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)
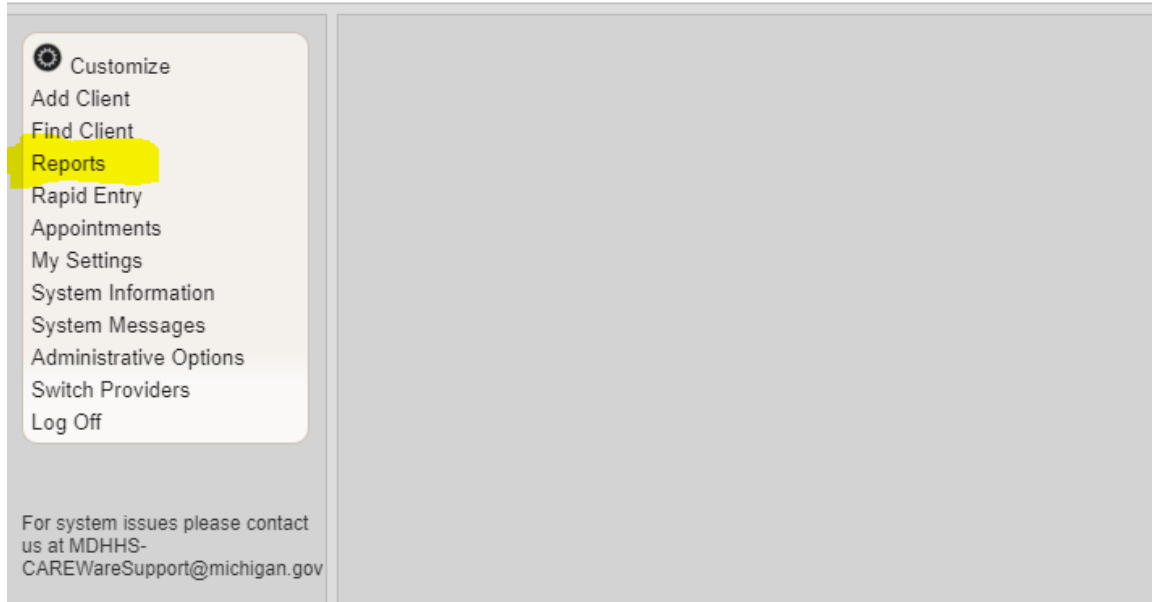
- Last Quantitative Lab Value (Viral Load)

This guide was created in partnership By Genna Owens

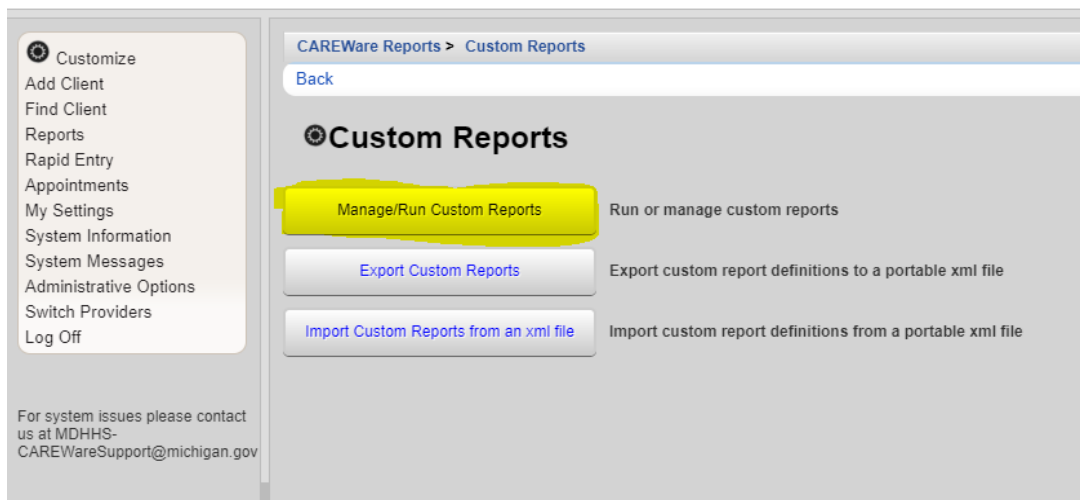## Detailed Overview:

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.**

New Feature: You can change the font and color of your report.

