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Bureau of HIV/STI Programs
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CAREWare 6

User Guide

For any questions, please contact
MDHHS-SHOARS-SUPPORT@michigan.gov

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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.

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Disclaimer: No real client data was used in creating this handout. All client information in this handout has been created specifically for training purposes.

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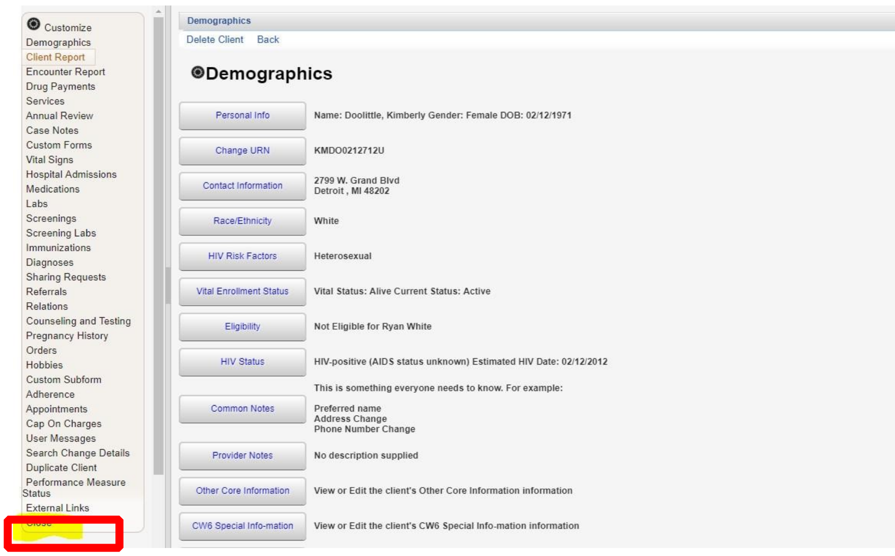
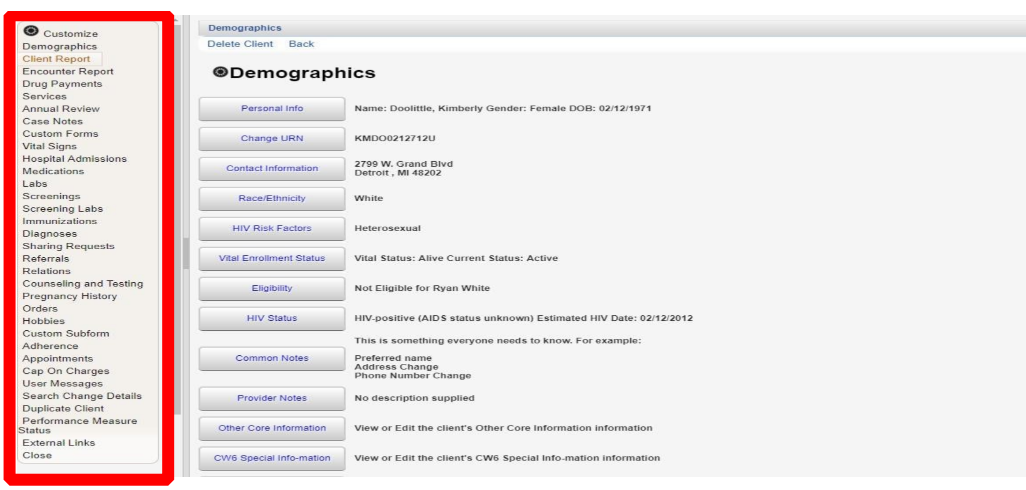
What You Need to Know About CAREWare 6

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.



