July 2025

Ryan White Part B Program

CAREWare 6 User Guide

Tips and Tricks

Indiana Department of Health

CAREWare 6 Overview

CAREWare is a free, electronic health and social support services information system for HRSA's Ryan White HIV/AIDS Program recipients and providers. CAREWare was developed by HRSA's HIV/AIDS Bureau and first released in 2000.

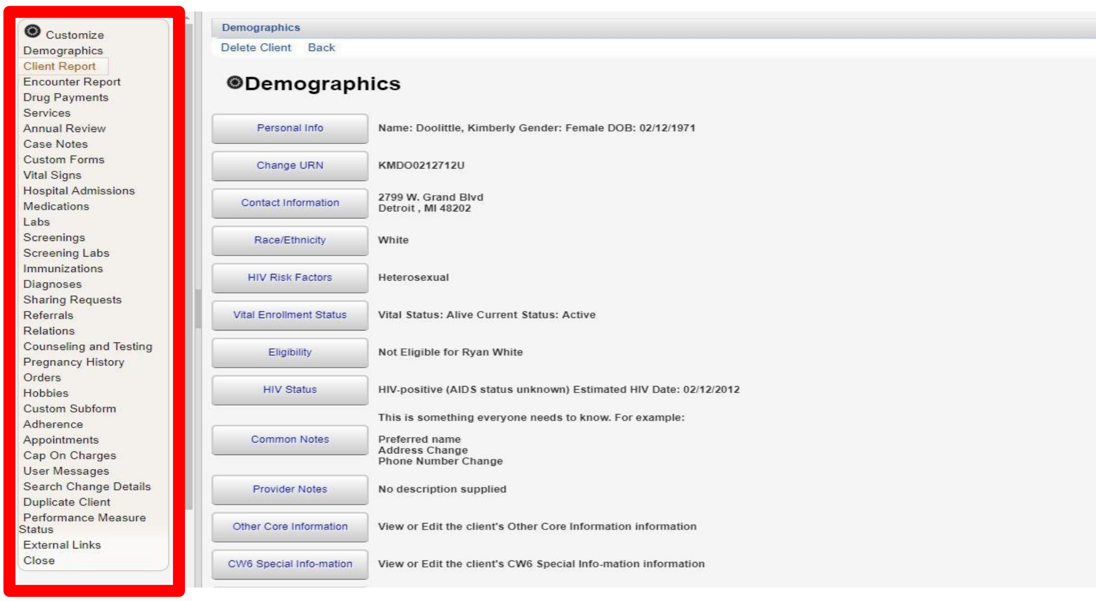
CAREWare 6 will run in an internet browser of your choice, except Internet Explorer/Edge.

Contents

What You Need to Know About CAREWare 6

CAREWare 6 is different than CAREWare 5 in many ways. Here are some things you need to know:

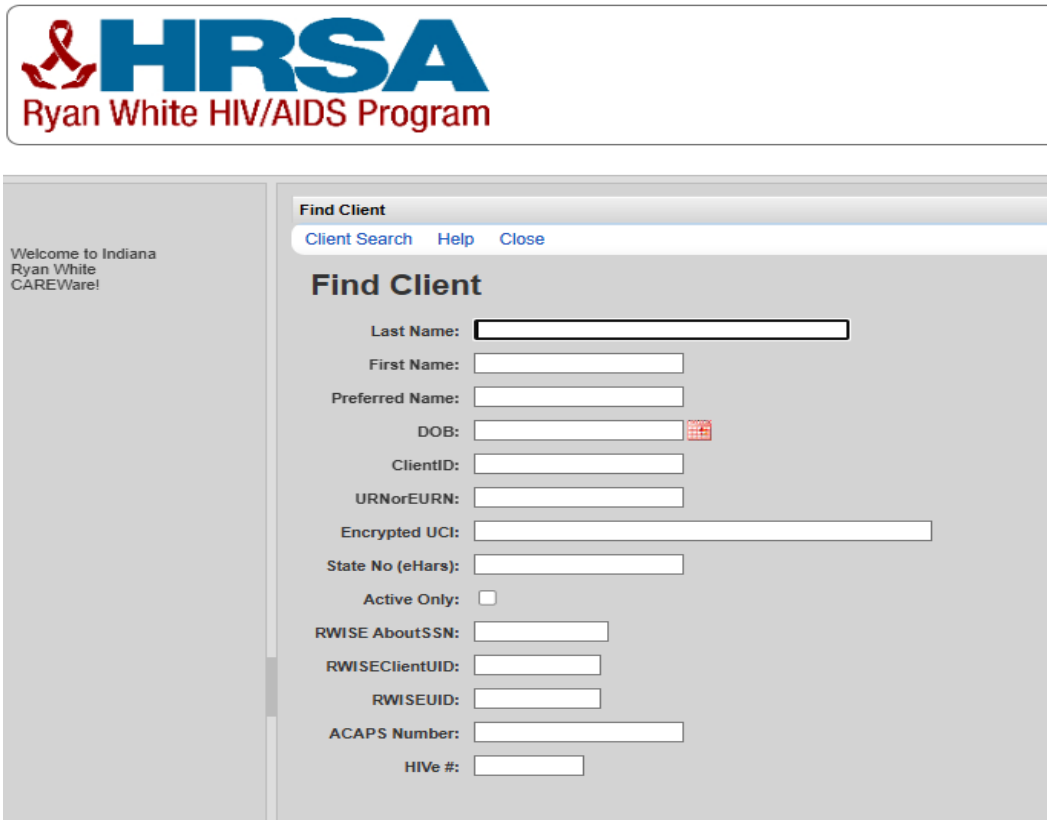
1. When you open a client record, it will open a new tab on your browser. Make sure you close the record after entering in all necessary information. If you don't, it will keep the record open in that tab even if you move on to a new client.
2. You navigate the client's record through the menu options located on the left-hand side of the record. When you want to move from one tab to the other, simply click the tab on the left-hand side. It will take you to that tab. For example, if you want to add a case note, click it.



3. If you are in the middle of adding any record, whether it is a service, lab, etc., you will not be able to access anything else. For example, if you are in the middle of adding a screening lab and want to add a service, you must either:
   - Add the current record and save it
   - Click the **Back** button

How To Find a Client

1. Select **Find Client**.

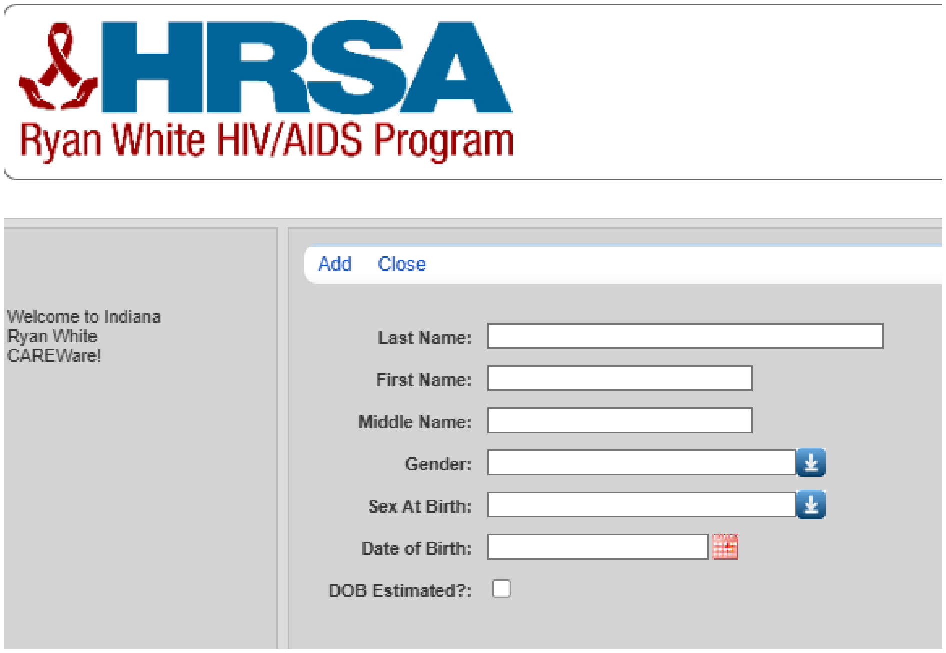


2. A new tab will open. Enter the Last Name and First Name, or Client ID/URN.
3. Select **Client Search**.

Please note that you should search with all information you have, and use different combinations of those tabs to eliminate the creation of duplicate records.

How To Add a Client

1. Select **Add Client;** a new tab will open.



2. Enter the last name, first name, middle name, gender, and date of birth. All fields must be completed to add the client.
3. Click **Add.**

IDOH and MCPHD Policy: Add Client Permission Policy

Effective Date: June 1, 2025

Policy

The Indiana Department of Health (IDOH) and Marion County Public Health Department (MCPHD) Ryan White Services Programs institute and maintain practices to minimize the number of duplicate clients entered into CAREWare, RWISE, and RWISE Viewer (the "system").

Background

The purpose is to eliminate the duplication that comes from the multitude of users with the ability to add clients into the system.

Procedure

Limiting the number of system users with add client permission is essential to minimizing the number of duplicate clients entered into the system. To this end, the number of users with add client permission at each sub-recipient (also called the "agency" in this policy) will be adjusted to two persons who have the roles "CAREWare administrator I" and "CAREWare administrator II," respectively.

The procedure below outlines the process to obtain add client permission.

I. Overview: Agencies funded by MCPHD and IDOH Ryan White Services Programs will have two specified CAREWare users who have the following roles:
   a. **CAREWare administrator I**: In addition to any other existing permissions, CAREWare administrator I will have the ability to run reports, manage client caseloads, and Add Clients into their agency domain. The CAREWare Administrator I also will ensure each new user's CAREWare User agreement, authenticator download, and initial system log in are correctly completed.
   b. **CAREWare administrator II:** One staff member at each agency will serve as the back-up to CAREWare Administrator I. This back-up role is named "CAREWare Administrator II" and will have the ability to run reports, manage client caseloads, and Add Clients. The CAREWare Administrator II also will ensure each new user's CAREWare User agreement, authenticator download, and initial System log in are correctly completed.

To ensure timely client care, if neither of the two designated roles above at an agency is available to add a client, the following steps shall be taken:

1. Reach out to the eligibility unit (i.e. business coordinators/eligibility specialists) to request a client be added into your domain
2. If no business coordinator/eligibility specialist is available, reach out to the IDOH Ryan White ADAP coordinator/HSP manager or the MCPHD Ryan White Services Program Business Operations coordinator to request a client be added into your domain.

Other agency users who do not have Add Client permission shall retain their other permissions (e.g., view, client notes).

II. Recommended qualifications: Agencies will choose personnel for the CAREWare administrator I and CAREWare administrator II roles. MCPHD and IDOH recommend that candidates for these roles:
    - Be employed by the agency for a minimum of 90 days
    - Have at least 60 days of demonstrated experience working in the System
    - Be funded by a Ryan White Services Program grant

III. Requesting add client permission: Agency management may request add client permission by completing the add client permission request form and sending it to the MCPHD database manager or the IDOH program director.
Once accepted, the candidate must review the online add client training, successfully pass knowledge checks, and complete in-person add client training.[1] Each CAREWare administrator I and CAREWare administrator II must complete annual refresher trainings.

IV. Suspension of add client permission: IDOH and MCPHD reserve the right to suspend the Add Client permission of CAREWare administrators I and II who create more than five duplicates in a 30-day period. The suspension shall last 15 business days. The suspension will not be lifted until the worker successfully completes the online and in-person add client trainings. After the suspension is lifted, it may take up to two days of administrative processing for the worker to regain add client permission. Repeated suspension may result in permanent loss of add client permission.

Exceptions: None currently

References

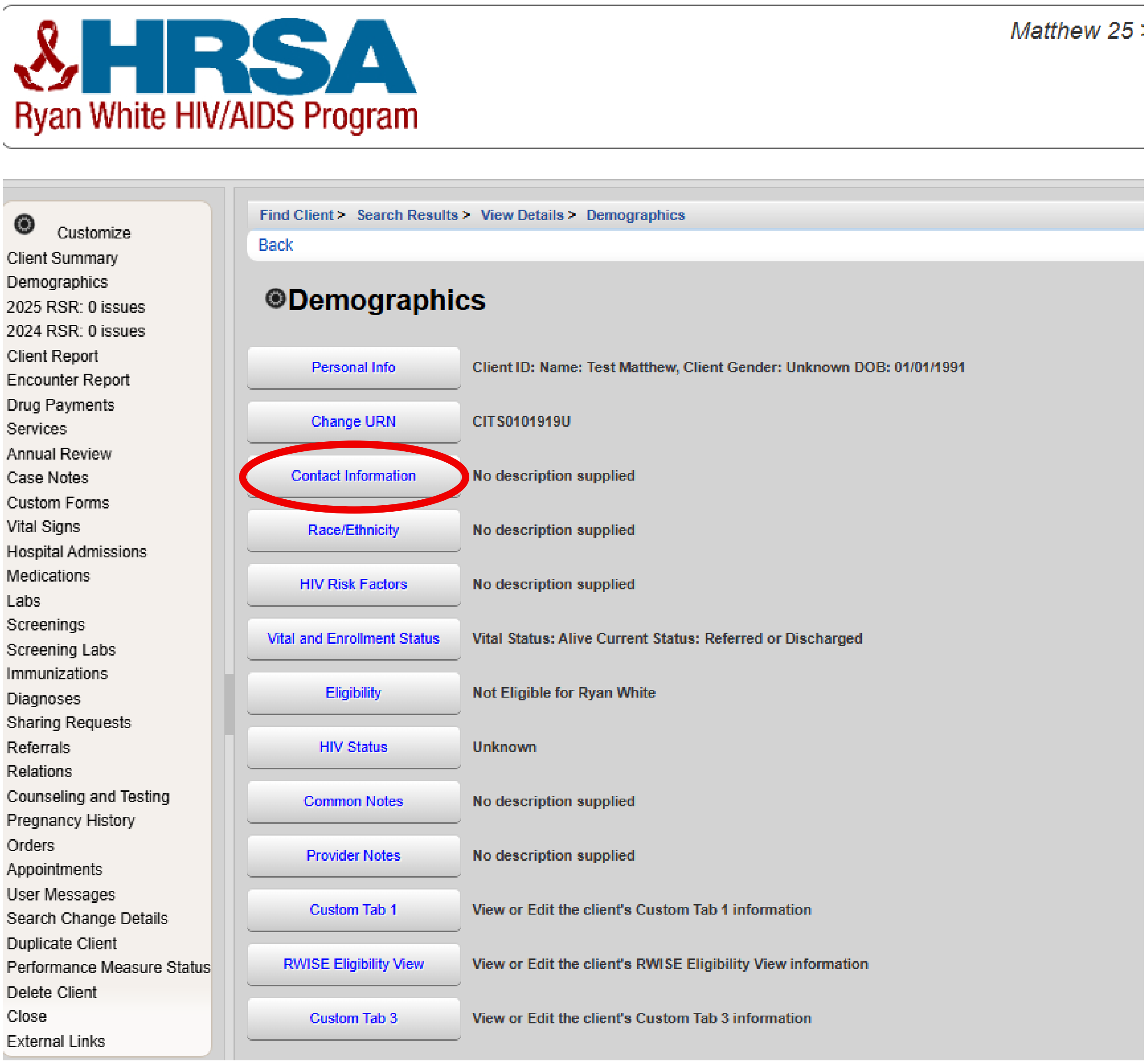
- Ryan White HIV/AIDS Program (RWHAP) National Monitoring Standards for RWHAP Part A Recipients. March 2025.

[1] Virtual training may be available to agencies located outside the Indianapolis metropolitan area.

- Ryan White HIV/AIDS Program Services Report (RSR) 2024 Instruction Manual. Revised Feb. 28, 2025.
- PCN 13-02, Clarifications on Ryan White Program Client Eligibility Determinations and Recertifications Requirements. Revised May 1, 2019.
- PCN 15-02, Clinical Quality Management Policy. Updated Sept. 1, 2020.

How to Add Information to the Demographics Page

1. From the main page, you can add, view, and edit various demographic information. To add or edit information, click the blue lettered tab of the category you wish to view or edit.



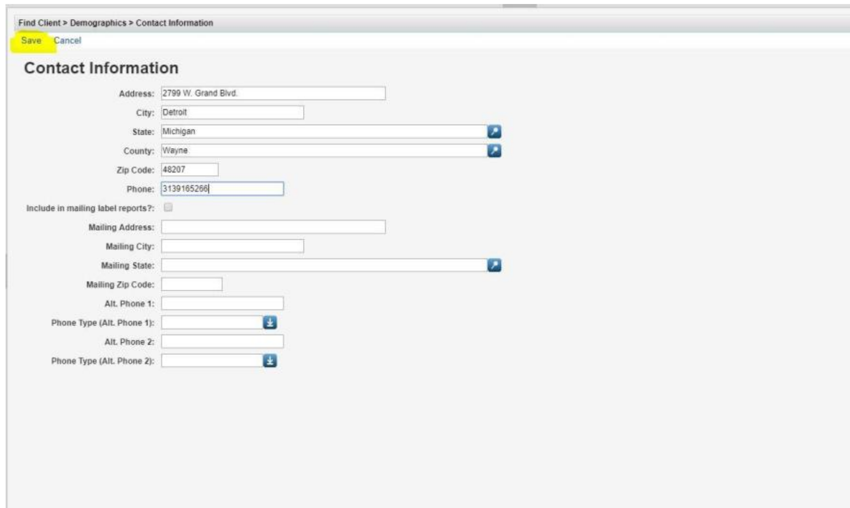
2. Once you click the tab you want to edit, it will open. Enter all relevant information and then save it.

