Yellow highlights indicate changes since the last version.



This document describes the 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 Resource	Health and Human Services
	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 R	Reports	CAREWare Reports > Custom	n Reports	
	HRSA Reports	RSR and ADR	Back		
\langle	Custom Reports	Run or manage custom reports	Custom Report	orts	
	Performance Measures	Run or Manage Performance Measures	Manage/Run Custom Repo	orts	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	n 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."

Manage/R	un Cust	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."





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

Department of Health and Hur Phane Phane P	man Services es Administration	mrafferty > MDPH	Report generation complete.
Customize	CAREWare Reports > Custom Reports > Edit Run Report Back	Manage Run Custom Reports > TLSClientList	> Run Report
Find Client Reports Rapid Entry Appointments My Settings System Information System Messages Administrative Options Log Off	Run Report Date From: Date Through: Clinical Review Year: Output Display:	Parameters 5/26/2019 22 5/26/2020 22 2020 2020 2020	<u>Go To Top</u>
** Connected to the MDPH TEST CAREWare Server **	Show New Clients only: Show Clients with Service only: Show Specifications: Sum Numeric Fields: Show Shared Service Records: Show Shared Clinical Records:	Pomain Sharing Settings	<u>Go To Bottom</u>

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

	🖸 CV	V6 - bm	nilner	>	TLS	ClientList.pd	f		× +								×
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:=	1	of 1	Q			- +	- ୍	€ →	(B	AN ∣ I	\forall	∕∀~	\Diamond	þ	B	2	[^]
			TLSClientList Data Scope: Report Start Da Report End Date <u>Last Name</u> : *- <i>Restricted File</i>	te: e: <u>First Name</u> :	Default 05/01/2022 05/31/2022 DOB:	Ins.Type:	Housi	ng Arr :	PovertyLev:	<u>RV Bigibility</u> <u>Status By</u> Pare:	Race/Ethnicity:	Enri I	hate: Number of licated acro	Records : 0			



- 6. File Explorer will open. Save under the
 - "Data (G:)" drive, under the folder for your specific agency. *You will only be able to view your agency's folder*

$\leftarrow \ \rightarrow \ \checkmark \ \bigstar$	This PC 🔺 Data (G:) 🔺	✓ ^ひ Sea	arch Data (G:)
Organize 🔹 New	folder		≣≡ - ?
✓ ▼ This PC	Name	Date modified	Туре
> 🗎 DefaultDownld	_Custom Reports	6/28/2022 9:20 AN	1 File folder
	📜 A Positive Place (Cooley D	Dickinson) 2/17/2022 9:15 AM	1 File folder
🔰 🕪 Data (G:)	AIDS Action Committee	2/14/2022 3:54 PM	I File folder
🔉 🔮 Network	📜 AIDS Project Worcester	6/24/2022 8:57 AM	1 File folder
	📜 AIDS Support Group of C	Cape Cod 3/8/2022 1:48 PM	File folder
	📜 Baystate Health	5/6/2022 8:37 AM	File folder
	📜 Berkshire Medical Center ((Project Empowerment) 3/14/2022 9:10 AM	1 File folder
	📜 Boston Health Care for th	e Homeless 12/19/2019 8:20 A	M File folder
	📜 Boston Medical Center	6/14/2022 5:05 PN	1 File folder
	<		>
File name:	TLSClientList		~
Save as type:	DF File		~
▲ Hide Folders			Save Cancel

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.



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).