Note: A **crosstab** is a table that shows the number of times each of the possible category combinations occurred in your data. For example, you could select a crosstab for gender and zip code. When you run the report, it would show you the number of male, female, and transgender clients in each zip code.
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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 appear. 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**.
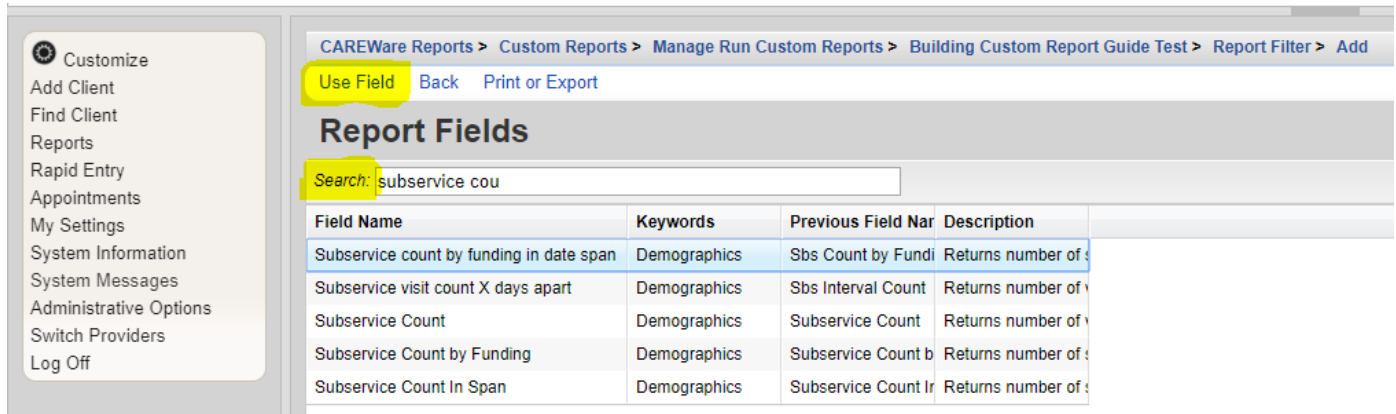
9. This is where you will indicate the parameters of the filter. The parameter will differ slightly among the filters. For **Subservice Count by Funding in Date Span**, three fields have to be defined: funding source, date span, and cross-provider.
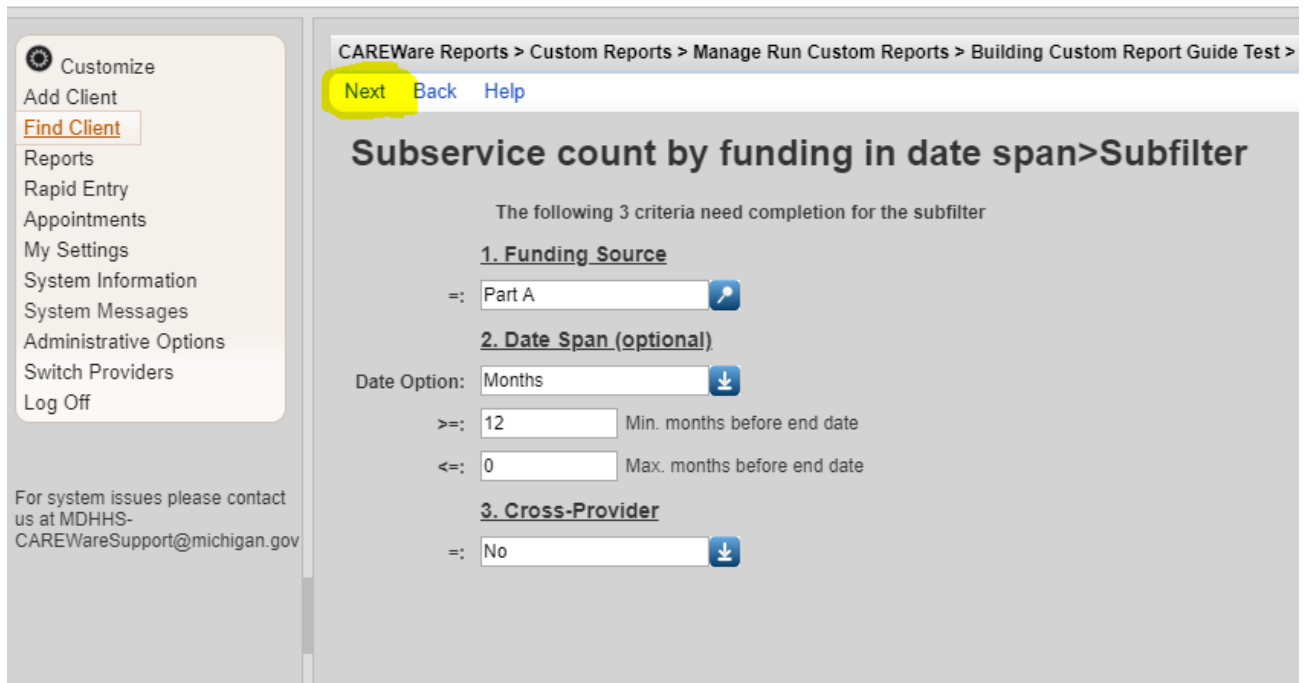
10. From the dropdown menu, choose the correct **Funding Source, Date Span,** and **Cross-Provider**. Then select **Next.**

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 amount of months goes in the first box (>=) and the minimum amount 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 in order 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.**

14. Select the **Field Selection** tab. The field selection lets you specify what you want to see about the filtered clients. That includes name, eURN, race, age, address, last labs, last services, etc.