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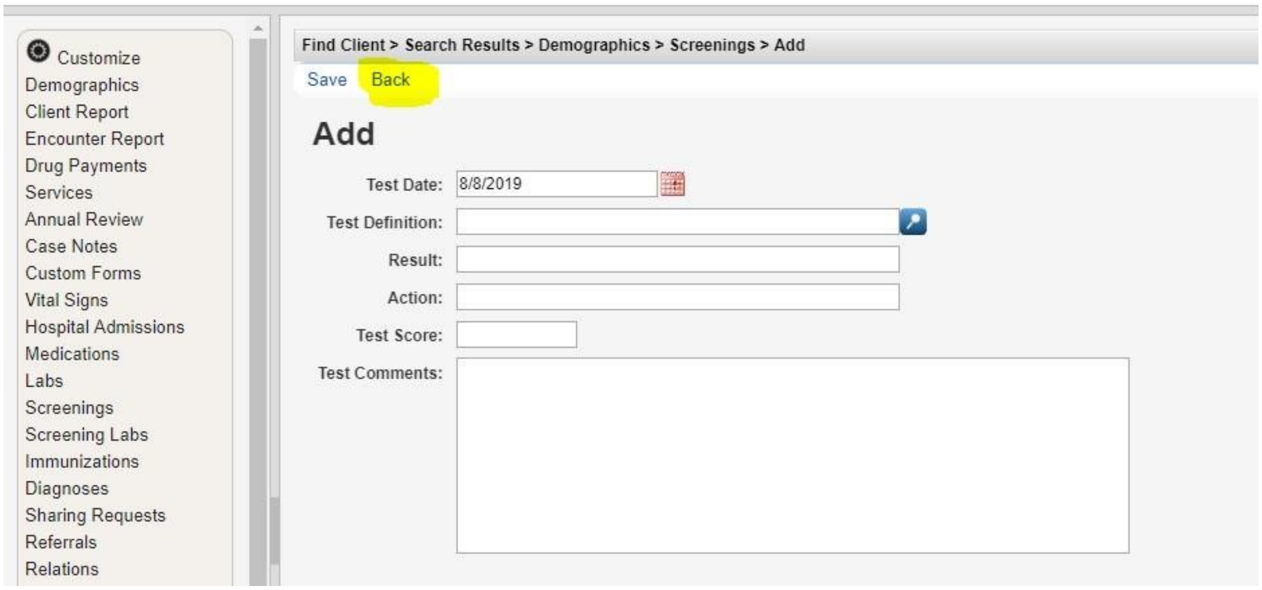
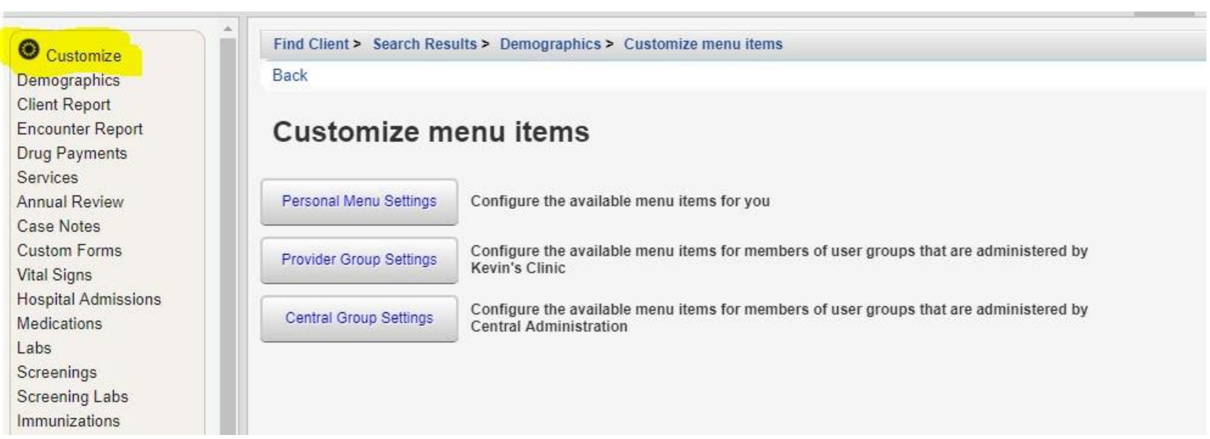
3. If you are in the middle of adding any record, whether it is a service, lab, etc., you will not be able to access anything else. For example, if you are in the middle of adding a screening lab and want to add a service, you must either:
    - Add the current record and save it
    - Click the **Back**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



If you try to access the menu on the left-hand side without doing one of the two things listed above, nothing will happen.

4. The **Customize** link allows you to configure the available menu items you see on the left-hand side. **It is <u>not</u> <u>recommended</u> to customize the menu;** instead, leave all of the options available. That way, you don't have to worry about leaving out a menu item that you may need in the future.