c	fare reports						
⊛c#	AREWare Re	ports			CAREWare Reports > Custom R	Reports	
н	HRSA Reports	SR and ADR			Back		
Cu	Custom Reports	un or manage custom re	eports		Custom Report	rts	
Perfor	ormance Measures	un or Manage Performa	nce Measures		Manage/Run Custom Report	ts Run	or manage custom reports
Clier	ient Data Reports	un reports on client info	rmation		Export Custom Reports	Exp	ort custom report definitions to a portable xml file
Fir	Financial Report	etup and run the financi	al report		Invest Curden Research from on V	umi filo dana	od avotam ranadi definitiona from a nastable umi file
Admir	ninistrative Reports	dministrative reports an	d options		import Custom Reports from an x	Imp	ort custom report definition's from a portable xml file
Perr	ermission Reports	un and search permisso	ons held by a user at a point	t in time			
					CAREWare Reports > Custom	n Reports > Man	hage Run Custom Reports > TLSClientList > Run Report >
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teWare Reports > Cu age Run Add De anage/Run anage/Run arr in control of the second anage/Run arr in control of the second arr (second) control of the second arr (Medical) co	vestom Reports > Manar Nake Read On CUSSOT Re COSSTab Report Ty Demograp Demograp Service Service Yes Service Yes Service	e Run Custom Reports y Back Help Prir DODTS e Description ics ics ics ics ics	nt or Export	ate Created /26/2016 9:58 AM /26/2016 9:58 AM /2/2016 8:35 AM /2/2016 8:35 AM /2/2016 8:35 AM /9/2019 10:33 AM /9/2019 10:33 AM /9/2019 10:33 AM	CAREWare Reports > Custom Save Cancel 3 Run Report 2 C Clinical OC Show New Show Clients with Show S Sum Nu Show Shared Clients	n Reports > Man Date From: Date Through: I Review Year: utput Display: v Clients only: i Service only: is Service only: ispecifications: umeric Fields: vice Records: form Records:	Parameters I1/1/2017 Copen in New Window Domain Sharing Settings

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:	MDPH					
Report Start Date:	11/01/2017					
Report End Date:	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".
- 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	B9A91111662U						
	asd, asd	ADAD0101701U						н
	asd, asd asd	ADAD1010701U						
	Berry, Mary	MRBR0204252U						
	Bobcat, Bates	BTBB0101162U						
	Bond, James L	JMBN1007771U	Medicaid		1	7900.0000	66%	٩
	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, Mat	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:	Enrl Status:	HIV Status:	HIV Risk	<u>Vital</u>	HIV Date:	AIDS Date:
				Factor:	Status:		
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:

TLSMissingDemographic	s						
Data Scope:	MDPH						
Report Start Date:	11/01/20	17					
Report End Date:	11/11/20	19					
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: Report Start Date: Report End Date:	MDPH 03/05/2017 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 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



TLS Service Detail Report for ISP/Care Plans

This report displays a list of ISP/Care Plans 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 ISP/ Care Plan 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:

TLSServiceDetail ISP/Care Plan								
Data Scope: Report Start Date: Report End Date:	MDPH 05/26/2019 05/26/2020							
Name:	Srv Date:	Srv Qty:	Srv Category:	Srv Short Name:	Srv Total:			
fred, rogers patrick	12/06/2019	1	Medical Case Management	MCM ISP/Care Ran	0			
Nau, Robin	12/12/2019	1	Medical Case Management	MCM ISP/Care Ran	0			
Ray, Mike	12/12/2019	1	Medical Case Management	MCM ISP/Care Ran	0			

TLS Service Detail Report for Acuity Assessment

This report displays a list of Acuity Assessment 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 Acuity Assessment 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 Acuity Assessment

Data Scope: Report Start Date: Report End Date:		MDPH 05/26/2019 05/26/2020				
Name:	Srv Date:	<u>Si</u>	rv Qty:	Srv Category:	Srv Short Name:	Srv Total:
Alcius, Charmant	12/12/2019	9 1		Medical Case Management	MCM Acuity assessment	0
Doe, John	12/13/2019	9 1		Medical Case Management	MCM Acuity assessment	0
doe, john	12/06/2019	9 1		Medical Case Management	MCM Acuity assessment	0
Edwards, Alyssa	12/12/2019	9 1		Medical Case Management	MCM Acuity assessment	0
hrsa, mdph	12/12/2019	9 3		Medical Case Management	MCM Acuity assessment	0
Jacks, Apple	12/03/2019	9 1		Medical Case Management	MCM Acuity assessment	0
MDPH, Test	12/09/2019	9 3		Medical Case Management	MCM Acuity assessment	0
OConnor Jr, William	05/08/2020	0 1		Medical Case Management	MCM Acuity assessment	0
Ray, Mike	12/12/2019	9 1		Medical Case Management	MCM Acuity assessment	0
Test, JohnSnow	04/27/2020	0 1		Medical Case Management	MCM Acuity assessment	0
testing, Testing	12/06/2019	9 2		Medical Case Management	MCM Acuity assessment	0