Note:

Some information has to be entered using a drop- down menu. If a category has a drop-down menu

next to it, 

you must choose from the list provided.

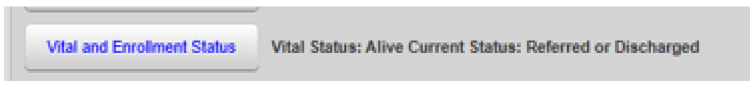


3. After you save, you will be taken back to the main page. You can view and edit other categories by clicking the blue tab of the category you wish to view and follow the same instructions. Some categories will require you to enter data while others will require you to check the appropriate box.

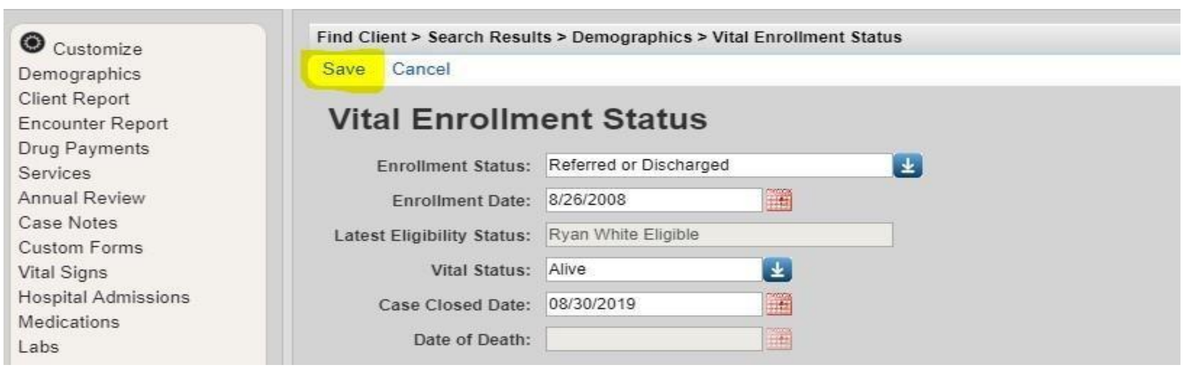
How To Edit Enrollment Status

When you add a client to CAREWare, the enrollment status will automatically be **Active,** and vital status will be **Alive;** however, that information could change. The client may be discharged from your agency or become inactive. You will need to add a record to reflect that. If enrollment or vital status changes, follow these instructions:

1. Open a client record. Enrollment Status is located on the demographics page.
2. Select **Vital and Enrollment Status.**



3. Enter the NEW **Enrollment** or **Vital Status**. Choose from the dropdown menu.
4. **Save.**



Note: When you change enrollment status from active, you will be prompted to enter a

Case Closed Date.

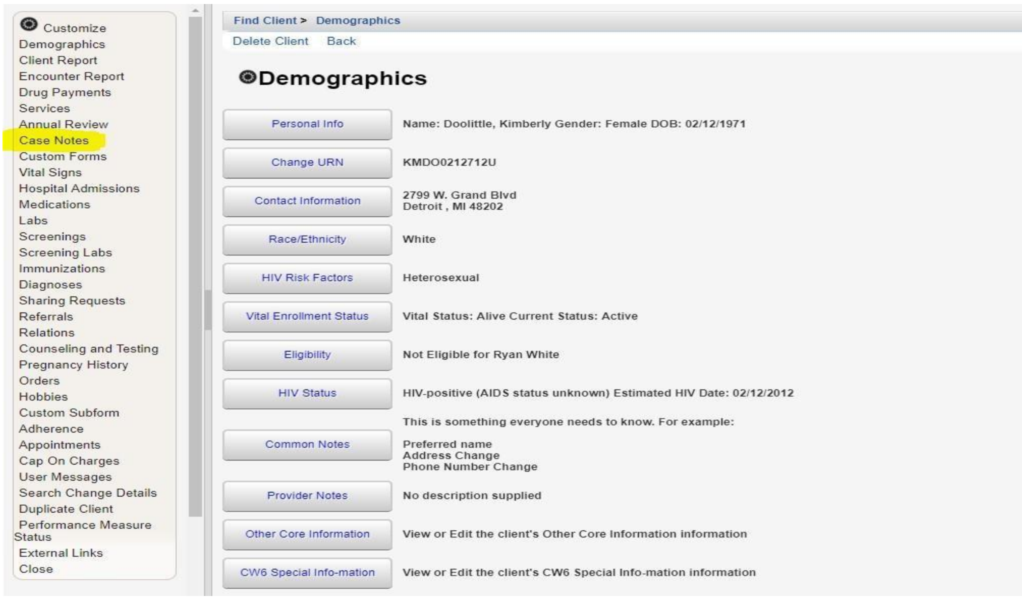
You will also be prompted to enter a **Date of Death** if you change vital status to deceased.

Discharging a Client

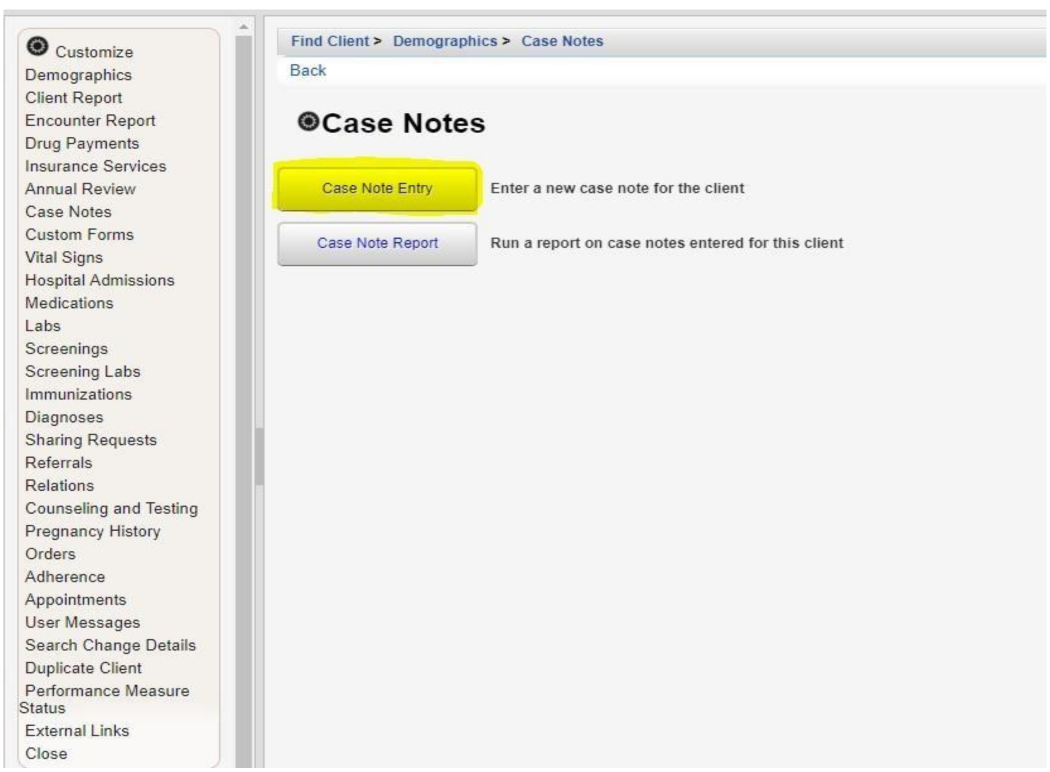
1. When a client is **discharged** from your agency and you enter a case closed date, you will need to update the eligibility status records. You must enter a NEW record that marks the client as NOT eligible for the funding source.
2. Do not edit any previous eligibility records; just add a new record. If you adjust old records, it may appear that you provided services to someone who was not eligible.
3. When you return to the demographics page, the client record will be updated.

How To Add Case Notes

1. Open the client record.
2. Select **Case Notes** from the menu of links on the left-hand side of the record.



3. Select **Case Note Entry.**



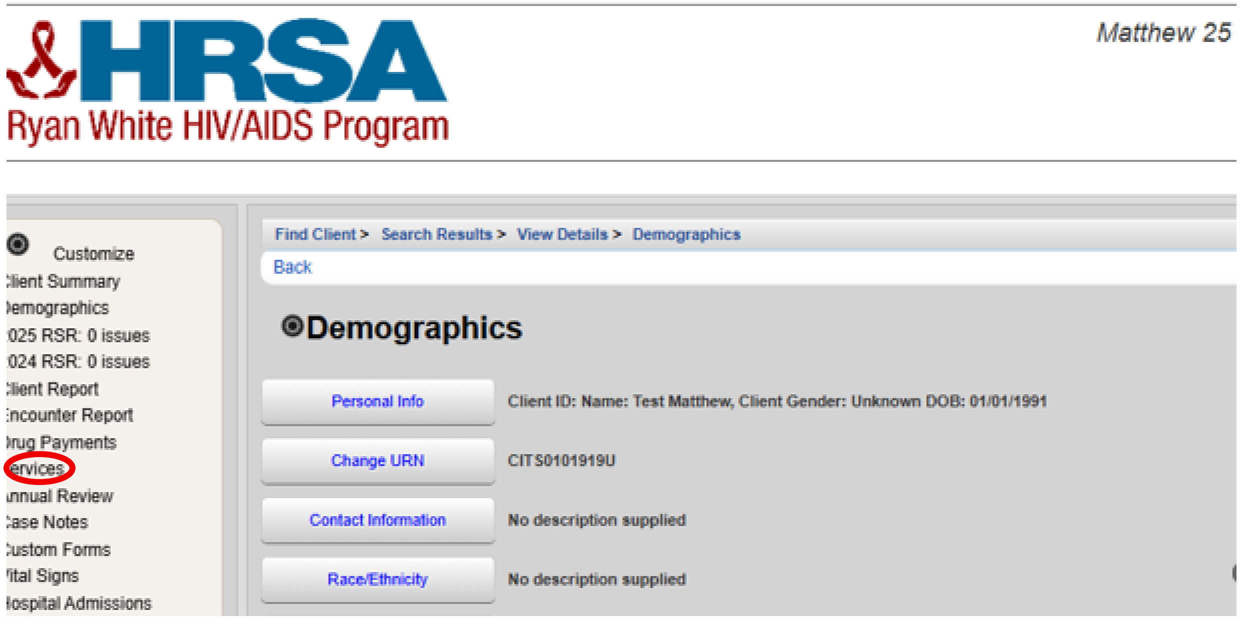
4. Select **Add.**

5. Enter the **Date** of service and **Author** name (if applicable).
6. Enter **Case Note.**
7. Save.

Note: If you select the **Add Service** box, you will be directed to the services tab where you can enter the service for the client. This is a short cut to adding a service.

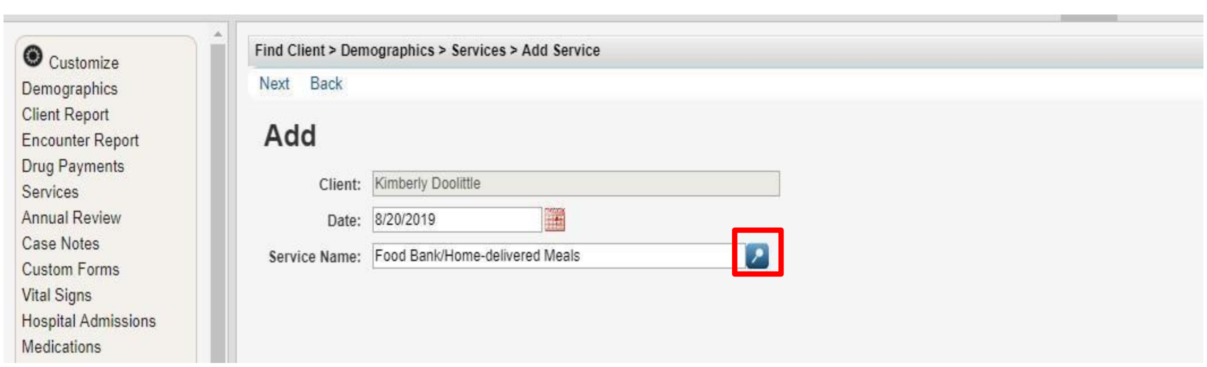
How To Add a Service

1. Open a client record. Select the **Services** tab from the menu of links on the left-hand side of the client record.



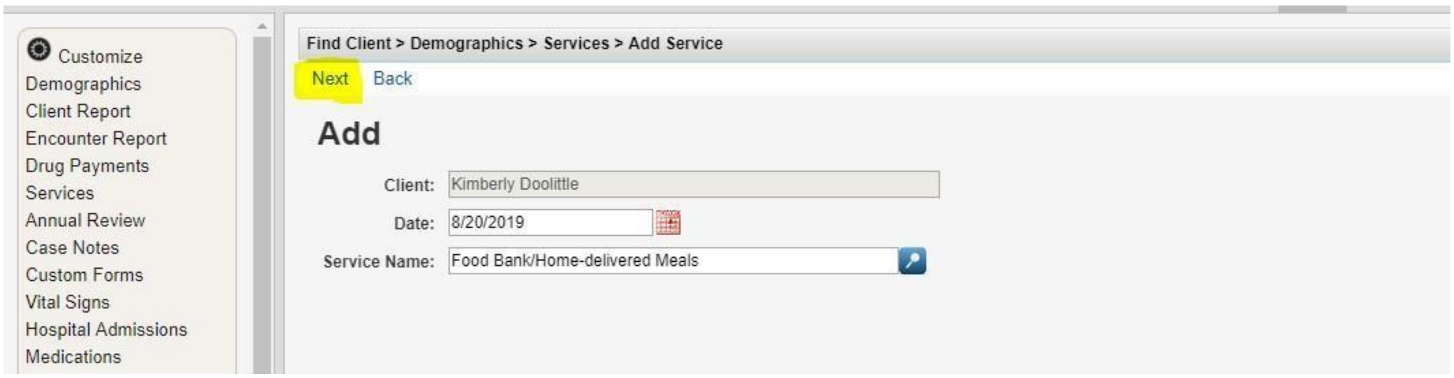
2. Select **Add.**

3. Enter the **Date** the service was provided and select the **Service Name** from the subservice drop-down list.

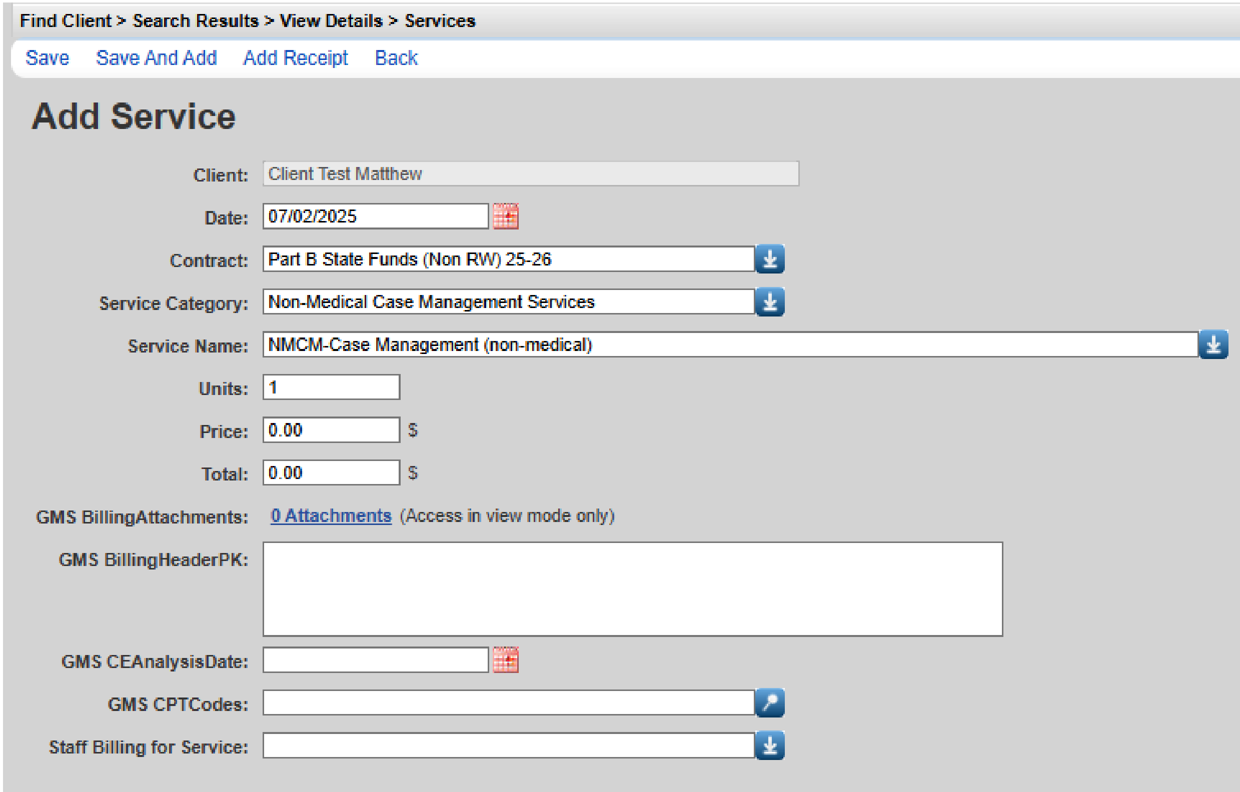


Note: You cannot scroll through the drop-down menu. Therefore, if you need to add a service that doesn’t immediately appear when you click the drop-down menu, enter the first couple of letters in the search box. From there, you can select the correct service.

