

Instructions for Data Reports

July 2023, v2.5

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.

Table of Contents

Navigating to Reports	2
Downloading Reports in CAREWare 6	3
TLS Client List	6
TLS Missing Annual Review	7
TLS Missing Client Status.....	8
TLS Missing Demographics	8
TLS Missing Ryan White Eligibility	9
TLS Service Detail Report.....	9
TLS Service Detail Report for ISP/Care Plans.....	10
TLS Service Detail Report for Acuity Assessment.....	10
TLS Service Detail Report for Acuity Reassessment	11
Care Access Service Detail Report.....	11
Viral Suppression ≤ 199	11
Viral Suppression ≥ 200	12
Viral Load (All Results)	12
Referral (Medical/Non-Medical) Completion	13
Referral (Medical/Non-Medical) Completion Percentage	14
Referral (Medical/Non-Medical) Type Percentage	14
Changes in Acuity	15
List of ISP Services	15
Aggregate Housing Counts (6 months)	16
Aggregate Housing Counts (12 months)	16
Aggregate Insurance Counts.....	17
Aggregate Poverty Level Counts	17
MCM Last Acuity Reassessment and Referral Info	18
No Service in X Days Reports	19
Missing Acuity Reassessment in 6 months (OHA Funded MCM Services Only)	19
Missing Acuity Assessment in 6 months.....	21
Missing ISP/Care Plans in 6 months.....	23
Clinical Encounter Reports	25
Report to identify clients without CD4 or viral load in the past six months	25
Performance Measures	27
Viral Suppression.....	27
Financial Report	28
HRSA Reports	30
RDR Report	30
RSR Validation report.....	31

Instructions for Data Reports

July 2023, v2.5



Navigating to Reports

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

A screenshot of the CAREWare login page. At the top, it says 'Department of Health and Human Services' and 'HRSA Health Resources and Services Administration'. Below this is a 'Login' section with a 'Submit' button and a 'Login' heading. Under the heading is a prompt 'Enter your CAREWare Username' and a text input field labeled '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.

A screenshot of the 'CAREWare Reports' menu. It has a title 'CAREWare Reports' and a list of report types with buttons: '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), 'Administrative Reports' (Administrative reports and options), and 'Permission Reports' (Run and search permissions held by a user at a point in time).

Instructions for Data Reports

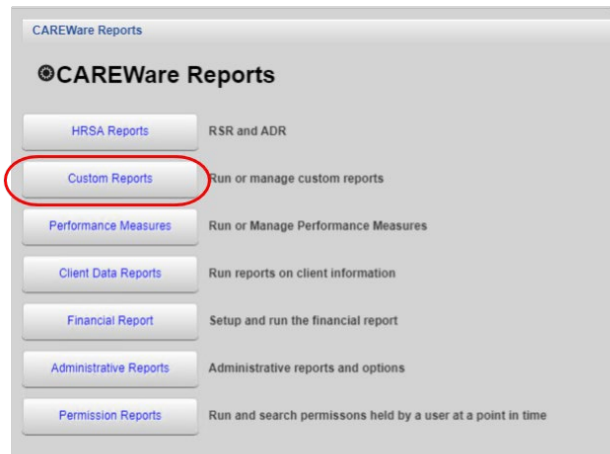
July 2023, v2.5



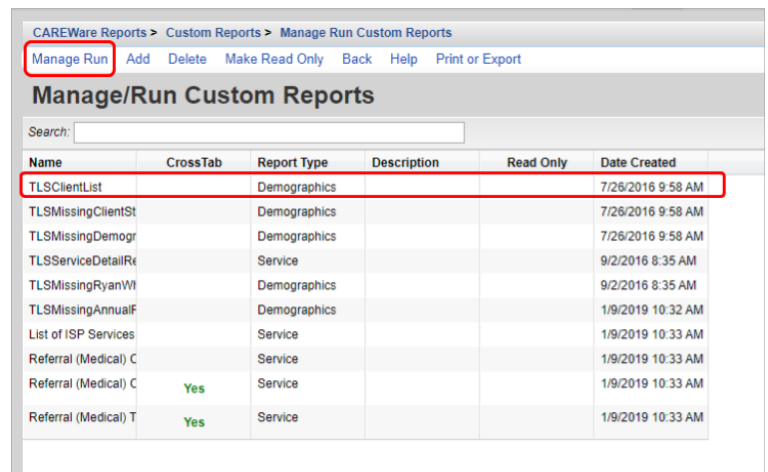
Downloading Reports in CAREWare 6

The process of downloading and exporting Custom Reports from CAREWare 6 has changed with the transition from a Remote Desktop to a secure web browser. Users will no longer use the secure file transfer protocol (SFTP) WinSCP software to transfer CAREWare files from the server to their computer. Instead, users will be able to download reports directly from CAREWare.

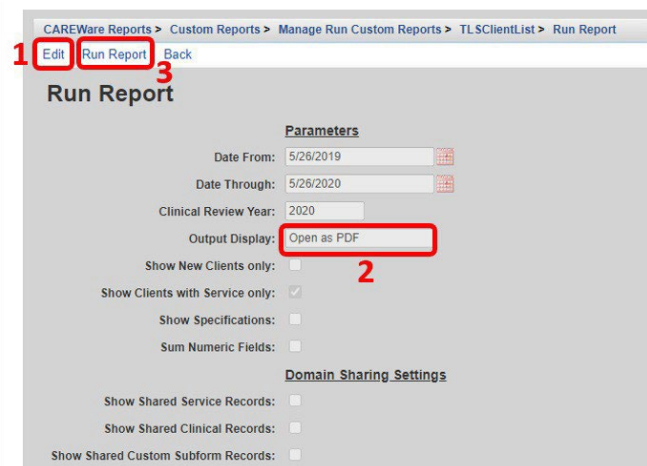
1. Click on “Reports” from the main menu. Select “Custom Reports” and then “Manage/ Run.”