TLS Service Detail Report for Acuity Reassessment

This report displays a list of Acuity Reassessment 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 Acuity Reassessment 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:

TLSService DetailRep	TLSServiceDetailReport Acuity Reassessment								
Data Scope:	MDP	н							
Report Start Date:	05/26	/2019							
Report End Date:	05/26	/2020							
Name:	Srv Date:	Srv Qty:	Srv Category:	Srv Short Name:	Srv Total				
addclient, mdph	12/13/2019	2	Medical Case Management	MCM Acuity Reassessment	0				
bet, alpha test	12/03/2019	1	Medical Case Management	MCM Acuity Reassessment	0				
fate, elpha	12/06/2019	1	Medical Case Management	MCM Acuity Reassessment	0				
Gomez, Adam	01/16/2020	1	Medical Case Management	MCM Acuity Reassessment	0				
johnson, Test	12/06/2019	4	Medical Case Management	MCM Acuity Reassessment	0				
Last, First	12/06/2019	1	Medical Case Management	MCM Acuity Reassessment	0				
Lopez, Carla	06/04/2019	1	Medical Case Management	MCM Acuity Reassessment	0				
Martin, Steve	01/16/2020	1	Medical Case Management	MCM Acuity Reassessment	0				
MDPH, Testing	12/06/2019	2	Medical Case Management	MCM Acuity Reassessment	0				
Nau, Robin	12/12/2019	1	Medical Case Management	MCM Acuity Reassessment	0				
Obi, first j	06/04/2019	1	Medical Case Management	MCM Acuity Reassessment	0				
Pitt, Brad	12/06/2019	1	Medical Case Management	MCM Acuity Reassessment	0				
smith, rob	12/13/2019	1	Medical Case Management	MCM Acuity Reassessment	0				
Test, JohnSnow	06/01/2019	1	Medical Case Management	MCM Acuity Reassessment	0				
Test, Test	12/06/2019	1	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:



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	Les et este		2			4				
1										
-										
-										
-										
-										
:		2 Viral Load Supp	pression <=19	99						
•										
-		Data Scope:	MDPH							
1										
1		Name:	Last VL	Last VL	Last VL					
1			Cab Dator	operation	Value:					-
5		asd, asd	6/1/2018	-	199					
•		Bondtest, James	1/30/2018	>	50					
2		Careware, Mass Boston	6/26/2018	-	10					
1		cherry, coke	6/25/2018	<	20					
1		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					
1		Mercado, Rosa M	1/30/2018	<	20					
1		Pepe, Juan DeLaLuma	1/30/2018	<	20					
1		Testing, Elmo	6/25/2018	<	20					
4										-
٩,										•

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:	<u>Name:</u>	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".

Instructions for Data Reports February 2021, v2.2



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	1		2 .		1 7	
÷		Viral Load List (Al	l Results)			_
-		Data Scope:	MDPH			
1		Name:	Lab Date:	Lab Result:		
		Von Trapp, Maria	9/6/2016	400		
E.		Smith, Granny	9/6/2016	75		
		Saruman, Manycolors	9/6/2016	0		
- 2		Simon, Simple S	9/6/2016	20		
		Snow, Jon	9/6/2016	20		
L II		Gemini, Raja	9/6/2016	20		
		Test1, Test1	5/30/2017	10000		
		Affleck, Ben	6/5/2017	1		
3		asd, asd	4/12/2018	4660	-	
11		Mele, Jane	1/30/2018	20		
12		Mercado, Rosa M	1/30/2018	20		
		Foley, Patricia Ann	1/30/2018	20		
-		Pepe, Juan DeLaLuma	1/30/2018	20		
1		Bondtest, James	1/30/2018	50		
		asd, asd	6/1/2018	199		
		asd, asd	5/31/2018	12		
		asd, asd	5/9/2018	260		
5		Martinez, Marla	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: Report Start Date:	MDPH 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:

<u>Referral (Medical) C</u>	Completion Perce	entage		
Data Scope:	MDPH			
Report Start Date:	03/05/2017			
Report End Date:	11/11/2019			
Linkage Status (Srv. C	ustom)Crosstab			
Linkage Status (Srv. Custo	<u>m): Tot</u>	al:	<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				

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)	<u>Type Percentage</u>	2		
Data Scope:	MDPH			
Report Start Date:	03/05/2017			
Report End Date:	11/11/2019			
Linkage Type (Srv. Cu	istom)Crosstab			
Linkage Type (Srv. Custon	<u>n):</u> <u>T</u>	otal:	<u>Col. %:</u>	
Not Specified	10	38	96.5	
HCV	4		2.8	
HIV	1		0.7	
Total:	14	43	100.0	
				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)	٩
	Bond, James L	9/28/2016	MCM Acuity Reassessment	15	Moderate (15-28)	٩
	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 Date: Report End Date:		MDPH 03/05/2017 11/11/2019						
First Name:	Last Name:	Srv Date:	Srv Short Name:	Case Manager Name (CIn. 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	۵				
					Number of Records : 4			
					(Count is unduplicated across providers)			
* - Restricted Field	l.							



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

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. %:
NotSpecified	19	52.8
Stable/Permanent	12	33.3
Temporary	1	2.8
Unstable	4	11.1
Total:	36	100.0

Number of Records: 5

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:	MD	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												
cantiana 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	^{Back} ●Client Data Reports				
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."

CAREWare Reports > Client Data Reportation Client Data Reportation Client Data Report	rts > Clinical Encounter Reports
Clinical Encounter	r 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
Clients with no Pneumovax in X months	Clients who have not had a Pneumovax immunization in a specified number of months



- 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 End	counter 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	180
Apply Custom Filter:	2
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:

Data Scope:	MDPH							
Report Criteria	:							
Provider:		MDPH						
Service Ca	tegony	Outpatient/Ambulatory	utestient/Ambulatery Health Corvises					
Subservice		Lahs	ficulti Scivices					
Last qualify service:	ying	at least 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					



Missing Acuity Assessment in 6 months

MDPH requires that OHA-funded medical case management clients have an acuity assessment every six months. ARCH clients must have an acuity assessment at intake and an acuity reassessment at discharge. Use this report to find clients who do not have acuity assessments entered into CAREWare for this time frame.

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	Back ●Client Data Reports				
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."

CAREWare Reports > Client Data Report	rts > Clinical Encounter Reports
Back	
Clinical Encounter	r 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 resul
ARV Ingredient Report	Displays ARV ingredient counts for active HIV-positive clients on the specified date

- 3. Click on Service Category and select "Medical Case Management."
- 4. Click on Subservice Type and enter the subservice. To identify clients without an assessment, type "MCM Acuity assessment" into the subservice.



5. Set Number of Days and click "Run".

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

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

Data Scope:	MDPH					
Report Criteria:						
Provider:		MDPH				
Service Cat	egory:	Medical	Case Managemer	t		
Subservice		MCM Ac	uity assessment			
Last qualify	ing	at least	180 days ago.			
service: Enrollment	Status:	active o	r unknown.			
	Climat ID:		UDN		Last Carries Date:	Descriden
456	Client ID:		URN:	Z4BZGO6em	Last Service Date:	Provider:
2222			9999011420111	C+WBatH8x		
lient. mdph			MPAD0801191U	TPYr+ieoQ		
us, Charmant			CAAC1223551U	qow5OI+SL	12/12/2019 12:00:00 AM	MDPH
a, bet			BTAP0101752U	LeNbRmpUJ		
asd			ADAD0101701U	8DUOap0Ge	6/1/2018 12:00:00 AM	MDPH
asd asd			ADAD1010701U	KU6HGUWcE		
ijk, nasdp			NSAD0708301U	apSGaOqxZ		
y, Mary			MRBR0204252U	9WnR82ANe		
alpha test			APBT0708942U	QqI18LDsJ		
, foxtrot			FXBT0401002U	aBzdnODRU		
Bird			BRBG0101961U	QqRgARPIE		
mario A			MRBA0912751U	F9BVCltKq		



Missing ISP/Care Plans in 6 months

MDPH requires that OHA-funded medical case management clients have an ISP/Care Plan every six months. Use this report to find clients who do not have ISP/Care Plans entered into CAREWare for this time frame.