4. Once you enter the date and service, click **Next.** This will take you to the next phase of adding a service.

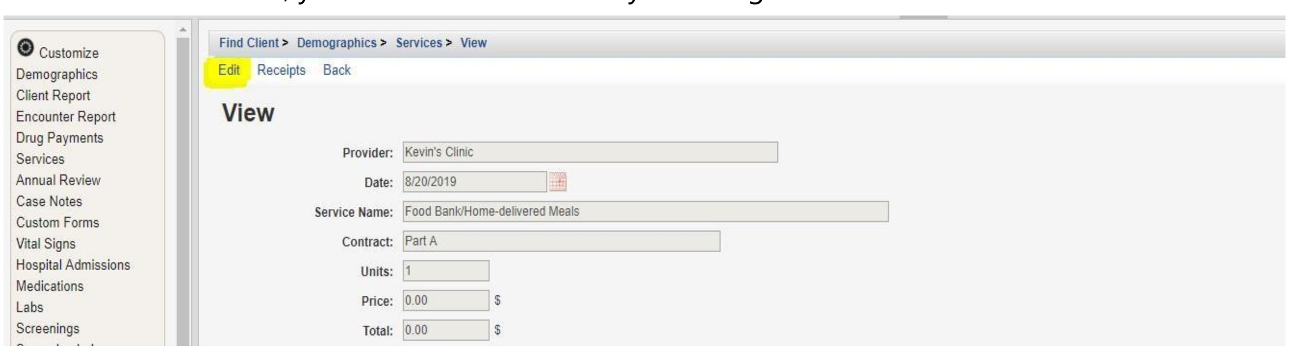


5. Enter the correct **Contract** and **Units. Approved contracts will be built into your domain for you.**



6. Save

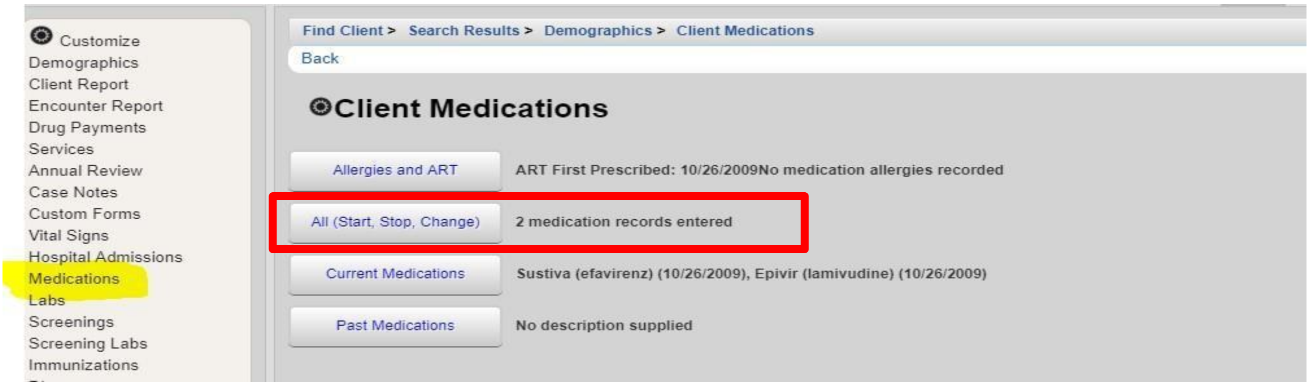
7. If you need to edit a service, select the service that needs editing and then click **View**. From there, you can edit the service by selecting **Edit.**



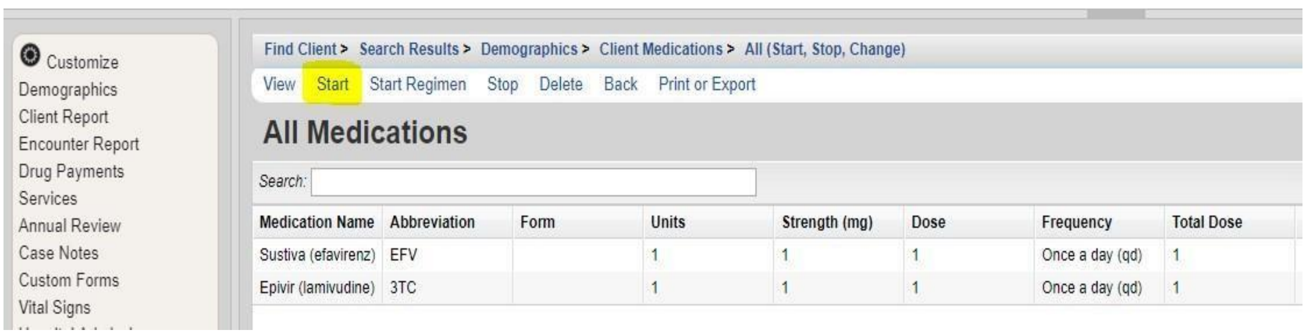
8. **Save your changes.**

How To Add a Medication

1. Open a client record. Select the **Medications** from the menu of links on the left-hand side of the client record.
2. You can view the client's current medications, past medications, allergies, and add new medications. To add or edit a medication, select **All (Start, Stop, Change).**



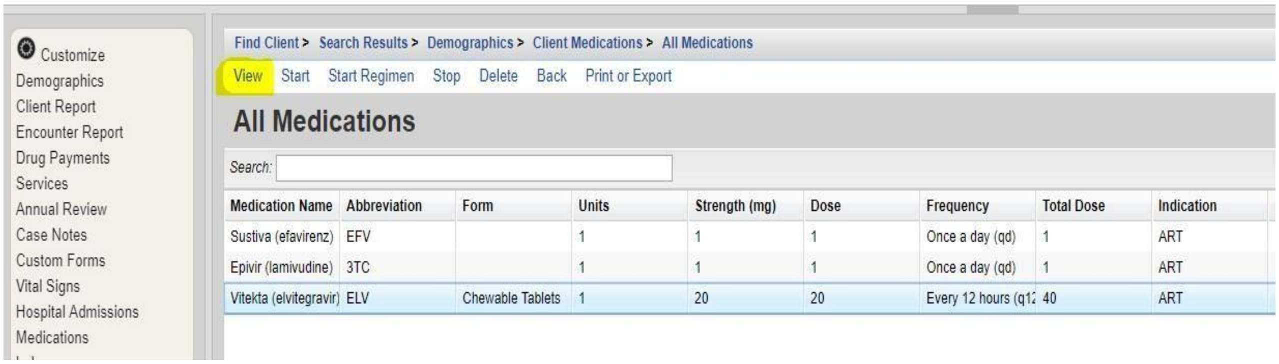
3. Select **Start.**



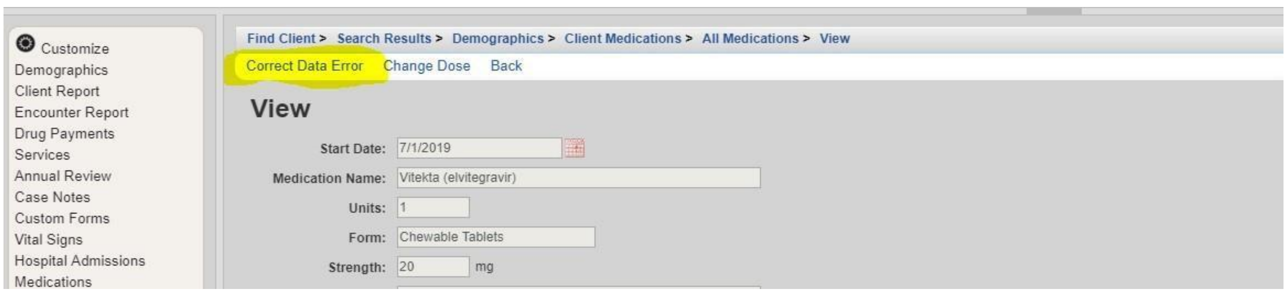
4. From the drop-down menu, select the **Start Date, Medication Name, Units, Form, Strength, Frequency, Indication** and comments (if necessary).
5. Save.

How To Edit a Medication

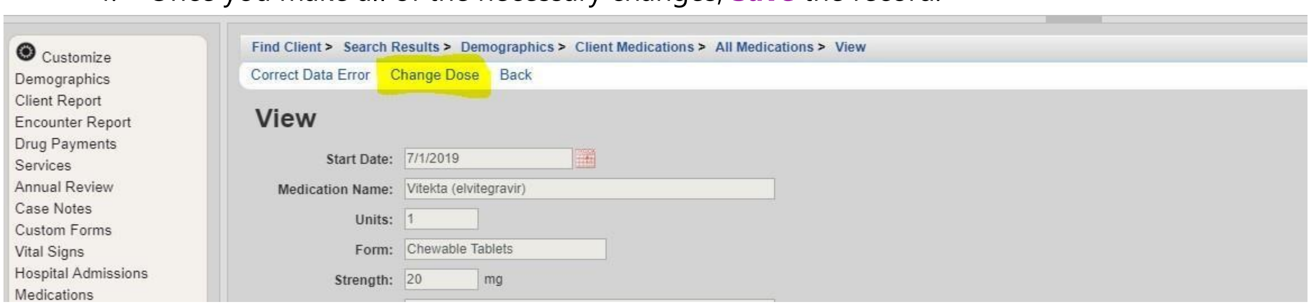
1. If you need to edit a medication, select the medication you would like to change and click **View.**



2. From there, you can either correct a data error or change the dose.
3. Either select **Correct Data Error** or **Change Dose.**



4. Once you make all of the necessary changes, **Save** the record.

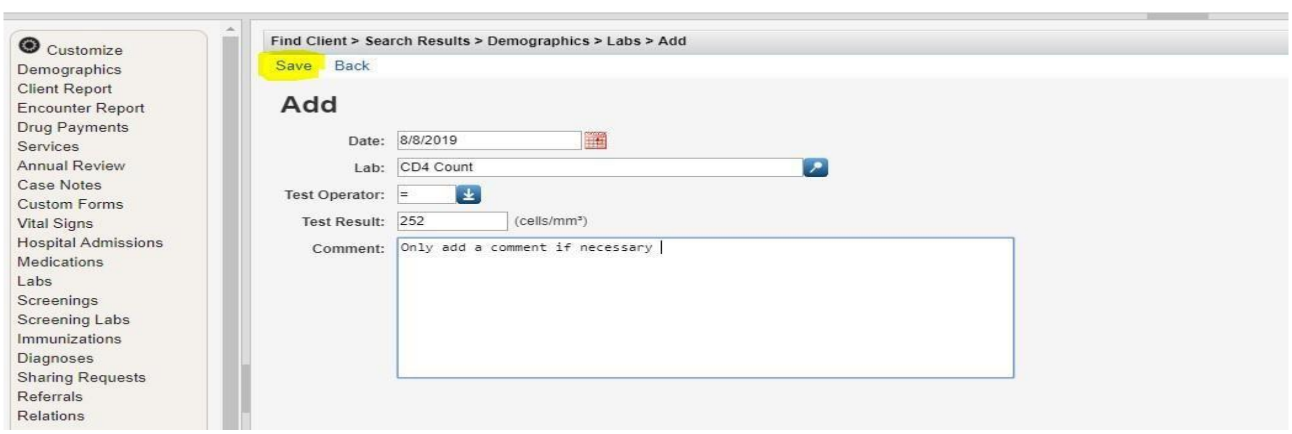


How To Add a Lab/Screening Lab/Screening

IDOH has an automated process to pull viral load and CD4 counts from eHARS. Manual updates can still be done.

1. Open a client record. Select **Labs** or **Screening Labs** or **Screenings** from the menu of links on the left-hand side of the client record. Each is a different tab, but the information is entered the same way.

2. Click **Add.**
3. Under the drop-down menu, select the appropriate **lab, test operator**, and the **result.**
4. Save.



Note: You cannot scroll through the drop-down menu. In order to access the necessary lab, type in the first couple of letters of the lab in the search box.

What You Must Enter into CAREWare for the Ryan White Services Report (RSR)

The Ryan White HIV/AIDS Programs Services Report (RSR) is a client-level data reporting requirement that monitors the characteristics of Ryan White HIV/AIDS Program Parts recipients, providers, and clients served. All Ryan White HIV/AIDS Program-funded recipients (Parts A-D) and their contracted service providers are required to report client- level data annually to the HIV/AIDS Bureau through the RSR.

To limit the amount of data cleanup that has to be done at the end of the year, it is imperative that you enter in all of the relevant information that is needed for the report.

Below is a list of items that <u>must be entered</u> in CAREWare for the RSR: Located under the Demographics tab

1. Enrollment Status/Eligibility
2. Vital Status (Alive, Deceased)
3. Race/Ethnicity (includes Asian and Hispanic Subgroups)
4. Gender
5. HIV Status
6. HIV Risk Factor

Located under the Annual Review tab

7. Housing Status
8. Poverty Level
9. Medical Insurance

Located under the Medications tab

10. ART Medications

Located under the Services tab

11. Services Provided

Located under the Labs tab

12. CD4/Viral Load Tests

CAREWare 6: Running Financial Reports

This guide will walk you through the basics of creating and running a financial report. It includes definitions of all financial report fields.

What is a Financial Report?

Financial reports are used to calculate the total number of clients receiving individual services. For example, you can run a financial report to see how many clients received EIS services at your agency. However, financial reports will not tell you any client names or other information. For that, you will need a custom report.

You can also customize your financial reports to pull in specific criteria. For instance, you can filter a report that only calculates female clients who have received services at your agency.

Financial Report Field Definitions

- **Begin Date and End Date:** Date range you want to measure
- **Funding Source Filter:** Use this to pick the correct contract. Examples include MAI (Part A), Part A, Part B, etc.
- **Edit Filter:** This is used to add a filter to the financial report. For example, use edit filter to calculate the number of female clients who have received services at your agency
- **Run:** Use this to run the report
- **PDF:** Runs the report as a PDF
- **Back:** Use this to go back to the previous page or step
- **Include Subservice Detail:** Includes all services plus their subservices. Examples include EIS Discharge, MCM Discharge, OAHS Medical Complex, etc.
- **Filter Description:** Describes the filter created (if applicable)

Running a Basic Financial Report (Quick Overview)

1. Login to CAREWare.
2. Select **Reports** tab.
3. Select **Financial Report** from the menu of links.
4. Specify the **Begin Date and End Date.**
5. Select **Funding Source Filter**. Choose the correct funding source. If it is multiple funding sources, make sure you check all that apply. If your funding source is not on the first page, you can type it into the search box.
6. Select **Save.** This will take you back to the main page of the financial report. From there, you can run your report.
7. Select **Run.** On the upper right-hand side, you will see a box that lets you know the report is running.
8. Once the report has generated, you will receive a message that says **Complete** (on the upper right-hand side too). Click **View Financial Report.**

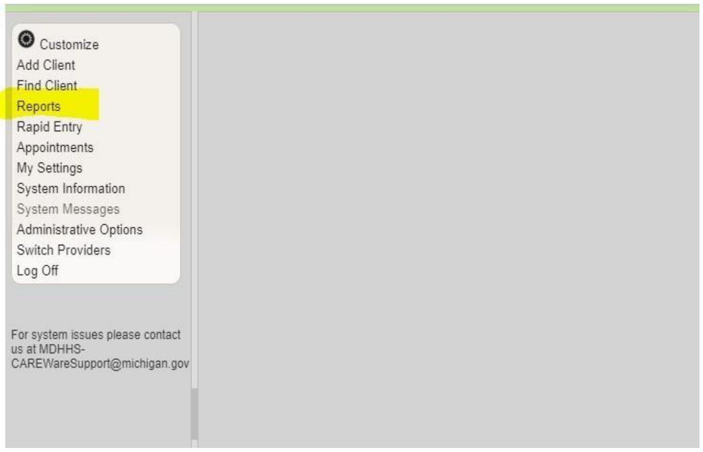
Note: If you want **to save the file or view it as a PDF, you should run it as a PDF. Click PDF instead of Run.**

