Instructions for Data Reports

December 2024, v2.6
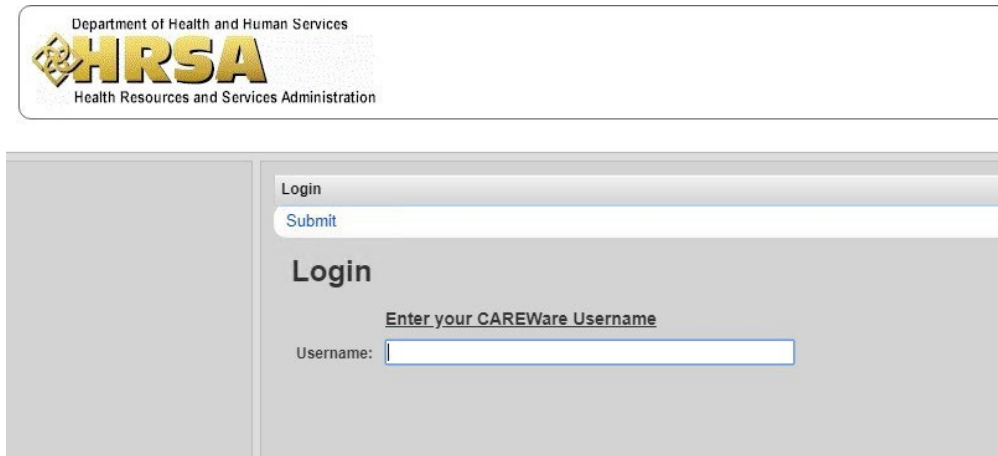*Yellow highlights indicate changes since the last version.*

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

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

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

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

MASSACHUSETTS careware
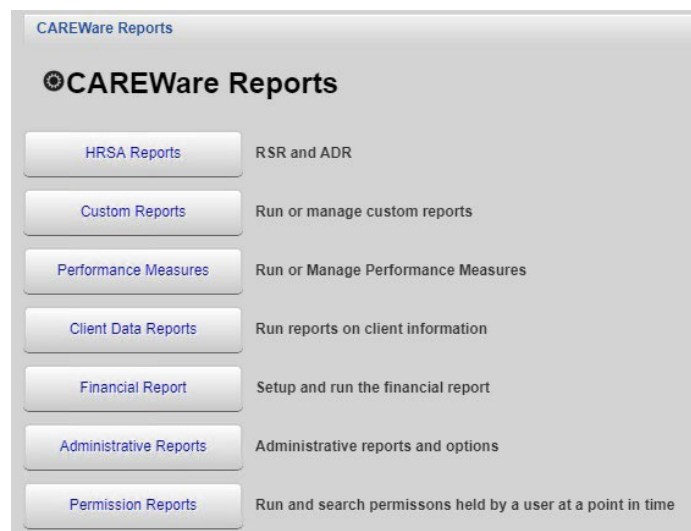
Downloading Reports in CAREWare 6

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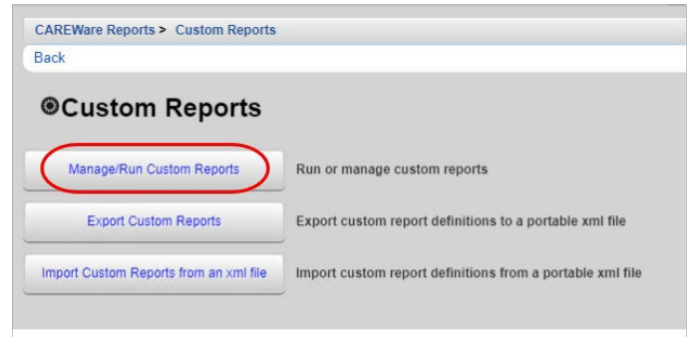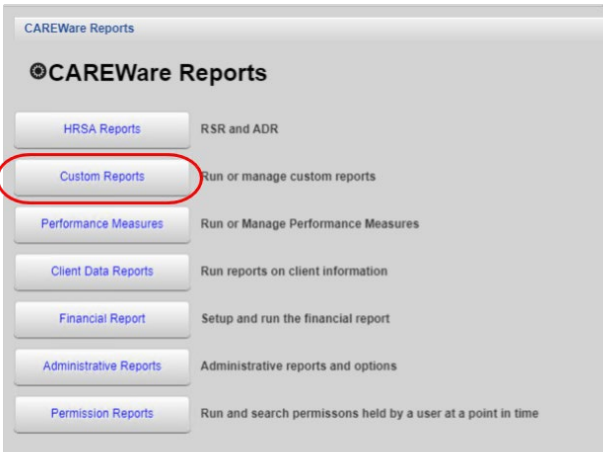
2. Select the desired report and then select "Manage Run."
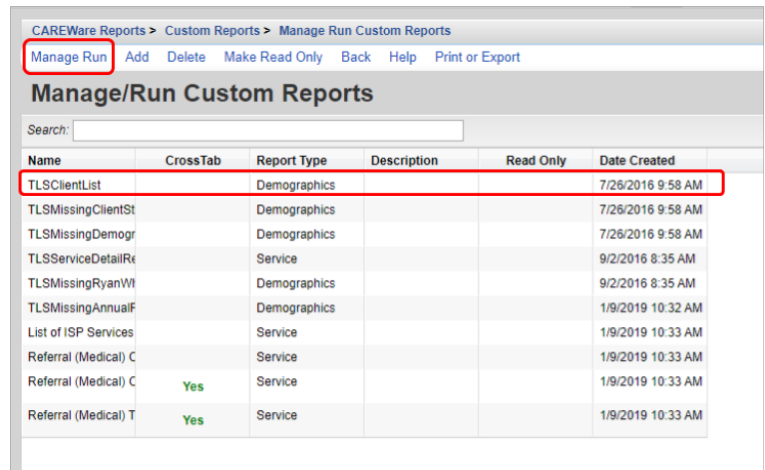
3. Select "Run Report." Ensure that your output display is set to export correctly by selecting "edit" and then choosing either "Open as PDF" or "Download as CSV." Click "Save" and then "Run report."