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

CAREWare Reports	CAREWare Reports		Reports
		Back	
		Client Data Rep	ports
HRSA Reports	RSR and ADR		
Custom Reports	Run or manage custom reports	Clinical Encounter Reports	Run clinical encounter reports
		Clinical Encounter Preprints	Run clinical encounter preprints for selected clients
Performance Measures	Run or Manage Performance Measures		
Client Data Reports	Run reports on client information	Multiple Client Case Note Report	Configure and run the report
		Service Detail Report	List details of services provided to clients within a specified range of dates
Financial Report	Setup and run the financial report	Poterrais Depart	List datails of informals 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."

CAREWare Reports > Client Data Report Back	ts > Clinical Encounter Reports
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
Clients with no Pneumovax in X months	Clients who have not had a Pneumovax immunization in a specified number of months

- 3. Click on Service Category and select "Medical Case Management."
- 4. Click on Subservice Type and enter the subservice. To identify clients without an ISP/Care Plan, type "MCM ISP/Care Plan" into the subservice.

Instructions for Data Reports



- January 2022, v2.3
 - 5. Set Number of Days and click "Run".

Clients With No Service in 180 days.

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 X	(days	
Service Category:	Medical Case Management	3
Subservice Type:	MCM ISP/Care Plan	4
Number of Days:	180	
Apply Custom Filter:		
Hide Personally Identifying Information:		
Include shared services entered by other providers:		

6. The report (identifying clients who have not had an ISP/Care Plan in six months) will look like the picture below:

Da	ta Scope: MDPH									
Re	port Criteria:									
	Provider:	MDPH	MDPH							
	Service Category:	Medical Case Management								
	Subservice:	MCM ISP/Care Plan								
	Last qualifying service:	at least 180 days ago.								
	Enrollment Status:	active or unknown.								
Name:	Client ID:	URN:	eURN:	Last Service Date:	Provider:					
123, 45	6	99990113202U	Z4BZGO6sm							
222, 22	22	99990114201U	C+WBqtH8x							
addclier	nt, mdph	MPAD0801191U	TPYr+ieoQ							
Alcius, O	Charmant	CAAC1223551U	qow50I+SL							
alpha, b	et	BTAP0101752U	LeNbRmpUJ							
asd, aso	i	ADAD0101701U	8DUOap0Ge	12/20/2018 12:00:00 AM	MDPH					
asd, aso	i asd	ADAD1010701U	KU6HGUWcE							
asdhjk,	nasdp	NSAD0708301U	apSGaOqxZ							
Berry, N	lary	MRBR0204252U	9WnR82ANe							
bet, alpł	ha test	APBT0708942U	QqI18LDsJ							
beta, for	xtrot	FXBT0401002U	aBzdnODRU							
Big, Bird	t	BRBG0101961U	QqRgARPIE							
bla, mar	rio A	MRBA0912751U	F9BVCltKq							



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 Reports > Clinical Encounter Reports		
Back		Dack		
	ports	Clients with no encounter in X days	r Reports 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 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	Clients whose last selected lab result was less than or greater than the specified result 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

Cleveland, Brown Indian

CLTC, Test

BOCE0202921U

TSCT0101601U



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: 1	NDPH						
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 enrollm status: HIV Status:	ent	is active	or unknown. Il to Negative or Unkn	own.			
Custom Filter	:	None	5				
Name:	URN:		Last Screening Result:	Last Screening Date:	Provider Name:		
Bondtest, James	JMBN0510	631U		1/30/2018	MDPH		
Brady, Thomas Greatest	TOBA0601	801U					
Brady, Tom M	TMBA0101	1755U					
Brookshire, Stacey	SABO0202	2732U		9/9/2016	MDPH		
careware, chris	CRCR0101	1802U		4/17/2018	MDPH		
Careware, Mass Boston	MSCR0625	5001U		6/26/2018	MDPH		
Carter, Lisa Marie	LSCR0615	545U		9/7/2016	MDPH		
cherry, coke	CKCE0629	801U		6/25/2018	MDPH		
Claus, Michael	MCCA0926	6601U		9/7/2016	MDPH		