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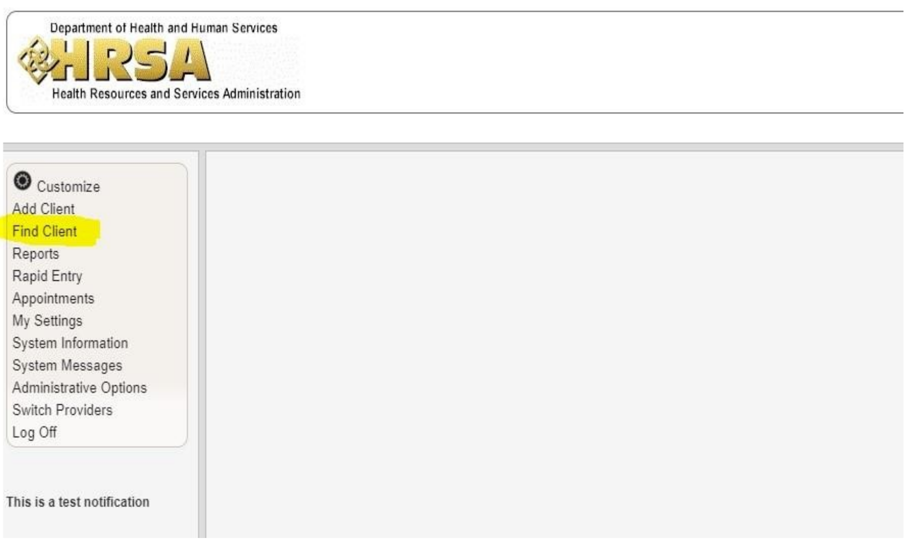
How To Add a Client

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 in order to add the client.
3. Click **Add.**

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. 3.Select **Client Search.**

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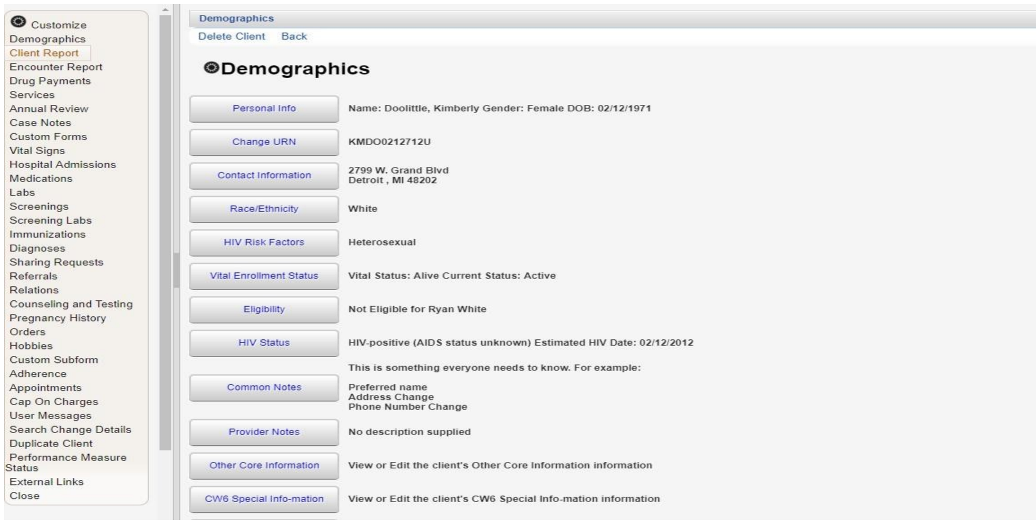
This is the Demographics Page-Main Page



This page holds all of the basic client information. Here are a few things you need to know:

- Once you add a client, you **cannot** change the First Name, Last Name, Gender, or Date of Birth. If one of these fields need to be changed, you **must** contact the CAREWare data team.
- In order to add any records (such as Race/Ethnicity, HIV Risk Factor, or Contact Information) you must click the blue lettered tabs of the category you wish to edit (located in the middle of the page).
- All information on the demographic page is displayed next to the blue lettered tabs.
- Common notes are not permanent and can be viewed, edited, or deleted by anyone who has access to the client record. Therefore, common notes should only be used when it is something you want everyone to know about the client. If you want to enter something that will be permanently saved in CAREWare or is personal to the client, then enter it into **Case Notes.**
- Everything on the demographics page, with the exception of custom tabs, eligibility status, case notes, and enrollment date and status, is shared with other providers that are also providing services to the client and can be changed by those providers.
- Custom tabs are now located on the demographics page.
- The left-hand side is how you will navigate all of the tabs of the client’s record.