MASSACHUSETTS careware
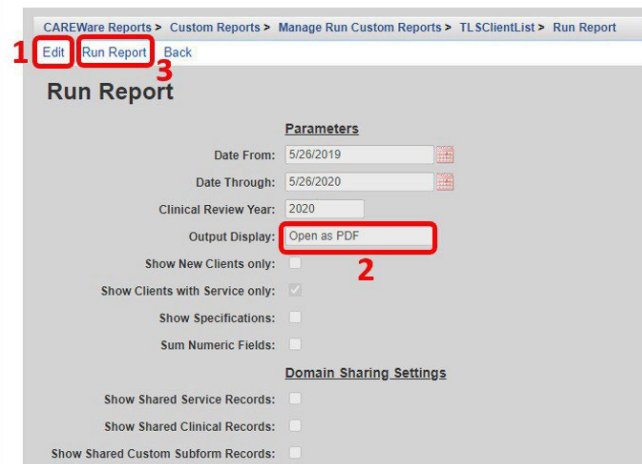
4. A "Report Generation Complete" box will appear in the top right corner. Select "View [Report Name]."
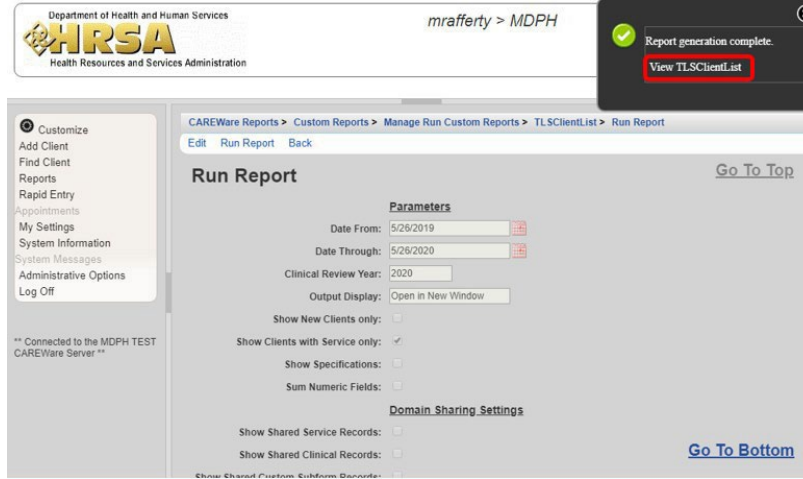
5. The report will open as a new tab. Click the Printer icon.
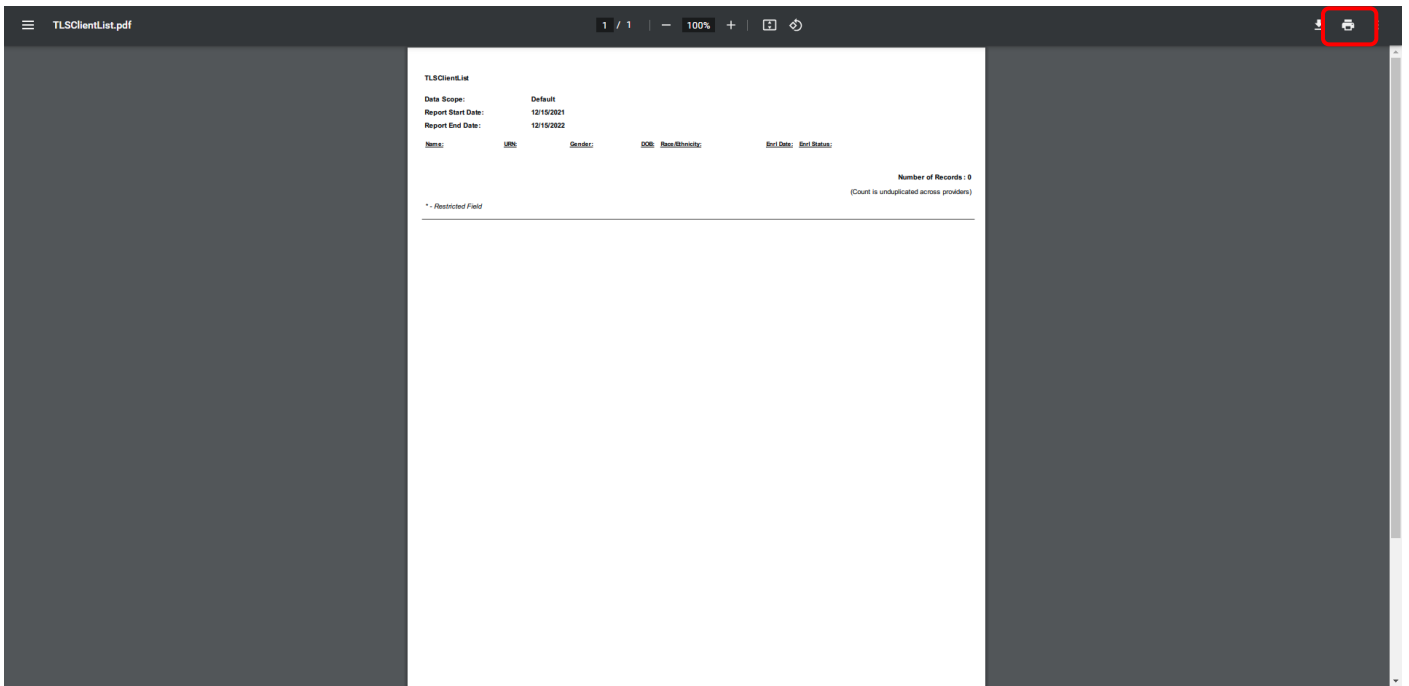
6. On the page that opens up, click Destination, and then Save as PDF. Click Save.
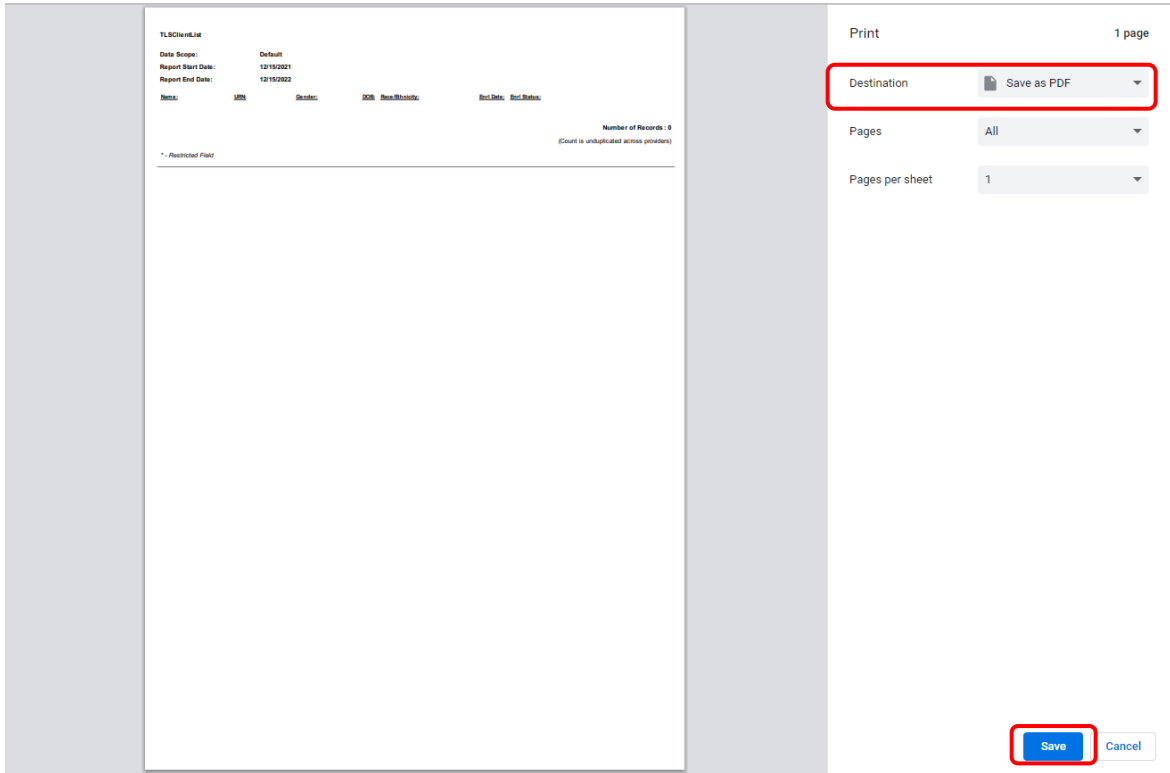
7. Choose the folder on your own computer to which you would like to save the report. Click Save. *Important note: As always, agency staff are responsible for acting in accordance with their own agency policies when downloading sensitive data from CAREWare. Follow your agency's security and privacy rules for reports and data files you download from CAREWare.*
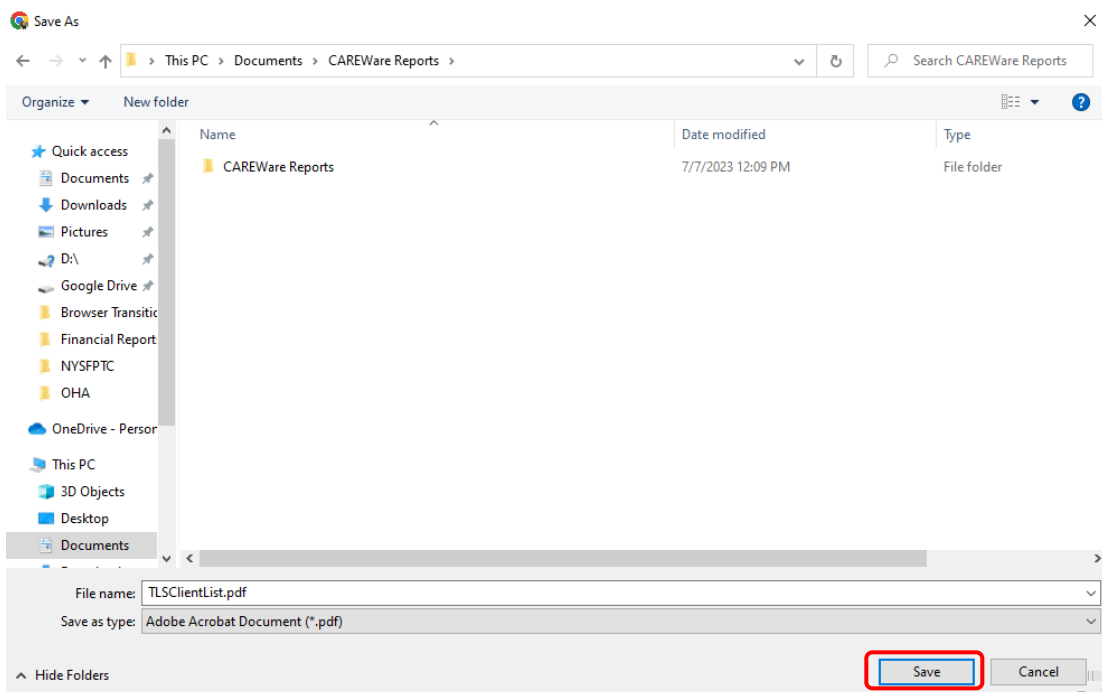
MASSACHUSETTS **CARE**ware

