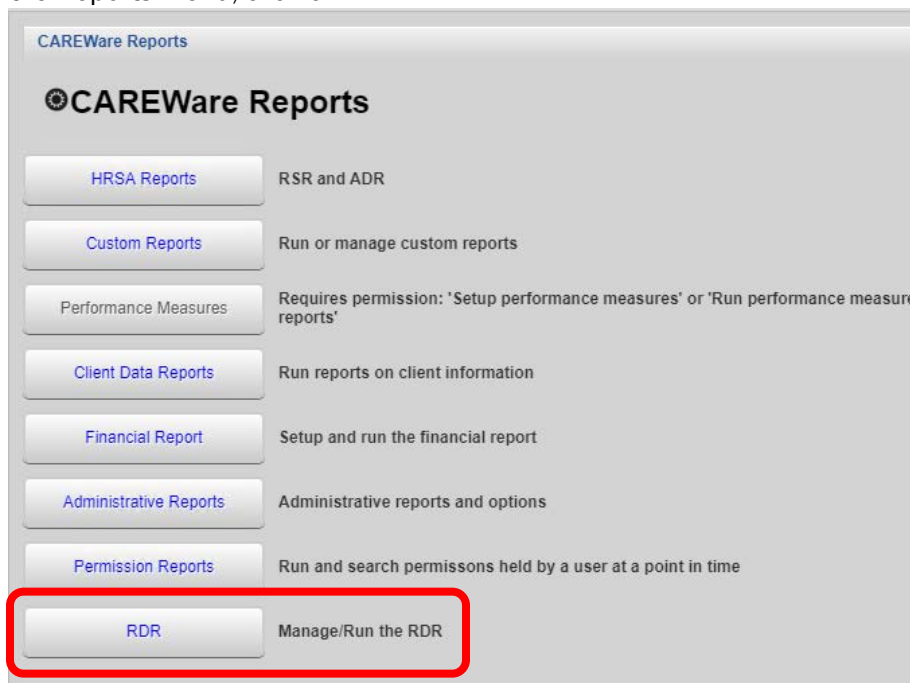


## RDR Report

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”.





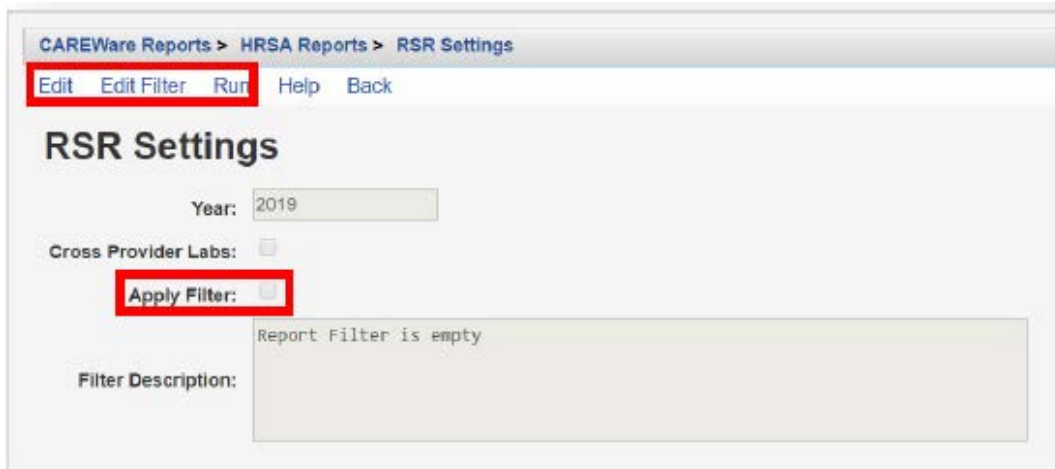
**RSR Validation report**

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.

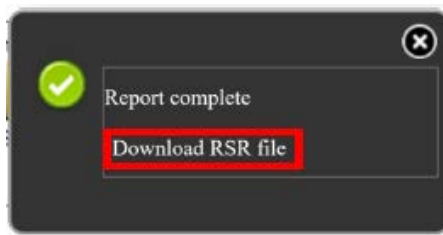
1. From the HRSA Reports menu, click on “RSR Client Report.”



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



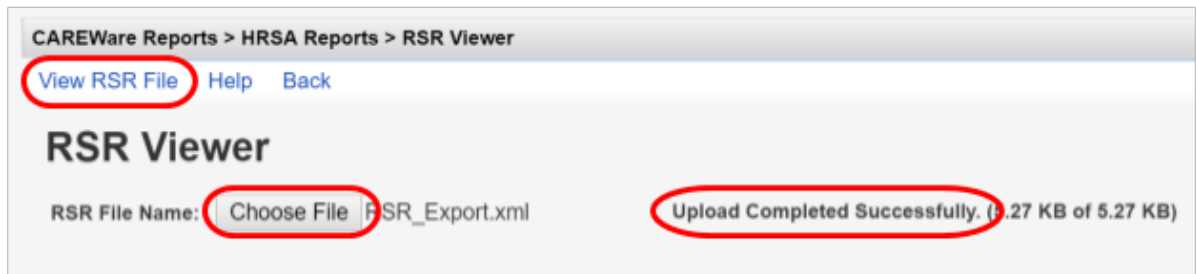
3. Once the RSR Validation report is downloads, click “Download RSR file” in the popup window.



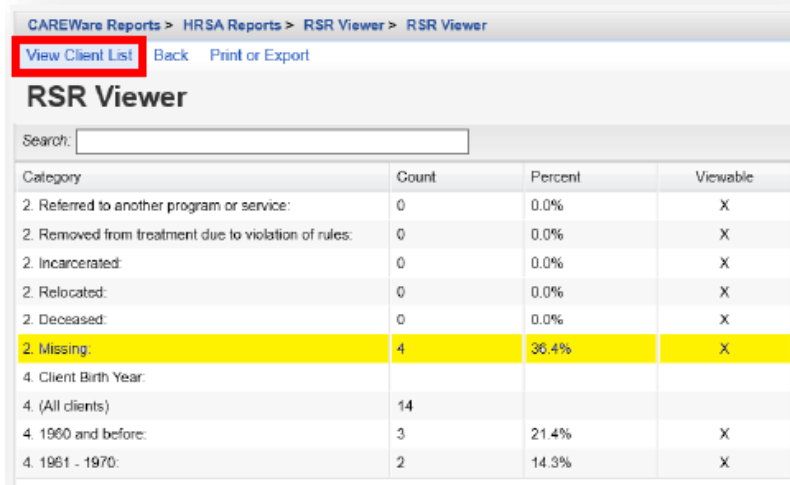
- Return to the CAREWare Reports screen and click “HRSA Reports,” and then click “RSR Viewer.”



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



- The report should look similar to the image below. To correct an error, click “View Client List.”



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.