12/6/2016

MDPH



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"

©CAREWare Reports		CAREWare Reports > Performance Measures > Evaluate Measures				
		Evaluate Selected Evaluate Group Back Print or Export Evaluate Measures				
HRSA Reports	RSR and ADR	Search:				
		Code	Name	Description	Selecte	
Custom Reports	Run or manage custom reports	HAB01	Two Primary Care visits>= 3mos Apart	Percentage of clients with HIV infection who had two or more medica		
	`	HAB02	Percentage with >=2 CD4 Counts	No. of HIV-infected clients who had at least one medical visit with a p		
Performance Measures	Run or Manage Performance Measures	HAB03	CD4<200 with PCP prophylaxis	Percentage of clients with HIV infection who had a CD4 count below		
Client Data Reports	Run reports on client information	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.		
Financial Report	Setup and run the financial report	MA02	Clients with VL >=200	HIV Positive Cleints with a visit in the last years (365 days) and enro		
Administrative Reports	Administrative reports and options	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		
Permission Reports	Run and search permissons held by a user at a po	HAB17	Hepatitis B Screening	Percentage of clients with HIV infection who have been screened for		
PDP	Managa/Dup the DDD	HAB08	Hepatitis B Vaccination	Perentage of HIV-infected client who completed vaccination series for		

3. Click "Edit" to adjust the date from which the report should run. Then click "Run."

CAREWare Reports > Per Edit Today Run Ba	formance Measures > Evaluate Measures > Performance Measure Settings ick	
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:	<u>Name:</u>	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

 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: 2/1/2019		Save Cancel Print or Export		
End Date:	6/26/2019	Funding	Source Filt	ter
Funding Sources:	Part B, Part D	Search:		
		Select	Funding Source	
			Medicare	
			Part A	
Include Subservice Detail?:	 Image: A set of the set of the		Part B	
Include Provider Information ?:			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

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 Assessmen	t	1	1	\$0.00	\$0.00	\$0.00
Case Management (non-med	lical)Totals:	1	1	\$0.00	\$0.00	\$0.00
Health ed./risk reduction/pre	evention	Clients:	Units:	Total:	Amount Received:	Not Received:
MC Communication with Healt	th Care Provider	1	1	\$0.00	\$0.00	\$0.00
MC HERR Health Education/R	lisk Education Session	1	2	\$0.00	\$0.00	\$0.00
MC HIV, the Viral Cycle & Med	lications at work	1	1	\$0.00	\$0.00	\$0.00
Health ed./risk reduction/pre	ventionTotals:	1	4	\$0.00	\$0.00	\$0.00
Medical Case Management		Clients:	Units:	Total:	Amount Received:	Not Received:
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 recer	tification	2	2	\$0.00	\$0.00	\$0.00
MCM Initial acuity asessment		1	1	\$0.00	\$0.00	\$0.00
MCM Referrals to Partner Ser	vices	1	1	\$0.00	\$0.00	\$0.00
Medical Case ManagementT	otals:	7	10	\$0.00	\$0.00	\$0.00



HRSA Reports

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

Customize	CAREWare Reports		
Add Client Find Client	CAREWare Reports		
Reports Rapid Entry	HRSA Reports	RSR and ADR	
Appointments 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	
Change this from Central Admin -> System nformation > Application Notification Settings	Financial Report	Setup and run the financial report	

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."

CAREWare Reports > HRS/ Help Back	A Reports				
HRSA Reports					
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 > HR	SA Reports > RSR Settings
Edit Edit Filter Run	Help Back
RSR Settings	5
Year: 2	019
Cross Provider Labs:	
Apply Filter:	
Filter Description:	eport Filter is empty

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





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

Help Back	A Reports
●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
ADD Validation Deport	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 PSR_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."

CAREWare Reports > HRSA Reports > RSR Viewer > RSR Viewer 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. 1960 and before:	3	21.4%	×	
4. 1961 - 1970:	2	14.3%	х	



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,					