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).

CAREWare Reports

⊙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
Administrative Reports	Administrative reports and options
Permission Reports	Run and search permissons held by a user at a point in time

CAREWare Reports > Custom Reports
Back

⊙Custom Reports

Manage/Run Custom Reports	Run or manage custom reports
Export Custom Reports	Export custom report definitions to a portable xml file
Import Custom Reports from an xml file	Import custom report definitions from a portable xml file

CAREWare Reports > Custom Reports > Manage Run Custom Reports

Manage Run   Add   Delete   Make Read Only   Back   Help   Print or Export

Manage/Run Custom Reports

Search:

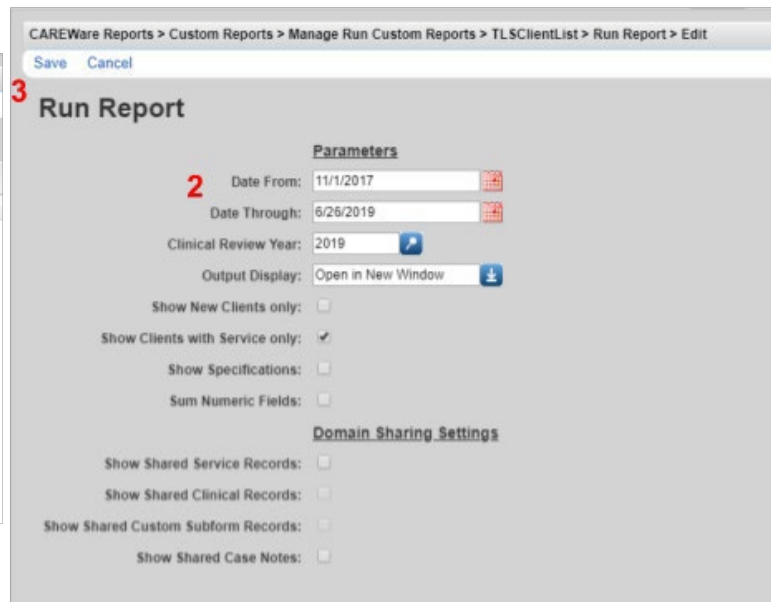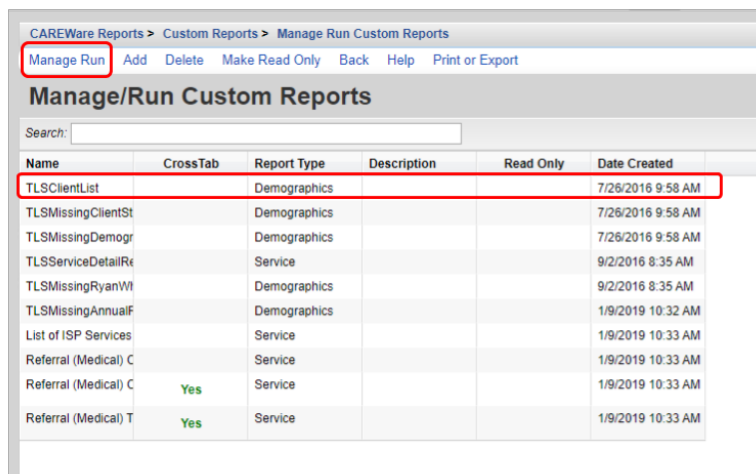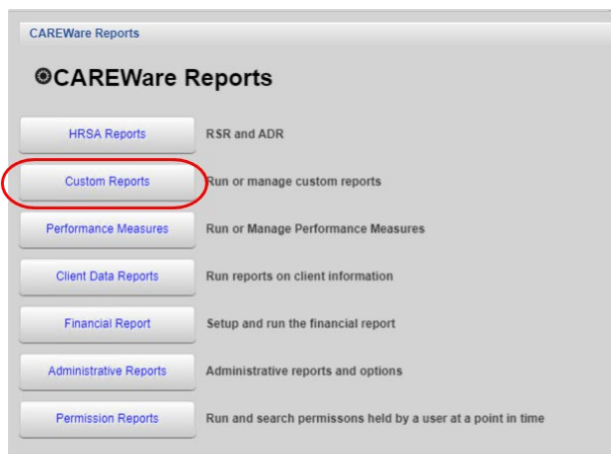| Name	CrossTab	Report Type	Description	Read Only	Date Created
TLSClientList		Demographics			7/26/2016 9:58 AM
TLSMissingClientSt		Demographics			7/26/2016 9:58 AM
TLSMissingDemogr		Demographics			7/26/2016 9:58 AM
TLSServiceDetailRe		Service			9/2/2016 8:35 AM
TLSMissingRyanWl		Demographics			9/2/2016 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

CAREWare Reports > Custom Reports > Manage Run Custom Reports > TLSClientList > Run Report > Edit
Save   Cancel

3 **Run Report**

Parameters

2	Date From:	11/1/2017
	Date Through:	6/26/2019
	Clinical Review Year:	2019
	Output Display:	Open in New Window
	Show New Clients only:	☐
	Show Clients with Service only:	✔
	Show Specifications:	☐
	Sum Numeric Fields:	☐

Domain Sharing Settings

Show Shared Service Records:	☐
Show Shared Clinical Records:	☐
Show Shared Custom Subform Records:	☐
Show Shared Case Notes:	☐

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

TLSClientList_MCM

This report identifies clients that recieve Medical Case Management (MCM) services.