Adding a Filter to the Financial Report

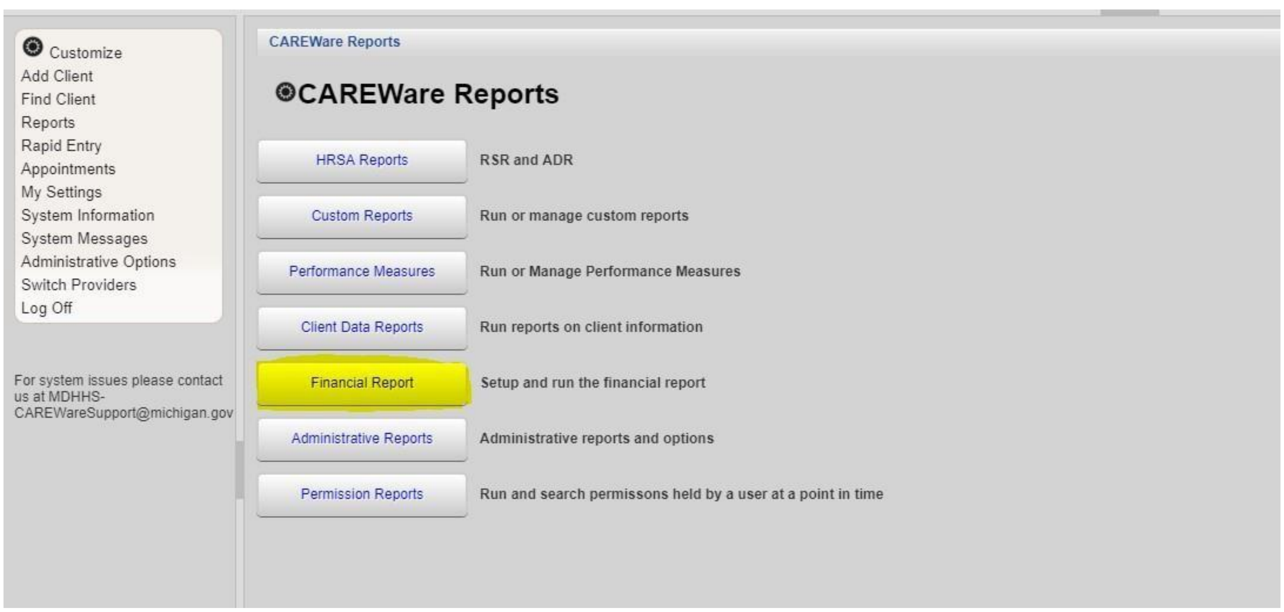
1. Follow steps 1-6. Then select **Edit Filter.**
2. Select **Add.**
3. Select the criteria you would like to use for the filter from the list provided by clicking on the field name and clicking **Use Field**. You can narrow down the list by typing in the search bar at the top.
4. Most field selections will have you set parameters by using the **Drop-down List**. Enter the necessary information under the drop-down menu.
5. Select **Save.**
6. You can add as many filters as you need. Once you are done adding filters, click **Back.** This will take you back to the financial report main page.
7. Click **Apply Filter**.
8. Then select **Run Report** or **PDF.**
9. Once the report has generated, you will receive a message that says **Complete** (on the upper right-hand side too). Click **View Financial Report.**

Running a Basic Financial Report (Detailed Overview)

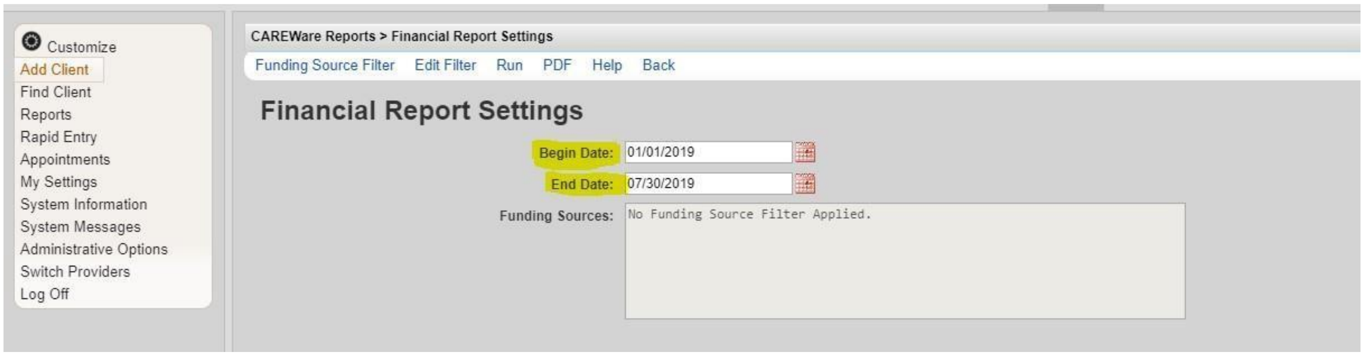
1. Select the **Reports** tab.



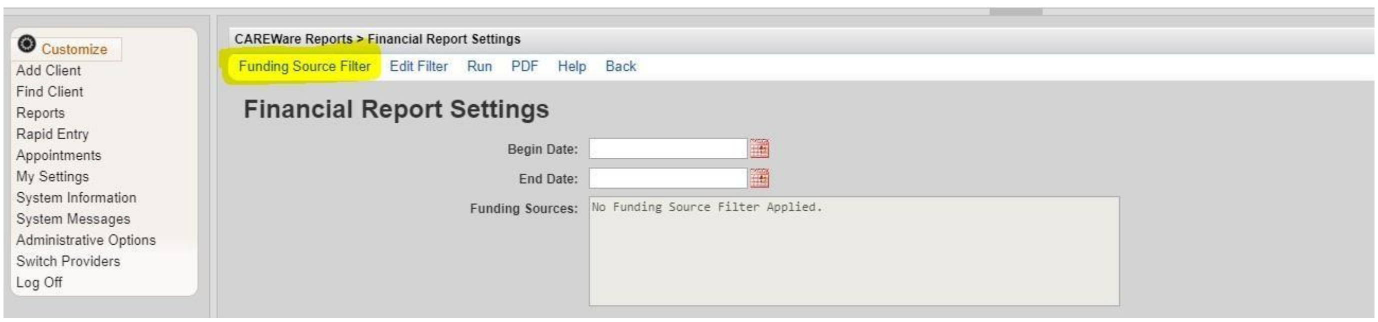
2. Select **Financial Report** from the menu of links.



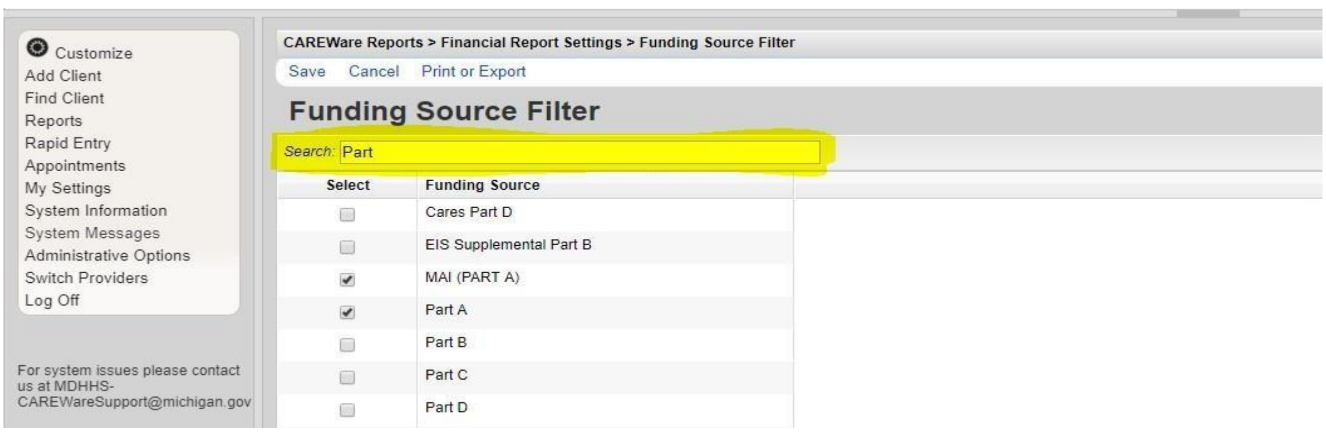
3. Specify the **Begin Date and End Date.**



4. Select **Funding Source Filter.**

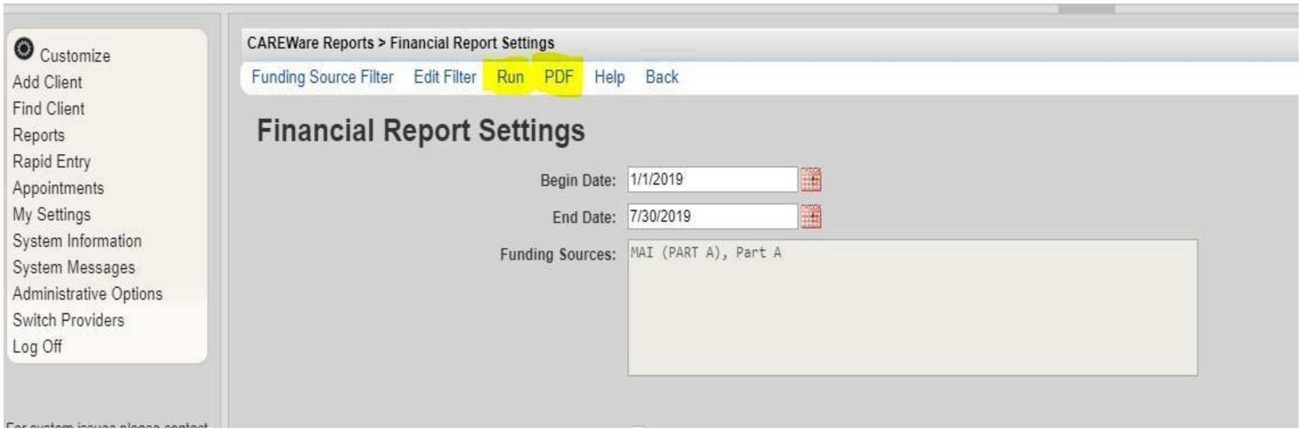


5. Choose **Funding Source.**

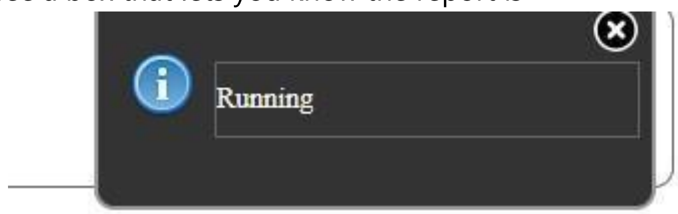


Note: You can type the funding source into the search bar to narrow down the list. You can also check multiple funding sources.

6. Save.
7. This will take you back to the main page of the financial report. From there, run your report. You have two options: **Run** the report or run it as a **PDF**.



8. On the upper right-hand side, you will see a box that lets you know the report is **Running**. You want to see this box.



9. Once the report is generated, you will receive a message (also on the upper right- hand side) that says **Complete.** Click **View Financial Report.**

10. The report should look like this:

Financial Report

Tuesday, January 1, 2019 through Tuesday, July 30, 2019

Report Criteria:

Providers:	Henry Ford Hospital
Funding Sources:	Part A, MAI (PART A)
Group By Providers:	False
Include Subservice Detail:	False
Receipts In Period:	False

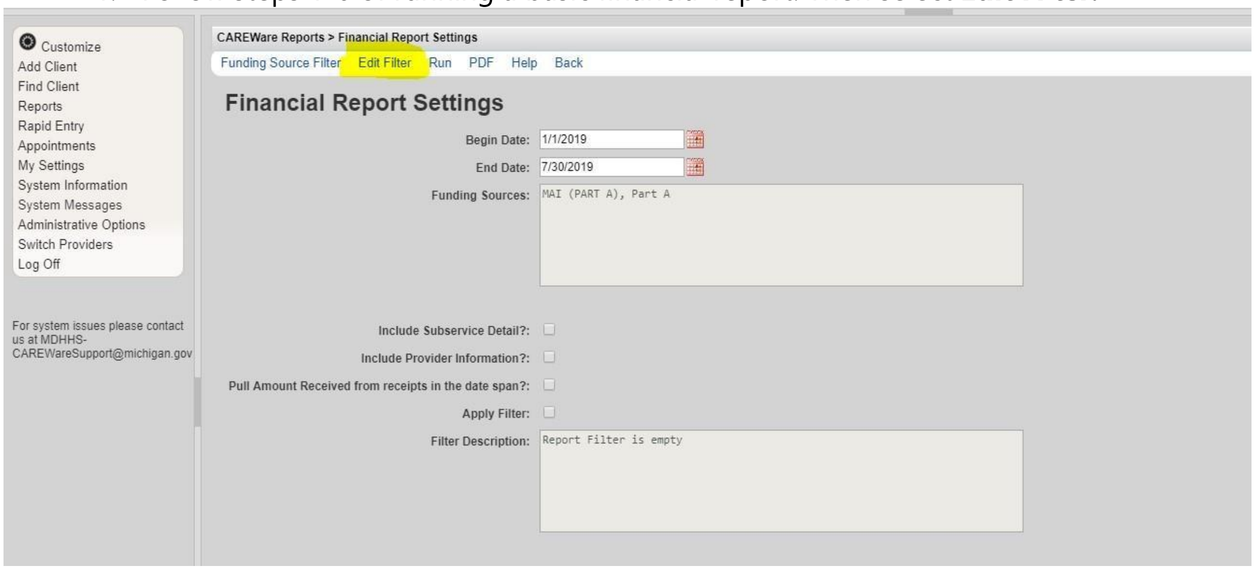
Henry Ford Hospital

	Clients:	Units:	Total:	Amount Received:	Not Received:
Early Intervention Services					
Early Intervention ServicesTotals:	96	1127	$0.00	$0.00	$0.00
Outpatient/Ambulatory Health Services	Clients:	Units:	Total:	Amount Received:	Not Received:
Outpatient/Ambulatory Health ServicesTotals:	619	1827	$0.00	$0.00	$0.00
Provider Totals:	644	2954	$0.00	$0.00	$0.00

Note: The report will open up on a separate tab. When you need to exit the report, simply close the tab. That will take you back to CAREWare.

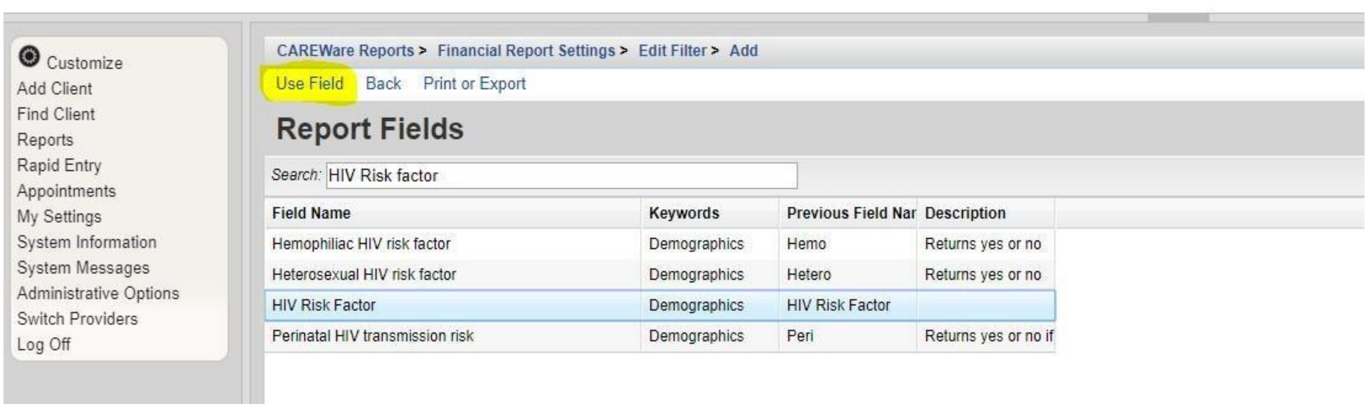
Adding a Filter to the Financial Report

1. Follow steps 1-6 of running a basic financial report. Then select **Edit Filter.**



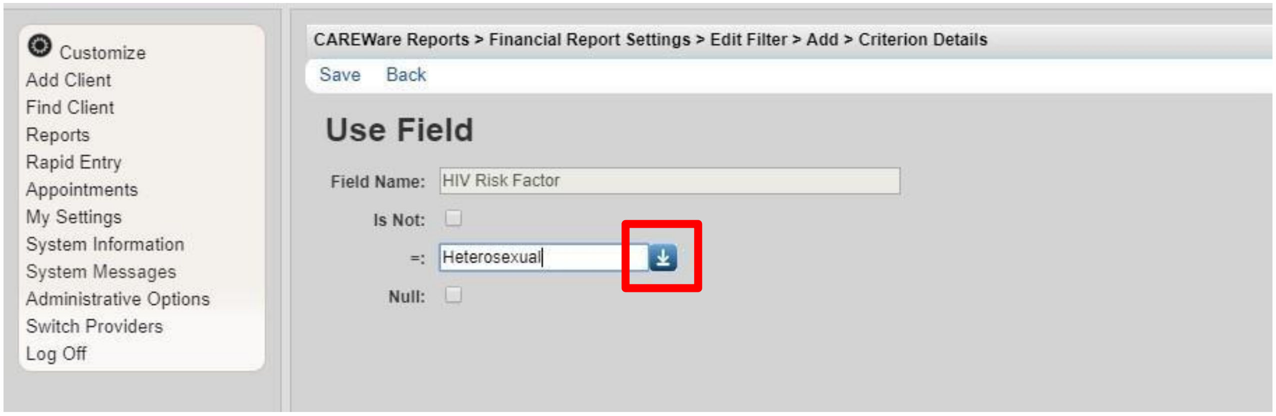
2. Select **Add.**

3. Select the criteria you would like to filter from the list provided and click **Use Field.** You can narrow down the list by typing the name in the search bar at the top.