15. Select **Add.**

16. For this report, we want to know four things: eURN, race, last viral load date & 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 subfilter. 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. You can change the column header, set priorities, and change fonts and colors. Once you do that, select **Save.**

Note: The "**Last Quantitative Lab Date**" field is where dates are pulled for a lot of tests including CD4 and Viral Load.
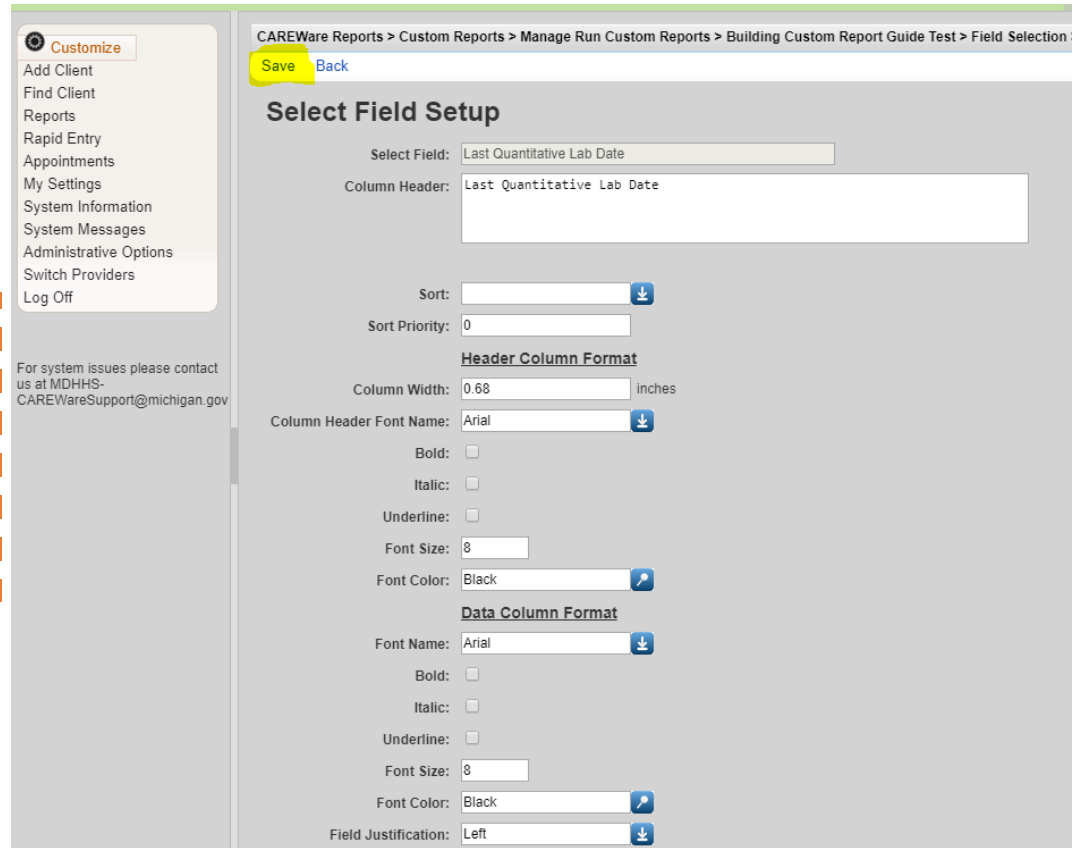
24. A summary of your field selection appears. You can view your field selection or make any edits by clicking the blue link. Once you are done, select **Back.** This will take you back to the field selection page.

25. Repeat Step 15—16. Select **Add.** From the list, select **Last Quantitative Lab Value.** This will take you to a subfilter. For **Last Quantitative Lab Value**, three fields have to be defined: lab, date range, and cross-provider.
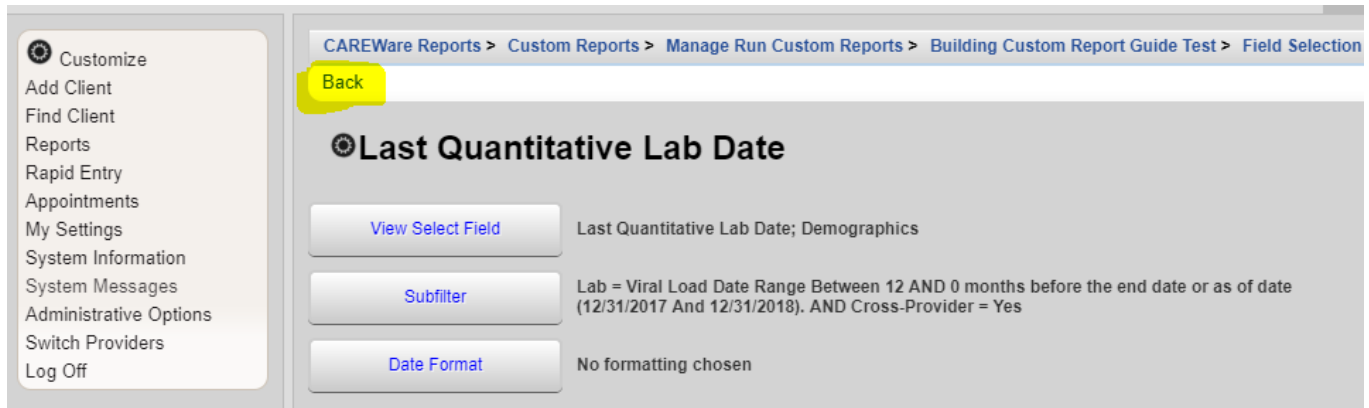
26. Repeat Step 22—24. From the dropdown menu, select the **Lab** (Viral Load), **Date Range** (12 months), and **Cross-Provider** (Yes)**.** Then Select **Next, Save,** and **Back.**

