Quick Start Guide #7
Creating Basic Custom Reports

CAREWare Quick Start Guides will walk you through the basics of setting up, managing, and using the main CAREWare functions. It is intended for non-technical users who need to get basic information in and out of CAREWare.

PLEASE NOTE: The client data used in these manuals is purely fictional.
First Things First

Getting Started

• You must have the appropriate user privileges to create and run reports.
• You should have enough client data entered to see how report filtering works in practice.

Best practices

Check if there are pre-built reports that provide the desired information. Decide what the purpose of a custom report is. “I need a list of my clients with a break-out by race and gender,” for instance.

Diagram your report by selecting the fields you’ll need - in this case, client name, race, and gender.

You may need to add fields, at least temporarily, that confirm your reports are running as intended. For example, you create a filter for active clients only, so to make sure it’s working, you might add the “Enrollment status” field to your report. If the report runs correctly, and only Active results return in that column, you can delete that field from the report, if not needed in the results.

Demographic reports run differently than other reports:

• Demographic reports display results per client. This can be useful in determining the number of clients in a given date span. With the use of calculated objects, demographic reports can be a powerful tool for data analysis (see Quick Start guide 8 - Advanced Reports).
• Other report types; such as services and labs display results ‘per service visit or lab date.’ This often results in several lines for each client, providing a detailed summary.

Creating Custom Reports

In addition to the prebuilt reports in CAREWare, you can use custom reports to view data sets tailored to your needs. It helps if you have some familiarity with SQL databases before you use custom reports, but if not, the report builder feature will help you design queries without prior database experience.

1. Log into CAREWare. For more details on how to do so, please refer to the Navigating CAREWare Version 6.0 Guide. If you have administrative privileges and are asked to choose between Central Administration and Provider (“Default” until you change the name) domain, you can log into either a Provider or the Central Administration domain. To run reports for multiple agencies within a provider network, log in to the Central Administration domain.
2. Select **Reports** from the **Main Menu**.

3. Select **Custom Reports** from the link menu.
4. Select **Manage/Run Custom Reports** from the link menu.

5. Select **Add**.
6. Enter in the following information (as applicable) and click **Save**.
   - Report Name
   - Report Type
   - Is Crosstab (checkbox)
   - Description (optional)
   - Use Totals (checkbox – will automatically sum total fields in the report)
   - Header/Footer Format (optional)
7. After clicking save, you will be on the custom report’s menu. Select **Field Selection**.

8. Select **Add**.
9. Use the Search box to find the fields to display in the report. In this example, “Name” was entered. Since the complete client name is desired for the report, the Name field has been selected. Click Use Field.
10. You will now be on the Use Field menu. Enter in the following information (as applicable) and click **Save**.

- **Column Header**
- **Sort**
- **Sort Priority**
- **Header Column Format**
- **Data Column Format**
11. After clicking save, you will be on the selected field’s menu. Return to the Field Selection menu by clicking Field Selection within the breadcrumb trail. Repeat steps 8 through 10 to add additional Report Field selections (such as Race/Ethnicity and Gender).

12. To return to the custom report’s menu, click the name of the custom report in the breadcrumb trail (in this example, “Clients by Race and Gender”) or click Back from the Field Selection menu.

13. Click Run Report
14. Click Edit. Select the following report parameters and click Save (will be visible after clicking Edit).

- Date From
- Date Through
- Clinical Review Year (optional – typically matches the reporting year)
- Output Display
  - Download as CSV
  - Open in New Window
  - Open as PDF
- Show New Client only (check box)
- Show Clients with Service only (check box – will only list clients with services within date span)
- Show Specifications (check box – to list report criteria)
- Sum Numeric Fields (check box)
- Domain Sharing Settings (default value)
15. Click **Run Report** and then click **View [name of report]** (in this example, View Clients by Race and Gender). The report will appear in a new tab within your browser.
Add Report Filters to “Clients by Race and Gender”

Use the Report Filter to choose how to sort your data. (It is a good idea to include Field Selections that will verify your filters are working as intended.) For example: if you filter your report for Females only, you would want to include the ‘Gender’ column among your Field Selections in the report.

