December 2020

Generating RSR Reports in CAREWare

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

- <u>Guide on how to run a "Client Report Viewer" Report</u>

  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: A er you update client informa on, you must create a new report to re ect those changes.

- <u>Guide on how to run a "Data Validation" Report</u>

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

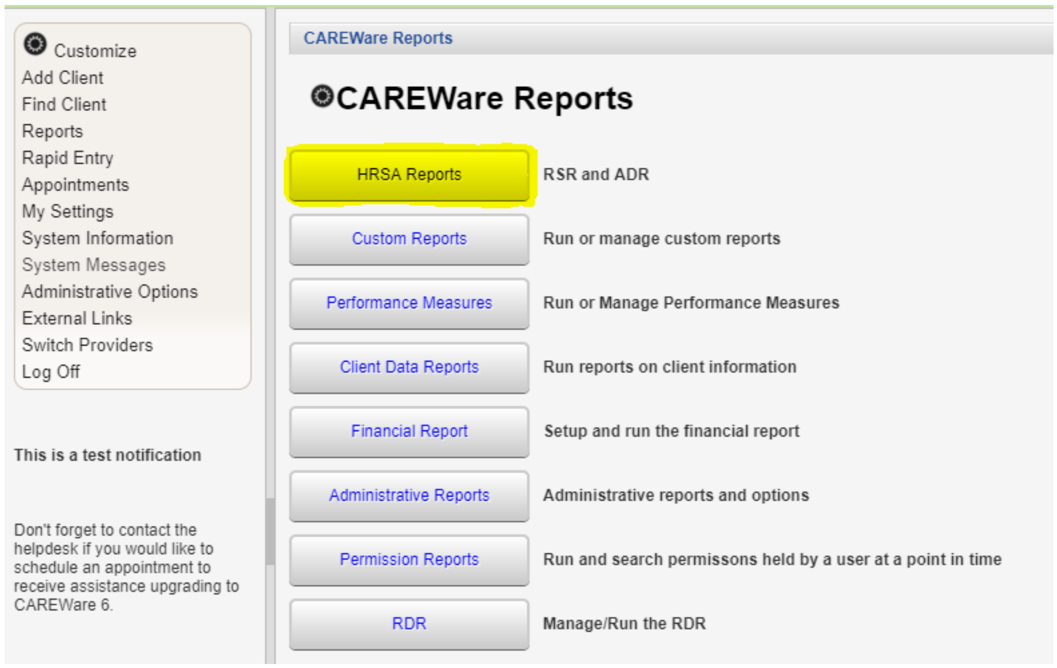
This guide was created in partnership By Genna Owens

For any questions, please contact MDHHS - Division of HIV/STD Programs (MDHHS-DHSP-TAandData-Requests@michigan.gov).

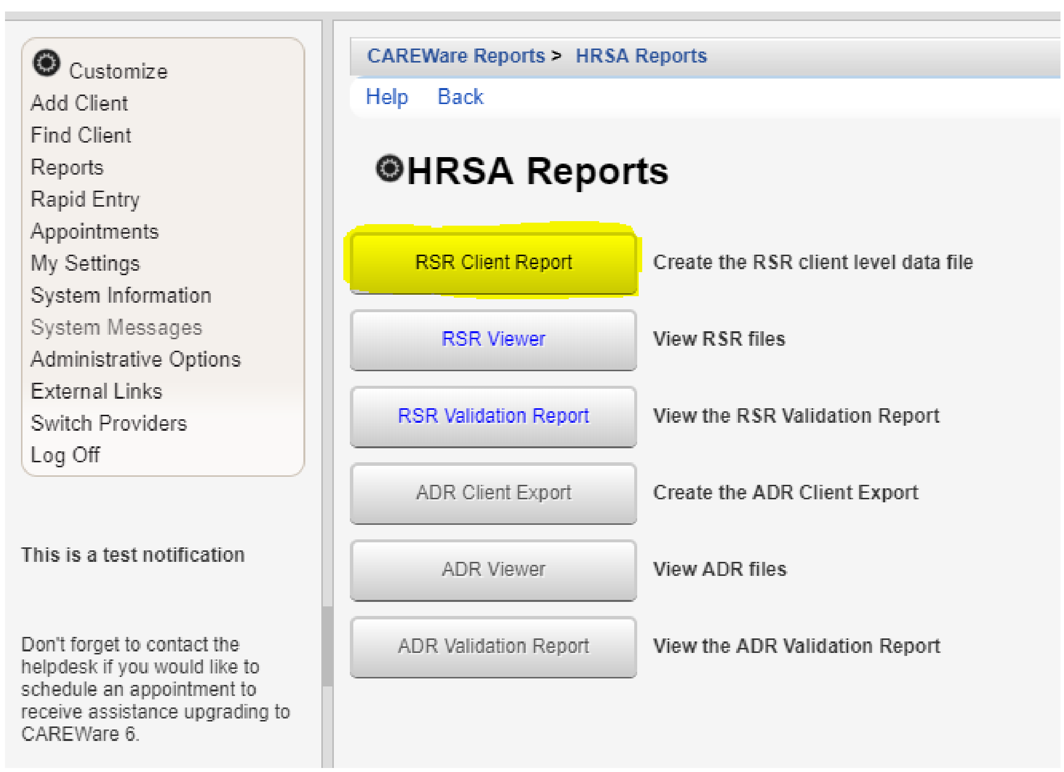
Creating and Running the "Client Report Viewer" Report