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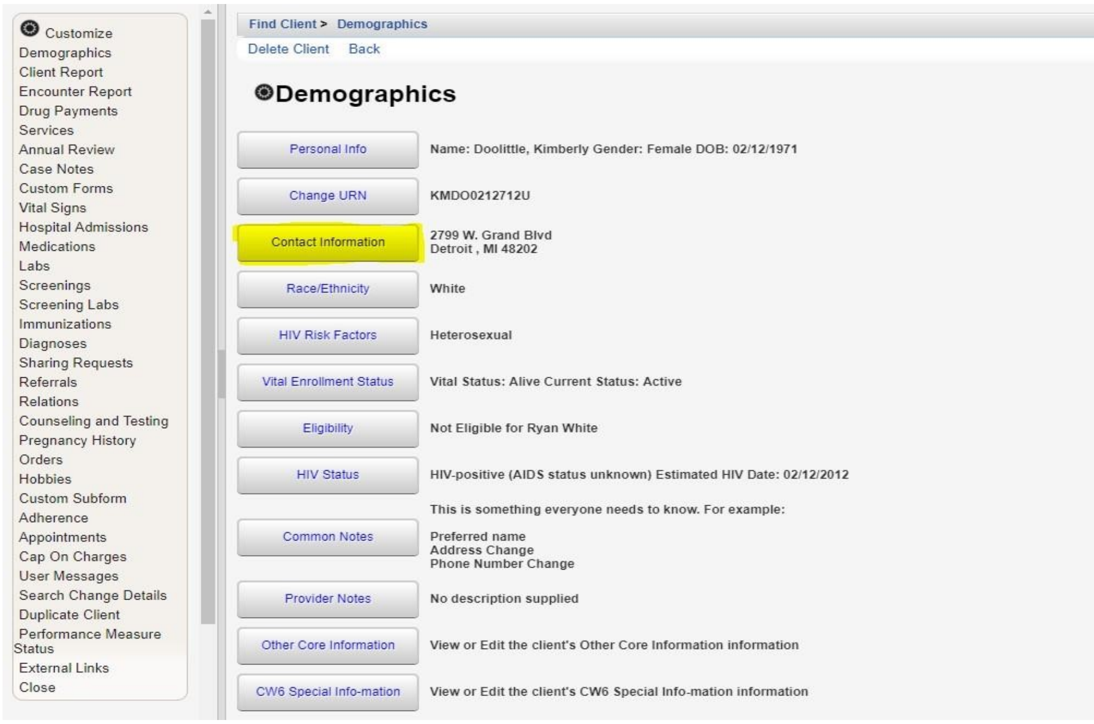
How to Add Information to the Demographics Page

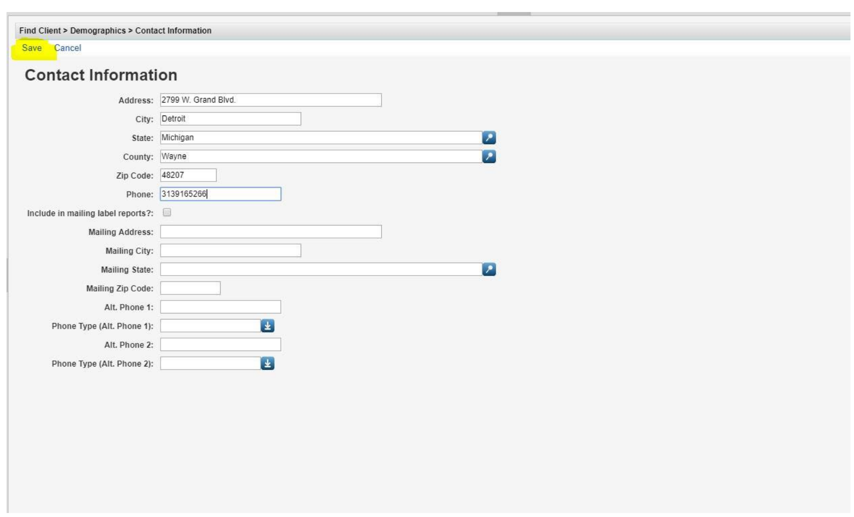
1. From the main page, you can add, view, and edit various demographic information. To add or edit information, click the blue lettered tab of the category you wish to view or edit.