1. Select TLSClientList_MCM 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:

TLSClientList_MCM

Data Scope:	MDPH	
Report Start Date:	11/01/2024	
Report End Date:	11/30/2024	

Last Name:	First Name:	DOB:	Ins.Type:	PovertyLev:	RW Eligibility Status By Date:	Race/Ethnicity:	Enrl Date:	Enrl. Status:
Frost	Juniper	10/01/1980			No	Not Specified		Active
Bunny	Buggz	11/18/1986			No	Hispanic	05/01/2019	Active
asd	asd	10/10/1970			No	Not Specified	01/08/2019	Active
asd	asd	01/01/1970			No	Not Specified	06/01/2018	Active
Snow	John	09/16/1972			No	White (non-Hispanic)	03/25/2021	Active

Number of Records : 5

(Count is unduplicated across providers)

* - Restricted Field

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 (Cln. Custom):
AA, BB	B9A91111662U						
asd, asd	ADAD0101701U						HI
asd, asd asd	ADAD1010701U						
Berry, Mary	MRBR0204252U						
Bobcat, Bates	BTBB0101162U						
Bond, James L	JMBN1007771U	Medicaid		1	7900.0000	66%	Q
Bondtest, James	JMBN051063lU	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	DPCl0101011U						
Crane, Ichabod Tarrytown	IHCA0112681U						
Cruz, Maria	MRCU1022672U						
Cruz, Maria	MRCU0522002U						
cruz, trippy doo	TICU0312832U	Medicare Part D	Stable/Permanent				
Damon, Matt	MTDM0303701U						
davis, samuel	SMDV0627941U						
decaprio, leonardo	LODC0423791U	Medicare Part D		2	100000.0000	624%	

TLS Missing Client Status

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

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

TLSMissingClientStatus

Data Scope:	MDPH
Report Start Date:	11/01/2017
Report End Date:	11/11/2019

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

TLS Missing Demographics

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

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

TLSMissingDemographics

Data Scope:	MDPH
Report Start Date:	11/01/2017
Report End Date:	11/11/2019

Name:	Gender:	Hisp.:	Race:	Address:	City:	County:	State:
AA, BB	Female	No	Not Specified				
asd, asd	Male	No	Not Specified				
asd, asd asd	Male	No	Not Specified				
bet, alpha test	Female	No	White	33 Farnsworth	Boston		Massachusetts
CLTC, Test	Male	Yes	More than one race	44 Farnsworth St	Boston		Massachusetts
Duck, Donald	Male	No	Not Specified				
Gomez, Adam	Male	No	Not Specified				
Lopez, Carla	Female	Yes	Not Specified	123 Oak St	Boston		Massachusetts
Mercado, Rosa M	Female	No	Pacific Islander	24 Arbroth St	Dor	Essex	Massachusetts
Mouse, Minnie	Female	No	Not Specified				
Obi, first j	Female	No	More than one race	no 1 Dr street worcester	worcseter		Massachusetts
Patrick, Bird Saint	Unknown	No	Pacific Islander	44 sesame street	New York	Coos	New Hampshire
Roshan, Andrew	Transgender F2M	No	Not Specified				
S, B	Female	Yes	More than one race				

TLS Missing Ryan White Eligibility

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

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

TLSMissingRyanWhiteEligibility

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

Name:	Gender:	DOB:	Race/Ethnicity:	Enrl Date:	Enrl Status:	Is RW Eligible?:	Last RW Service:
asd, asd	Male	01/01/1970	Not Specified	06/01/2018	Active	No	09/05/2019
asd, asd asd	Male	10/10/1970	Not Specified	01/08/2019	Active	No	01/08/2019
bet, alpha test	Female	07/08/1994	White (non-Hispanic)		Active	No	03/12/2019
Bond, James L	Male	10/07/1977	White (non-Hispanic)	03/06/2012	Active	No	12/20/2018
Bouffet, Phoebe	Transgender 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:	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

Acuity Check

This report displays a list of Acuity Assessment and 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 Acuity_Check 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:

Acuity_check

Data Scope:	MDPH
Report Start Date:	11/01/2023
Report End Date:	11/30/2024

First Name:	Last Name:	Srv Date:	Srv Short Name:	Level of Acuity (Srv. Custom):
John	Ingerick	11/27/2023	MCM Initial acuity asessment	Basic (1-14)
John	Milner	11/27/2023	MCM Acuity Reassessment	Basic (1-14)
John	Jones	12/04/2023	MCM Initial acuity asessment	Basic (1-14)
Johnny	doe	11/27/2023	MCM Initial acuity asessment	Basic (1-14)
John	Doe	11/27/2023	MCM Initial acuity asessment	Basic (1-14)
John	E	12/06/2023	MCM Acuity Reassessment	Basic (1-14)
Vincent	Guerrero	12/07/2023	MCM Care Access acuity reassessment	
Juniper	Frost	12/07/2023	MCM Acuity Reassessment	Basic (1-14)
Jakob	Huber	12/07/2023	MCM Acuity Reassessment	Moderate (15-28)
Mike	Wazowski	12/07/2023	MCM Acuity Reassessment	Moderate (15-28)

TLSServiceDetailReport_CareAccess

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

TLSServiceDetailReport_CareAccess

Data Scope:	MDPH
Report Start Date:	11/01/2023
Report End Date:	11/30/2024

Name:	Srv Date:	Srv Qty:	Srv Category:	Srv Short Name:
Guerrero, Vincent	12/07/2023	1	Medical Case Management	MCM Care Access acuity reassessment
Bunny, Buggz	11/20/2024	1	Medical Case Management	MCM Care Access acuity reassessment

Number of Records : 2
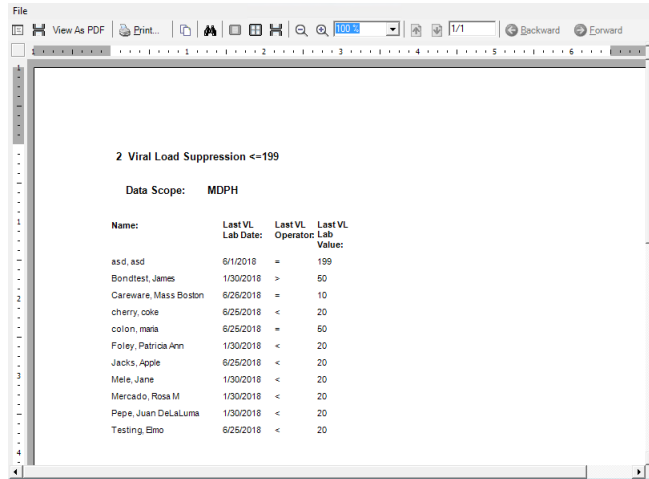
(Count is unduplicated across providers)

* - Restricted Field

Viral Suppression ≤ 199

This report returns a list of clients whose last Viral Load lab value as ≤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:

Viral Suppression ≥ 200

1. This report returns a list of clients whose last Viral Load lab value as ≥ 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

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

Viral Load (All Results)

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

1. Select Viral Load List (All Results) from the list of reports.
2. Modify the date range to the desired range.
3. Click on "Run Report".

