

# 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.

This guide was created in  
partnership By Genna Owens

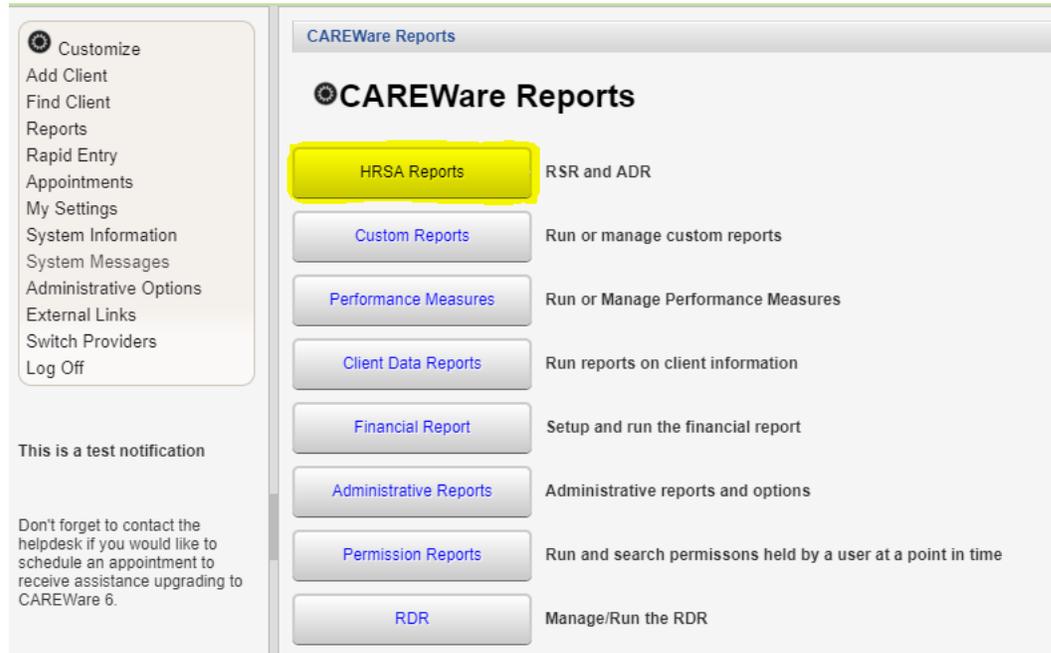


For any questions, please contact MDHHS - Division of HIV/STD Programs  
(MDHHS-DHSP-TAandData-Requests@michigan.gov).

# Creating and Running the “Client Report Viewer” Report

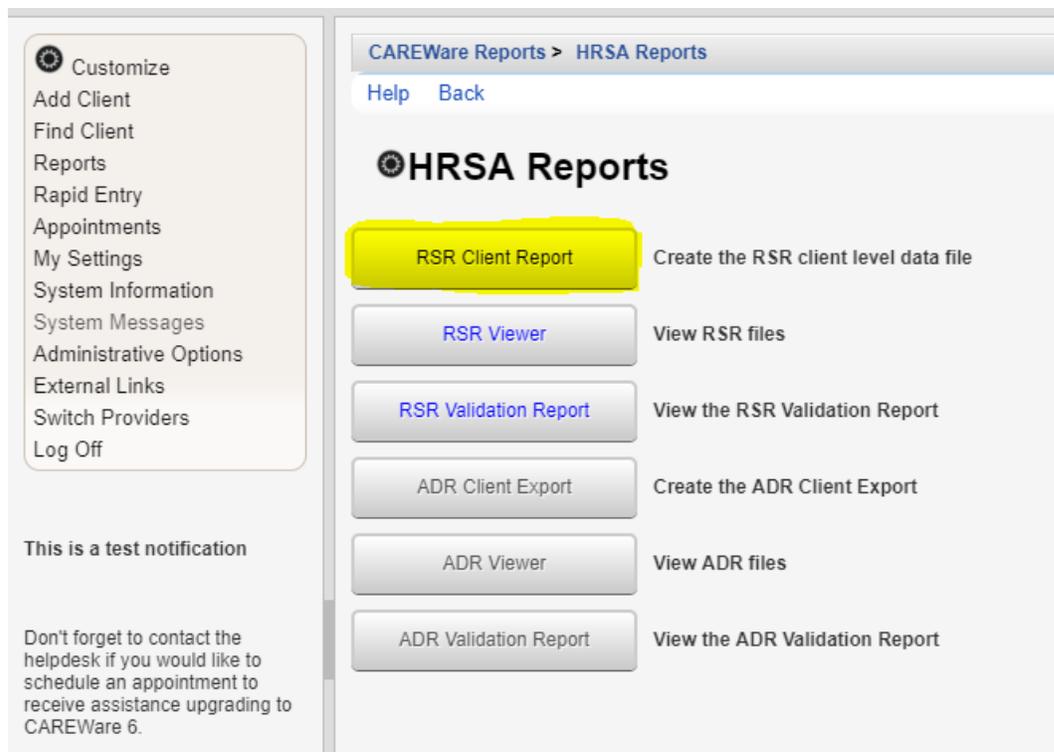
1. From the main page, click **Reports**.