1. From the main page, click **Reports.**

2. Select **HRSA Reports.**



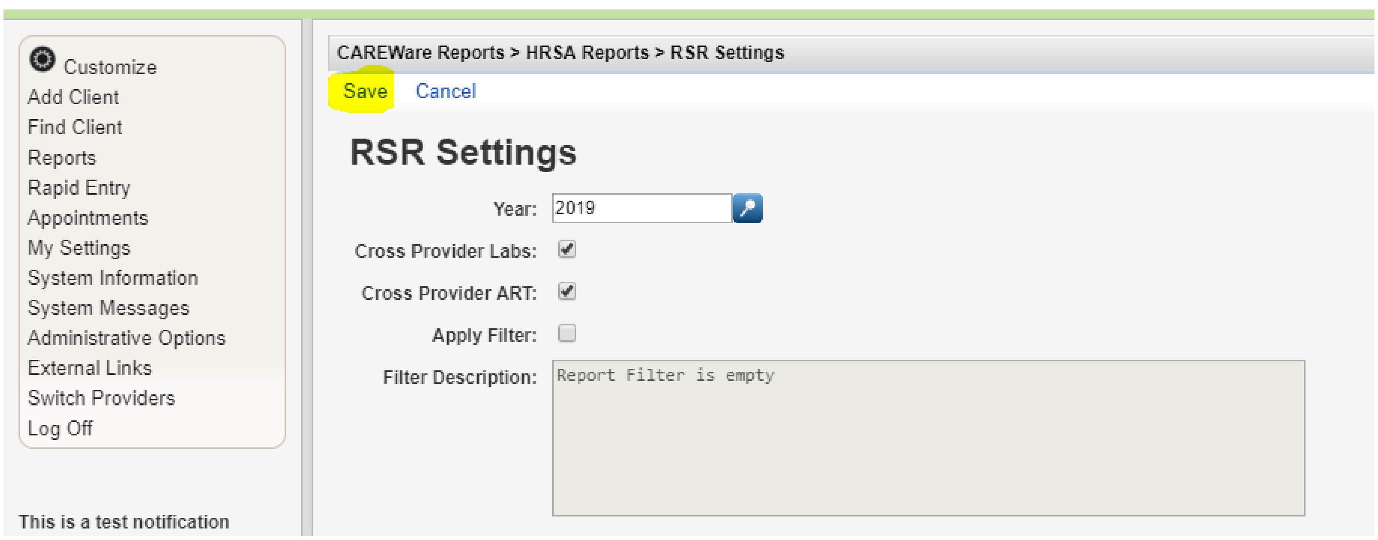
3. Select **RSR Client Report.**



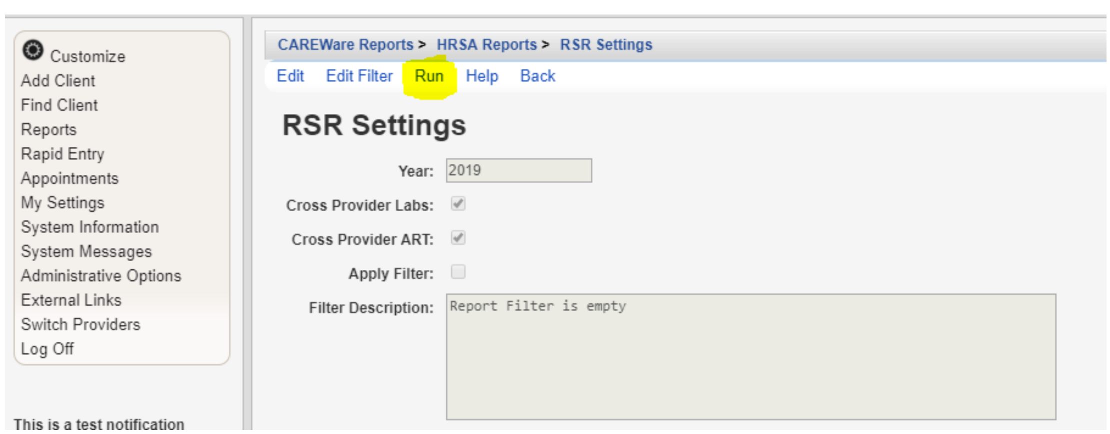
4. This is the main RSR page. Make sure the report year is set to the year in which you want to run the report. Select **Edit** to change the year of the report.

Note: You always want to make sure **Cross Provider Labs & 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.

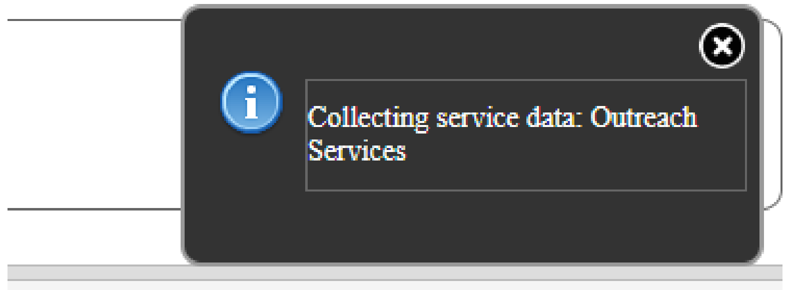
5. Once you make those changes, click **Save.**



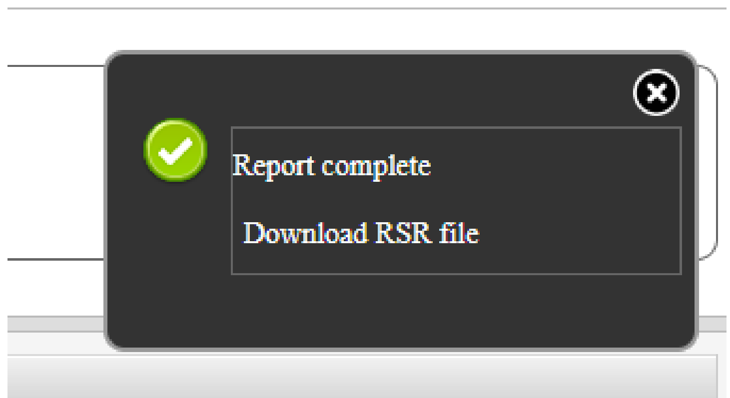
6. Select **Run.**



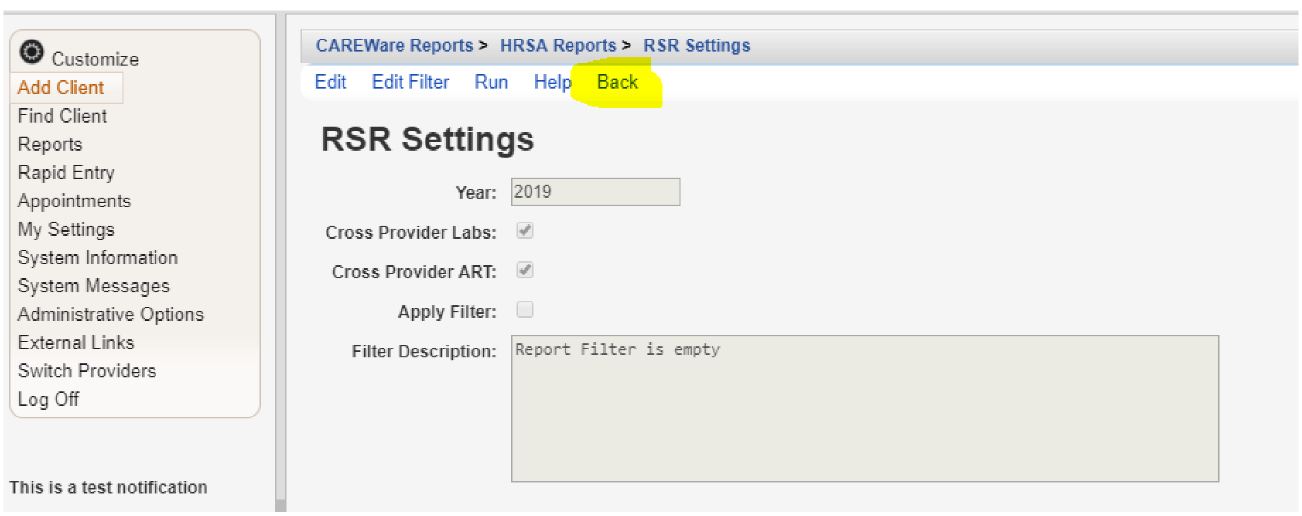
7. On the right-hand side, you will see a box that lets you know the report is running. It will say "Collecting Service Data."