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.**
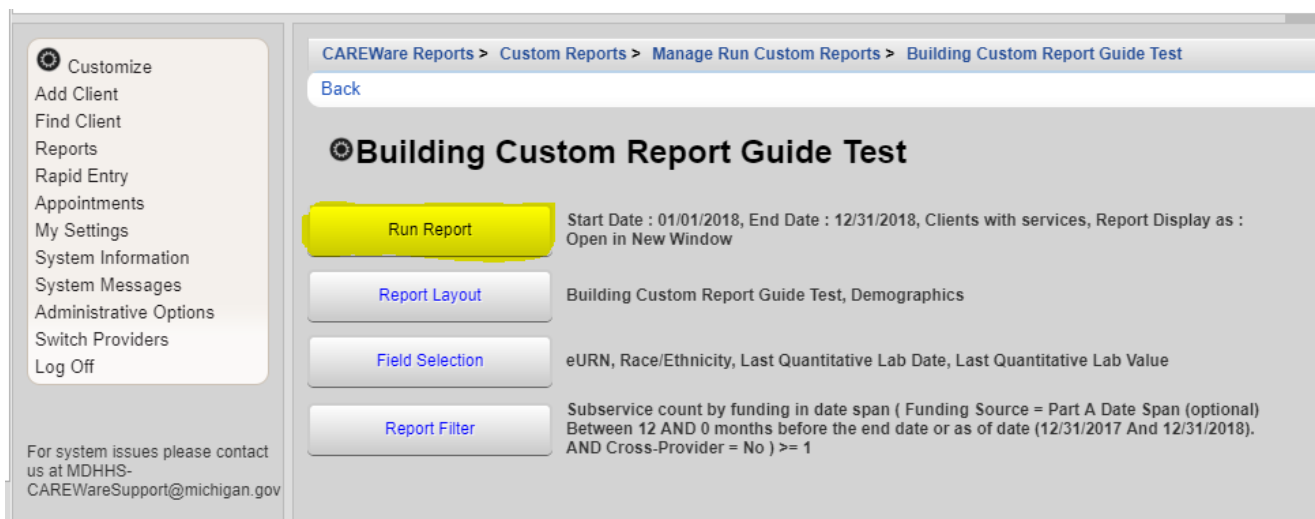
30. Click **Edit.** Specify the **timespan** and **output display.** Then **Save.**
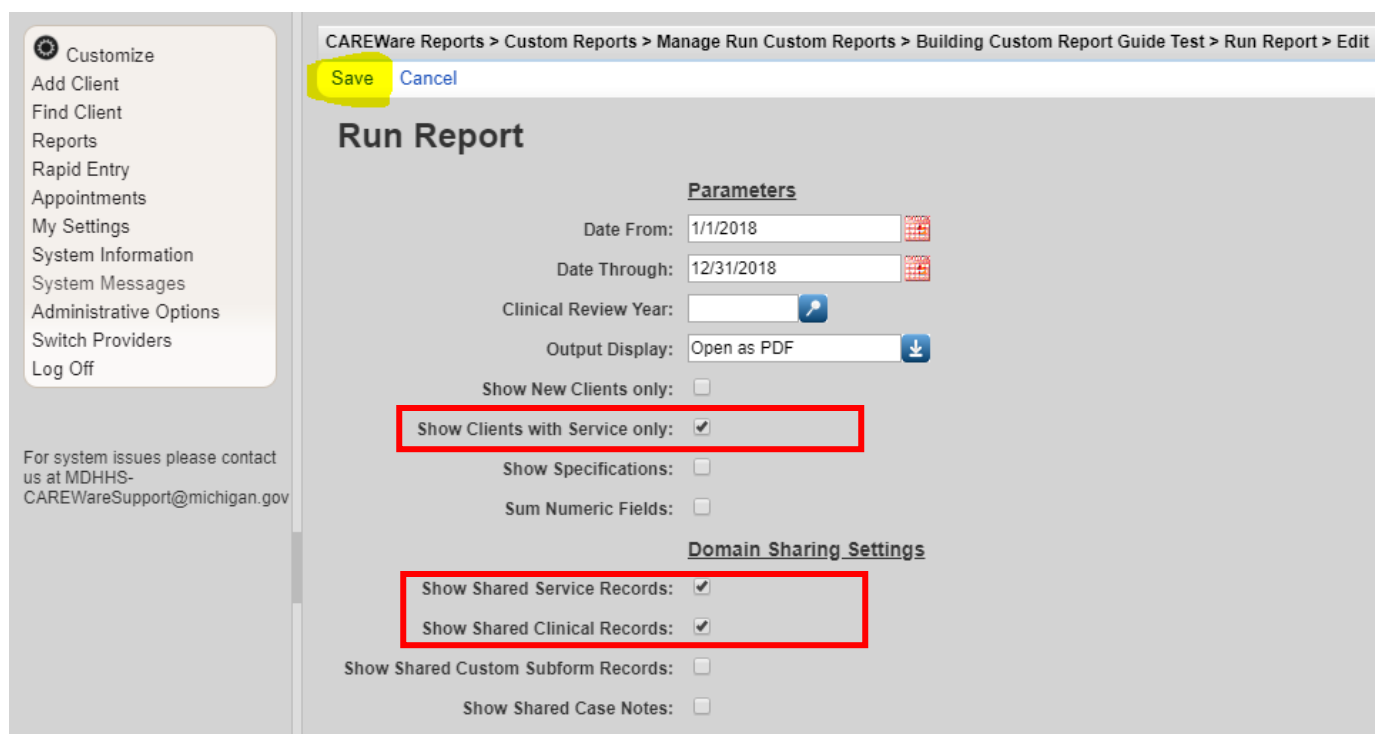
Note: For **Output Display,** you have three options: open as PDF, download as CSV, or open in new window. If you want to export it to excel, then you should download it as a CSV. If you just want to just view the results, then you should either open it as a PDF or open in a new window.