4. Most filters will require you to set parameters (provide more information because the field has a wide range of options). Click the drop-down menu to set those

parameters.

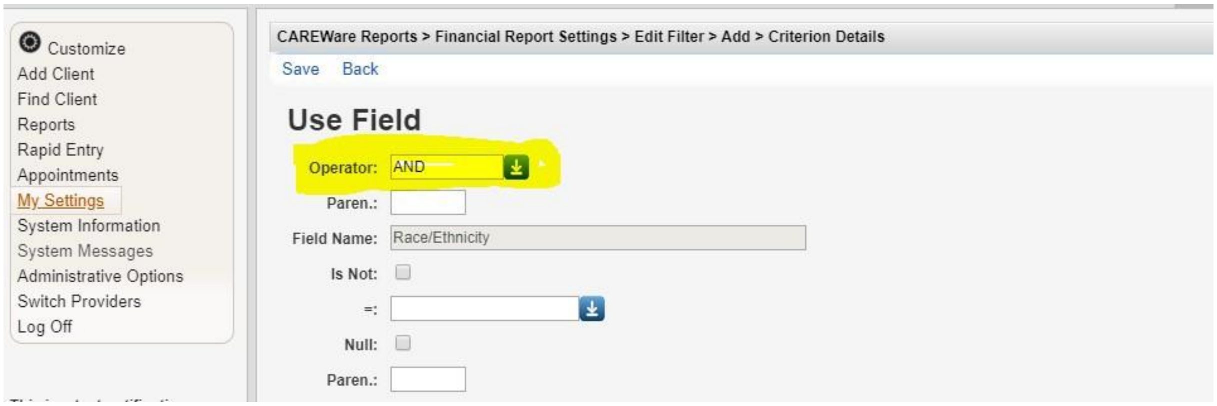


5. Save

6. Add as many filters as necessary. For instance, you could add a filter for race, age, virally suppressed clients, etc. If you need to add multiple filters, make sure you choose the correct **operator.** There are two choices for operator:

    Operator = AND means all criteria has to be met in order to pull in clients

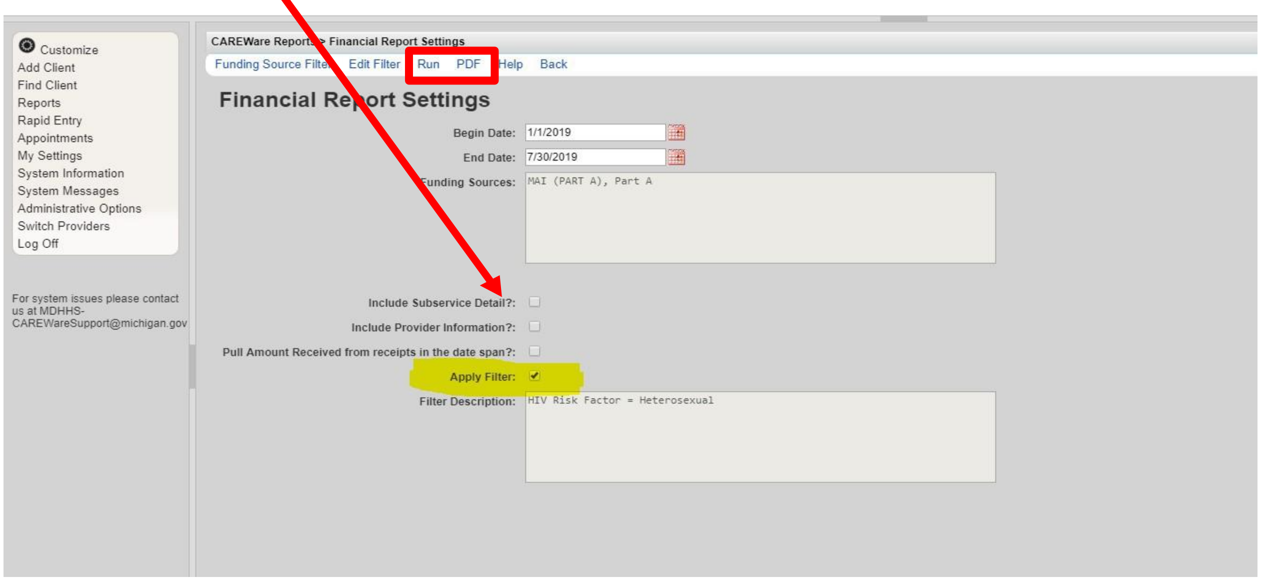
    Operator = OR means that any of the filters can be met to be pulled into the report.



7. Once you are done adding all of your filters, click **Back.** This will take you back to the financial report main page.

Note: Once **Apply Filter** is checked, it will stay checked until you uncheck it. That means that **anyone** from your agency who tries to run a report will have that filter applied to it. That will skew your data, so please make sure you uncheck the box once you are done running your report.

8. Select **Apply Filter**. It is important that you select **Apply Filter** for the filter to be pulled into the report. Then, click **Run** or **PDF.**



9. Once the report is generated, this is what it will look like. View or save it.

Financial Report

Tuesday, January 1, 2019 through Tuesday, July 30, 2019

Report Criteria:

Providers:	Henry Ford Hospital
Funding Sources:	Part A, MAI (PART A)
Group By Providers:	False
Include Subservice Detail:	False
Receipts In Period:	False
Custom Filter:	HIV Risk Factor = Heterosexual

Henry Ford Hospital

Early Intervention Services	Clients:	Units:	Total:	Amount Received:	Not Received:
Early Intervention ServicesTotals:	25	266	$0.00	$0.00	$0.00
Outpatient/Ambulatory Health Services	Clients:	Units:	Total:	Amount Received:	Not Received:
Outpatient/Ambulatory Health ServicesTotals:	229	654	$0.00	$0.00	$0.00
Provider Totals:	237	920	$0.00	$0.00	$0.00

CAREWare 6: Running a Performance Measure

What is a performance measure?

Performance measures generate reliable data on the quality-of-care clients receive; this can be measured at an agency level or by funding sources such as Part A or Part B. Performance measures are used to calculate many things including:

- The number of virally suppressed clients. The number of clients prescribed ARTs
- The number of clients that had medical visits during the year
- There are two ways to run performance measures: Run a Basic Performance Measure and Run a Performance Measure Client List
- The Basic measure pulls the percentage of clients that meet the criteria of the performance measure.
- The Client List report pulls the actual clients that meet or do not meet the criteria for the performance measure.

Running a Basic Performance Measure

Quick Overview:

1. Login to CAREWare.
2. Select the **Reports** tab.
3. Select the **Performance Measures** tab.
4. Select **Run Performance Measures**.
5. A list of all performance measures will appear. Select the performance measure you want to run. You can use the search box to narrow down your search.
6. Select **Evaluate Selected** at the top of the page.
7. This will take you to the page to set the parameters of your report.
8. Click **Edit.**
9. Specify the **As of Date** (this will be the date at which the performance measure stops). For example, an as of date of 09/30/19 would indicate to CAREWare to run data for one year back from that date (09/30/18 – 09/30/19). Once you add the date, **Save** it.
10. Select **Run.** On the right-hand side, you will see a box that lets you know the report is running.
11. Once the report is generated, you will receive a message that says **Report Generation Complete** (on the right-hand side too). Select **View Report.**
12. If you want to run multiple reports at once, click all the ones you want to run (step 5). Then follow the subsequent steps.

Note: The report will open on a separate tab. In order to get back to CAREWare, simply exit the tab. That will take you back to the performance measure tab**.**

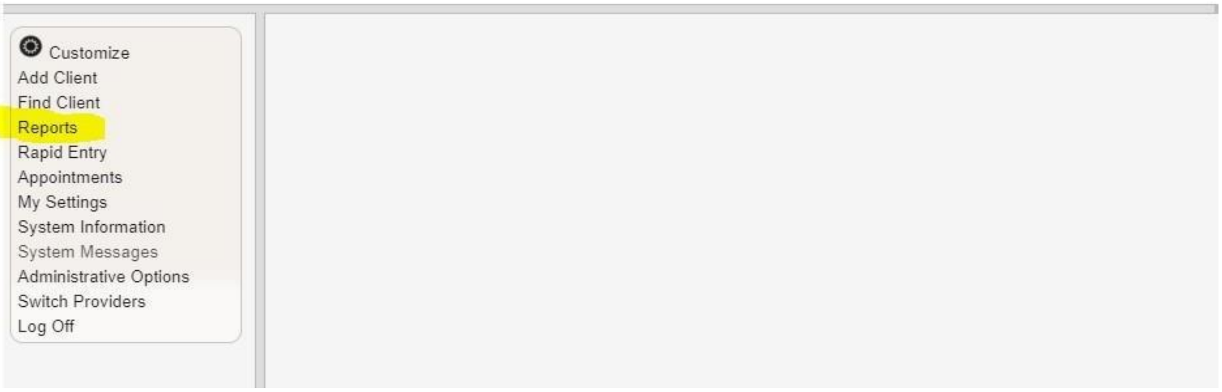
Running a Performance Measure Client List

Quick Overview:

1. Login to CAREWare.
2. Select the **Reports** tab.
3. Select the **Performance Measures** tab.
4. Select **Create Client List.**
5. A list of all performance measures will appear. Select the performance measure you want to run. You can use the search box to narrow down your search.
6. Select **Use Selected** at the top of the page.
7. This will take you to the page to set the parameters of your report. This is where you choose the date, section, and output format.
8. Click **Edit.**
9. Specify the **As of Date**, **Performance Measure Section** (there are four options: Not in Numerator, In Numerator, In Denominator, and Not in Denominator) and **Output Format** (this is how you will see the report as a separate document or in CAREWare).
10. Once you make your selections, click **Save.**
11. Select **Create Client List.**

Detailed Overview: Running Basic Performance Measure

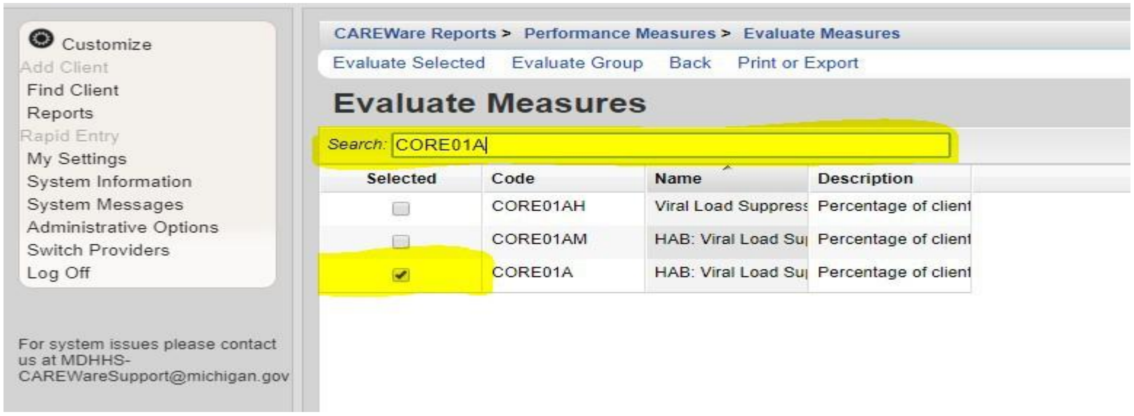
1. Select the **Reports** tab.



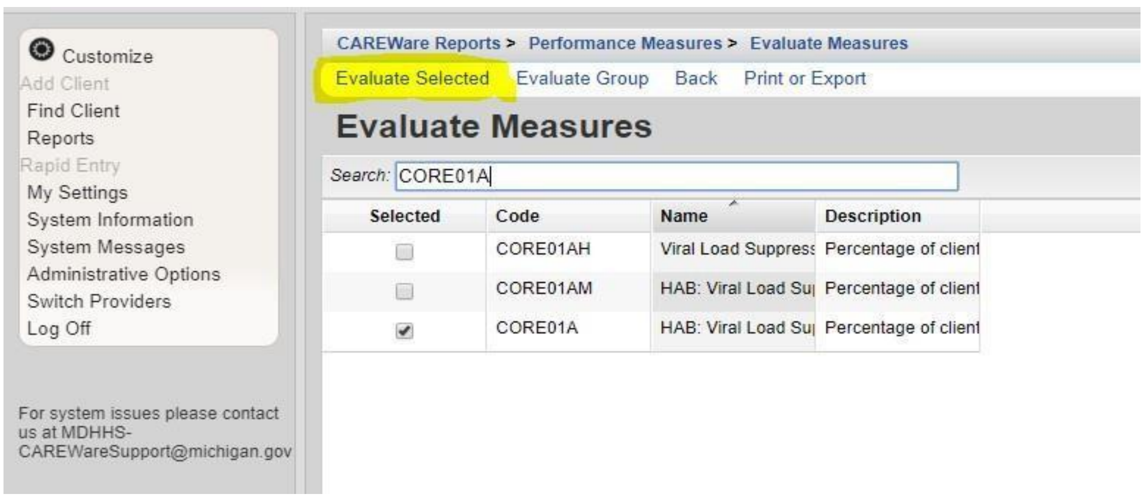
2. Select **Performance Measures.**

3. Select **Run Performance Measures**.

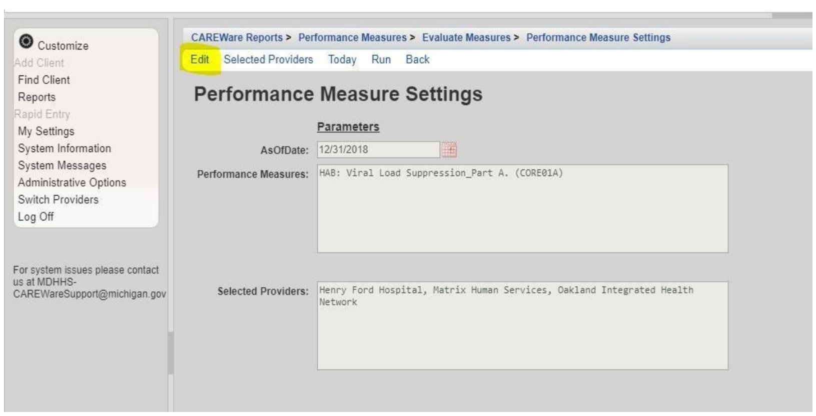
4. A list of all performance measures will appear. Select the performance measure you want to run. You can use the search box to narrow down your search.



