

# Reports in CAREWare: Review of RSR, performance measures and custom reports

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# Custom reports and performance measures

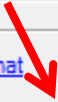
- Custom reports designed to produce lists of certain clients, sorted and filtered by specific criteria. For example:
  - a) We could list all clients sorted by last name, or by eUCI, or by gender and age within gender
  - b) We could take list (a) and filter it (restrict it) to female clients who are 25-54 years of age.
  - c) We could take list (b) and restrict it to female clients 25-44 yrs of age whose last viral load in the year was greater than 200 copies

# Types of fields used in custom reports



- The field “last quantitative lab value” is called a calculated field because CAREWare has to calculate that value from a set of values (in this case all viral loads sorted by date)
- CAREWare contains many powerful calculated fields, but these are a little more complicated than non-calculated fields (e.g. gender or age) because you have to set a series of parameters .

Report Type:  ☐ Use Totals

Select Field

Field: [Format](#) [Last Quantitative Lab Value](#) 

Report Column Header:  Width (in):  Width (cm):  Total:  Sort:

Field Justification:  Column Header Font:  Data Field Font: 

Col#	Field Name	Column Header	Width (in)
0	Name	Name	1.44
1	Race/Ethnicity	Race/Ethnicity	1.44
2	Last Quantitative Lab Date	Last viral load in Year	0.68
3	Last Quantitative Lab Value	Last viral load before year	0.55

# Using calculated fields in custom reports

- Clicking the 3-dot ellipsis on the previous screen, CAREWare shows the following screen, and requires additional information to pull the correct value. In this case, we must tell it what quantitative test to search for, what date range to grab that value from, and whether or not we want CW to search in any provider domain for that value.

Custom Reports - Calculated Field

Calculated Field Name:  
Last Quantitative Lab Value

Report Column Header:  
Last viral load before year

Criterion

Field:  ☐ Not  ☐ >=  ☐ <=  ☐ N

Pos...	Opera...	Par...	Field Name	Is Not	=	>=	<=
1		(	Quant Test		Viral Load		
2	AND		Quant Lab Date			72	13
3	AND		domain wide		No		

# Working with date fields


- Dates and date ranges are of course critical in many reports. Do we want the last viral in the year, in the first half of the year; do we want to know the number of mental health visits in the prior year.
- The point is, you must be very clear what time frame you are examining!
- You can select actual dates in your date range (e.g. clients with an OAMC visit between July and Dec 2013) or you can select months or days (not by actual date)

The screenshot shows a 'Criterion' dialog box with the following elements:

- Field:** A text box containing 'Quant Lab Date'.
- Operator:** A dropdown menu showing 'C'.
- Not:** A checkbox labeled 'Not'.
- Change To Days:** A blue hyperlink.
- Comparison:** A dropdown menu showing '>='.
- Max months before end date:** A text box containing '12'.
- Comparison:** A dropdown menu showing '<='.
- Min. months before end date:** A text box containing '0'.
- Null:** A checkbox labeled 'Null'.
- Buttons:** 'Save' and 'Cancel' buttons.

# How to find a field

- When we add a field to a report, we can search for fields by any string. For example, here we typed in the word “service” and Cware returns a list of all fields that have that word in it. (This is only a partial screenshot...)



↑ Field Name	◊ Key Words
RW-funded visits by service category (RDR)	Demographics
Date client closed out services	Demographics
Date of first ADAP service	Demographics
Date of first service	Demographics
Date of first service category in date span	Demographics
Date of First Subservice	Demographics
Date of last ADAP service	Demographics
Date of last service	Demographics
Date of Last Subservice	Demographics
First date specific service received	Demographics
First ever service date	Demographics
Has ADAP Funded Drug Services	
Has Any Drug Service	Demographics
Has Any Service	Demographics
Has custom service field	Demographics
Has HOPWA Service In Span	Demographics
Has Non HOPWA Only Service In Span	Demographics
Has primary health care service	Demographics
Has RSR Defined Funded Service	
Has RW Funded Service	Demographics
Has RW Funded Service In Span	Demographics
HIP 1st Service	Demographics
HIP Last Service	Demographics

# Performance measures

- Similar to custom reports in terms of the fields that are used, but different in important ways.
- In PMs you are also trying to generate a list of selected clients, but you are also interested in the proportion of certain individuals that do or do not meet your measure of interest. PMs are always calculated as a proportion of same denominator set of clients.

# Denominator and numerator

- For example, your ***denominator*** or base population could be all clients who are HIV positive who have had 2 or more OAMC visits in the last 12 months.
- Your numerator would be selected from the denominator population. For example, of those in the denominator, which clients did not have Hep C screening or a VL test.
- CAREWare will generate the PM rate (numerator clients/denominator) but also a list of those clients who do or do not meet the numerator criteria and allow you to hyperlink directly to those individuals to examine their records, or send to a report.



# Other features of reports and PMS

- They can be readily copied and modified
- They can be exported to other users
- You can include information on clients shared with other providers domains
- Performance measures can be shown on individual client records
- Custom report filters can be saved and re-used (in template files), saving lots of time and hassle

# Questions on Custom reports and PMs?

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# Resources

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- CAREWare helpdesk
  - 877-294-3571, 12-5 p.m. EST
- CAREWare email
  - [cwhelp@jprog.com](mailto:cwhelp@jprog.com)
- DART Team:
  - [Data.TA@caiglobal.org](mailto:Data.TA@caiglobal.org)