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

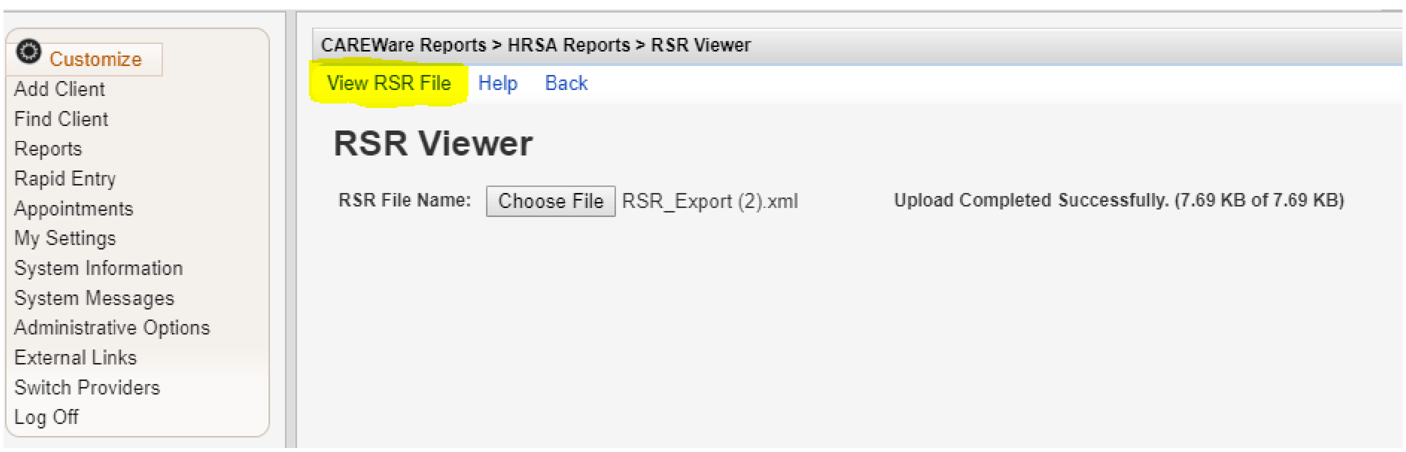


9. Once the report downloads, click the **Back** button to get back to the main RSR page.



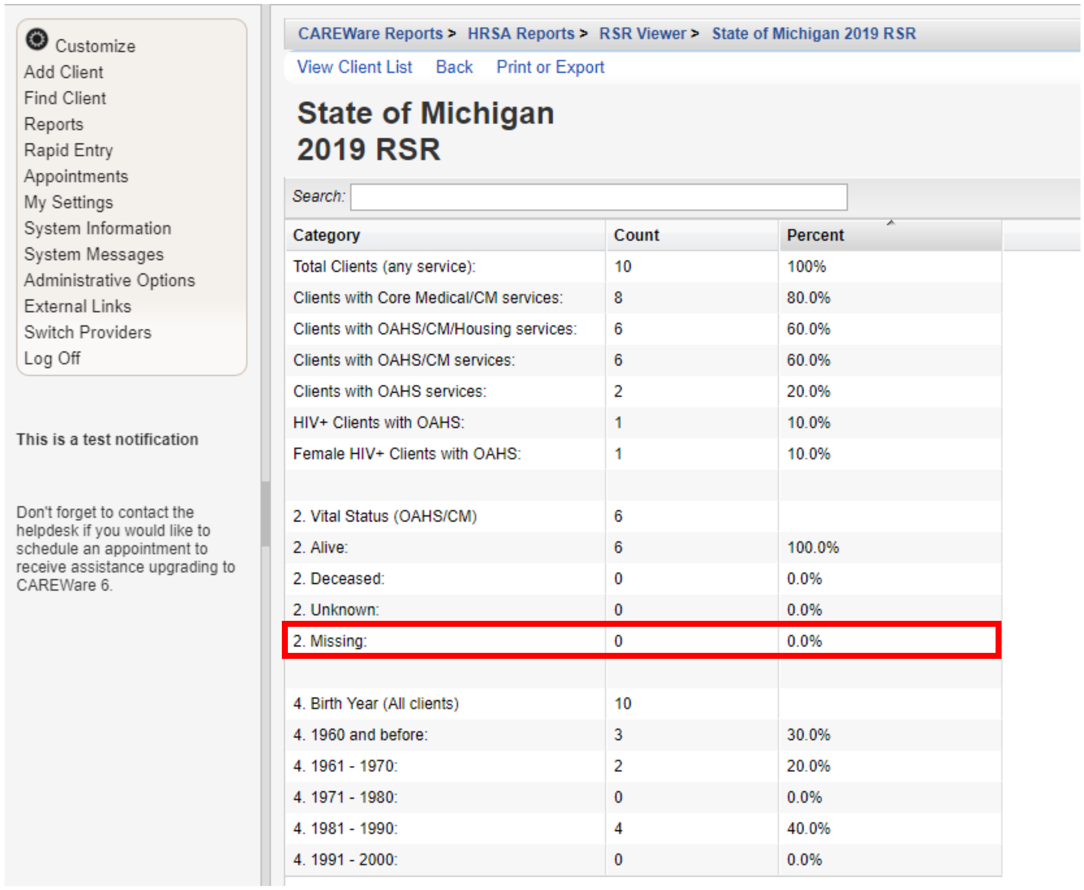
10. Select **RSR Viewer.** The RSR Viewer will show you the results of that exported file. It will include demographical, service, and lab information for all your clients and is broken into those categories. It will also tell you any missing data you may have.