5. Select **Evaluate Selected** (top of page).

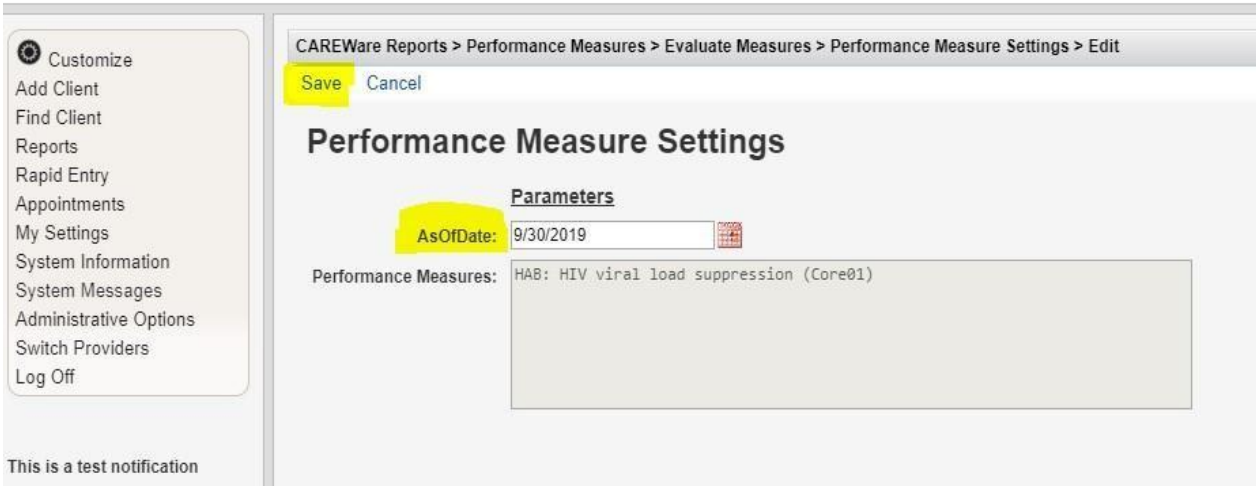


6. **This** will take you to the page to set parameters for your report. Click **Edit.**

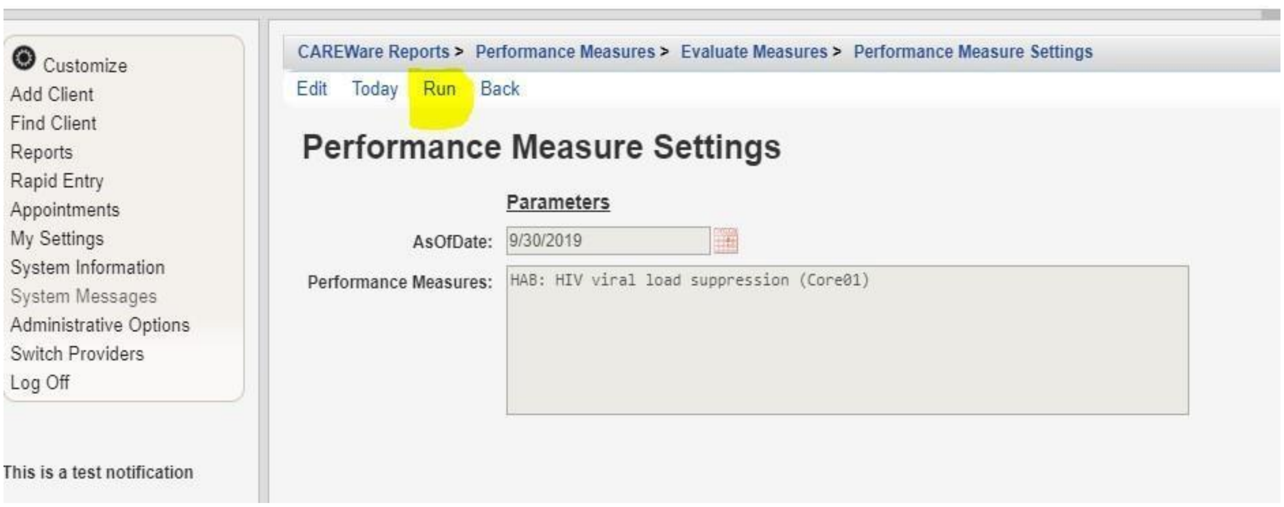


7. Select the as of date (this will be the date that performance measure stops).

8. Save.

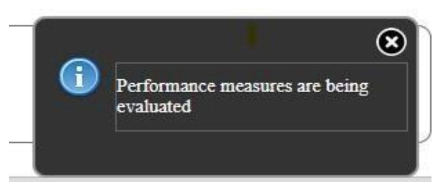


9. Run



Note: On the right-hand side, you will see a box that lets you know the report is generating.

10. **Once** the report has generated, you will receive a message that says **Report Generation Complete** (on the right-hand side too). Select **View Report.**



11. The report should look like this:

The report will open on a separate tab. This is what it looks like:

Multiple Performance Measures Report 9/30/2019

Selection: State ADAP Program

Code:	Name:	Numerator:	Denominator:	Percent:
Core01	HAB: HIV viral load suppression	0	2	0.00%

Detailed Overview: Running a Performance Measure Client List

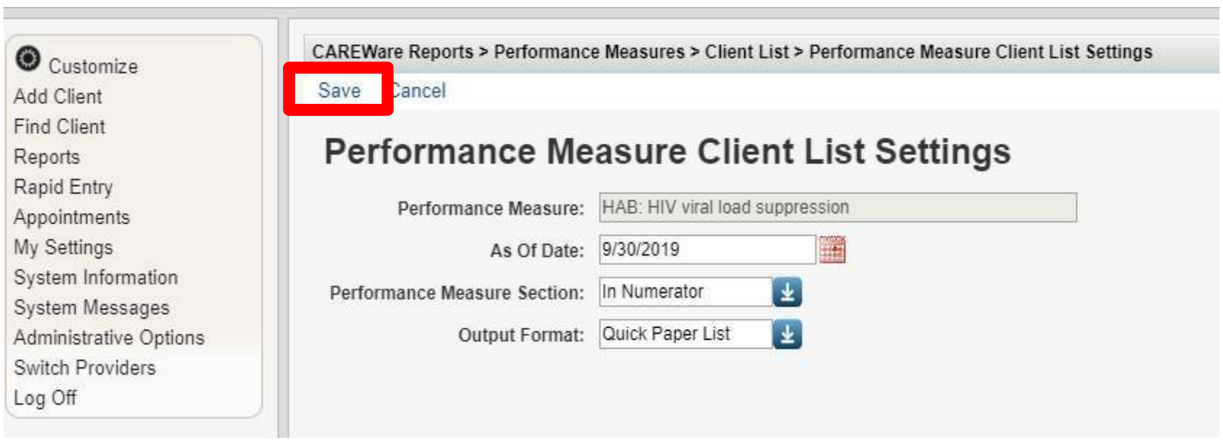
1. Follow steps 1-3 of running a basic performance measure.
2. Select **Create Client List.**

3. A list of all performance measures will appear. Select the performance measure you want to run.
4. Select **Use Selected.**

5. This will take you to the page to set parameters for your report. Select **Edit.**

6. Specify the **As of Date, Performance Measure Section,** and **Output Format.**

7. Select **Save.**



Note: For **Performance Measure Section,** there are four options: Not in Numerator pulls clients who don't meet the criteria of the measure; In Numerator pulls clients that meet the criteria for the measure; Not in Denominator pulls clients who are not even considered for the measure; In Denominator pulls all clients who are considered for the measure.

For example, you are running a report to pull the number of clients who are virally suppressed:

- In Numerator would pull all clients who **are** virally suppressed
- Not in Numerator would pull all clients in the denominator but **are not** virally suppressed
- Not in Denominator pulls clients who are not even considered for the measure- ex. Those who did not have an appointment within the measurement year.
- In Denominator pulls all clients who could potentially be virally suppressed

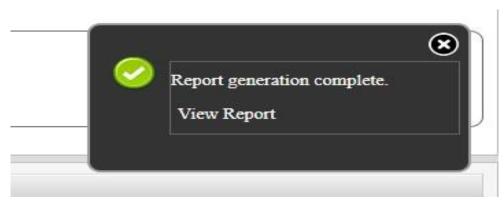
For **Output Function,** you have two options:

1. Real-time Lookup List allows you to click on client in the list and go to their CAREWare file. There is no need to exit the performance measure tab.
2. Quick Paper List generates a report that can be viewed, saved, or printed.

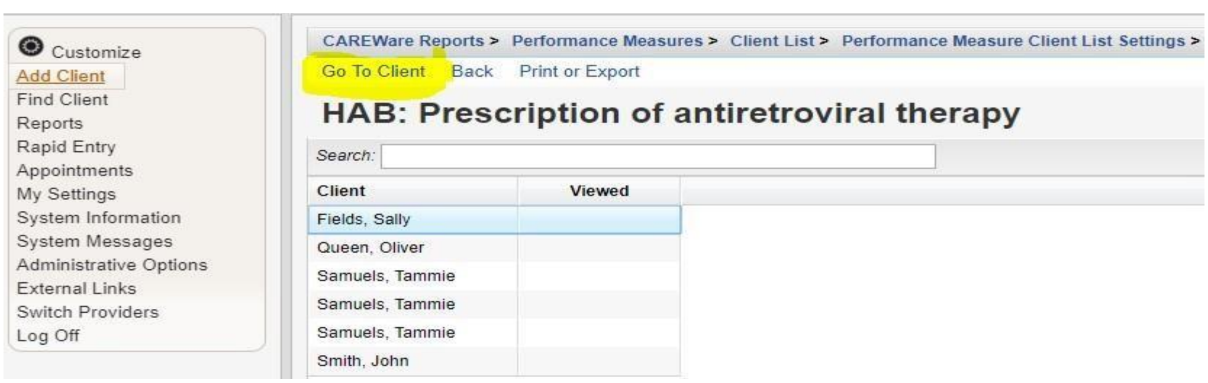
8. Select **Create Client List.**

9. Once the report is generated, you will receive a message that says **Report generation complete** (on the right-hand side)**.** Click **View Report.** The report will open in a separate tab.

This only happens if you select **Quick Paper List** as the report output.



10. If you select **Real-time Lookup list** as the output, then this is what the report will look like. Select the client you would like to view, then click **Go to Client.** This will take you to the client record in CAREWare.



CAREWare 6: Building a Custom Report

This guide will walk you through the basics of building a custom report utilizing a filter that looks at clients by:

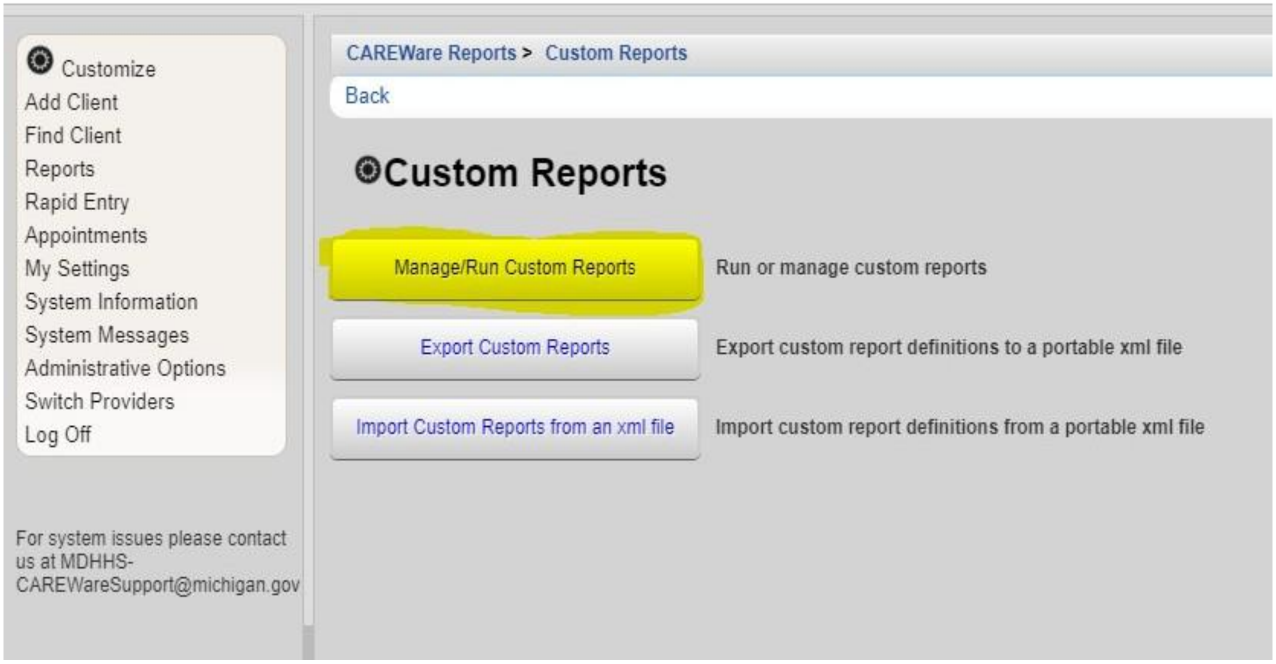
- Encrypted URN
- Race
- Last Quantitative Lab Date (Viral Load)
- Last Quantitative Lab Value (Viral Load)

Detailed Overview:

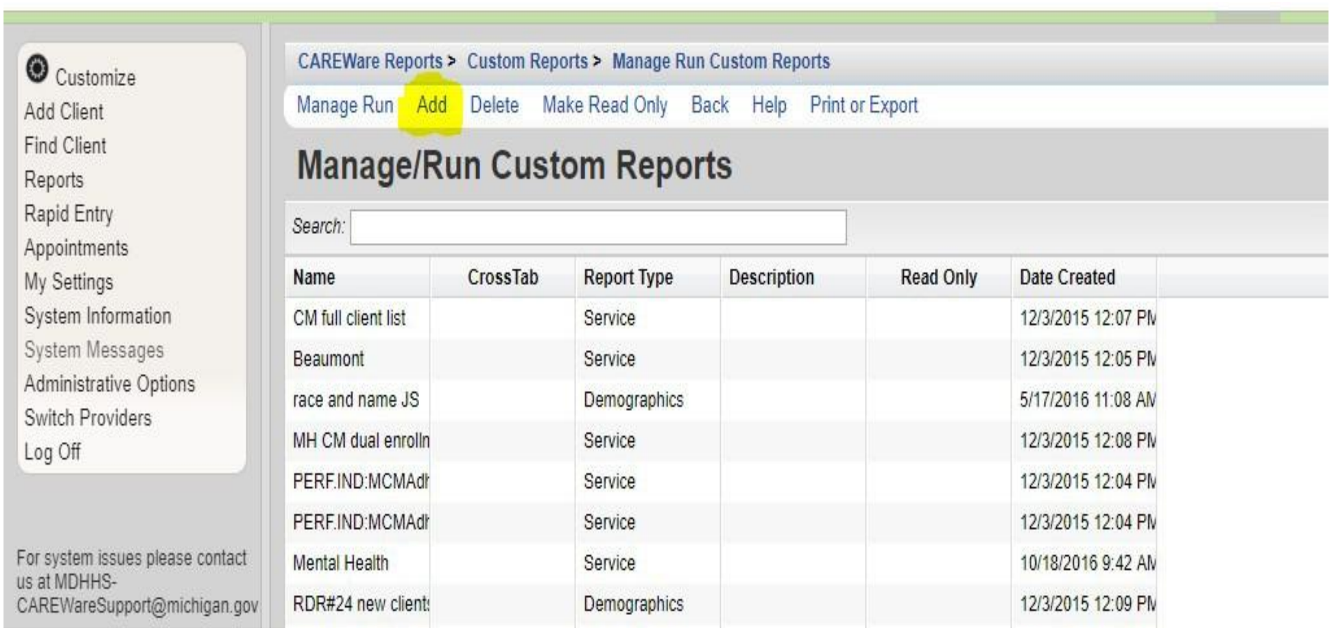
1. Select **Reports.**

2. Select the Custom **Reports** tab.

3. Select **Manage/Run Custom Reports**



4. This will take you to the main page for custom reports. This is where you will run all custom reports in your domain. To create a new report, select **Add**.

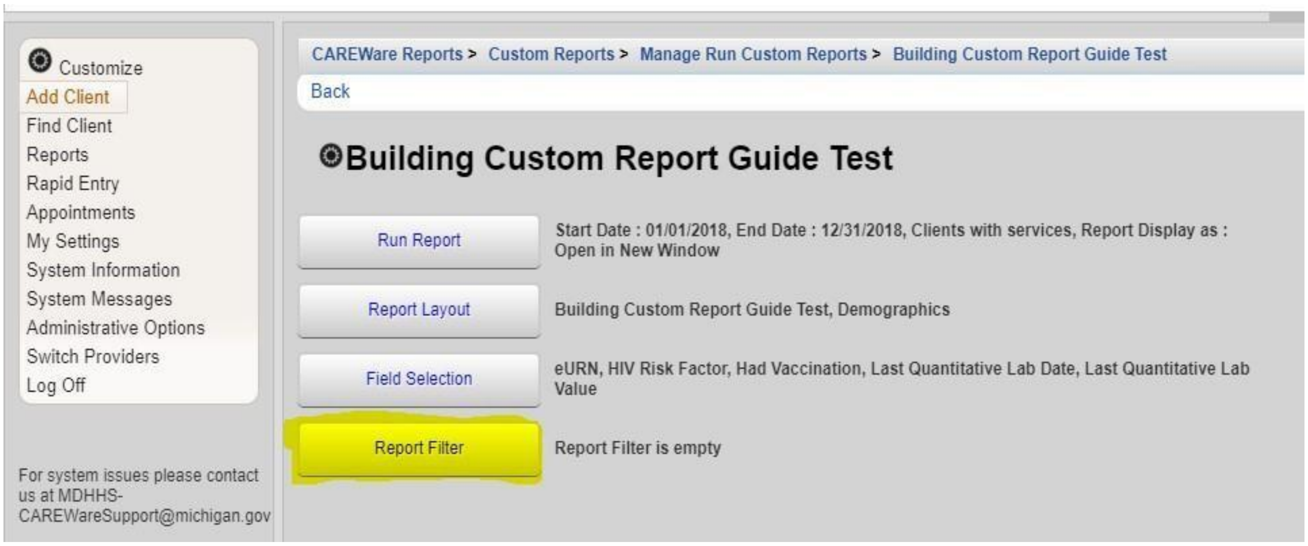


5. A box will pop up. Type in a **Report Name**, select a **Report Type**, and indicate if the report is a **crosstab.** For most reports, the report type will be **Demographic or Service.** Then select **Save.**

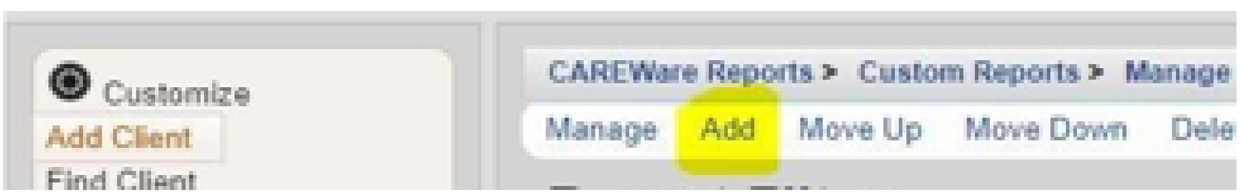
6. This will take you to the page where you can edit and run the report. Select the

Report Filter tab. The report filter is utilized to filter out the specific information you want to know. For example, if you only want to know information about medical visits, then you would add the OAHS service category to the report filter. Other examples include:

- Selecting the funding source, you want to view (A,B,C,D)
- Selecting a specific time period
- Selecting clients based on gender, race, risk, age, etc.