You can add a filter at the same time you create your field selections, before saving your report. However, you may first want to run a report without filters to make sure you’re getting data, and then add the filters.

1. From the Manage/Run Custom Reports menu (see pages 2 through 3), use the Search box to find the relevant report. We will be using the custom report: “Clients by Race and Gender.” Select the report and click Manage Run.

2. Click Report Filter.
3. Click **Add**.

4. Enter “Gender” in the **Search** box to limit available Field Names. Chose the appropriate Field Name and select **Use Field**.

5. Select Female from drop-down box. Click **Save**.

**NOTE:** The default value for Use Field is equal to “=". Checking the **Is Not** box will return all values unlike the one selected. For example, if you selected Gender **IS NOT** Female, the report would return Male, Transgender, Refused to Report, and Unknown values. Checking the **Null** box would return any values where the Gender field was missing.
Saving Filters as Templates

After selecting your filter field(s), you may also save this field selection as a template. Saving as a template lets you apply the filter you’ve created to any report type.

1. From the Report Filter menu, select **Templates**.

2. Select **Save to New Template**.

3. Enter the **New Template Name** and then click **Save**.
4. The filter template will appear on the Template Name list. In the future you can go to the Templates window and select a template to use as a filter or set of filters. Just select the filter and click **Use Selected Template**.

5. Select **Back**

Crosstab Reports

In the example above, we produced a report that listed each client separately. This is especially helpful when you need a list in order to identify specific clients requiring follow up (e.g. needing a vaccine, or who haven’t had an office visit for more than 3 months).

In addition, custom reports can be very useful in assessing data quality, for example, by listing all the clients who have missing or out-of-range information for a certain field(s).

Crosstab Reports, however, allow you to quickly obtain the counts of clients for specific criteria. For example, you may need to report the number of clients you are serving cross-classified by race/ethnicity and gender, or by HIV status and CD4 group. The crosstab wizard allows you to generate client counts.

Crosstabs have a row, column, and, if specified, a strata field. We will use the custom report created in the previous step and change the report type to a Crosstab.
1. From the Custom Reports menu, click **Manage/Run Custom Reports**.

2. Use the **Search** box to filter the existing custom reports. Select the report **Name** and click **Manage / Run**.
3. Select **Report Layout**.

![Select Report Layout](image)

4. Select **Edit** (located where Save is in the screenshot below). Select the **Is Crosstab** checkbox. Click **Save**.

![Select Edit and Is Crosstab](image)
5. After clicking save, click **Field Selection** from the menu.

6. Confirm the Field Names are correct. To remove a Field, select it and click **Delete**. In this example, we are deleting the “Name” field.
7. Race/Ethnicity will be the **Row** and Gender will be the **Column** of the Crosstab Report. Click **Back**.

9. A sample Crosstab report of Race/Ethnicity by Gender is provided below.

- **Total** column: lists the number of clients by race.
- **Col. %** column: lists the percent distribution of clients by Race.
- **Female, Male, Transgender FtM, and Transgender MtF** columns: show the gender distribution for each race category.

In the example above, Hispanic clients are 25% female and about 60% male clients, whereas about 70% of white clients are male.

**Crosst-tab Report (Adding a Strata field)**

To see the race and gender distribution of clients by HIV risk, you can add **HIV Risk Factor** as a third Field Selection or **Strata** field.

1. From the Field Selection menu (see page 19), click **Add**.
2. Use the Search box to find the desired Field Name. Choose the appropriate Field Name (in this example we are adding HIV Risk Factor) and select Use Field.

3. Click Save, then Back.

4. Race/Ethnicity will be the Row, Gender will be the Column, and HIV Risk Factor will be the Strata of the Crosstab Report. Click Back.
5. Select Run Report.

6. A sample (excerpt) Crosstab report of Race/Ethnicity by Gender and HIV Risk Factor is provided below.