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

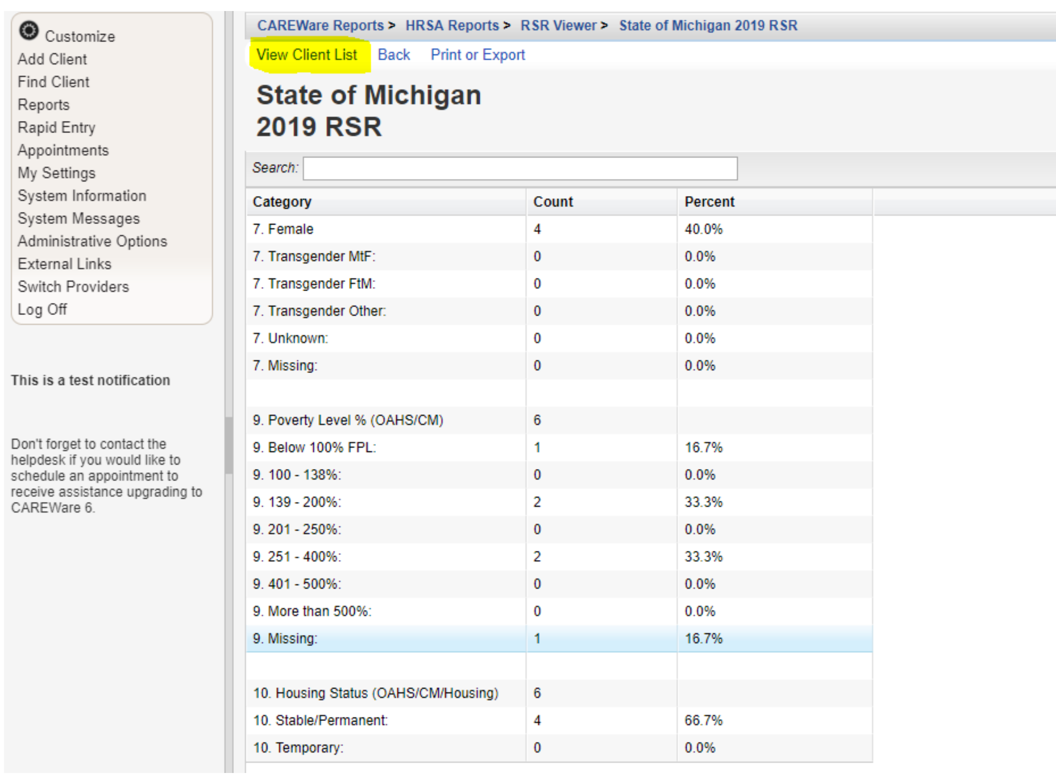


12. This is what your RSR file should look like.

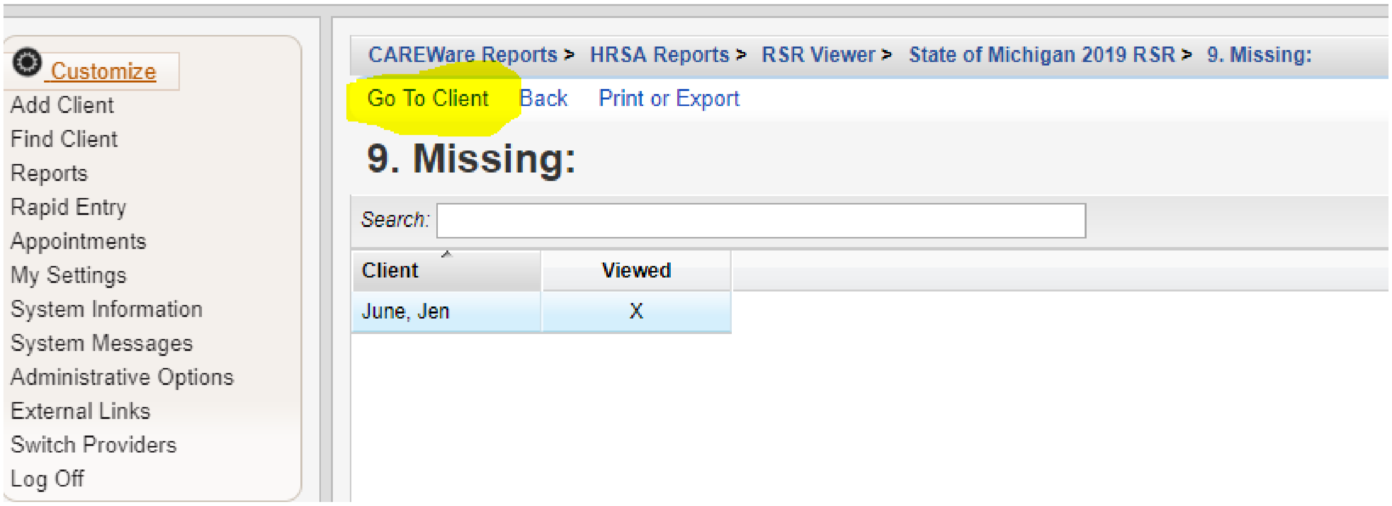
Note: You want to pay attention to any missing information. If there is a number next to the **Missing** category, it means you have missing records. If it says zero, then there are no missing records.



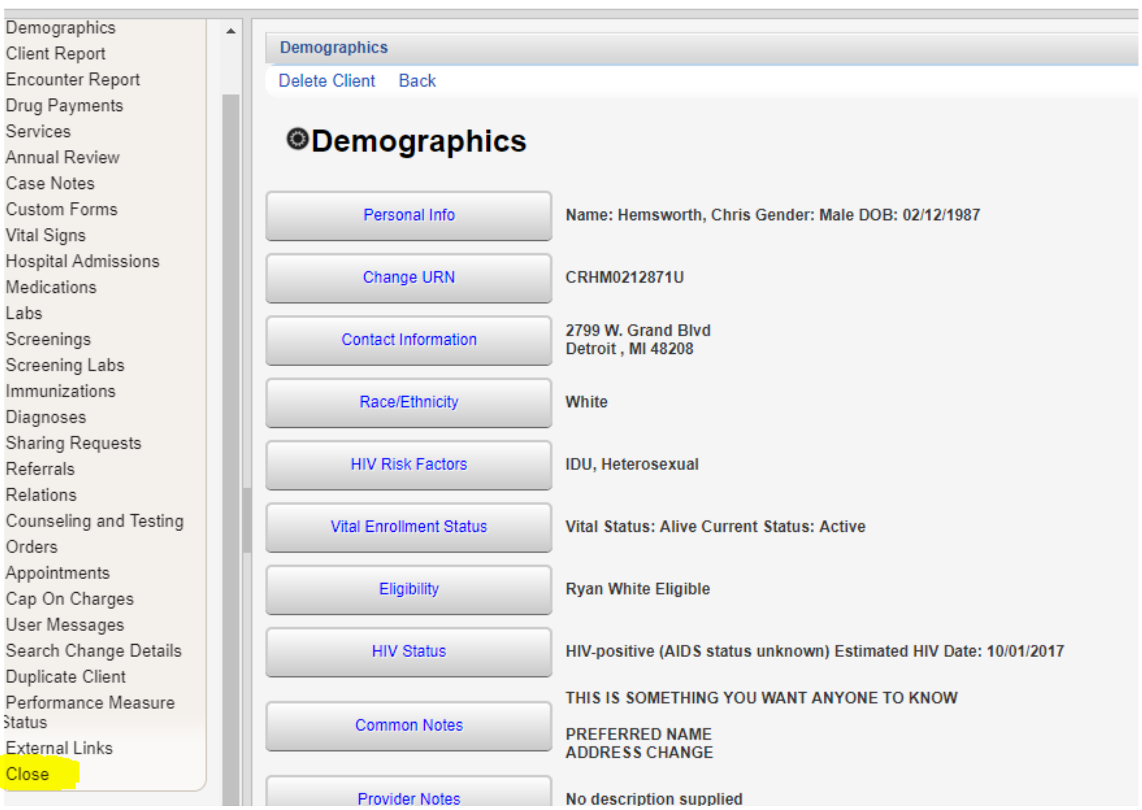
13. To view your missing records, simply select the box and then select **View Client List.**



14. A list of the clients will appear. From there, you can select a client and go to their individual record. Click **Go to Client.**



15. The client record will open up in a separate tab. Select the field in which information needs to be added. When you are done adding all of the missing information, close out of the client record.

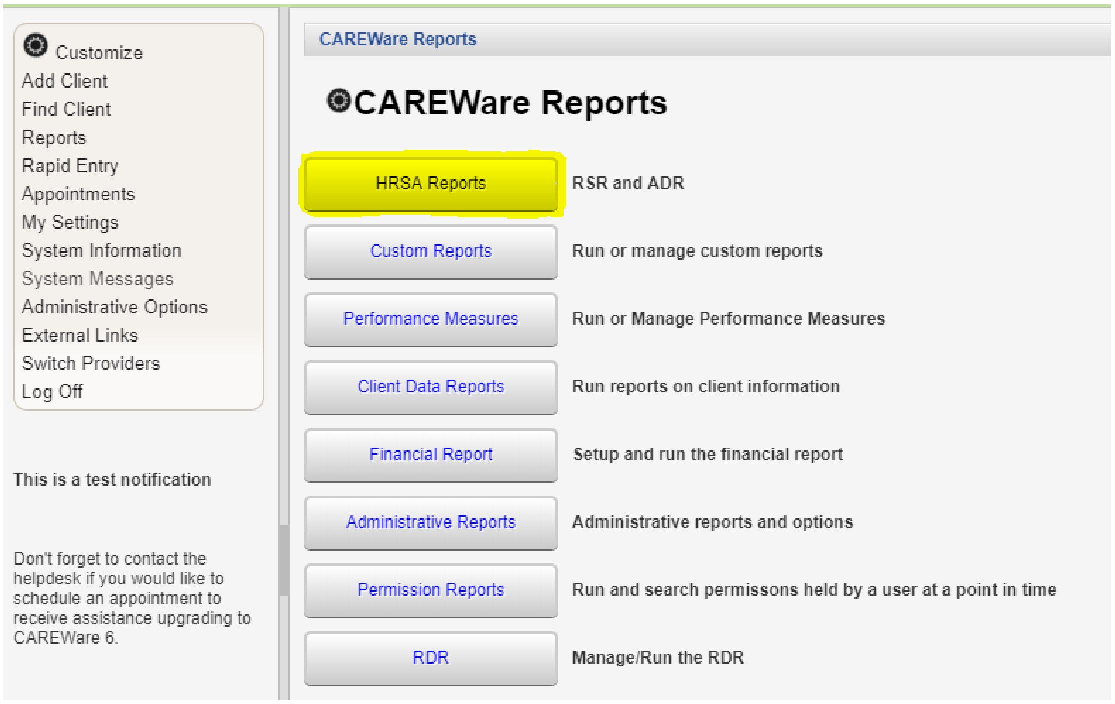


16. After closing, you will be taken back to the **Missing** client page. Follow step 14-15 for the next client on the list. Continue to do this until your list is empty.