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. Select **Run Report.**
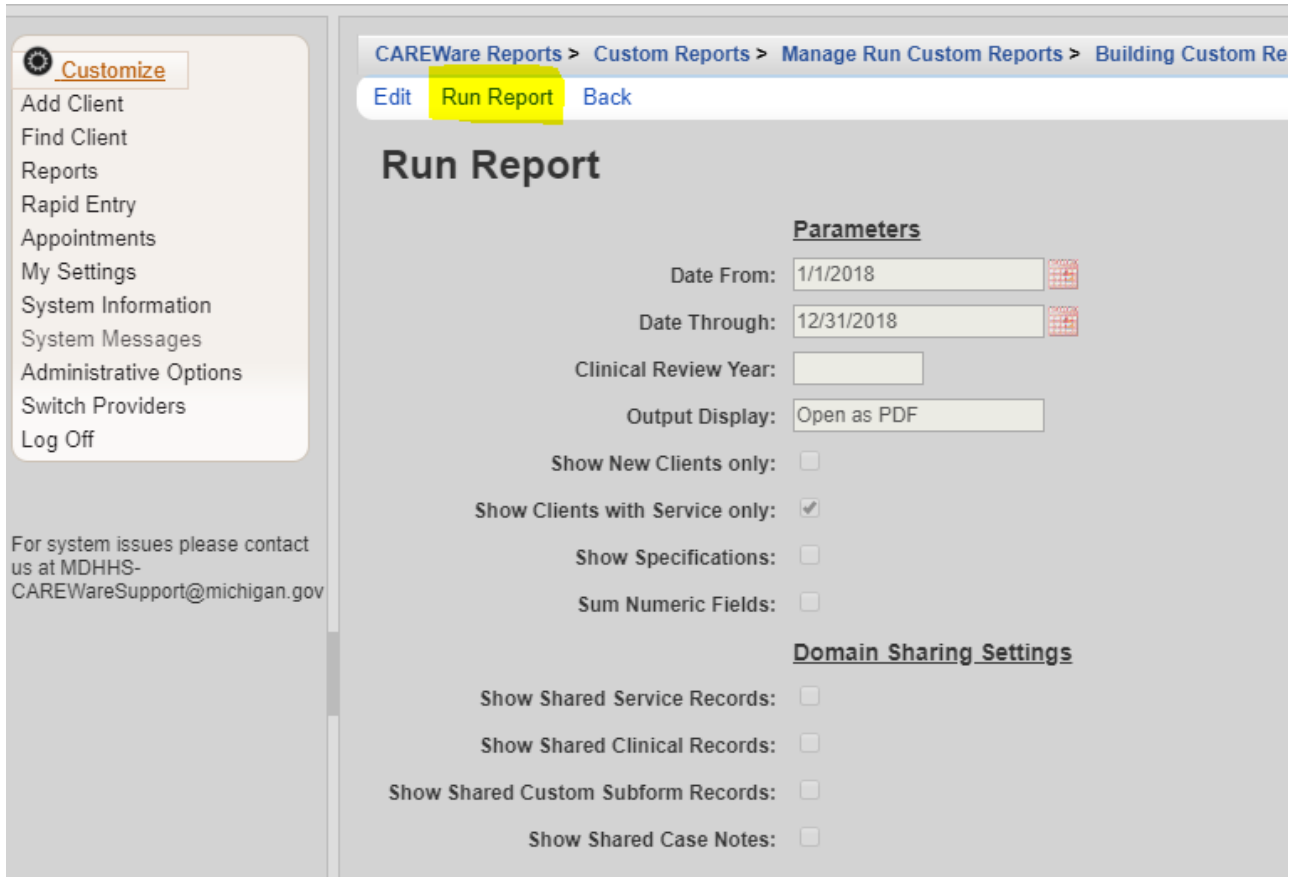
32. On the right-hand side, you will see a box that lets you know the report is running. You want to see that box.
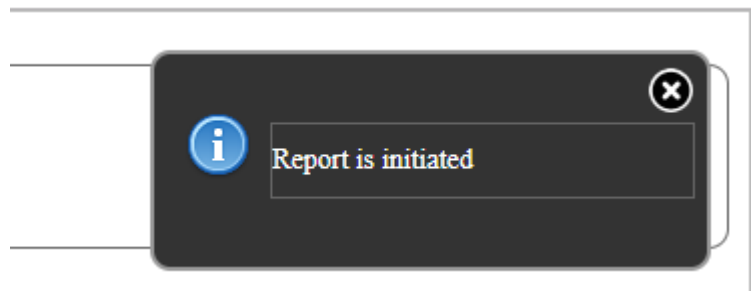
33. Once it generates, you will receive a message that lets you know it is completed. It will also be on the right-hand side. Click **View Building Custom Report Guide Test.**