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



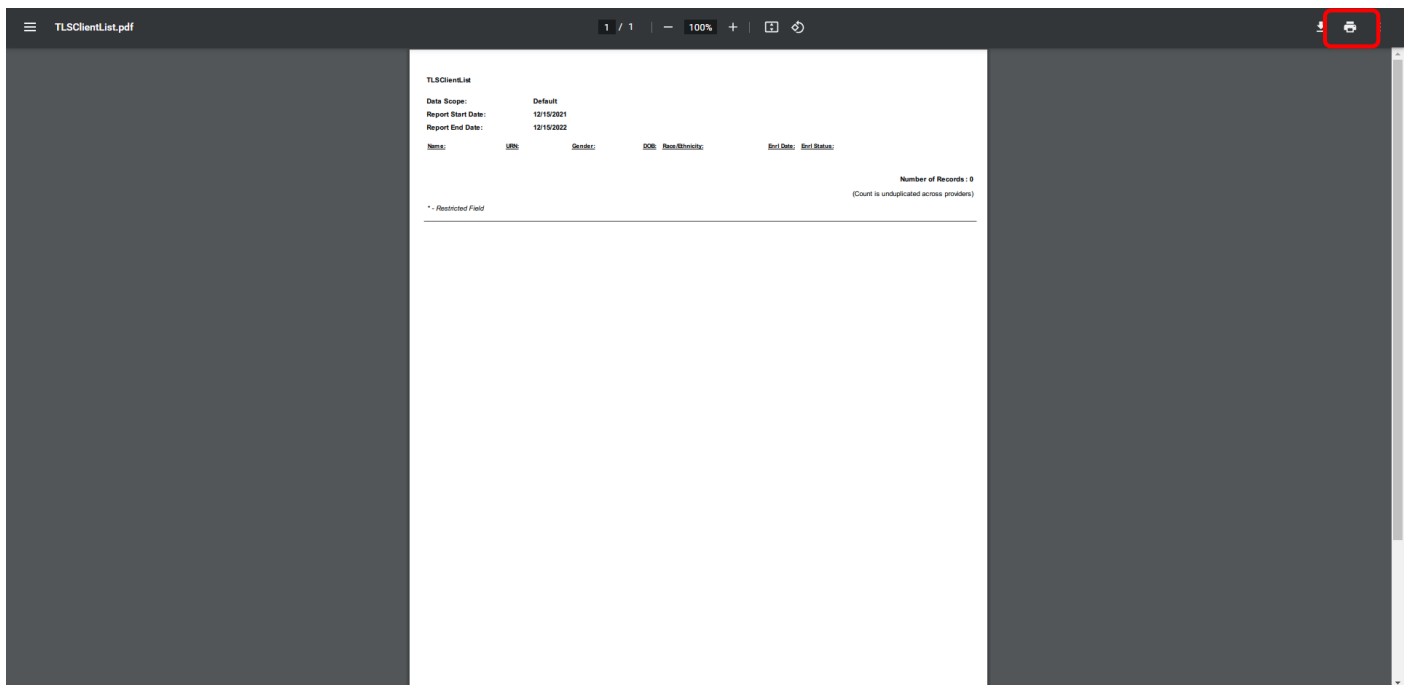
3. Select “Run Report.” Ensure that your output display is set to export correctly by selecting “edit” and then choosing either “Open as PDF” or “Download as CSV.” Click “Save” and then “Run report.”



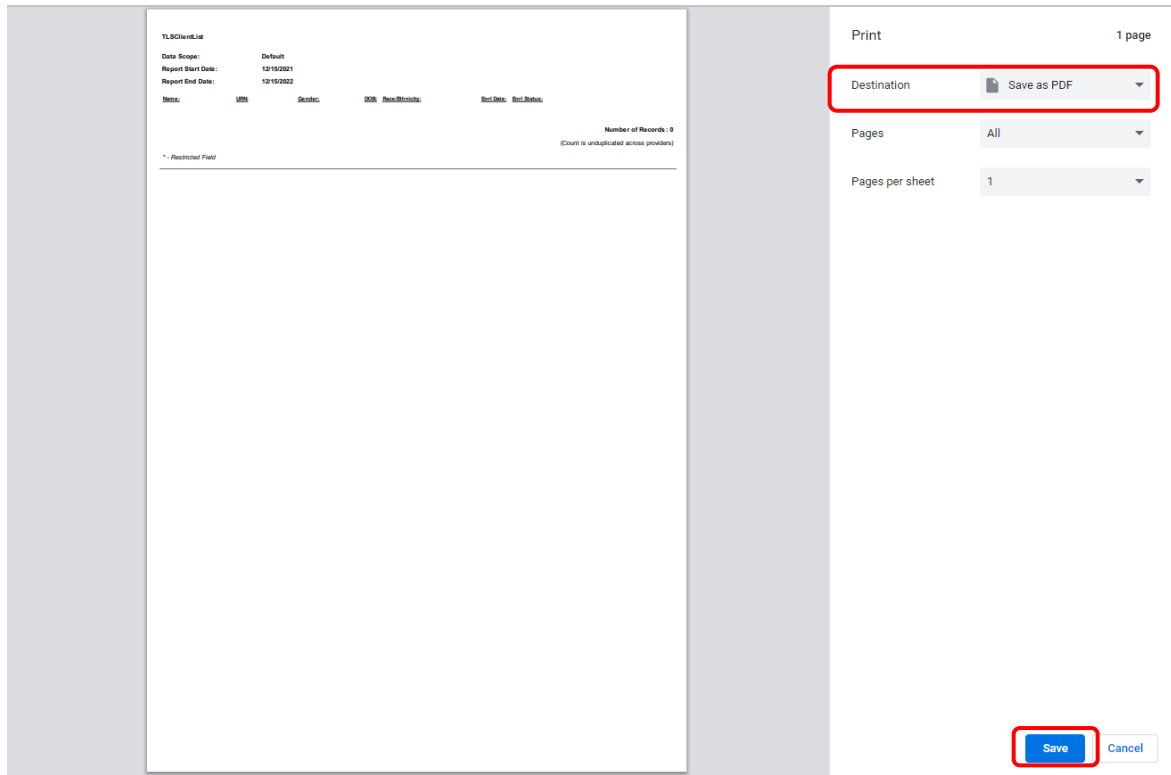
- A “Report Generation Complete” box will appear in the top right corner. Select “View [Report Name].”



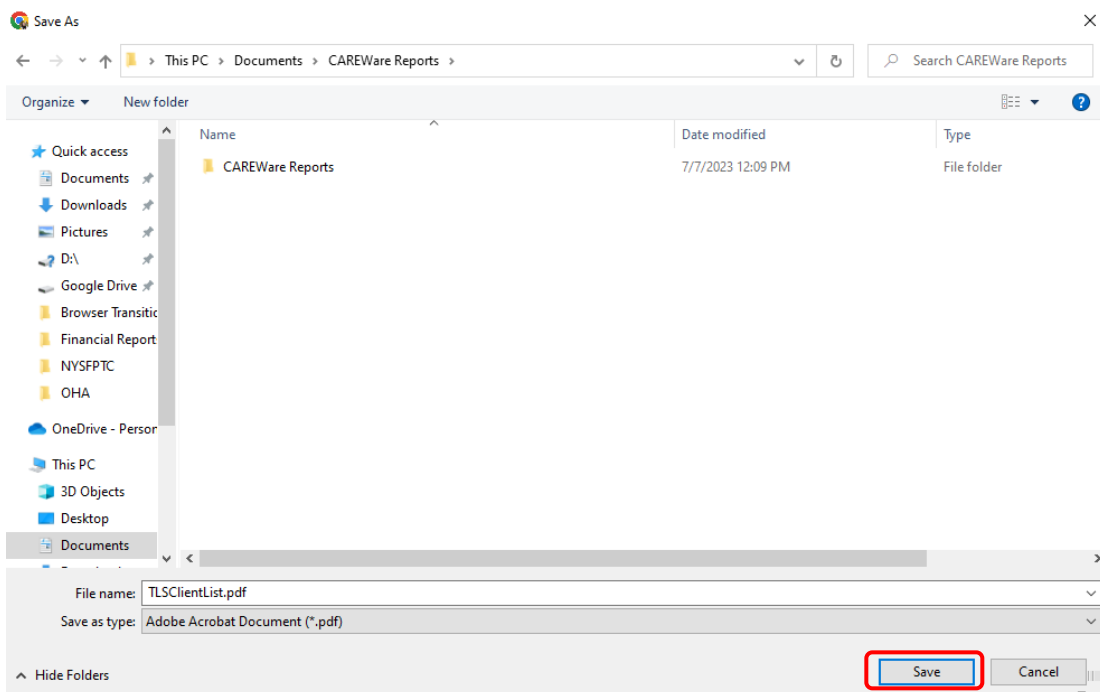
- The report will open as a new tab. Click the Printer icon.