2. Select **HRSA Reports**.



The screenshot shows the CAREWare Reports interface. On the left is a navigation menu with options: Customize, Add Client, Find Client, Reports, Rapid Entry, Appointments, My Settings, System Information, System Messages, Administrative Options, External Links, Switch Providers, and Log Off. Below the menu is a test notification and a helpdesk notice. The main content area is titled 'CAREWare Reports' and lists several report categories: HRSA Reports (highlighted in yellow), Custom Reports, Performance Measures, Client Data Reports, Financial Report, Administrative Reports, Permission Reports, and RDR. Each category has a brief description of its function.

3. Select **RSR Client Report**.



The screenshot shows the CAREWare Reports interface with the 'HRSA Reports' sub-menu selected. The breadcrumb trail is 'CAREWare Reports > HRSA Reports'. The main content area is titled 'HRSA Reports' and lists several report options: RSR Client Report (highlighted in yellow), RSR Viewer, RSR Validation Report, ADR Client Export, ADR Viewer, and ADR Validation Report. Each option has a brief description of its function.

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.

The screenshot shows the 'RSR Settings' page in the CAREWare Reports system. The breadcrumb trail is 'CAREWare Reports > HRSA Reports > RSR Settings'. The 'Edit' button is highlighted in yellow. The page includes a left sidebar with navigation options like 'Customize', 'Add Client', and 'Log Off'. The main content area shows the 'RSR Settings' form with a 'Year' dropdown set to '2019', and checkboxes for 'Cross Provider Labs', 'Cross Provider ART', and 'Apply Filter'. A 'Filter Description' text area contains the text 'Report Filter is empty'. A notification at the bottom left reads 'This is a test notification'.

**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.

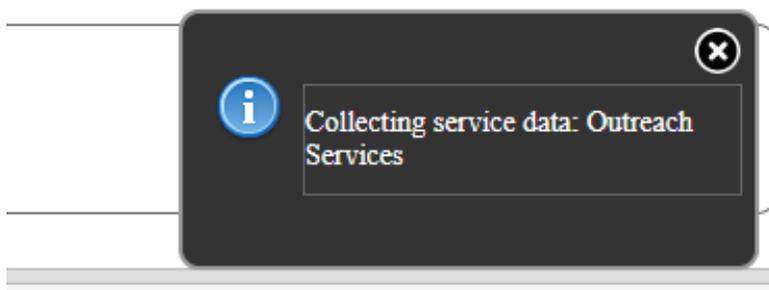
5. Once you make those changes, click **Save**.

This screenshot shows the 'RSR Settings' page after the 'Save' button has been highlighted in yellow. The 'Year' dropdown now includes a blue arrow icon on the right. The 'Cross Provider Labs' and 'Cross Provider ART' checkboxes are now checked. The 'Apply Filter' checkbox remains unchecked. The 'Filter Description' text area still contains 'Report Filter is empty'. The notification at the bottom left remains 'This is a test notification'.