34. The report should look like this.

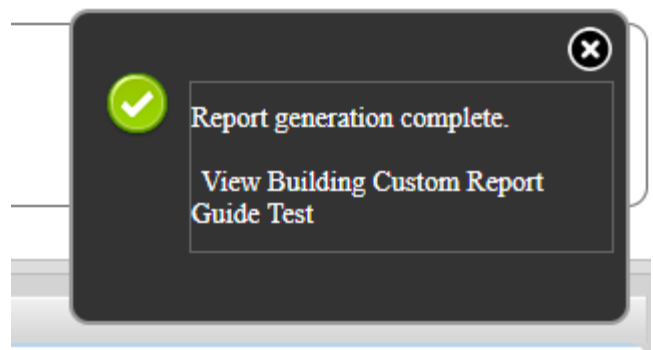**Building Custom Report Guide Test**

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
CHQl3ADzN	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
Pm8zzbEyx	Black or African-American	11/01/2018	20
J7hW+BE0T	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

Note: Creating a report using a "PDF" or "Open new window" output opens the report in a new tab. In order to get back to CAREWare, close out the tab. That will take you back to the run report page.

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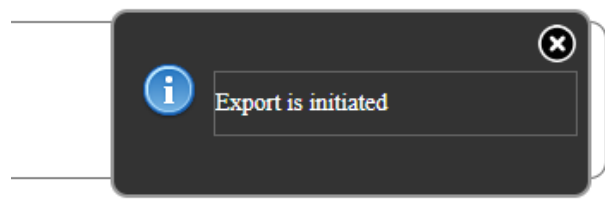
3. Once it generates, you will be prompted to download the report.
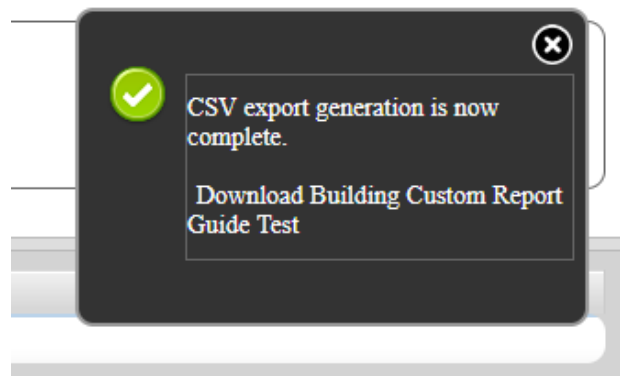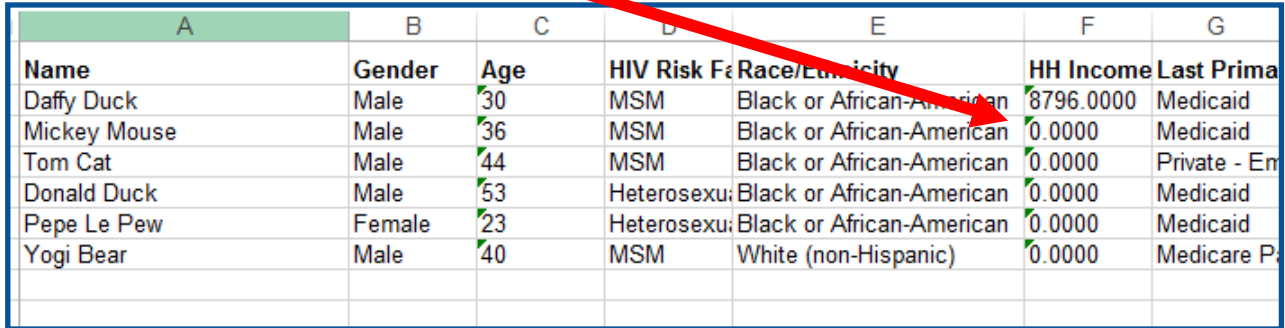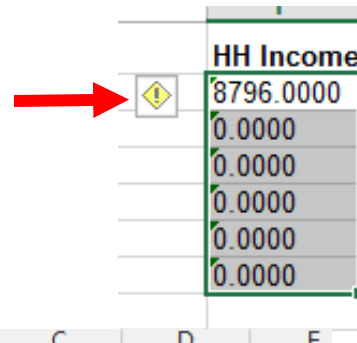
Import Errors