6. On the page that opens up, click Destination, and then Save as PDF. Click Save.



7. Choose the folder on your own computer to which you would like to save the report. Click Save. *Important note: As always, agency staff are responsible for acting in accordance with their own agency policies when downloading sensitive data from CAREWare. Follow your agency's security and privacy rules for reports and data files you download from CAREWare.*



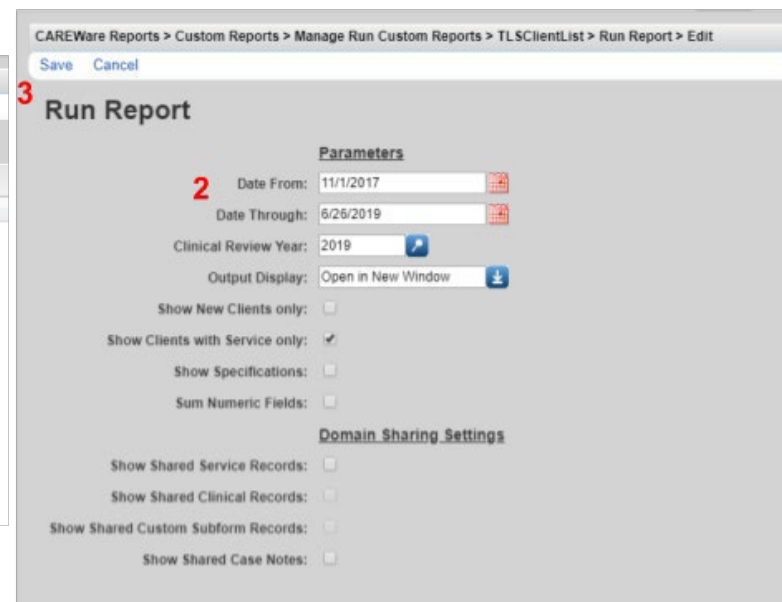
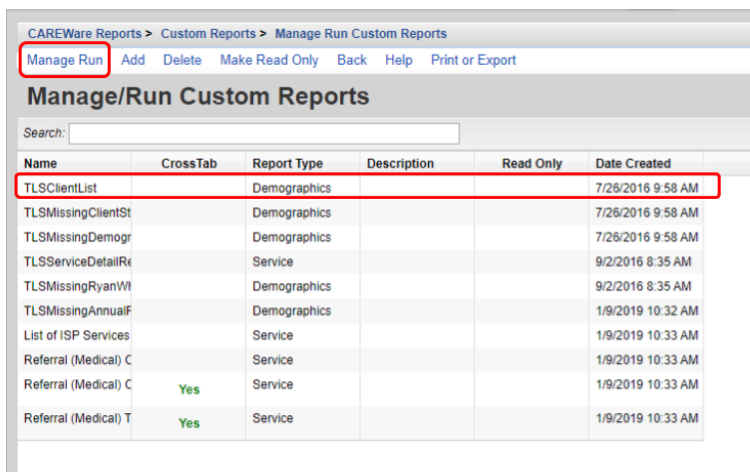
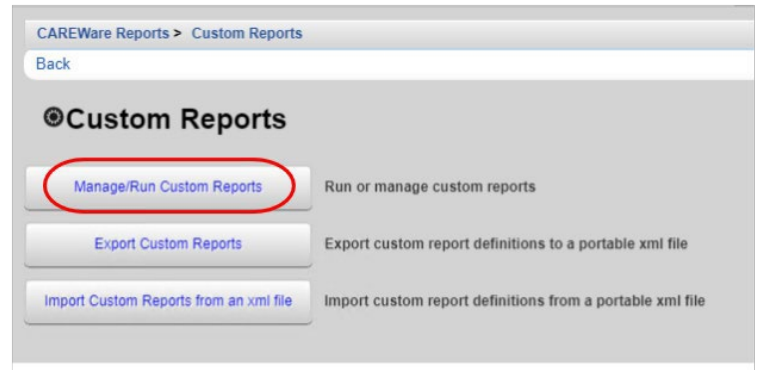
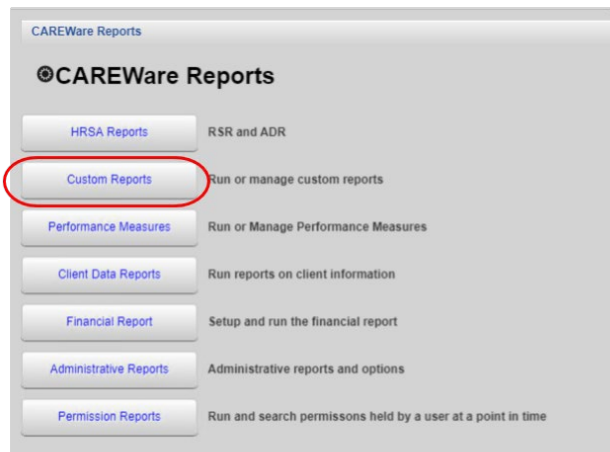
Instructions for Data Reports

July 2023, v2.5



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).



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”.