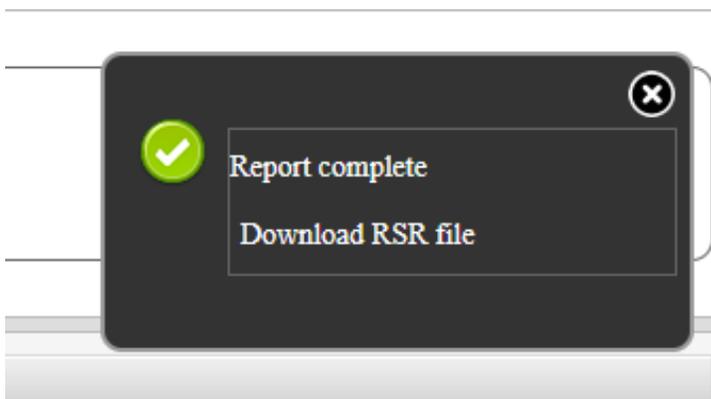
6. Select **Run**.

The final screenshot shows the 'RSR Settings' page with the 'Run' button highlighted in yellow. The 'Year' dropdown is set to '2019'. The 'Cross Provider Labs' and 'Cross Provider ART' checkboxes are checked, while 'Apply Filter' is unchecked. The 'Filter Description' text area contains 'Report Filter is empty'. The notification at the bottom left reads 'This is a test notification'.

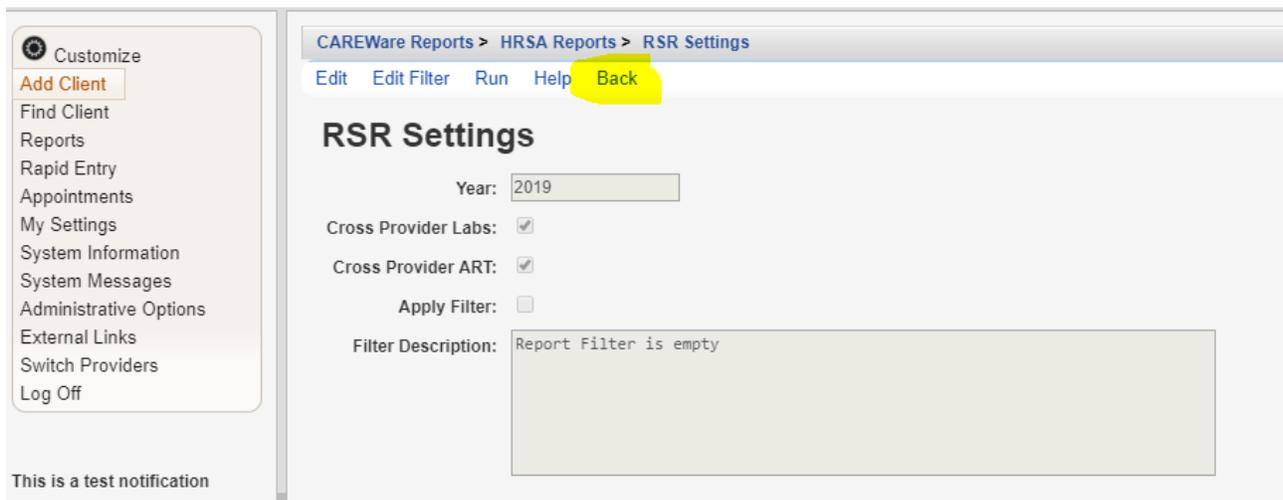
7. On the right-hand side, you will see a box that lets you know the report is running. It will say "Collecting Service Data."



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.