Once you have exported your data into excel, you may see green triangles in the top, left-hand corner of the data cells that look like this:
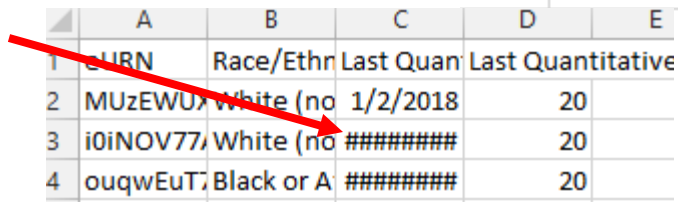

These sometimes occur when excel doesn't read the numbers as numbers. To resolve this, highlight the entire column and a yellow warning box will appear. Click on that, and then select **Convert to Number.**

You may also need to convert your dates.

1. To convert #### to dates, highlight the column.

2. Right-click the column and choose **Format Cells.**

3. Under the **Number** tab, choose **Date.**

4. Choose the date format you would like to use.

5. Select okay.

6. You will be redirected back to the excel sheet and the dates will appear.
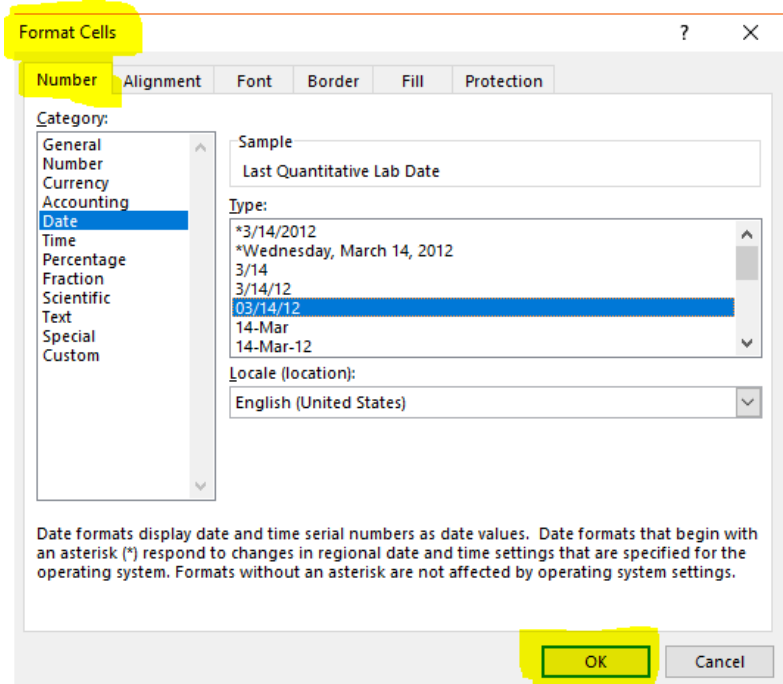
Sorting Your Data
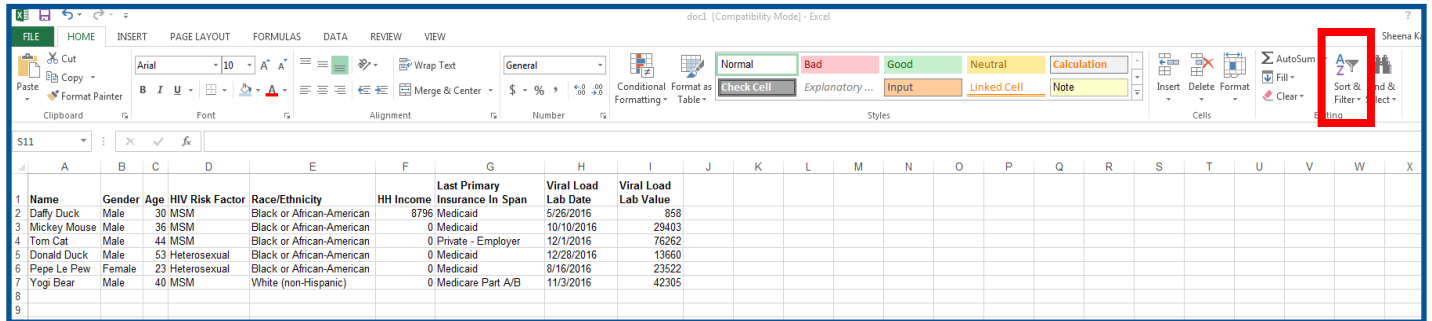
1. Highlight all cells and select **Sort & Filter.**