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/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

Linkage Status (Srv. Custom):	Total:	Col. %:
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

Linkage Type (Srv. Custom):	Total:	Col. %:
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

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. Modify the date range to the desired range.
2. Click on "Run Report".
3. 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

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

Aggregate Insurance Counts

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

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

Aggregate Insurance Counts

Data Scope: MDPH

Last Primary Insurance In SpanCrosstab

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

Number of Records: 7

Aggregate Poverty Level Counts

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

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

Aggregate Poverty Level Counts

Data Scope: MDPH

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

Number of Records   8

MCM Last Acuity Reassessment and Referral Info

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

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

MCM Last Acuity Reasesesment 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												
santiago, jose												

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."

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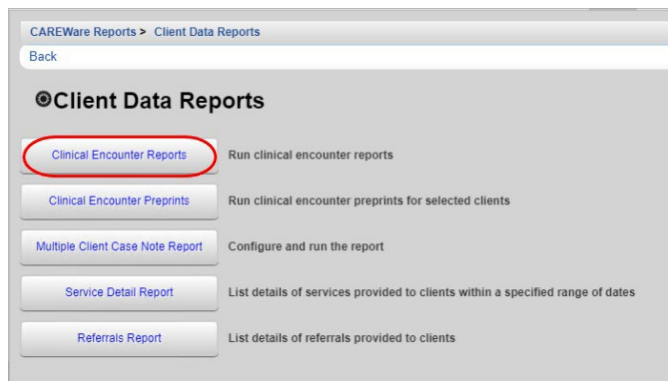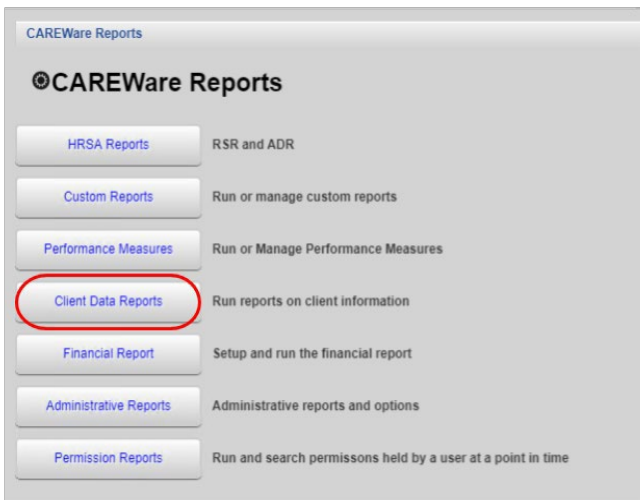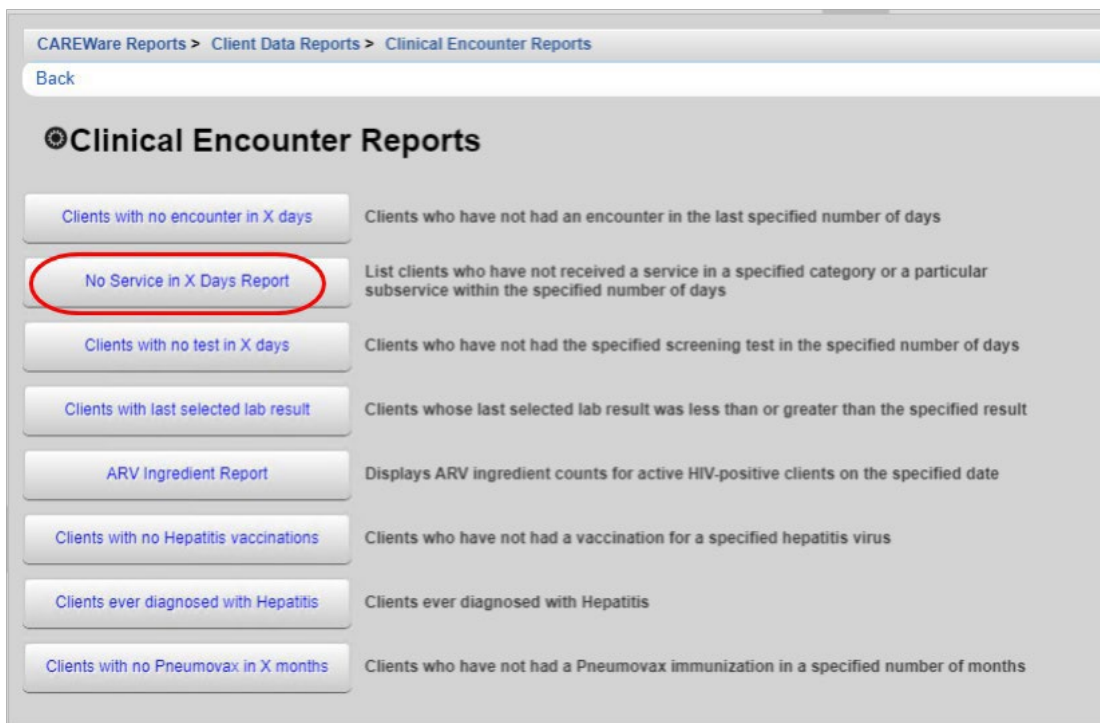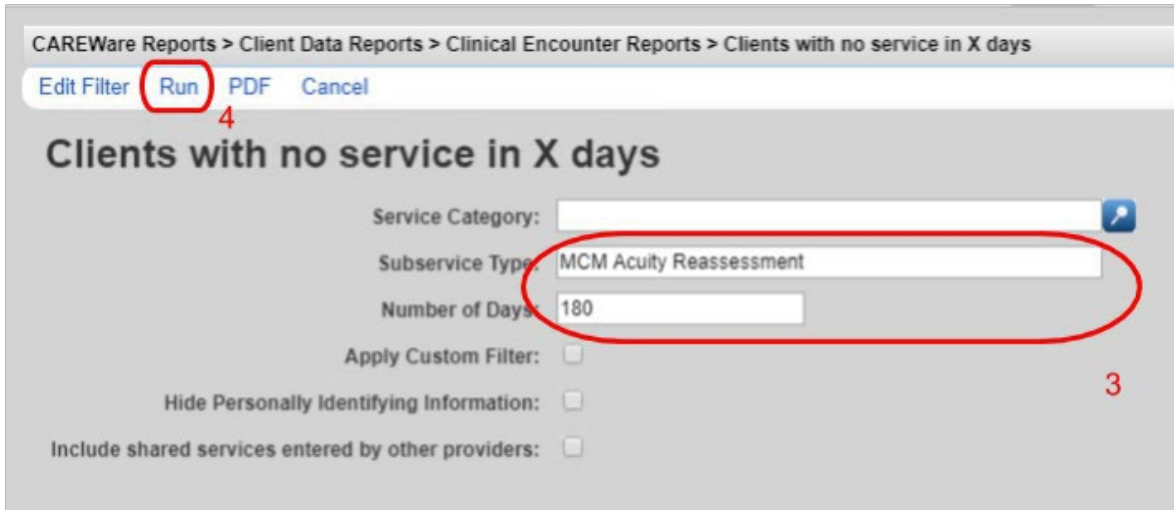
3. Click on Subservice Type and enter the subservice. To identify clients without a reassessment, type "MCM Acuity Reassessment" or "MCM Care Access Acuity Reassessment" into the subservice.
4. Set Number of Days and click "Run".