Instructions for Data Reports

July 2023, v2.5



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4. The report will look like this:

TLSCientList

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 TLSSMissingAnnualReview 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:

TLSSMissingAnnualReview

Name:	URN:	Primary Ins:	Housing Arr:	HH Size:	HH Income:	Poverty Lev:	Case Manager Name (Cln. Custom):
AA, BB	BB491111662U						
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	JMBN0610631U	Private - Employer		4	50000.0000	199%	
Bouffet, Phoebe	POBU0613704U						
Brookshire, Stacy	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	DPCL0101011U						
Crane, Ichabod Tanytown	IHCAD112681U						
Cruz, Maria	MRCU1022672U						
Cruz, Maria	MRCU0622002U						
cruz, trippy doo	TICU0312832U	Medicare Part D	Stable/Permanent				
Damon, Matt	MTDM0303701U						
davis, samuel	SMDV0627941U						
decaprio, leonardo	LODC0423791U	Medicare Part D		2	100000.0000	624%	

Instructions for Data Reports

July 2023, v2.5



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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: 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	worcester		Massachusetts
Patrick, Bird Saint	Unknown	No	Pacific Islander	44 sesame street	New York	Coos	New Hampshire
Roshan, Andrew	Transgender F/M	No	Not Specified				
S, B	Female	Yes	More than one race				

Instructions for Data Reports

July 2023, v2.5



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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 TLSMissingRyanWhiteEligibility 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

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

TLSServiceDetailReport Acuity Reassessment

Data Scope: MDPH
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	MDM Acuity Reassessment	0
bet, alpha test	12/03/2019	1	Medical Case Management	MDM Acuity Reassessment	0
fate, elpha	12/06/2019	1	Medical Case Management	MDM Acuity Reassessment	0
Gomez, Adam	01/16/2020	1	Medical Case Management	MDM Acuity Reassessment	0
johnson, Test	12/06/2019	4	Medical Case Management	MDM Acuity Reassessment	0
Last, First	12/06/2019	1	Medical Case Management	MDM Acuity Reassessment	0
Lopez, Carla	06/04/2019	1	Medical Case Management	MDM Acuity Reassessment	0
Martin, Steve	01/16/2020	1	Medical Case Management	MDM Acuity Reassessment	0
MDPH, Testing	12/06/2019	2	Medical Case Management	MDM Acuity Reassessment	0
Nau, Robin	12/12/2019	1	Medical Case Management	MDM Acuity Reassessment	0
Obi, First J	06/04/2019	1	Medical Case Management	MDM Acuity Reassessment	0
Pitt, Brad	12/06/2019	1	Medical Case Management	MDM Acuity Reassessment	0
smith, rob	12/13/2019	1	Medical Case Management	MDM Acuity Reassessment	0
Test, JohnSnow	06/01/2019	1	Medical Case Management	MDM Acuity Reassessment	0
Test, Test	12/06/2019	1	Medical Case Management	MDM Acuity Reassessment	0

Care Access Service Detail Report

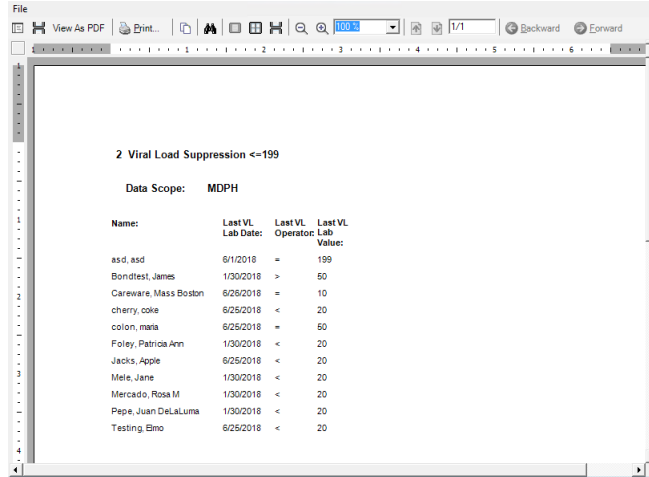
This report displays a list of services that Care Access clients have received. It includes the client name, service date, category and subservice for each service provided. The quantity field shows the number of units for each subservice.

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 ≤ 199

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

1. Select Viral Load Suppression ≤ 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, colie	6/26/2018	<	20
colon, maria	6/26/2018	=	50
Foley, Patricia Ann	1/30/2018	<	20
Jack's, Apple	6/26/2018	<	20
Mele, Jane	1/30/2018	<	20
Mercado, Rosa M	1/30/2018	<	20
Pepe, Juan DeLaLuna	1/30/2018	<	20
Testing, Elmo	6/26/2018	<	20

Viral Suppression ≥ 200

1. This report returns a list of clients whose last Viral Load lab value was ≥ 200 .
2. Select Viral Load Suppression ≥ 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 ≥ 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".

File View As PDF Print... 100% 1/2 Backward Forward

Viral Load List (All Results)

Data Scope: MDPH

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

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

Instructions for Data Reports

January 2022, v2.3



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

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

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

Number of Records : 4

(Count is unduplicated across providers)

* - Restricted Field

Instructions for Data Reports

January 2022, v2.3



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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 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 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 (Cln. 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

Instructions for Data Reports

January 2022, v2.3



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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 monthtime 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 12month 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

Instructions for Data Reports

January 2022, v2.3



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

Instructions for Data Reports

January 2022, v2.3



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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 Reassessment 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												
careware, inc												

Instructions for Data Reports

January 2022, v2.3



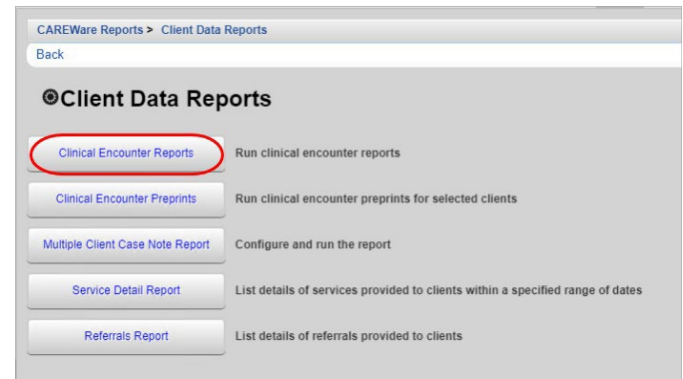
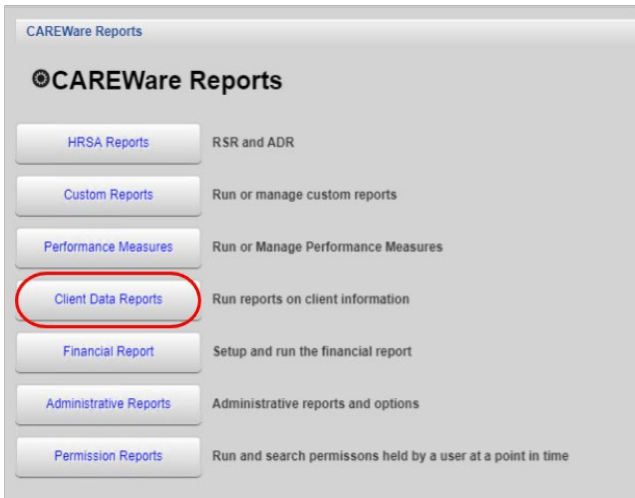
No Service in X Days Reports

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.