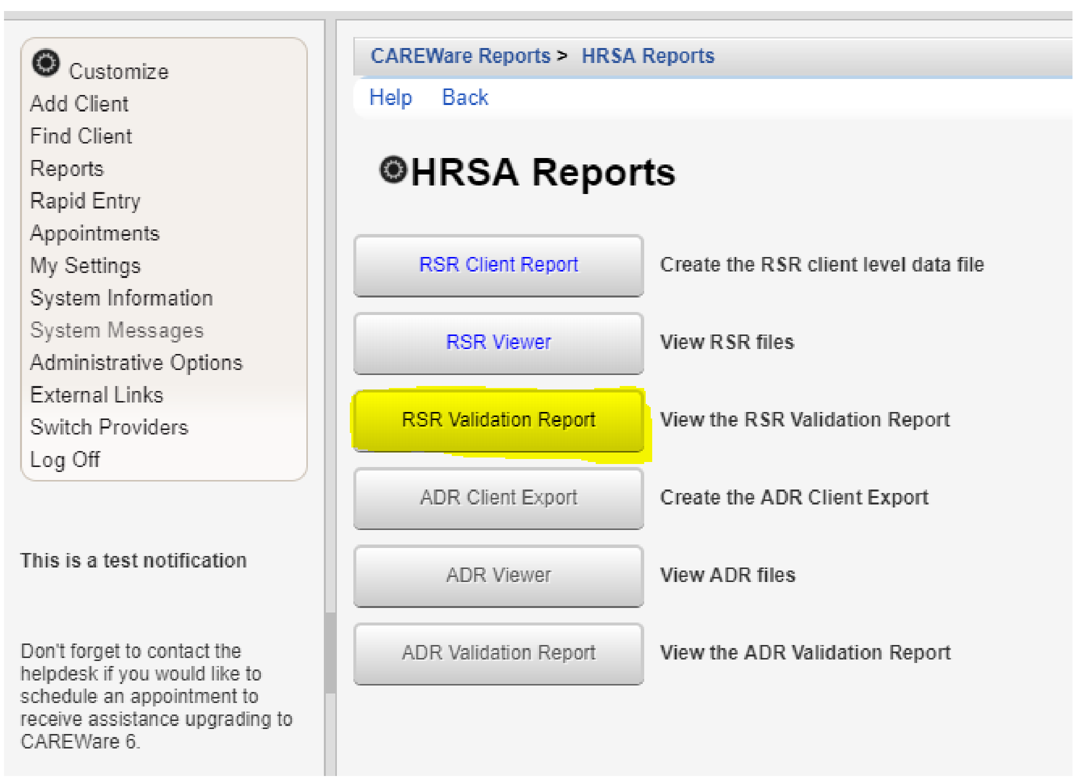
Running Data Validation Reports

1. From the main page, click **Reports.**

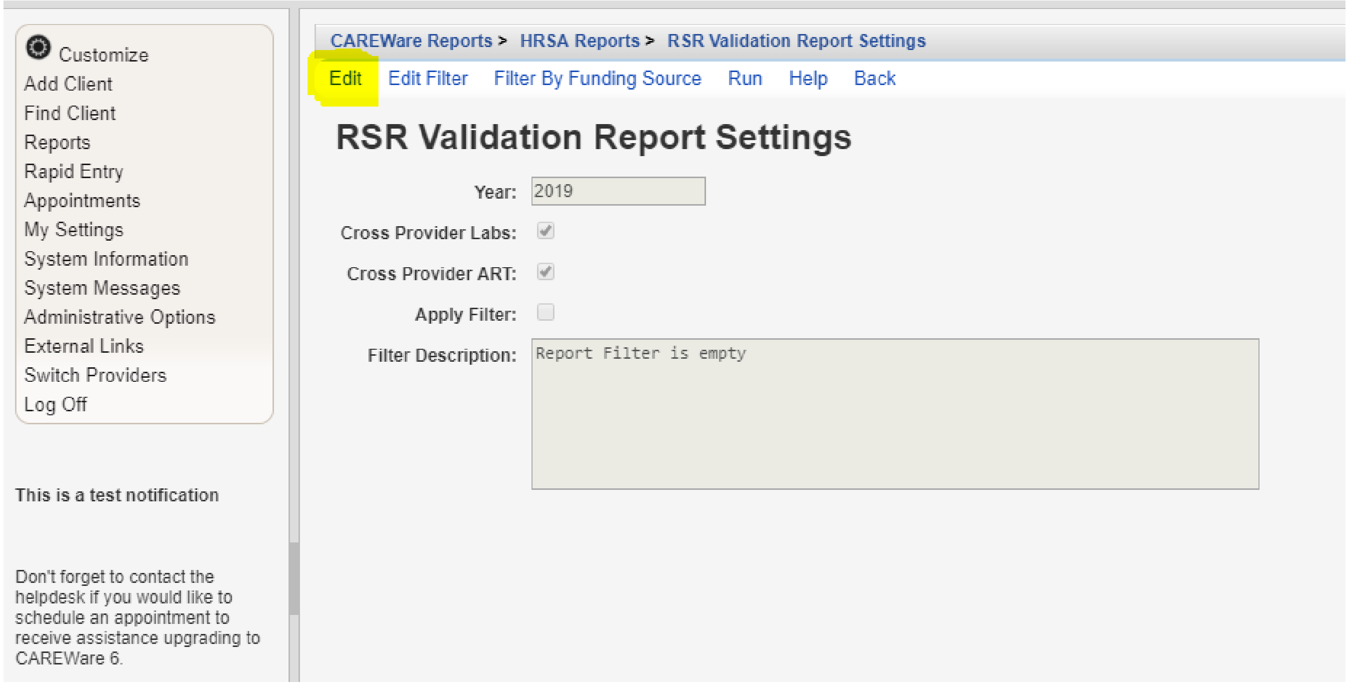
2. Select **HRSA Reports.**



3. Select **RSR Valida on Report.**



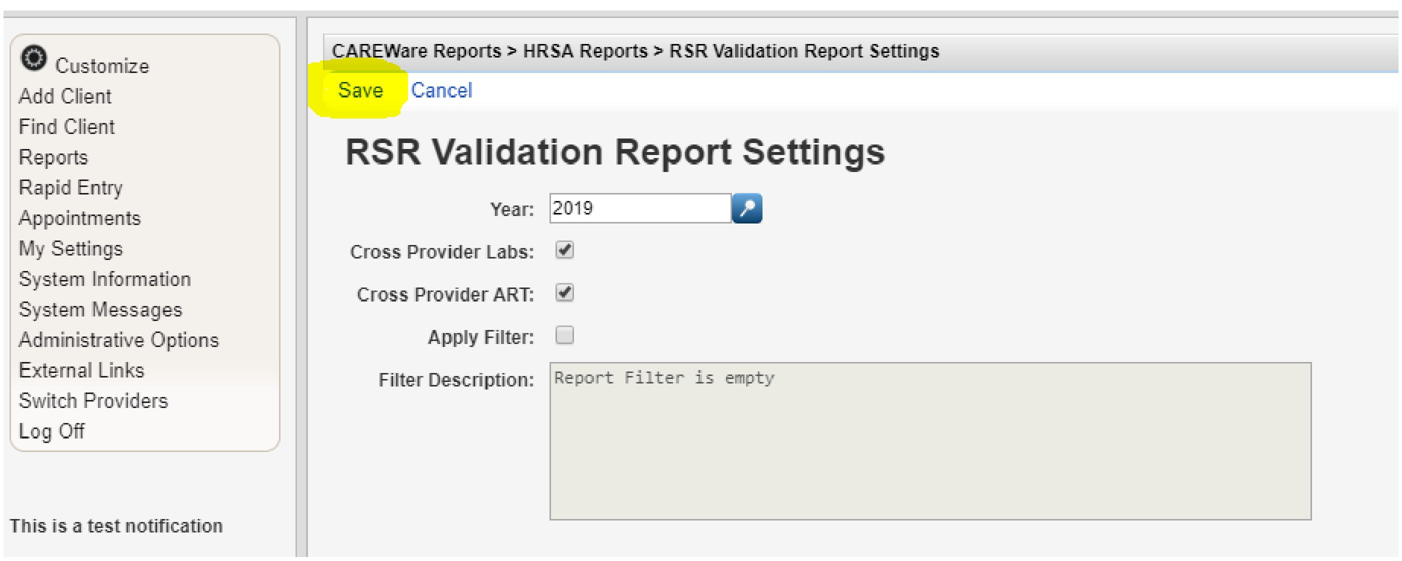
4. Select **Edit.**



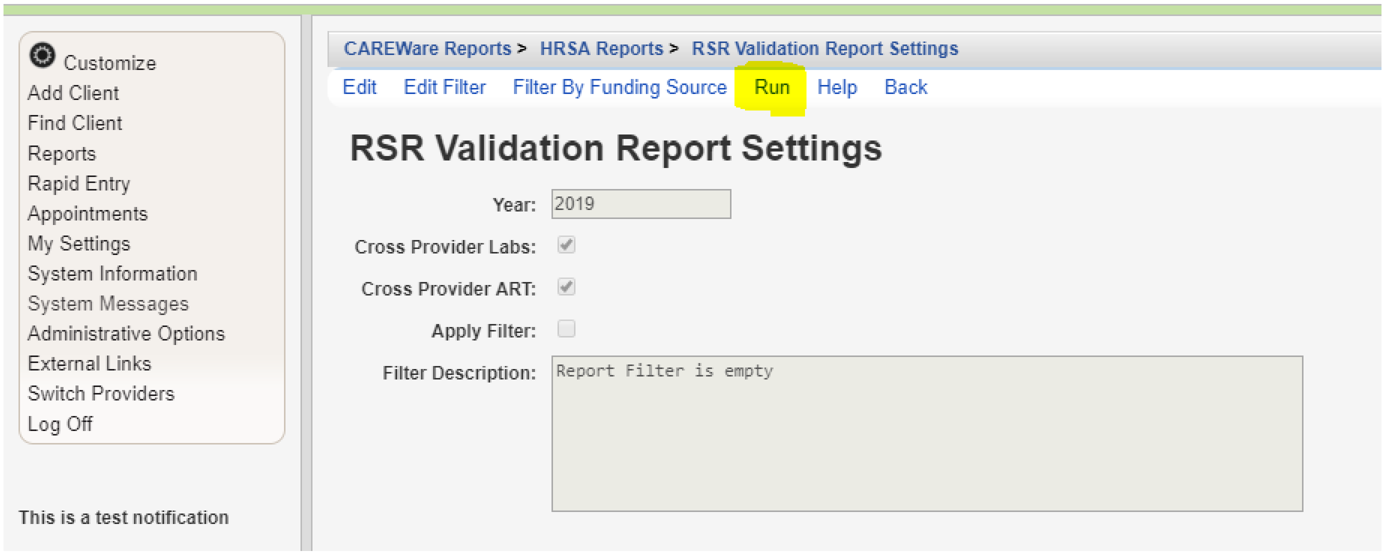
Note: You are given three editing options: **Edit, Edit Filter,** & **Filter by Funding Source.