2. From the dropdown menu, select "**Custom Sort".**

3. A sort box will appear from the dropdown menu. Select the column you would like to "sort by." In the order box, you can decide if you would like to list the numbers largest to smallest or vice versa.
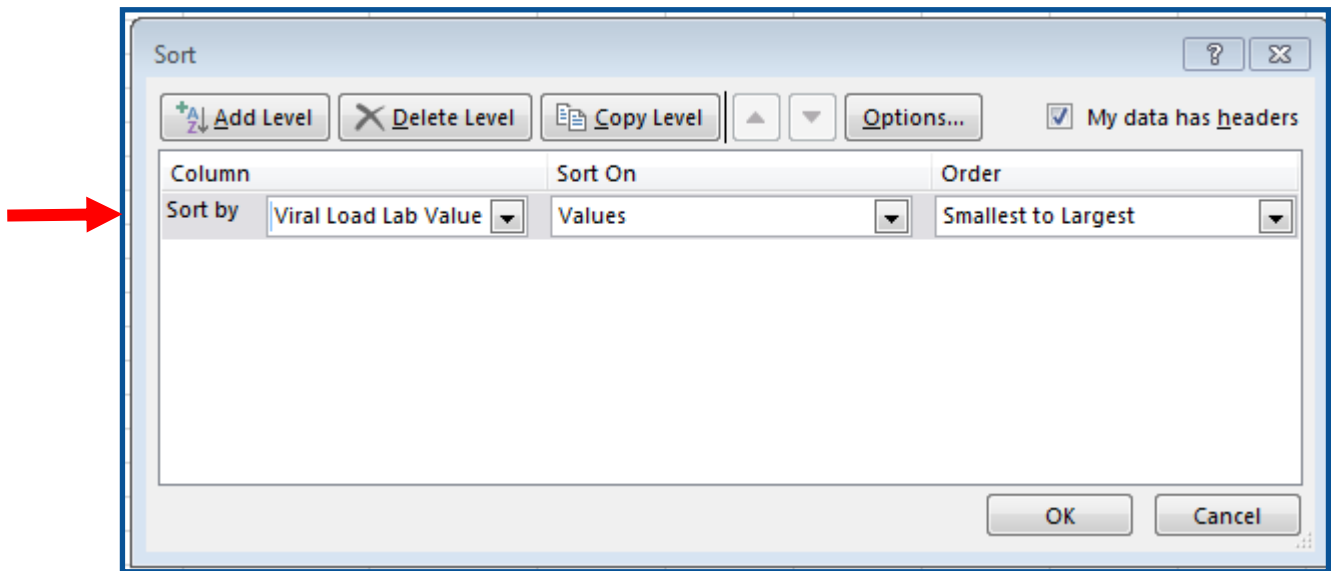

For this example, largest to smallest was used so you can easily pick out the individuals with the highest viral load as they have the highest risk for poor health outcomes.

	Name	Gender	Age	HIV Risk Factor	Race/Ethnicity	HH Income	Last Primary Insurance In Span	Viral Load Lab Date	Viral Load Lab Value
1	Name	Gender	Age	HIV Risk Factor	Race/Ethnicity	HH Income	Last Primary Insurance In Span	Viral Load Lab Date	Viral Load Lab Value
2	Tom Cat	Male	44	MSM	Black or African-American	0	Private - Employer	12/1/2016	76262
3	Yogi Bear	Male	40	MSM	White (non-Hispanic)	0	Medicare Part A/B	11/3/2016	42305
4	Mickey Mouse	Male	36	MSM	Black or African-American	0	Medicaid	10/10/2016	29403
5	Pepe Le Pew	Female	23	Heterosexual	Black or African-American	0	Medicaid	8/16/2016	23522
6	Donald Duck	Male	53	Heterosexual	Black or African-American	0	Medicaid	12/28/2016	13660
7	Daffy Duck	Male	30	MSM	Black or African-American	8796	Medicaid	5/26/2016	858
8									
9									