2. The tab will open. Enter all relevant information
3. **Save**

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.



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.

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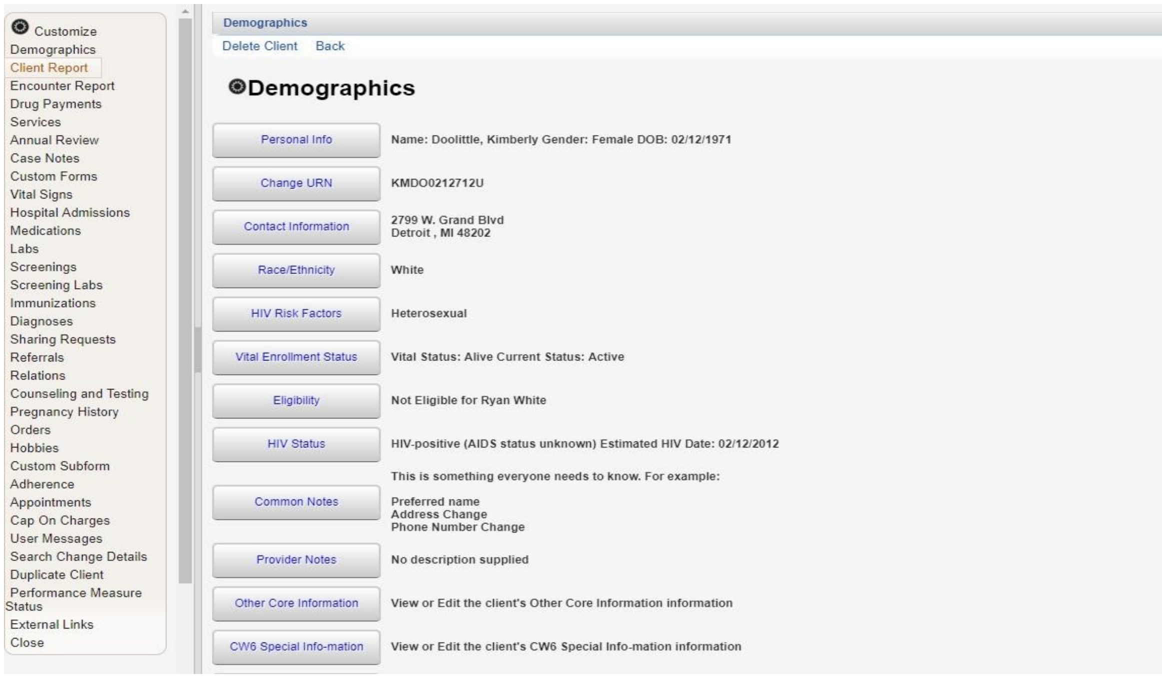
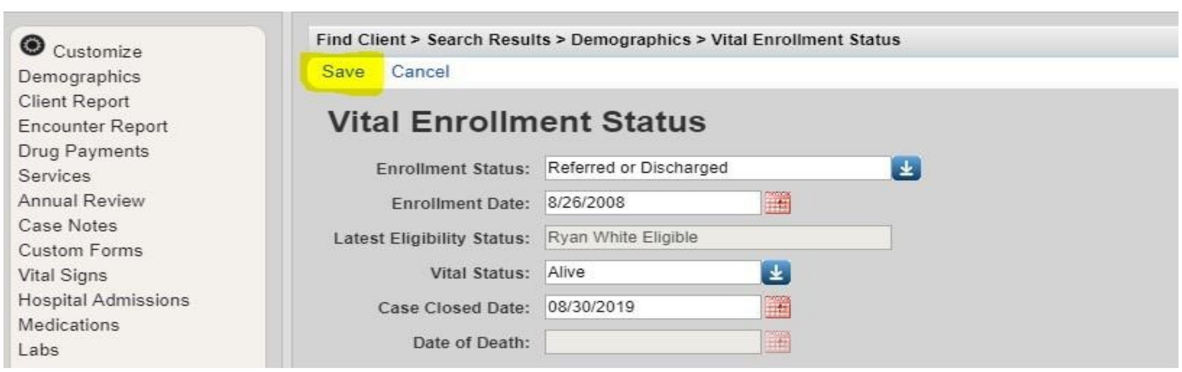
How To Edit Enrollment Status

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 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.