** In general, **Edit** is the one you will choose. However, if you ever want to apply a filter or if you receive funding from multiple sources and want to filter by each funding source, you have the option to edit by those criteria too.

5. After selecting edit, choose the **Year** you would like to review. Additionally, make sure you check **Cross Provider Labs & Cross Provider ART.**

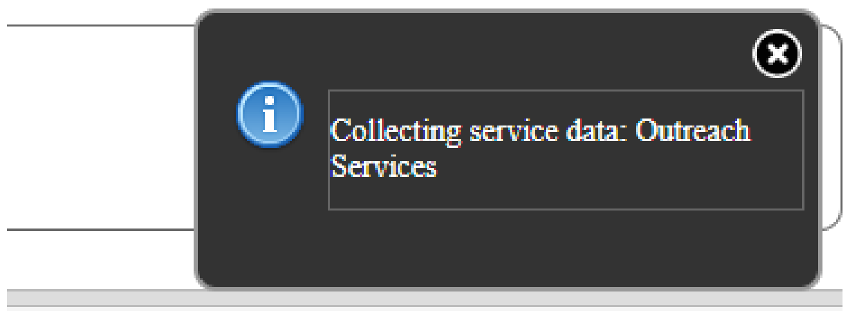
6. **Save**.



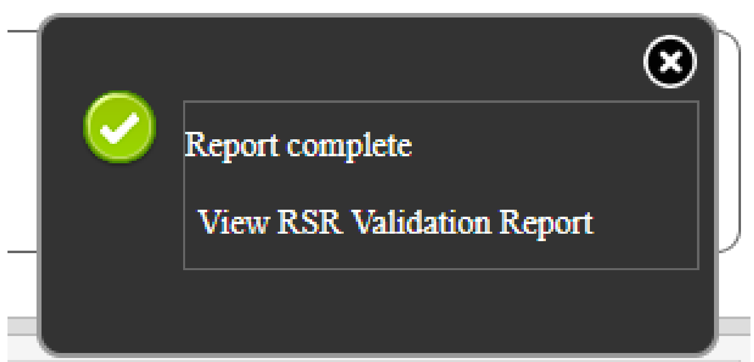
7. Once you save, you can run your report. Select **Run.**