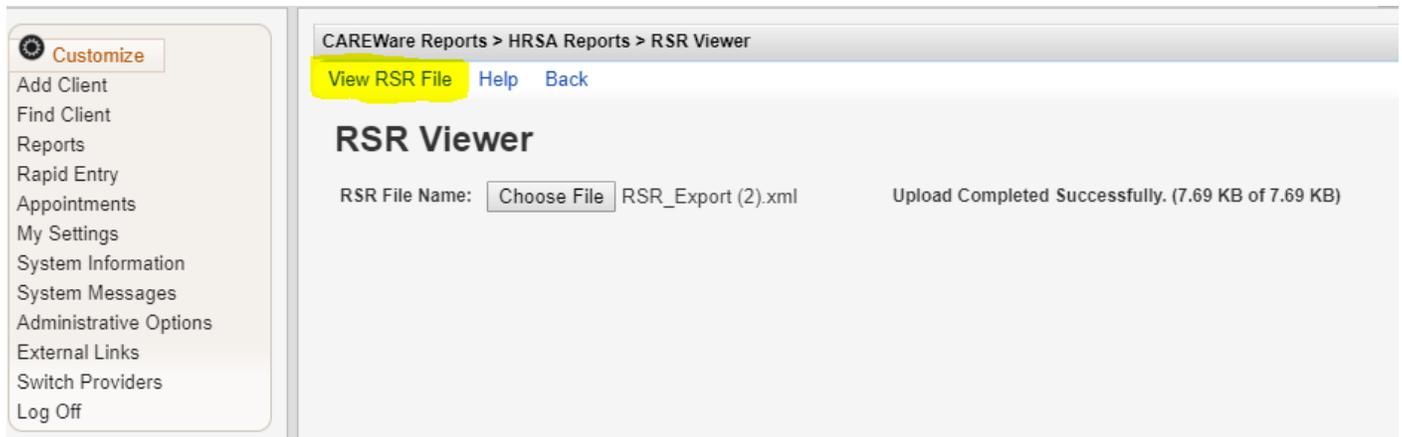
9. Once the report downloads, click the **Back** button to get back to the main RSR page.



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. 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.

CAREWare Reports > HRSA Reports > RSR Viewer > State of Michigan 2019 RSR

[View Client List](#) [Back](#) [Print or Export](#)

### State of Michigan 2019 RSR

Search:

Category	Count	Percent
Total Clients (any service):	10	100%
Clients with Core Medical/CM services:	8	80.0%
Clients with OAHS/CM/Housing services:	6	60.0%
Clients with OAHS/CM services:	6	60.0%
Clients with OAHS services:	2	20.0%
HIV+ Clients with OAHS:	1	10.0%
Female HIV+ Clients with OAHS:	1	10.0%
2. Vital Status (OAHS/CM)		
2. Alive:	6	100.0%
2. Deceased:	0	0.0%
2. Unknown:	0	0.0%
2. Missing:	0	0.0%
4. Birth Year (All clients)		
4. 1960 and before:	3	30.0%
4. 1961 - 1970:	2	20.0%
4. 1971 - 1980:	0	0.0%
4. 1981 - 1990:	4	40.0%
4. 1991 - 2000:	0	0.0%

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

CAREWare Reports > HRSA Reports > RSR Viewer > State of Michigan 2019 RSR

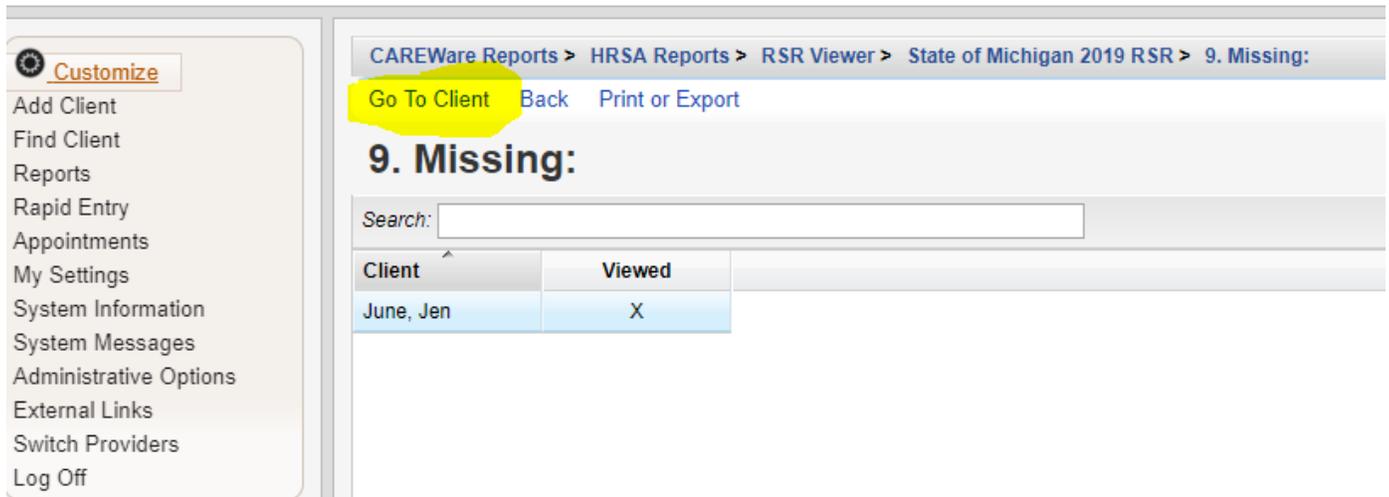
[View Client List](#) [Back](#) [Print or Export](#)