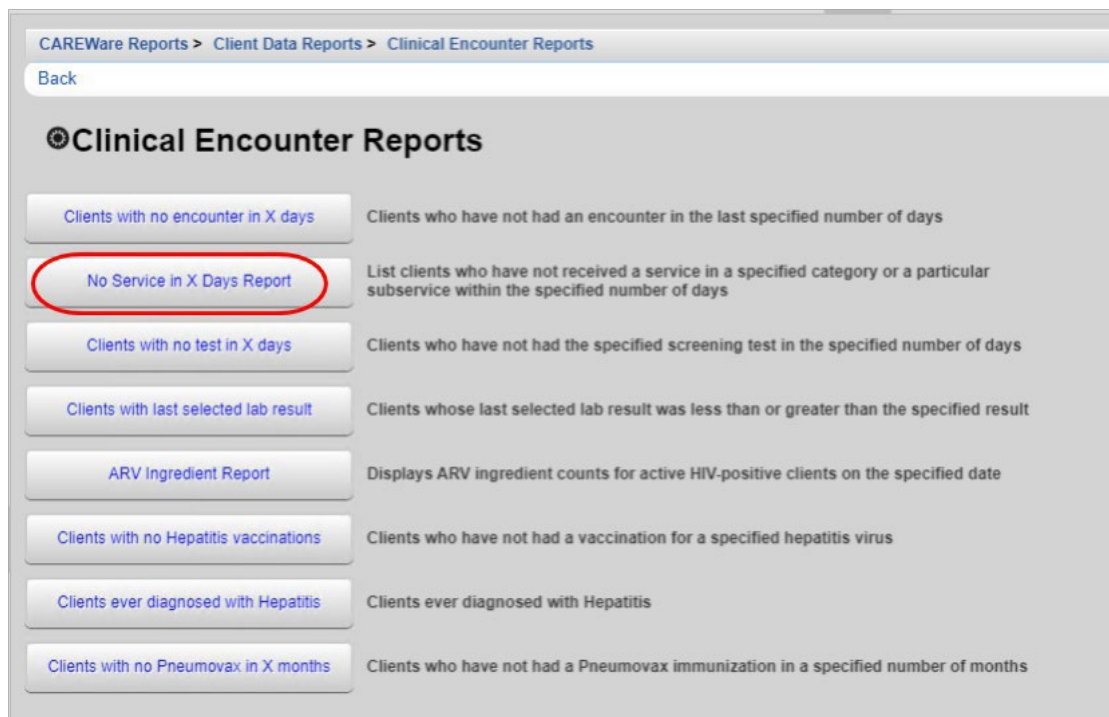
Missing Acuity Reassessment in 6 months (OHA Funded MCM Services Only)

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.”



Instructions for Data Reports

January 2022, v2.3



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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:

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		B9A91111662U	RHEgMvXhj		
asd, asd		ADAD0101701U	8DUOap0Ge		
asd, asd asd		ADAD1010701U	KU6HGUWcE		
Berry, Mary		MRBR0204252U	9VhR82ANe		
bet, alpha test		APBT0708942U	Qq118LDsJ		
Big, Bird		BRBG0101961U	QqRgARPIE		
bla, mario A		MRBA0912751U	F9BVCHKq		
Bobcat, Bates		BTBB0101162U	x1V3Q5IQX		
Bond, James L		JMBN1007771U	zkcpXeBJ0		
Bondtest, James	FRANKLY123	JMBN0510631U	XhP2yeQJU		
Bouffet, Phoebe		POBU0613704U	YycaHG8Me		
Brady, Thomas Greatest		TOBA0601801U	0gP6SbqDQ		
Brady, Tom M	1234	TMB40101755U	snypHq7Kn		
Breeze, Yolanda		YLBEO315864U	YBqodiox		
Brookshire, Stacey		SABO0202732U	NdNeVnUo0		
Brown, Danielle		DNBO0122552U	dOkn9UKDj		
Brown, James	12345	JMBO0101015U	GspthJbhK		

Instructions for Data Reports

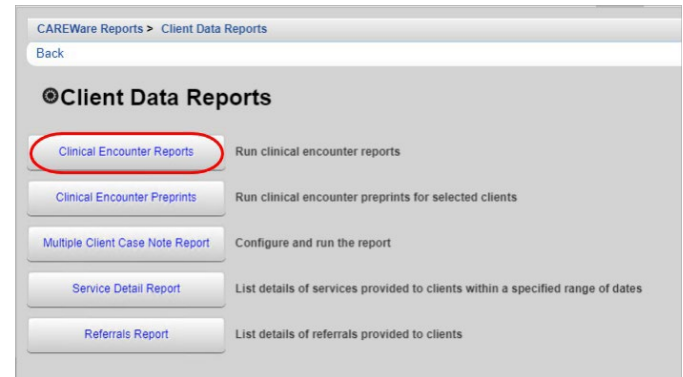
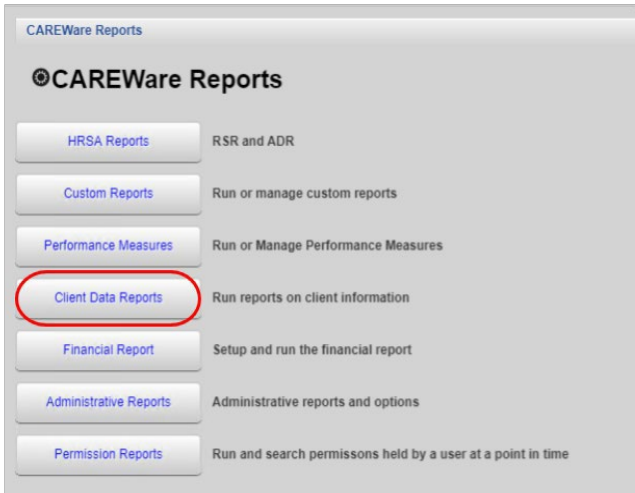
January 2022, v2.3



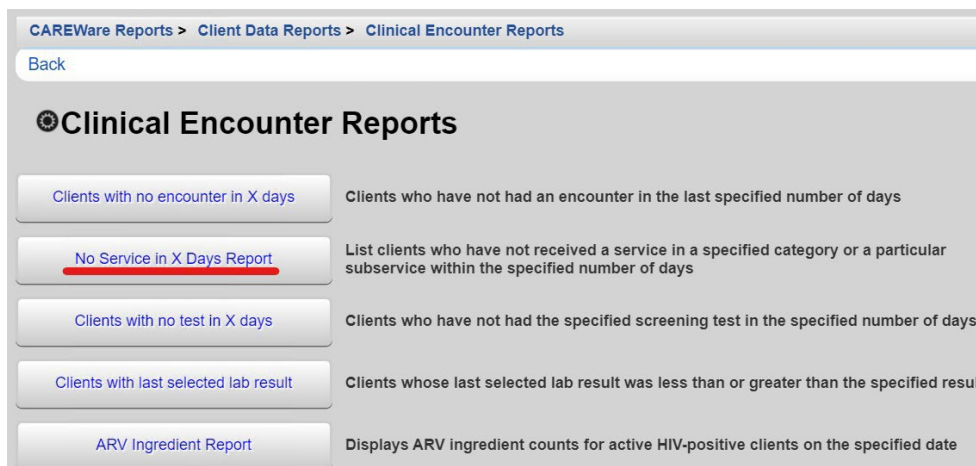
Missing Acuity Assessment in 6 months

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.”