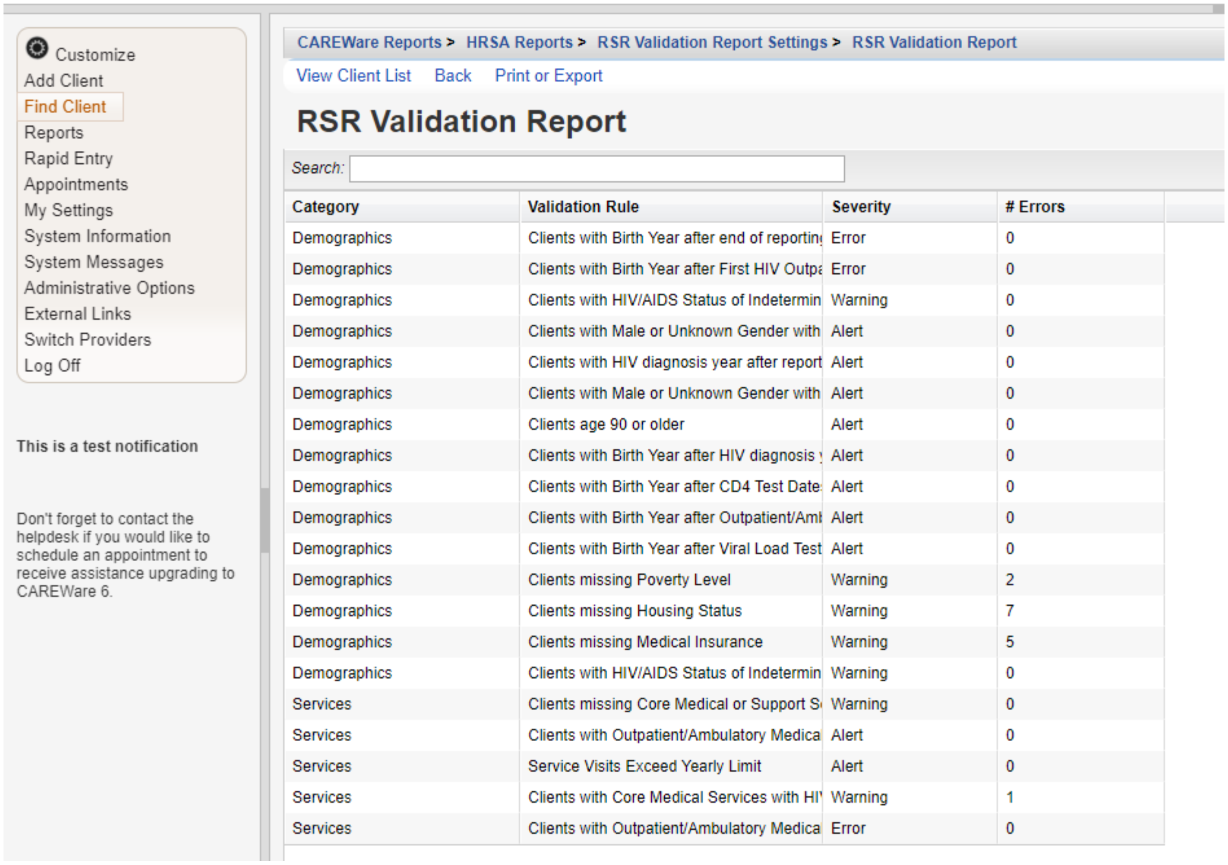
8. On the right-hand side, you will see a box that lets you know the report is running. It will say "Collecting Service Data."



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



10. This is your validation report.



Customize
Add Client
Find Client
Reports
Rapid Entry
Appointments
My Settings
System Information
System Messages
Administrative Options
External Links
Switch Providers
Log Off

This is a test notification

Don't forget to contact the helpdesk if you would like to schedule an appointment to receive assistance upgrading to CAREWare 6.

CAREWare Reports > HRSA Reports > RSR Validation Report Settings > RSR Validation Report

View Client List   Back   Print or Export

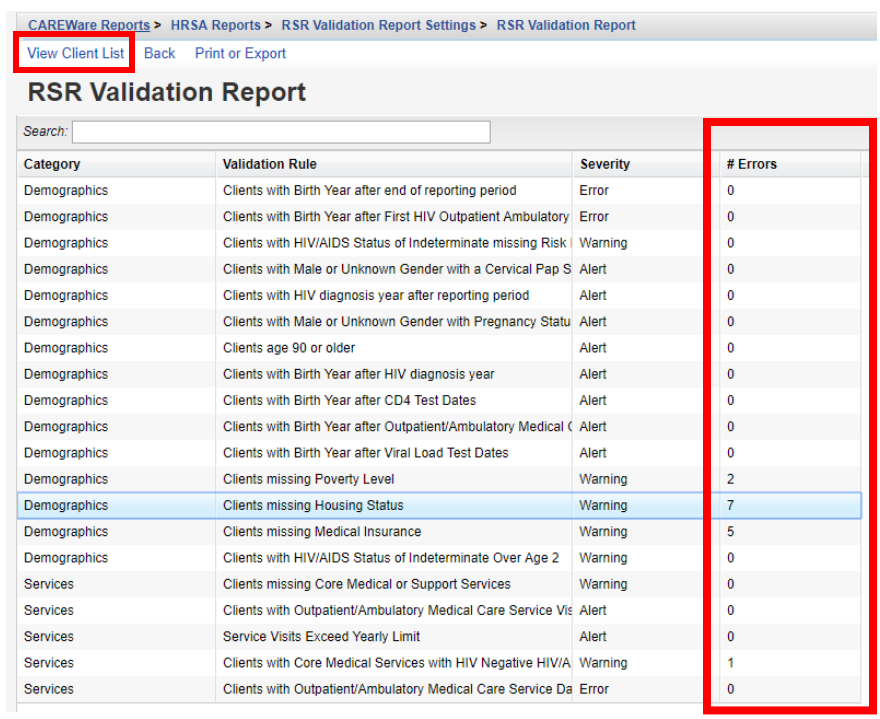
RSR Validation Report

Search:

Category	Validation Rule	Severity	# Errors
Demographics	Clients with Birth Year after end of reportin	Error	0
Demographics	Clients with Birth Year after First HIV Outp	Error	0
Demographics	Clients with HIV/AIDS Status of Indetermin	Warning	0
Demographics	Clients with Male or Unknown Gender with	Alert	0
Demographics	Clients with HIV diagnosis year after report	Alert	0
Demographics	Clients with Male or Unknown Gender with	Alert	0
Demographics	Clients age 90 or older	Alert	0
Demographics	Clients with Birth Year after HIV diagnosis	Alert	0
Demographics	Clients with Birth Year after CD4 Test Date	Alert	0
Demographics	Clients with Birth Year after Outpatient/Aml	Alert	0
Demographics	Clients with Birth Year after Viral Load Test	Alert	0
Demographics	Clients missing Poverty Level	Warning	2
Demographics	Clients missing Housing Status	Warning	7
Demographics	Clients missing Medical Insurance	Warning	5
Demographics	Clients with HIV/AIDS Status of Indetermin	Warning	0
Services	Clients missing Core Medical or Support S	Warning	0
Services	Clients with Outpatient/Ambulatory Medica	Alert	0
Services	Service Visits Exceed Yearly Limit	Alert	0
Services	Clients with Core Medical Services with HI	Warning	1
Services	Clients with Outpatient/Ambulatory Medica	Error	0

Note: The **Severity** column is important. There are three options: alert, warning, and error. You cannot submit an RSR if an error exists; therefore, if the severity column says "error" with a number displayed in the errors column, you must correct the missing data. If the column says "warning," you will be able to submit the report but will need to provide an explanation as to why the information is missing. "Alert" just means that it is something you should look at, but there are no penalties.