### State of Michigan 2019 RSR

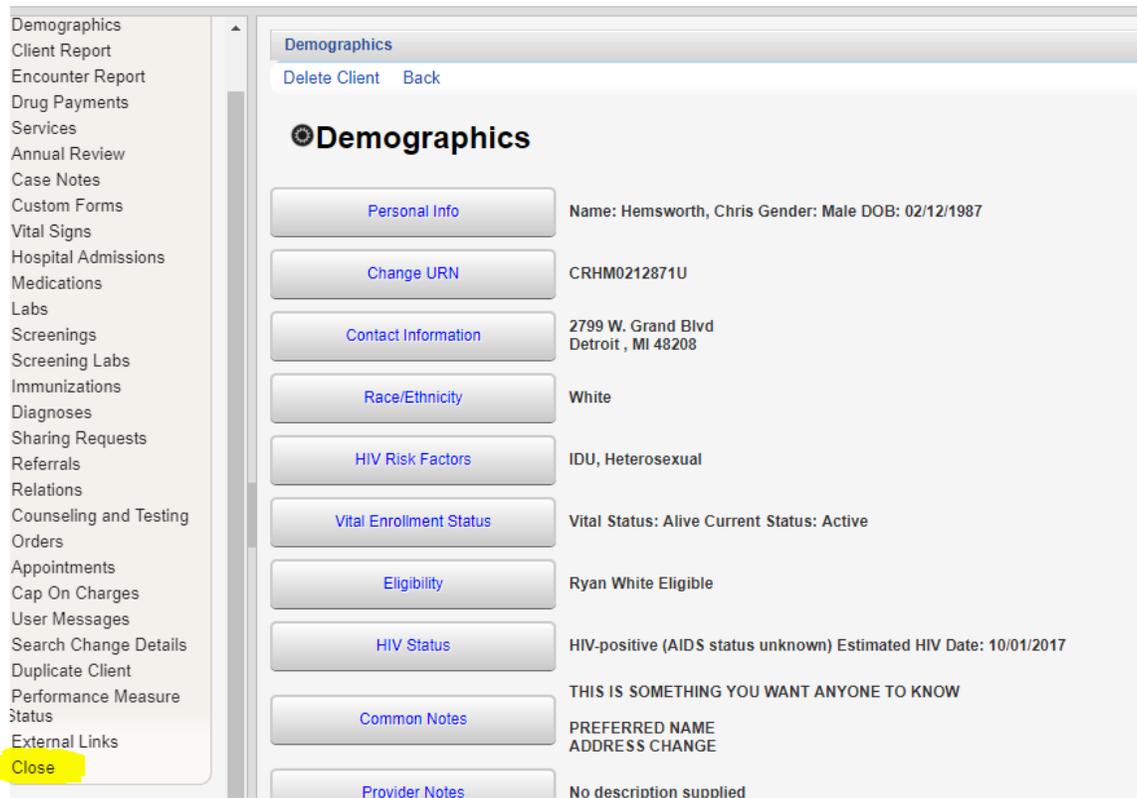
Search:

Category	Count	Percent
7. Female	4	40.0%
7. Transgender MtF:	0	0.0%
7. Transgender FtM:	0	0.0%
7. Transgender Other:	0	0.0%
7. Unknown:	0	0.0%
7. Missing:	0	0.0%
9. Poverty Level % (OAHS/CM)		
9. Below 100% FPL:	1	16.7%
9. 100 - 138%:	0	0.0%
9. 139 - 200%:	2	33.3%
9. 201 - 250%:	0	0.0%
9. 251 - 400%:	2	33.3%
9. 401 - 500%:	0	0.0%
9. More than 500%:	0	0.0%
9. Missing:	1	16.7%
10. Housing Status (OAHS/CM/Housing)		
10. Stable/Permanent:	4	66.7%
10. Temporary:	0	0.0%

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**.