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

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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."
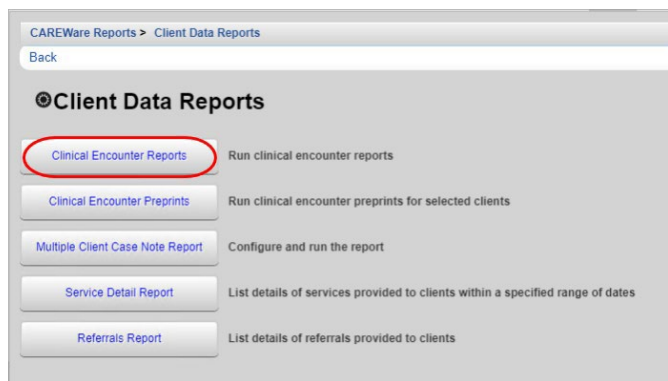
2. On the following page, click "No Service in X Days Report."
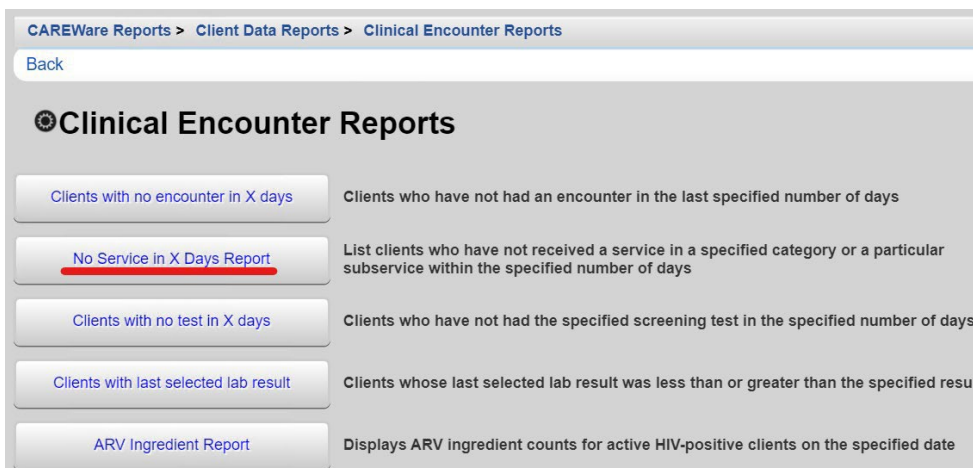
3. Click on Service Category and select "Medical Case Management."
4. Click on Subservice Type and enter the subservice. To identify clients without an assessment, type "MCM Acuity assessment" into the subservice.

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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	Qql18LDsJ		
beta, foxtrot		FXBT0401002U	aBzdnODRU		
Big, Bird		BRBG0101961U	QqRgARPIE		
bla, mario A		MRBA0912751U	F9BVCltKq		

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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.

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

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

Clinical Encounter Reports

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

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

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

1. From the Client Data Reports menu, click on "Clinical Encounter Reports."
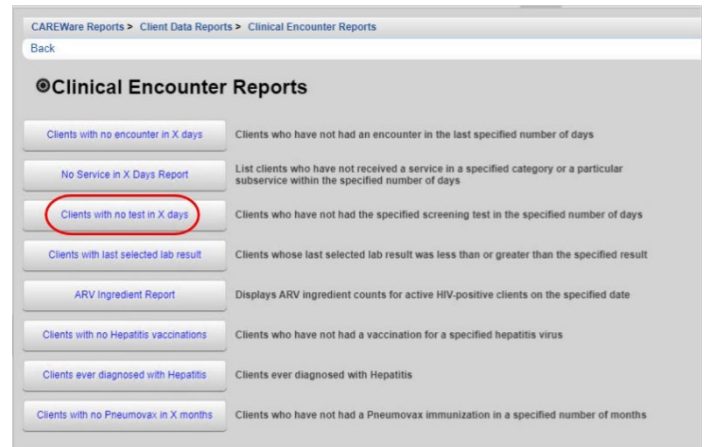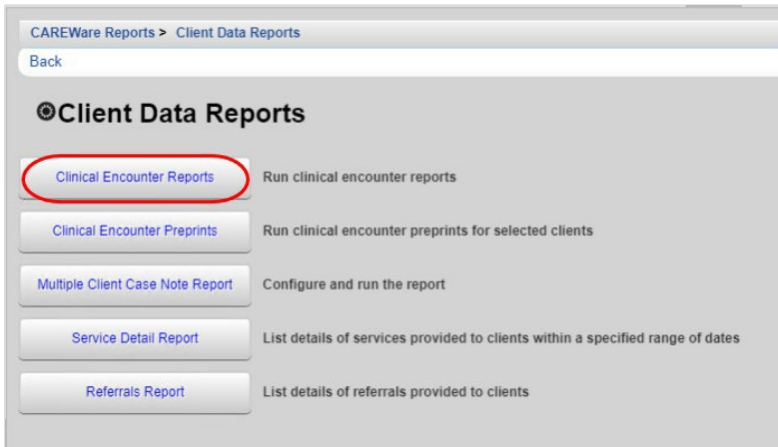
2. Click on "Clients with no tests in X days."
3. Select the screening test and set the Numbers of Days. Then click on "Run Report".

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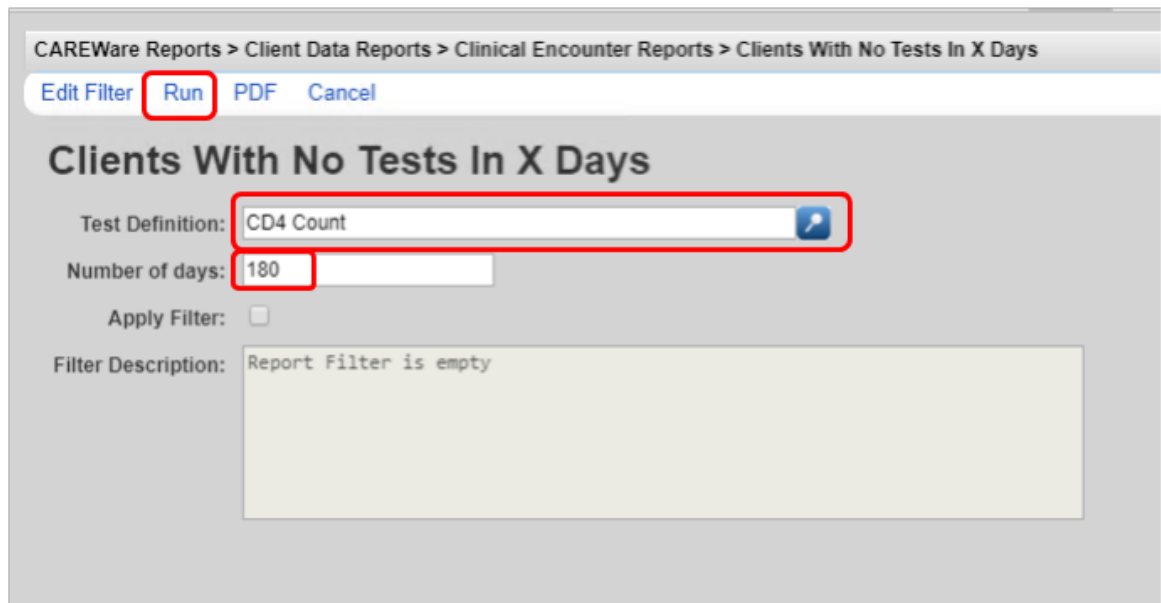
4. The report (to identify clients without CD4
or viral load in the past six months) will look like the screenshot below!