11. The errors column shows the number of clients missing information in the **Valida on Rule** data field. Click the field with the errors and select **View Client List.**



CAREWare Reports > HRSA Reports > RSR Validation Report Settings > RSR Validation Report

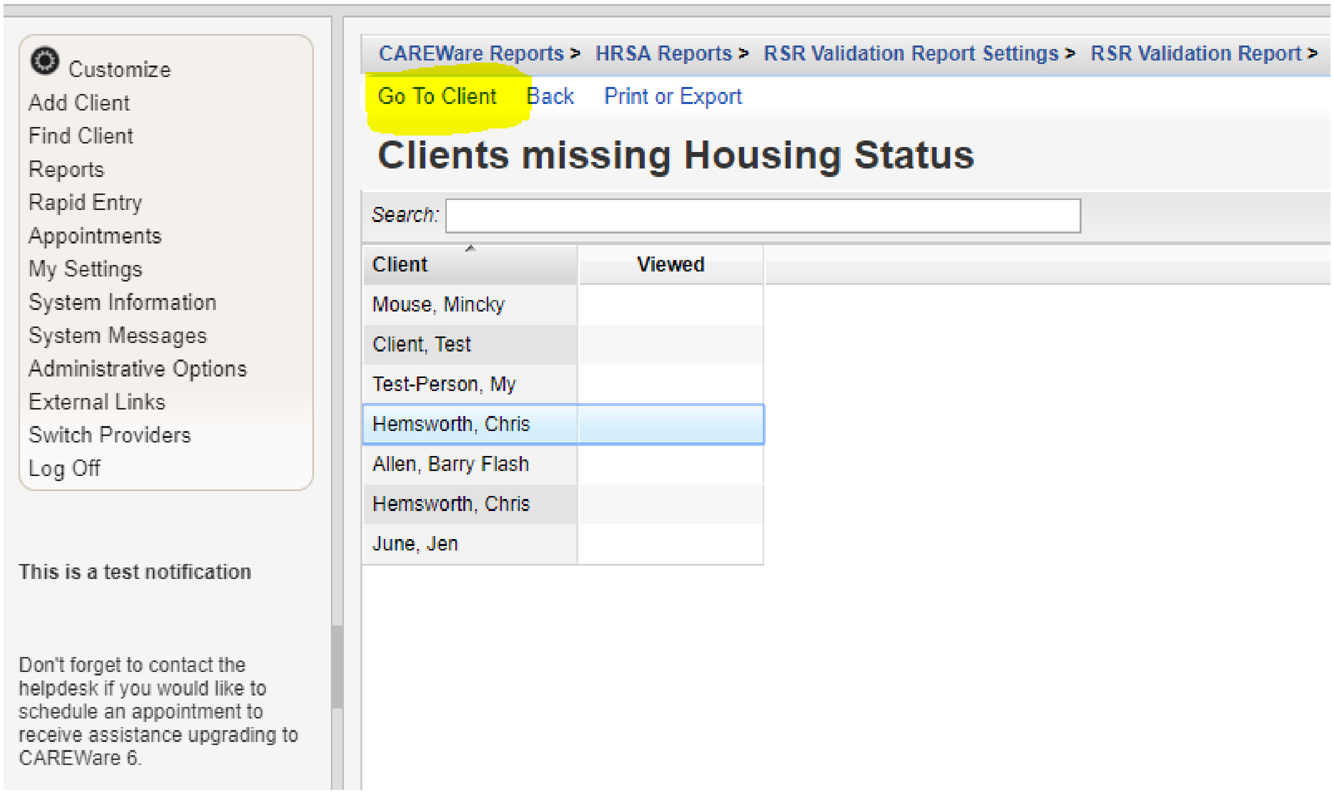
View Client List   Back   Print or Export

RSR Validation Report

Search:

Category	Validation Rule	Severity	# Errors
Demographics	Clients with Birth Year after end of reporting period	Error	0
Demographics	Clients with Birth Year after First HIV Outpatient Ambulatory	Error	0
Demographics	Clients with HIV/AIDS Status of Indeterminate missing Risk	Warning	0
Demographics	Clients with Male or Unknown Gender with a Cervical Pap S	Alert	0
Demographics	Clients with HIV diagnosis year after reporting period	Alert	0
Demographics	Clients with Male or Unknown Gender with Pregnancy Statu	Alert	0
Demographics	Clients age 90 or older	Alert	0
Demographics	Clients with Birth Year after HIV diagnosis year	Alert	0
Demographics	Clients with Birth Year after CD4 Test Dates	Alert	0
Demographics	Clients with Birth Year after Outpatient/Ambulatory Medical (	Alert	0
Demographics	Clients with Birth Year after Viral Load Test Dates	Alert	0
Demographics	Clients missing Poverty Level	Warning	2
Demographics	Clients missing Housing Status	Warning	7
Demographics	Clients missing Medical Insurance	Warning	5
Demographics	Clients with HIV/AIDS Status of Indeterminate Over Age 2	Warning	0
Services	Clients missing Core Medical or Support Services	Warning	0
Services	Clients with Outpatient/Ambulatory Medical Care Service Vis	Alert	0
Services	Service Visits Exceed Yearly Limit	Alert	0
Services	Clients with Core Medical Services with HIV Negative HIV/A	Warning	1
Services	Clients with Outpatient/Ambulatory Medical Care Service Da	Error	0

12. A list of clients with missing information will appear. Select the client you would like to view, and then select **Go to Client.**



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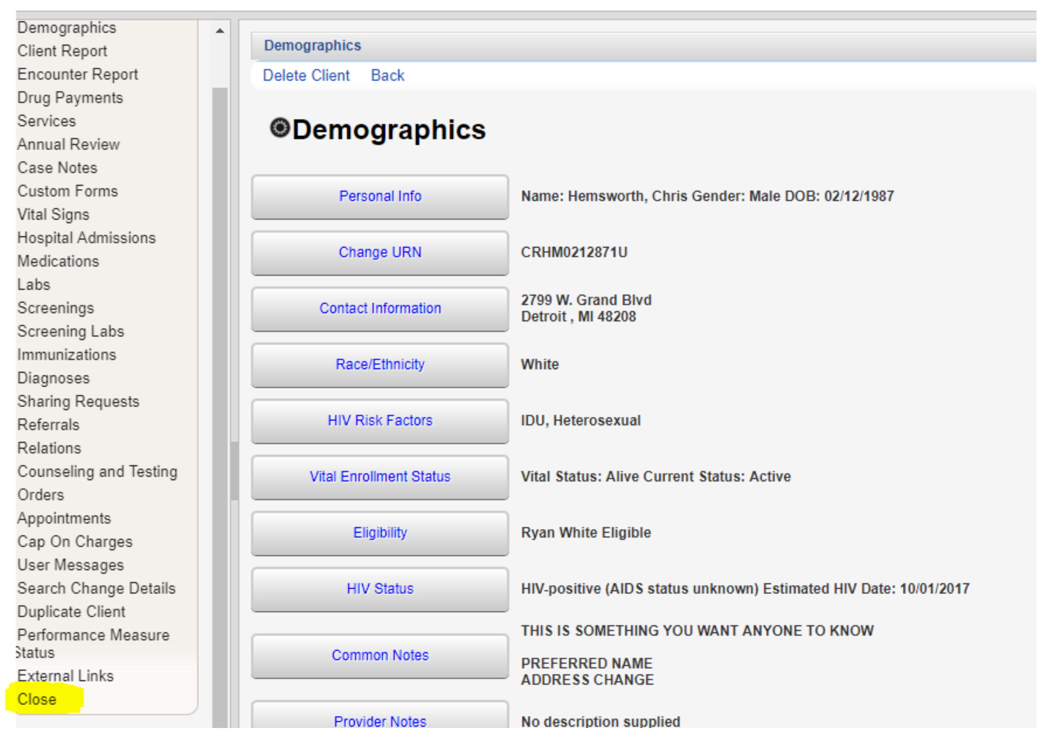

14. After closing, you will be taken back to the **Missing** client page. Follow step 12-13 for the next client on the list. Continue to do this until your list is empty.