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



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.

Instructions for Data Reports

January 2022, v2.3



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5. 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

5

Clients with no service in X days

Service Category: Medical Case Management **3**

Subservice Type: MCM Acuity assessment **4**

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:

Clients With No Service in 180 days.

Data Scope: MDPH

Report Criteria:

Provider: MDPH

Service Category: Medical Case Management

Subservice: MCM Acuity assessment

Last qualifying service: at least 180 days ago.

Enrollment Status: active or unknown.

Name:	Client ID:	URN:	eURN:	Last Service Date:	Provider:
123, 456		99990113202U	Z4BZGO6sm		
222, 2222		99990114201U	C+WBqtH8x		
addclient, mdph		MPAD0801191U	TPYr+ieoQ		
Alcius, Charmant		CAAC1223551U	qow5OI+SL	12/12/2019 12:00:00 AM	MDPH
alpha, bet		BTAP0101752U	LeNbRmpUJ		
asd, asd		ADAD0101701U	8DUOap0Ge	6/1/2018 12:00:00 AM	MDPH
asd, asd asd		ADAD1010701U	KU6HGUWcE		
asdhjk, nasdp		NSAD0708301U	apSGaOqxZ		
Berry, Mary		MRBR0204252U	9WnR82ANe		
bet, alpha test		APBT0708942U	QqI18LDsJ		
beta, foxtrot		FXBT0401002U	aBzdnODRU		
Big, Bird		BRBG0101961U	QqRgARPIE		
bla, mario A		MRBA0912751U	F9BVCIHKq		

Instructions for Data Reports

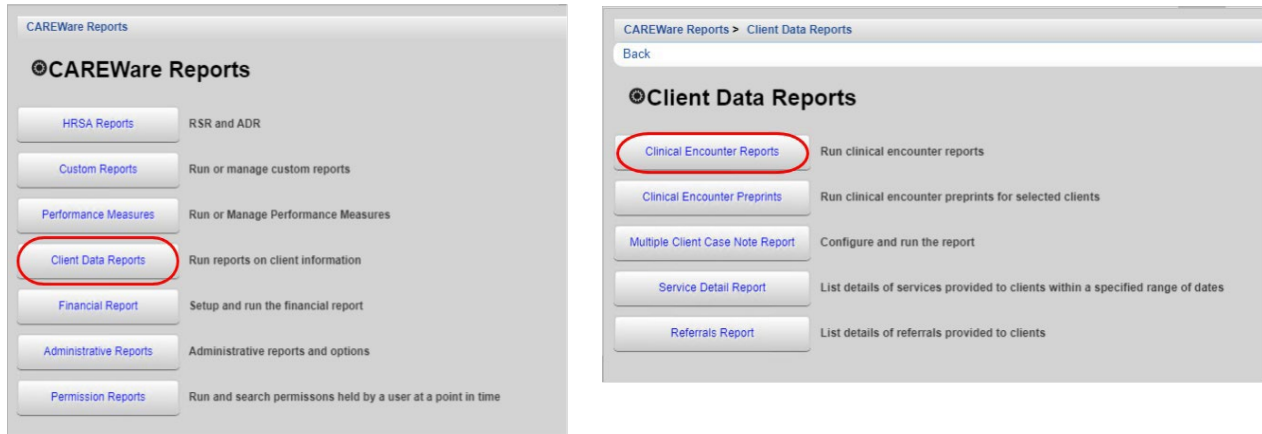
January 2022, v2.3



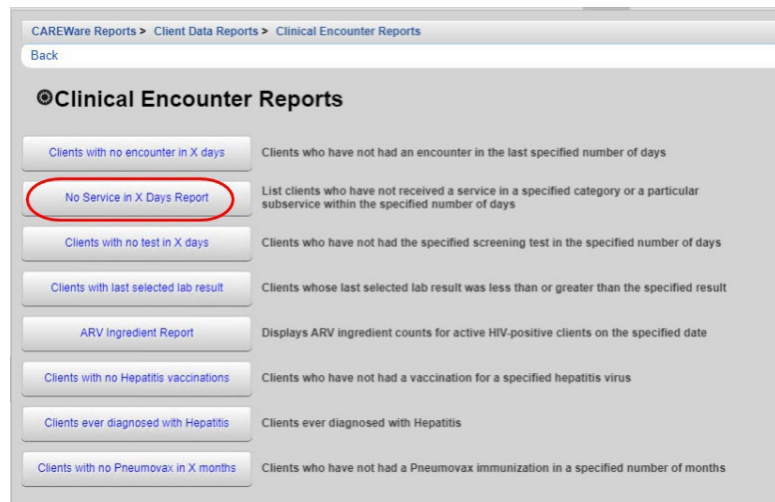
Missing ISP/Care Plans in 6 months

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.”



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



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



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- 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: 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: ☐

- The report (identifying clients who have not had an ISP/Care Plan 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: 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, 456		99990113202U	Z4BZGO6sm		
222, 2222		99990114201U	C+WBqIH8x		
addclient, mdph		MPAD0801191U	TPYr+ieoQ		
Alcius, Charmant		CAAC1223551U	qow5OI+SL		
alpha, bet		BTAP0101752U	LeNbRmpUJ		
asd, asd		ADAD0101701U	8DUOap0Ge	12/20/2018 12:00:00 AM	MDPH
asd, asd asd		ADAD1010701U	KU6HGUWcE		
asdhjk, nasdp		NSAD0708301U	apSGaOqxZ		
Berry, Mary		MRBR0204252U	9WnR82ANe		
bet, alpha test		APBT0708942U	QqI18LDsJ		
beta, foxtrot		FXBT0401002U	aBzdnODRU		
Big, Bird		BRBG0101961U	QqRgARPIE		
bla, mario A		MRBA0912751U	F9BVCllKq		

Instructions for Data Reports

January 2022, v2.3



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.”

A screenshot of the "Client Data Reports" menu in the CAREWare system. The menu is titled "Client Data Reports" and includes a "Back" button. Below the title, there are several buttons: "Clinical Encounter Reports" (highlighted with a red circle), "Clinical Encounter Preprints", "Multiple Client Case Note Report", "Service Detail Report", and "Referrals Report". Each button has a corresponding description of the report it generates.A screenshot of the "Clinical Encounter Reports" menu in the CAREWare system. The menu is titled "Clinical Encounter Reports" and includes a "Back" button. Below the title, there are several buttons: "Clients with no encounter in X days", "No Service in X Days Report", "Clients with no test in X days" (highlighted with a red circle), "Clients with last selected lab result", "ARV Ingredient Report", "Clients with no Hepatitis vaccinations", "Clients ever diagnosed with Hepatitis", and "Clients with no Pneumovax in X months". Each button has a corresponding description of the report it generates.