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

Data Scope:	MDPH

Report Criteria:

The client:	has not had a CD4 Count screening at the provider in the last 180 days.
Or the client:	has not had a CD4 Count screening at the provider.
Client enrollment status:	is active or unknown.
HIV Status:	Not equal to Negative or Unknown.
Custom Filter:	None
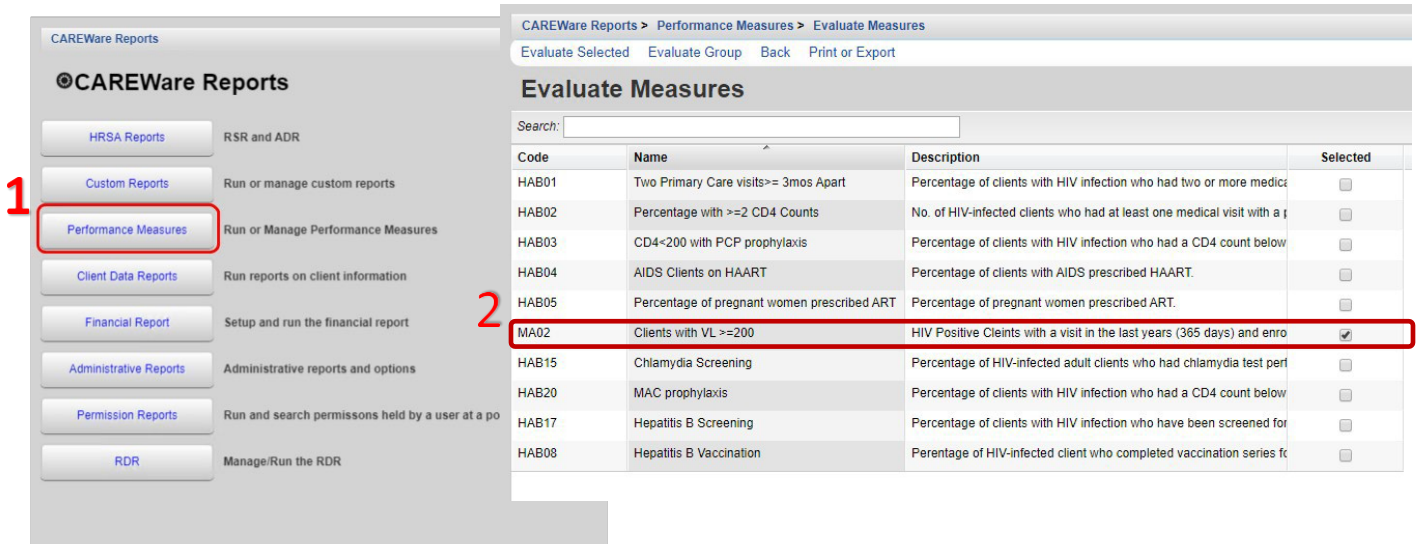
Name:	URN:	Last Screening Result:	Last Screening Date:	Provider Name:
Bondtest, James	JMBN0510631U		1/30/2018	MDPH
Brady, Thomas Greatest	TOBA0601801U			
Brady, Tom M	TMBA0101755U			
Brookshire, Stacey	SABO0202732U		9/9/2016	MDPH
careware, chris	CRCR0101802U		4/17/2018	MDPH
Careware, Mass Boston	MSCR0625001U		6/26/2018	MDPH
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			

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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

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

4. The report will look like the screenshot below

Multiple Performance Measures Report 9/1/2018

Selection: MDPH

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

Financial Report

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

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

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.

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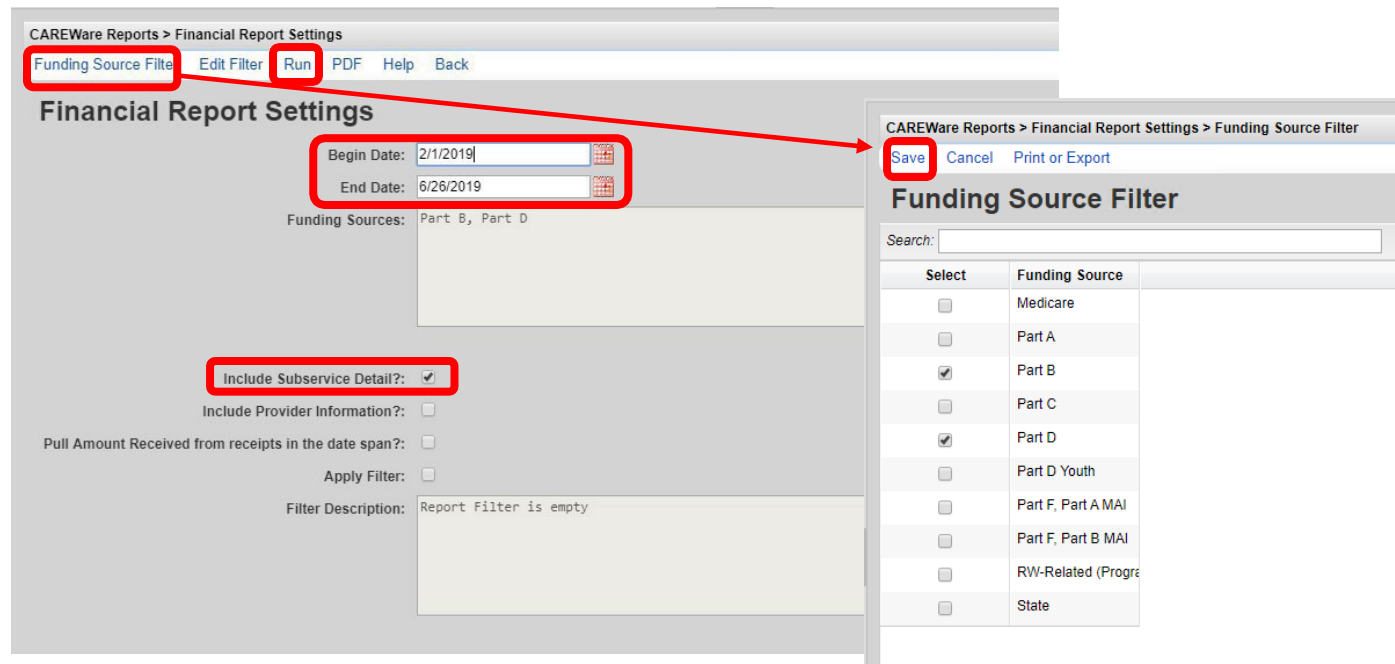
3. The financial report will look like the screenshot below!

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-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 asessment	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

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".