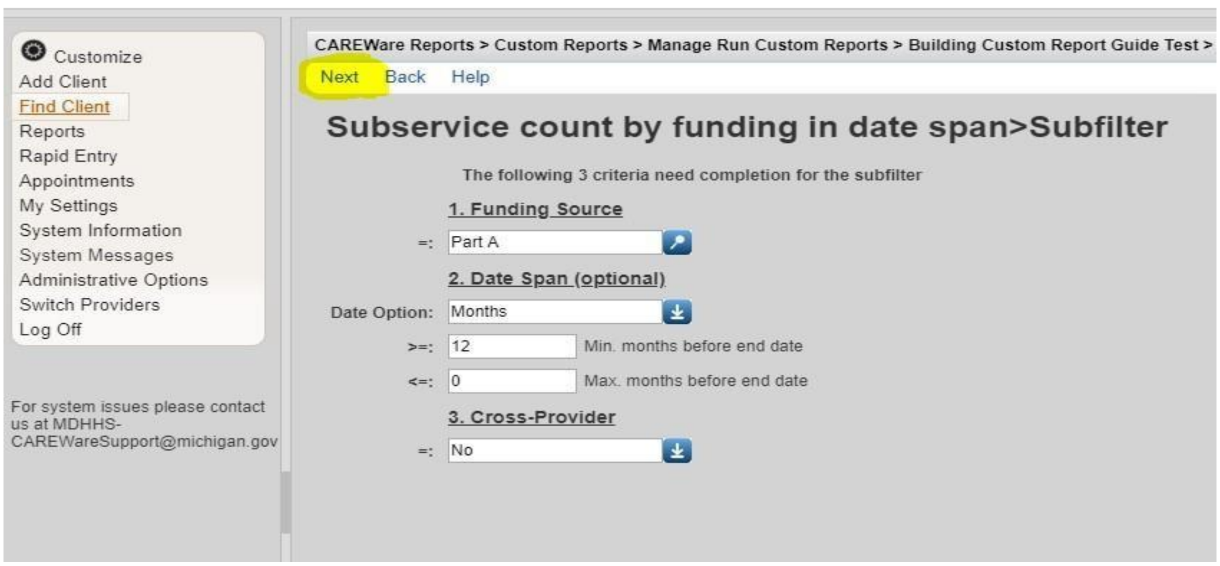


7. To add a filter, select **Add.**



8. A very large list of filter options appears. For the purposes of this exercise, we will be selecting all Part A clients that received a service in a year-long date span ("**Subservice Count by Funding in Date Span**"). Type the name of the filter into the search bar and double click the field name or select **Use Field**.

9. This is where you will indicate the parameters of the filter. The parameter will differ slightly among the filters. For **Subservice Count by Funding in Date Span**, three fields have to be defined: funding source, date span, and cross-provider.



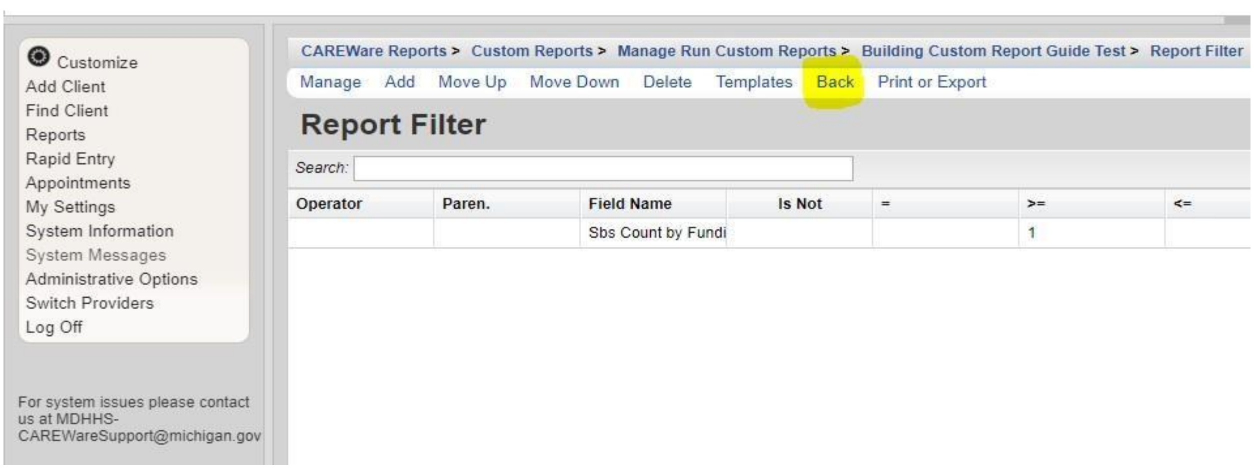
10. From the dropdown menu, choose the correct **Funding Source, Date Span,** and
Cross-Provider. Then select **Next.**

Note: Date Span can be in days, months, or specific dates. The default is now months. Indicate the number of months/days you want to confine the report. The maximum number of months goes in the first box (>=) and the minimum number of months goes into the second box (<=). For example, if you want to look at a year, the maximum months would be 12 and the minimum months would be 0. It would look like the picture above.

Cross-Provider allows you to pull values from other provider domains (such as lab values). When using lab fields, you should always select "yes" for cross-provider. This will pull labs from any agency.

11. This is where you indicate the number of services a client needs to receive to be included in this report. For the purposes of most reports, a client needs to receive at least <u>one</u> service. If that is the case, then indicate "1" in the >= box.
    - <= Refers to clients that have less than or equal to a certain amount of services
    - = Refers to clients that equal the number of required services
    - Is Not refers to clients who did not meet the field specifications (In this case, it would be clients who didn't receive a Part A service)

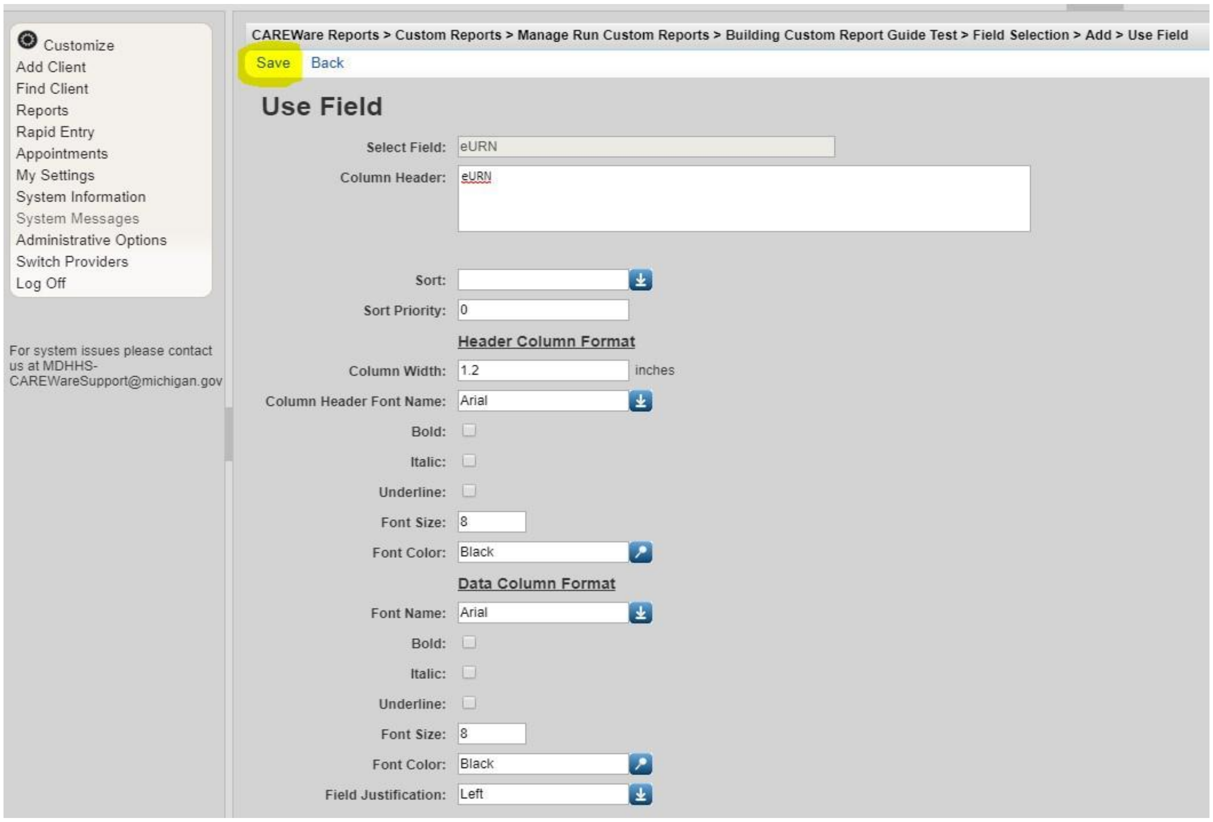
12. Save
13. This will **take** you back to the report filter page. Add as many filters as needed. Once you are done adding your filters, select **Back.**



15. Select **Add.**

16. For this report, we want to know four things: eURN, race, last viral load date and value. Let's start with eURN. To search for the field, type the name in the search bar. Select the field and click **Use Field.**

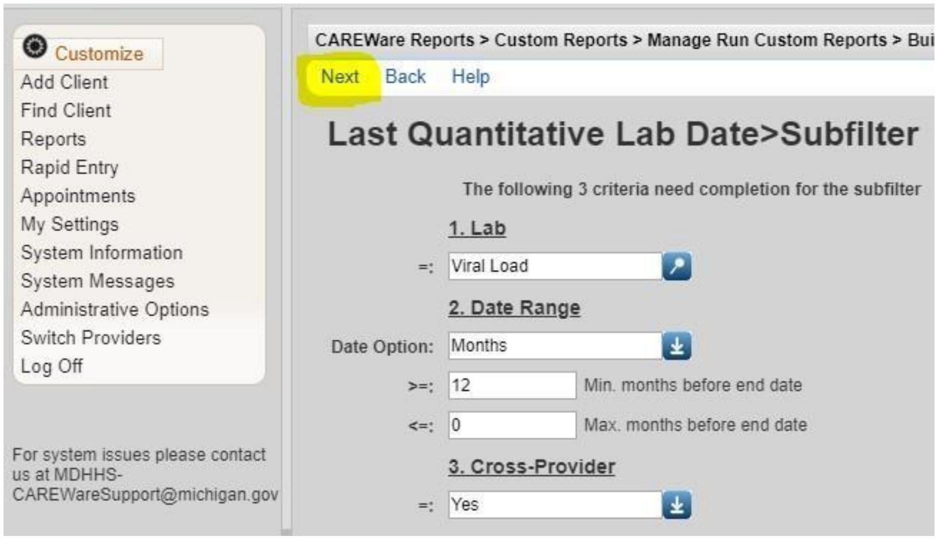
17. From here, you can customize the field. This includes changing the font and colors, sorting, and setting priorities. For example, if you wanted to sort names in alphabetical order, you could do that using the sort function. You could also prioritize name where it shows up as the first column in your report.



18. Save.

19. You can view your selected field (to check for accuracy). If you don't want to view the field, select Back. This will take you back to the field selection page.

20. Repeat Step 15-19 (Select **Add.** From the list, select **Race.** Click **Save.** Click **Back).**



21. Repeat Step 15-16. Select **Add.** From the list, select **Last Quantitative Lab Date.** This will take you to a sub-filter. For **Last**

Quantitative Lab Date, three fields have to be defined: lab, date range, and cross-provider.

22. From the dropdown menu, select the **Lab** (Viral Load), **Date Range** (12 months), and **Cross-Provider** (Yes)**.** Then select **Next.**

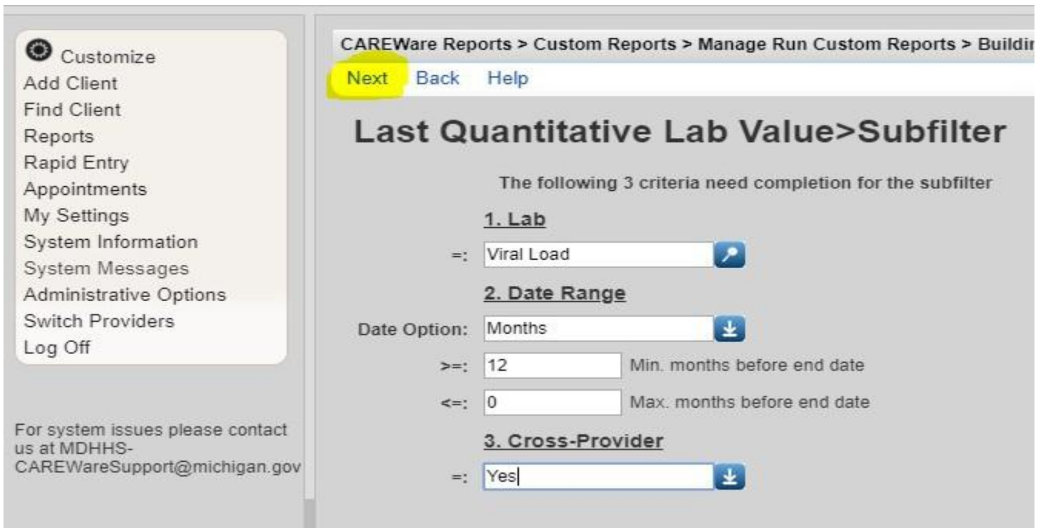
23. A summary of your field selection appears. You can view your field selection or make any edits by clicking the blue link. Once you are done, select **Back.** This will take you back to the field selection page.

24. Repeat Step 15-16. Select **Add.** From the list, select **Last Quantitative**

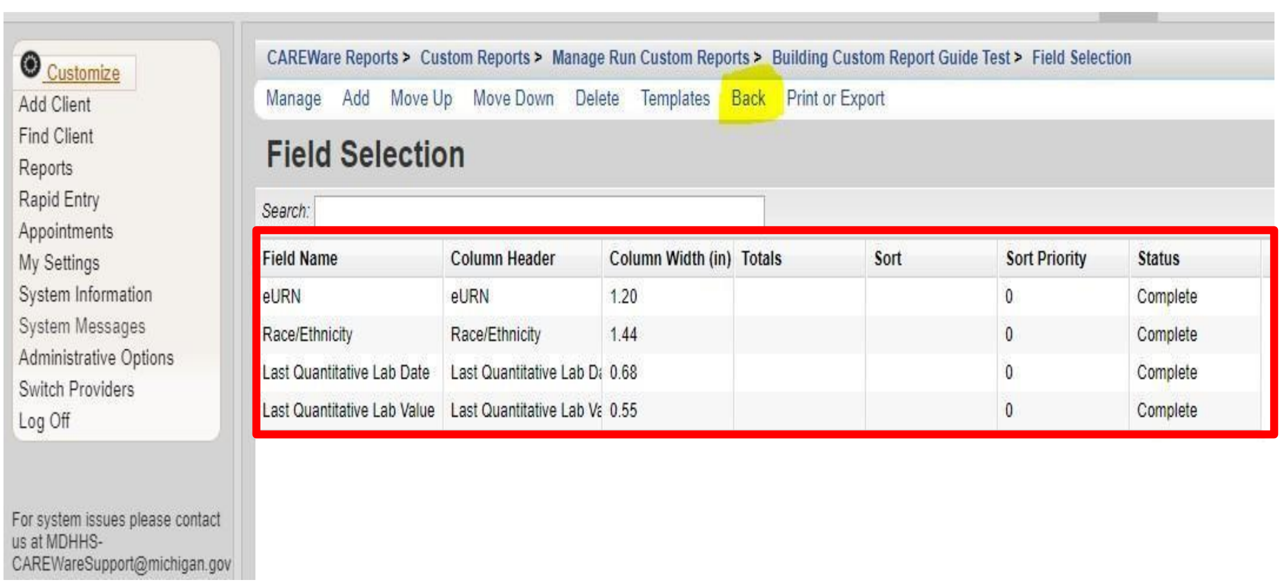
25. **Lab Value.** This will take you to a sub-filter. For **Last Quantitative Lab Value**, three fields have to be defined: lab, date range, and cross-provider.