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”.

A screenshot of the "Clients With No Tests In X Days" report configuration screen in the CAREWare system. The screen shows the breadcrumb path "CAREWare Reports > Client Data Reports > Clinical Encounter Reports > Clients With No Tests In X Days". Below the path are buttons for "Edit Filter", "Run" (highlighted with a red circle), "PDF", and "Cancel". The main title is "Clients With No Tests In X Days". Below the title, there are two input fields: "Test Definition:" with a dropdown menu showing "CD4 Count" (highlighted with a red circle) and "Number of days:" with a text box showing "180" (highlighted with a red circle). There is also an "Apply Filter:" checkbox which is unchecked. At the bottom, there is a "Filter Description:" field with the text "Report Filter is empty".

Instructions for Data Reports

January 2022, v2.3



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- 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
Carter, Lisa Marie	LSCR0615545U		9/7/2016	MDPH
cherry, coke	CKCE0629801U		6/25/2018	MDPH
Claus, Michael	MCCA0926601U		9/7/2016	MDPH
Cleveland, Brown Indian	BOCE0202921U		12/6/2016	MDPH
CLTC, Test	TSCT0101601U			

Instructions for Data Reports

January 2022, v2.3



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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”

The screenshot shows the CAREWare Reports interface. On the left, the 'CAREWare Reports' menu is visible, with 'Performance Measures' highlighted by a red box and a red number '1'. The main area displays the 'Evaluate Measures' table, which lists various performance measures. The row for 'MA02 Clients with VL >=200' is highlighted by a red box and a red number '2'. The 'Selected' column for this row has a checked checkbox.

Code	Name	Description	Selected
HAB01	Two Primary Care visits >= 3mos Apart	Percentage of clients with HIV infection who had two or more medical visits in the last 3 months	<input type="checkbox"/>
HAB02	Percentage with >=2 CD4 Counts	No. of HIV-infected clients who had at least one medical visit with a CD4 count of 200 or higher	<input type="checkbox"/>
HAB03	CD4<200 with PCP prophylaxis	Percentage of clients with HIV infection who had a CD4 count below 200 and received PCP prophylaxis	<input type="checkbox"/>
HAB04	AIDS Clients on HAART	Percentage of clients with AIDS prescribed HAART	<input type="checkbox"/>
HAB05	Percentage of pregnant women prescribed ART	Percentage of pregnant women prescribed ART	<input type="checkbox"/>
MA02	Clients with VL >=200	HIV Positive Clients with a visit in the last years (365 days) and enrolled in care	<input checked="" type="checkbox"/>
HAB15	Chlamydia Screening	Percentage of HIV-infected adult clients who had chlamydia test performed	<input type="checkbox"/>
HAB20	MAC prophylaxis	Percentage of clients with HIV infection who had a CD4 count below 200 and received MAC prophylaxis	<input type="checkbox"/>
HAB17	Hepatitis B Screening	Percentage of clients with HIV infection who have been screened for Hepatitis B	<input type="checkbox"/>
HAB08	Hepatitis B Vaccination	Percentage of HIV-infected client who completed vaccination series for Hepatitis B	<input type="checkbox"/>

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

The screenshot shows the 'Performance Measure Settings' dialog box. The 'Edit' button is highlighted by a red box. The 'Run' button is also highlighted by a red box. The 'AsOfDate' field is set to '9/1/2018' and is highlighted by a red box. The 'Performance Measures' field is set to 'Clients with VL >=200 (MA02)'.

4. The report will look like the screenshot below

Multiple Performance Measures Report 9/1/2018

Selection: MDPH

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

Instructions for Data Reports

January 2022, v2.3



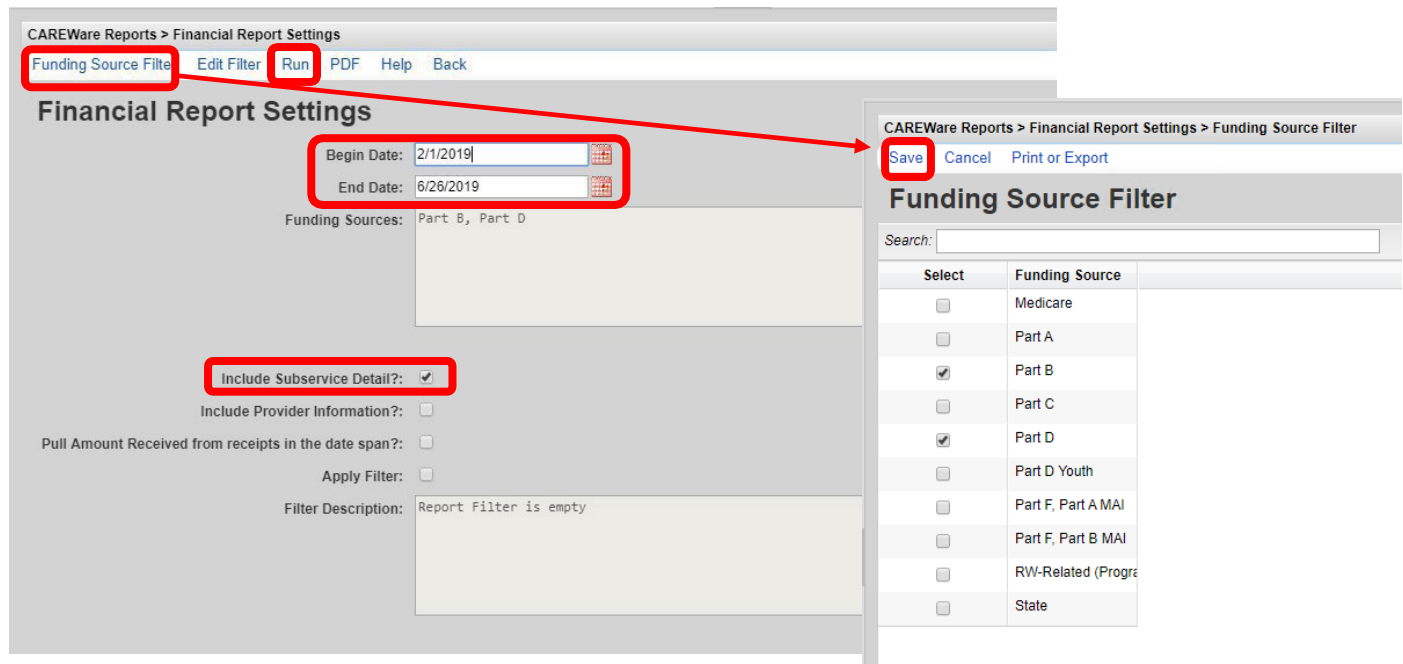
Financial Report

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"