MASSACHUSETTS
careware
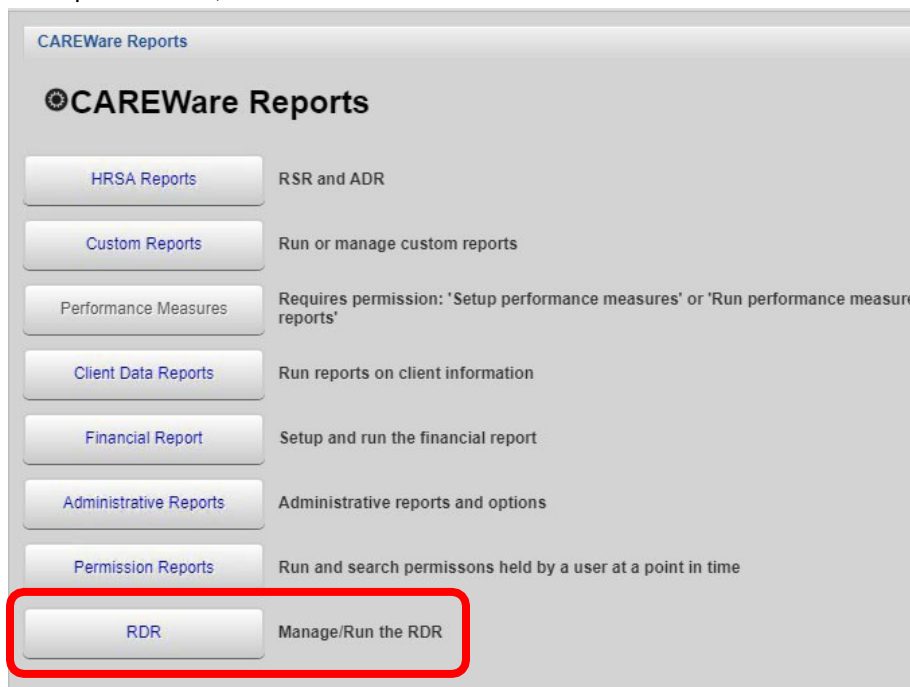
RSR Validation report

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.
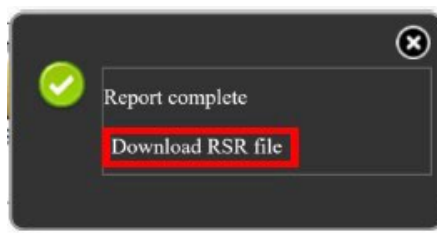
1. From the HRSA Reports menu, click on "RSR Client Report."
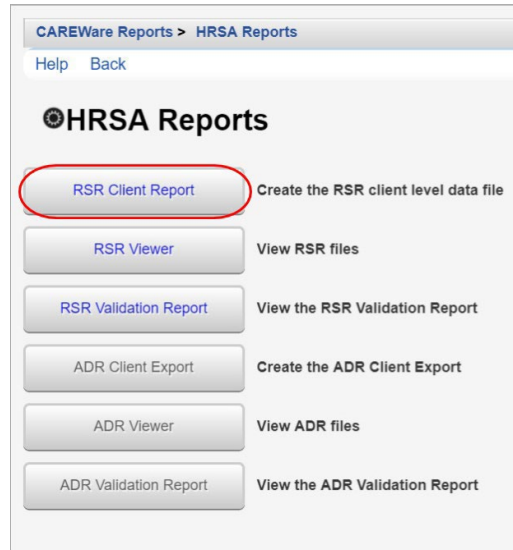
2. Select a reporting year by clicking "Edit", add a filter by clicking "Edit Filter", and then check off "Applyfilter." Once complete, click "Run."
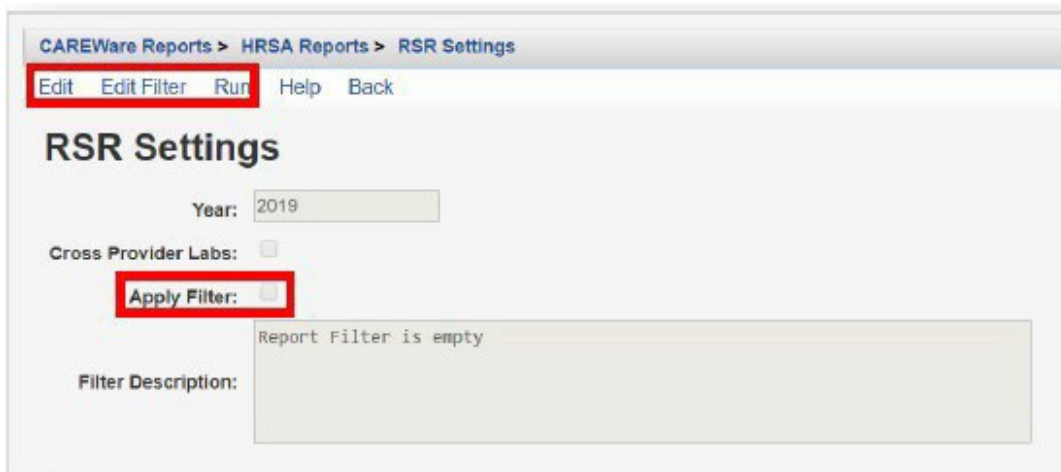
3. Once the RSR Validation report is downloads, click "Download RSR file" in the popup window.
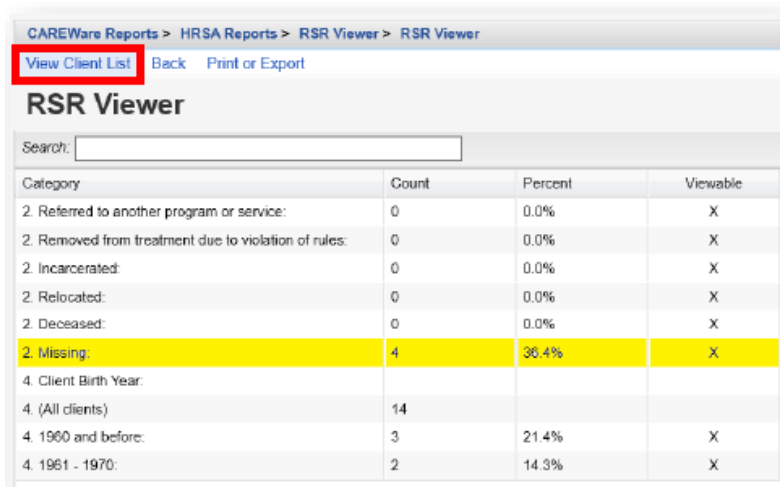
4. Return to the CAREWare Reports screen and click "HRSA Reports," and then click "RSR Viewer."

5. Click "Choose File" and select the exported XML file you have saved. A message "Upload Completed Successfully" should appear.
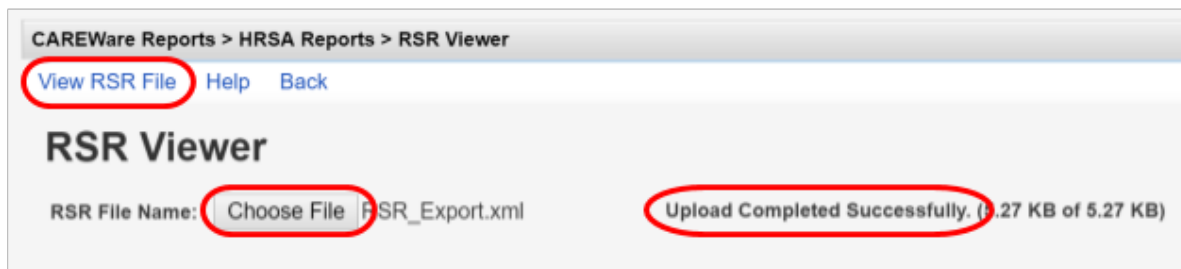
6. The report should look similar to the image below. To correct an error, click "View Client List."

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