26. Repeat Step 22-24. From the dropdown menu, select the **Lab** (Viral Load), **Date Range**
(12 months), and **Cross-Provider** (Yes)**.** Then Select **Next, Save,** and **Back.**

27. This is what your filter should look like:

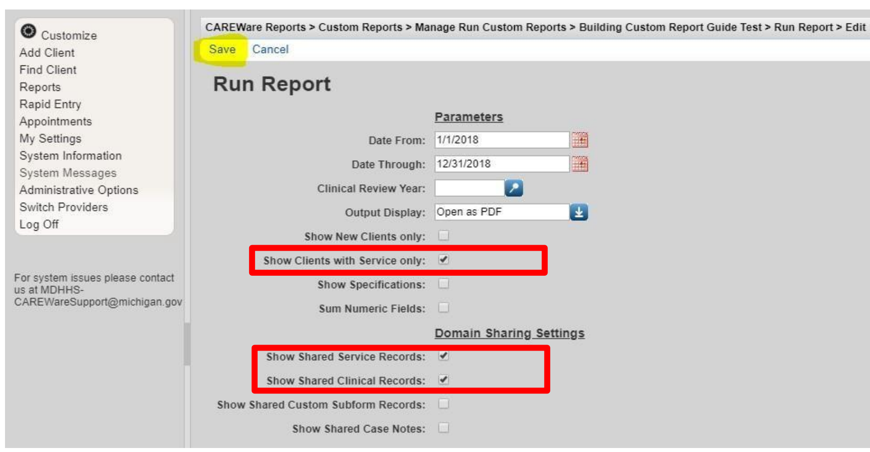


28. You can add additional field selections if necessary. If you don't need to add any additional filters, then this is what the final product will look like. Select **Back** to run your report. This is what the field selection will look like once all fields are added.



29. It is time to run your report. Click **Run Report.**

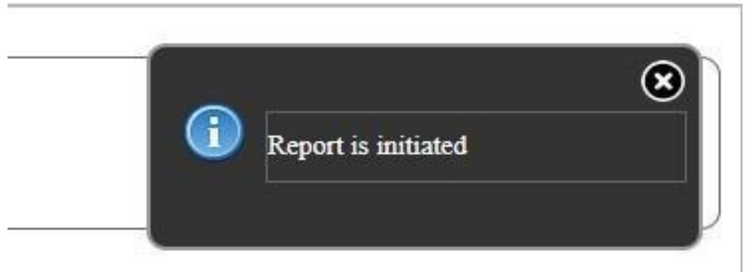
30. Click Edit**.** Specify the **timespan** and **output display.** Then **Save.**



Note: For **Output Display,** you have three options: open as PDF, download as CSV, or open in new window. If you want to export it to excel, then you should download it as a CSV. If you just want to just view the results, then you should either open it as a PDF or open in a new window.

Make sure **Show Clients with Services Only, Show Shared Service Records,** and **Show Shared Clinical Records** is always checked. You will get more comprehensive data.

31. Run the report



32. Once it generates, you will receive a message that lets you know it is completed. It will also be on the right-hand side. Click **View Building Custom Report Guide Test.**

33. Your report should look like this:

Building Custom Report Guide Test

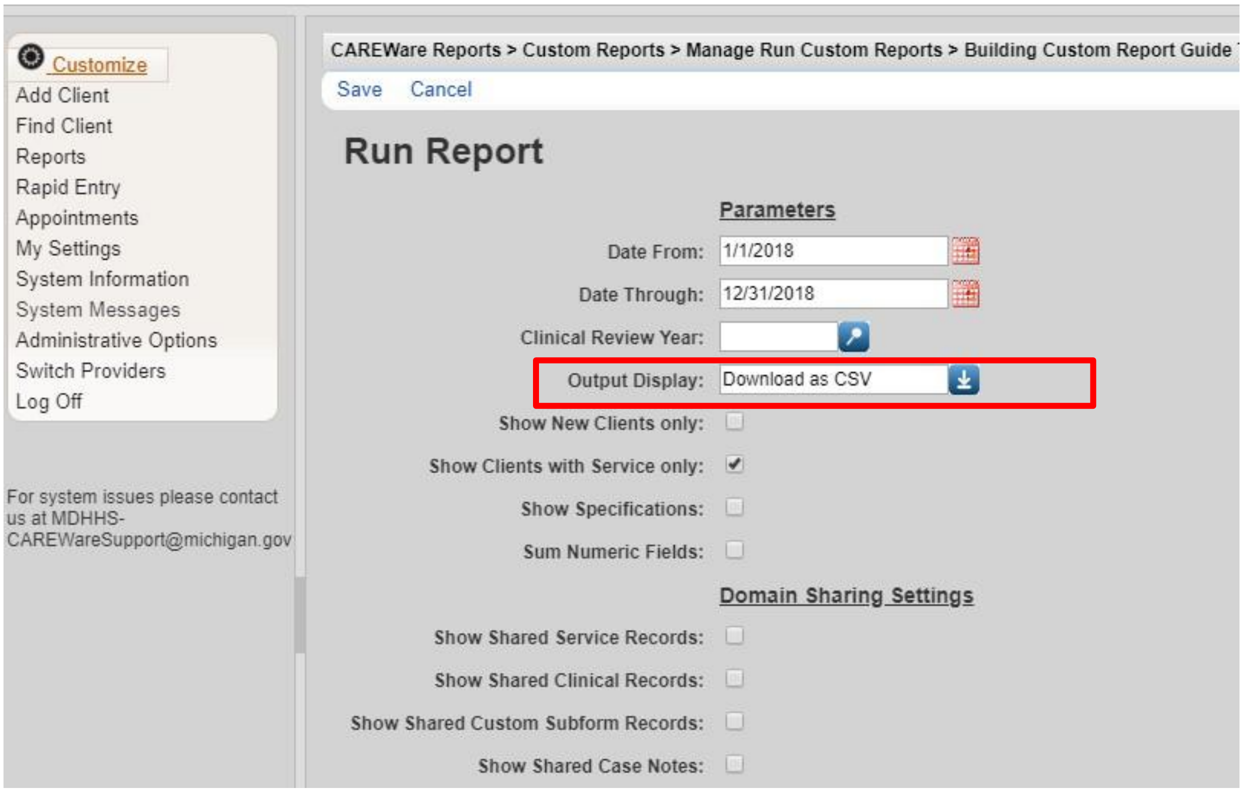
Data Scope:	**Matrix Human Services**
Report Start Date:	**01/01/2018**
Report End Date:	**12/31/2018**

eURN:	Race/Ethnicity:	Last Quantitative Lab Date:	Last Quantit... Lab
MUzEWUXIN	White (non-Hispanic)	01/02/2018	20
i0iNOV77A	White (non-Hispanic)	08/29/2018	20
ouqw EuT78	Black or African-American	11/15/2018	20
dtoiMS4nK	Hispanic	11/07/2018	20
Ujn0KRLNm	White (non-Hispanic)	09/18/2018	20
1ZBzZtoFa	White (non-Hispanic)	11/09/2018	20
CHQI3ADzN	White (non-Hispanic)	10/22/2018	20
Qcp3zP3Jk	Black or African-American	10/30/2018	20
bZs7qAmPu	White (non-Hispanic)	07/19/2018	20
VLnNw tfs8	Black or African-American	09/20/2018	20
Pm6zzbEyx	Black or African-American	11/01/2018	20
J7hW+BEDT	Hispanic	09/27/2018	20
mcHb0aZZF	White (non-Hispanic)		
Bsi8VcQ6P	Black or African-American		
w 9USZSIPm	White (non-Hispanic)	09/26/2018	20
5DhxbFygX	White (non-Hispanic)	11/19/2018	20
u26LyKBKy	Hispanic	08/29/2018	20
JYh+Lq7GD	Black or African-American	10/16/2018	20

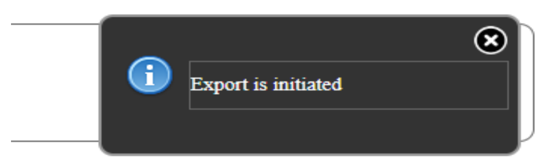
CAREWare: Export into Excel

Once you have a report, you can easily export the information into Excel.

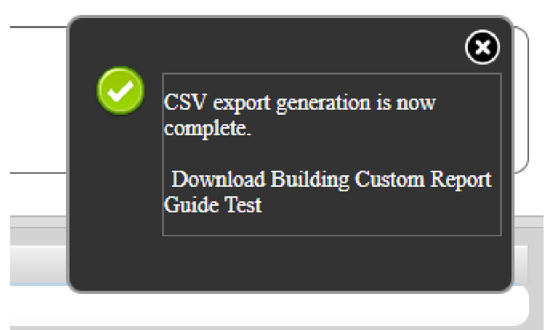
1. On the run report page, you choose the parameters for you report. This includes the date parameters and output. To export, you want to choose **Download as CSV** as your output. Then **Save.**



2. Click **Run Report.** You will get a message that lets you know the export is generating (on the right-hand side).



3. Once it generates, you will be prompted to download the report.



Generating RSR Reports in CAREWare

This guide will walk you through the process of creating and running a RSR report in CAREWare. This includes:

Guide on how to run a “Client Report Viewer” Report

This report allows users to view all client data being reported on the RSR. It also allows users to easily find clients and adjust any incorrect or missing clinical data.

Note: After you update client information, you must create a new report to reflect those changes.

Guide on how to run a “Data Validation” Report

- Creates a list of missing RSR related data and gives access to the list of clients who are missing this data

Creating and Running the "Client Report Viewer" Report

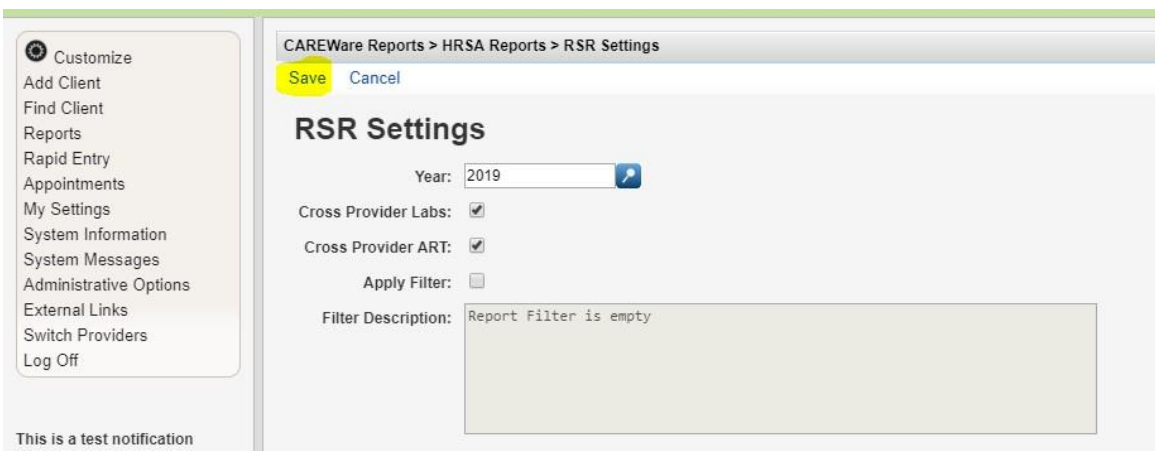
1. From the main page, click **Reports.**
2. Select **HRSA Reports**

3. Select RSR Client Report

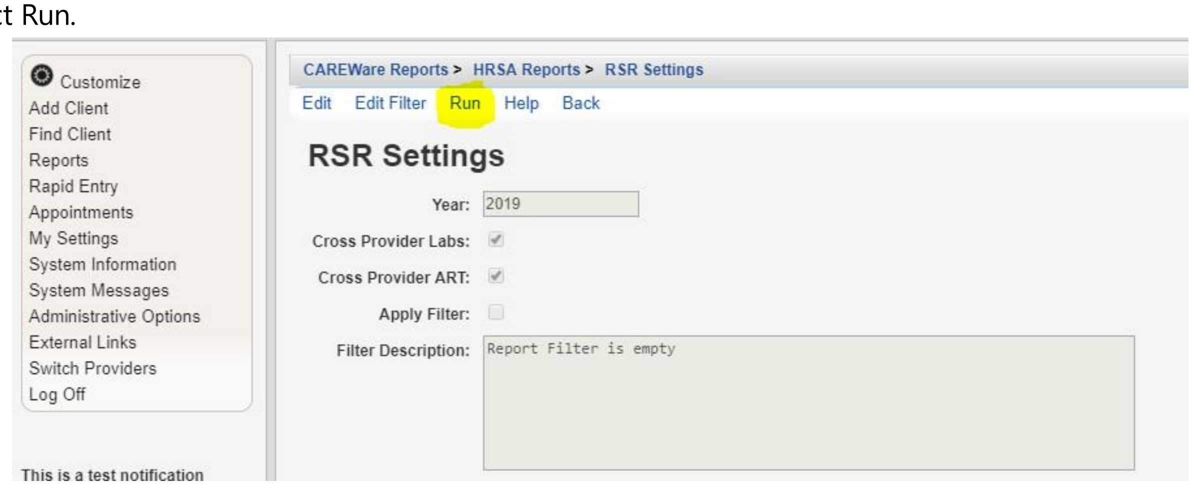
4. This is the main RSR page. Make sure the report year is set to the year in which you want to run the report. Select Edit to change the year of the report.

Note: You always want to make sure **Cross Provider Labs and Cross Provider ART** is selected. There is no need to add a filter because you never want to filter out clients when submitting the RSR.

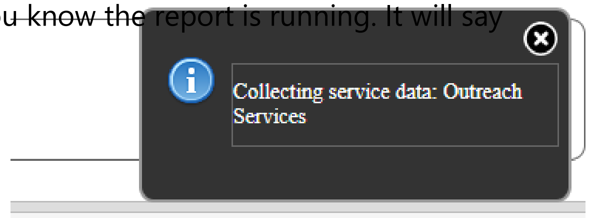
5. Once you make those changes, click Save.



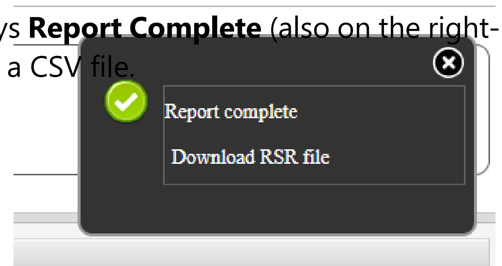
6. Select Run.



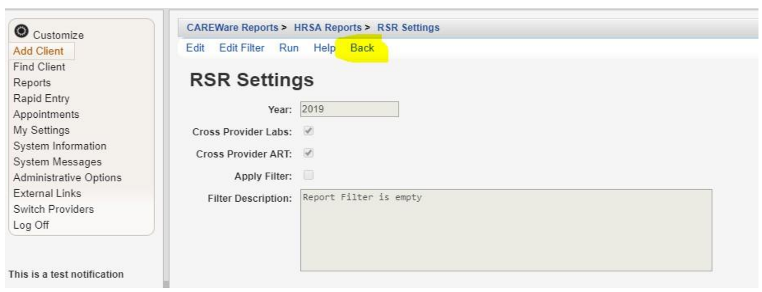
7. On the right-hand side, you will see a box that lets you know the report is running. It will say “Collecting Service Data.”



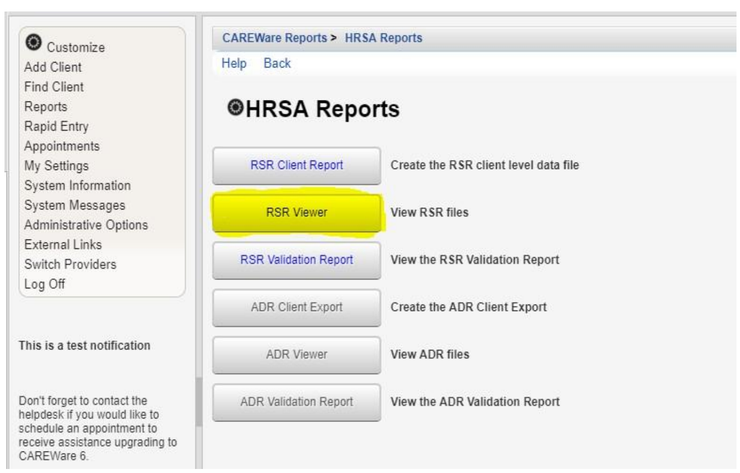
8. Once it generates, you will receive a message that says **Report Complete** (also on the right- hand side)**.** Select **Download RSR file.** It will download as a CSV file.



9. Once the report downloads, click the **Back** button to get back to the main RSR page.



10. Select RSR Viewer. The RSR Viewer will show you the results of that exported file. It will include demographical, service, and lab information for all your clients and is broken into those categories. It will also tell you any missing data you may have.



11. Choose the CSV file you just downloaded and then select View RSR File.

12. Your file should look like the below:

. Female	4	40.0%
. Transgender MtF:	0	0.0%
. Transgender FtM:	0	0.0%
. Transgender Other:	0	0.0%
. Unknown:	0	0.0%
. Missing:	0	0.0%
. Poverty Level % (OAHS/CM)	6	
. Below 100% FPL:	1	16.7%
. 100 - 138%:	0	0.0%
. 139 - 200%:	2	33.3%
. 201 - 250%:	0	0.0%
. 251 - 400%:	2	33.3%
. 401 - 500%:	0	0.0%
. More than 500%:	0	0.0%
. Missing:	1	16.7%