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



Instructions for Data Reports

January 2022, v2.3



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- 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-medical)	Clients:	Units:	Total:	Amount Received:	Not Received:
MC NMCM Acuity Assessment	1	1	\$0.00	\$0.00	\$0.00
Case Management (non-medical)Totals:	1	1	\$0.00	\$0.00	\$0.00
Health ed./risk reduction/prevention	Clients:	Units:	Total:	Amount Received:	Not Received:
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
Health ed./risk reduction/preventionTotals:	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 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
Medical Case ManagementTotals:	7	10	\$0.00	\$0.00	\$0.00

Instructions for Data Reports

January 2022, v2.3



HRSA Reports

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

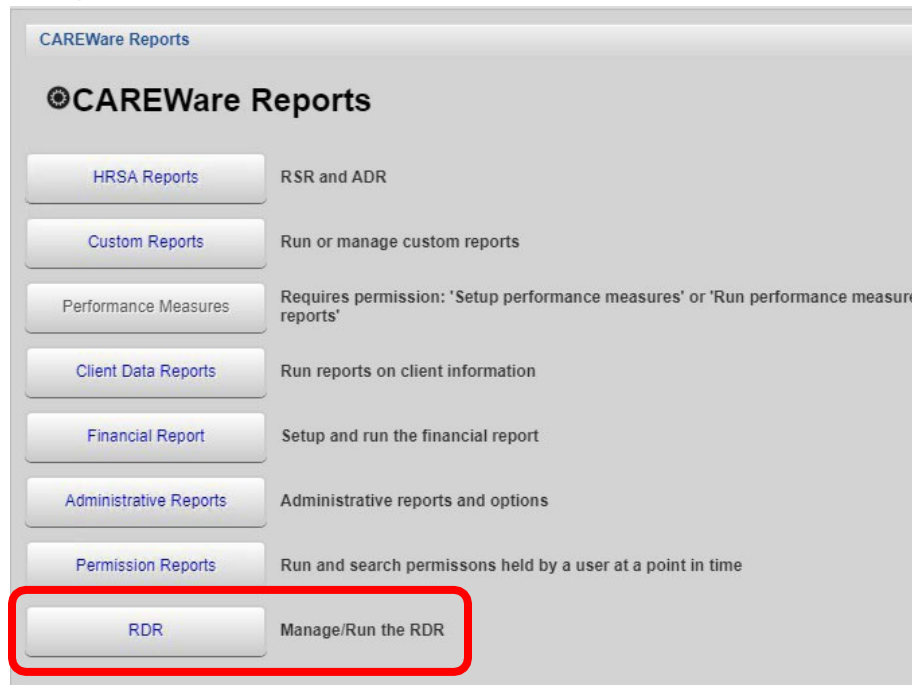


RDR Report

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”.



Instructions for Data Reports

January 2022, v2.3



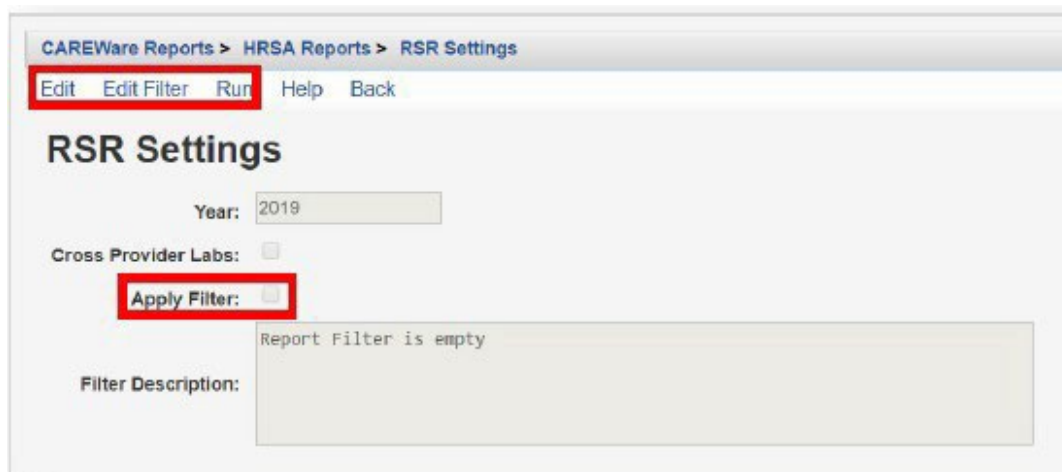
RSR Validation report

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.

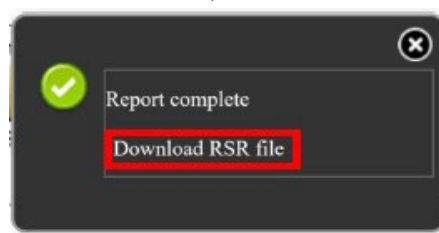
1. From the HRSA Reports menu, click on "RSR Client Report."



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.



Instructions for Data Reports

January 2022, v2.3

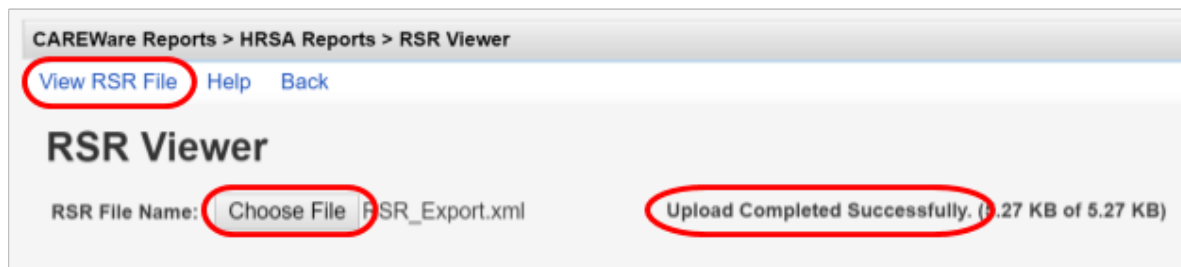


MASSACHUSETTS
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- Return to the CAREWare Reports screen and click “HRSA Reports,” and then click “RSR Viewer.”



- 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.”

Category	Count	Percent	Viewable
2. Referred to another program or service:	0	0.0%	X
2. Removed from treatment due to violation of rules:	0	0.0%	X
2. Incarcerated:	0	0.0%	X
2. Relocated:	0	0.0%	X
2. Deceased:	0	0.0%	X
2. Missing:	4	36.4%	X
4. Client Birth Year:			
4. (All clients)	14		
4. 1960 and before:	3	21.4%	X
4. 1961 - 1970:	2	14.3%	X



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.

Client	Visited
Cesar, Rex,	
Mann, Super,	
Brown, Buster,	
Tester, Beta,	