The screenshot shows the 'CAREWare Reports' interface. On the left is a navigation menu with options like 'Customize', 'Add Client', 'Find Client', 'Reports', 'Rapid Entry', 'Appointments', 'My Settings', 'System Information', 'System Messages', 'Administrative Options', 'External Links', 'Switch Providers', and 'Log Off'. Below the menu is a test notification and a helpdesk reminder. The main content area is titled 'CAREWare Reports' and contains several buttons: 'HRSA Reports' (highlighted in yellow), 'Custom Reports', 'Performance Measures', 'Client Data Reports', 'Financial Report', 'Administrative Reports', 'Permission Reports', and 'RDR'. Each button has a corresponding description of its function.

3. Select **RSR Validat on Report**.

The screenshot shows the 'HRSA Reports' sub-menu. The breadcrumb path is 'CAREWare Reports > HRSA Reports'. There are 'Help' and 'Back' links. The main title is 'HRSA Reports'. The menu contains buttons for: 'RSR Client Report' (Create the RSR client level data file), 'RSR Viewer' (View RSR files), 'RSR Validation Report' (highlighted in yellow, View the RSR Validation Report), 'ADR Client Export' (Create the ADR Client Export), 'ADR Viewer' (View ADR files), and 'ADR Validation Report' (View the ADR Validation Report). The left navigation menu and test notification are also visible.

#### 4. Select **Edit**.

CAREWare Reports > HRSA Reports > RSR Validation Report Settings

**Edit** Edit Filter Filter By Funding Source Run Help Back

### RSR Validation Report Settings

Year:

Cross Provider Labs:

Cross Provider ART:

Apply Filter:

Filter Description:

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.

**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**.

CAREWare Reports > HRSA Reports > RSR Validation Report Settings

**Save** Cancel

### RSR Validation Report Settings

Year:

Cross Provider Labs:

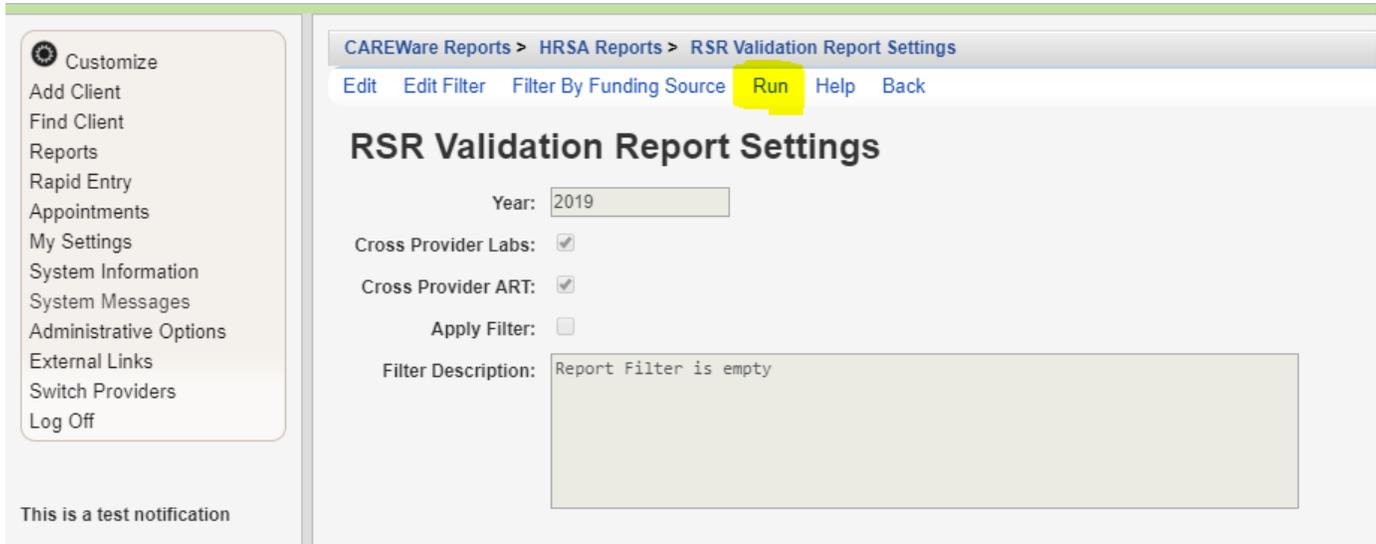
Cross Provider ART:

Apply Filter:

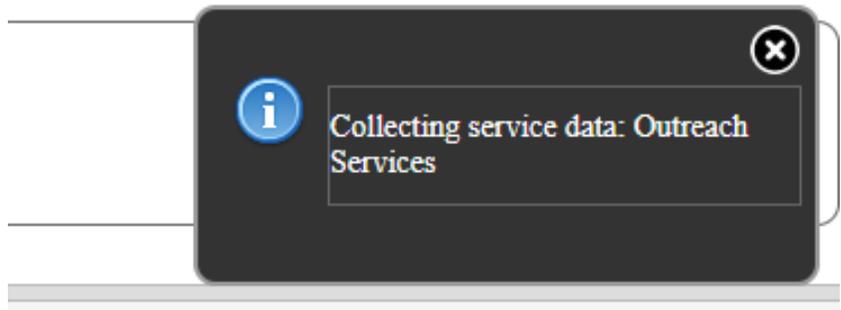
Filter Description:

This is a test notification

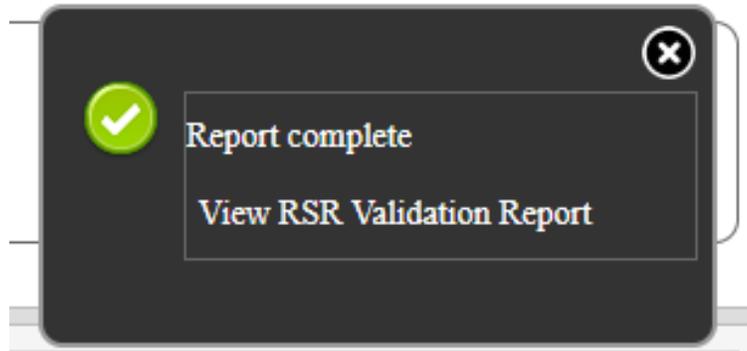
7. Once you save, you can run your report. Select **Run**.



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 Validation Report**. It will download as a CSV file.



10. This is your validation report.

**RSR Validation Report**

Search:

Category	Validation Rule	Severity	# Errors
Demographics	Clients with Birth Year after end of reporting	Error	0
Demographics	Clients with Birth Year after First HIV Outpa	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/Amb	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 **Validation Rule** data field. Click the field with the errors and select **View Client List**.

**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 C	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**.

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

**Go To Client** Back Print or Export

### Clients missing Housing Status

Search:

Client	Viewed
Mouse, Mincky	
Client, Test	
Test-Person, My	
Hemsworth, Chris	
Allen, Barry Flash	
Hemsworth, Chris	
June, Jen	

**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.

13. 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.

Demographics  
 Client Report  
 Encounter Report  
 Drug Payments  
 Services  
 Annual Review  
 Case Notes  
 Custom Forms  
 Vital Signs  
 Hospital Admissions  
 Medications  
 Labs  
 Screenings  
 Screening Labs  
 Immunizations  
 Diagnoses  
 Sharing Requests  
 Referrals  
 Relations  
 Counseling and Testing  
 Orders  
 Appointments  
 Cap On Charges  
 User Messages  
 Search Change Details  
 Duplicate Client  
 Performance Measure  
 Status  
 External Links  
**Close**

Demographics  
 Delete Client Back

### Demographics

**Personal Info** Name: Hemsworth, Chris Gender: Male DOB: 02/12/1987

**Change URN** CRHM0212871U

**Contact Information** 2799 W. Grand Blvd  
 Detroit, MI 48208

**Race/Ethnicity** White

**HIV Risk Factors** IDU, Heterosexual

**Vital Enrollment Status** Vital Status: Alive Current Status: Active

**Eligibility** Ryan White Eligible

**HIV Status** HIV-positive (AIDS status unknown) Estimated HIV Date: 10/01/2017

**Common Notes** THIS IS SOMETHING YOU WANT ANYONE TO KNOW  
 PREFERRED NAME  
 ADDRESS CHANGE

**Provider Notes** No description supplied

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.