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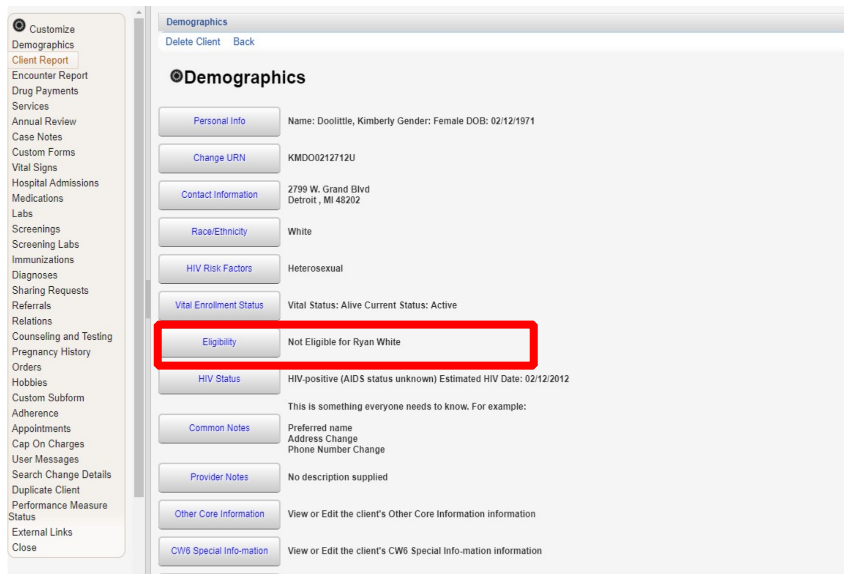
How To Add Eligibility Records

If a client has ever received a Ryan White funded service (Part A, B, C, D), they must be marked as **Ryan White Eligible.** This has to be done at the time of the first Ryan White funded service.

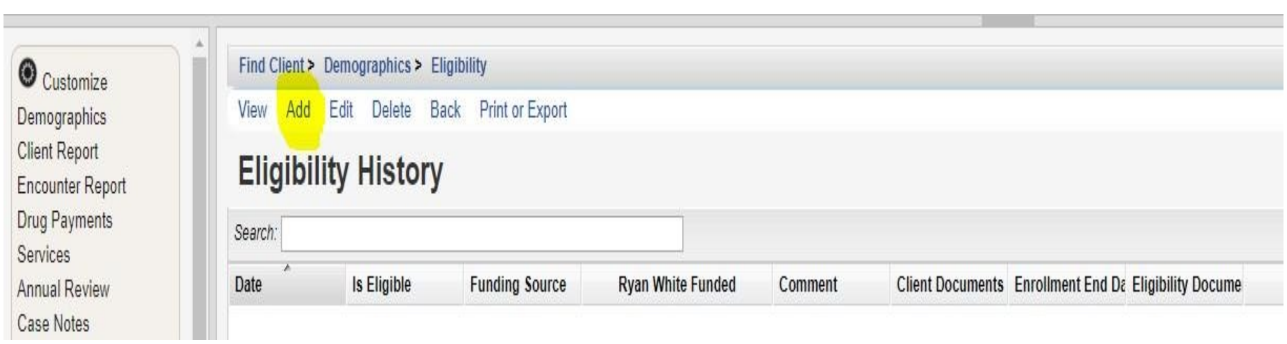
When you add a client to CAREWare, the default status will always be "Not Eligible for Ryan White." Therefore, every time you add a new client, you must create a record that documents the eligibility status. To document eligibility, follow the instructions below:

1. Open the client record. Eligibility is located on the demographics page.
2. Select **Eligibility.**

Note: You can find out if a client has any eligibility records by looking at the information next to Eligibility. For more details, click eligibility. It will show you a history of all records.



3. Select **Add.**



4. Enter the **Eligibility Date, Eligibility Status, & Funding Source**.

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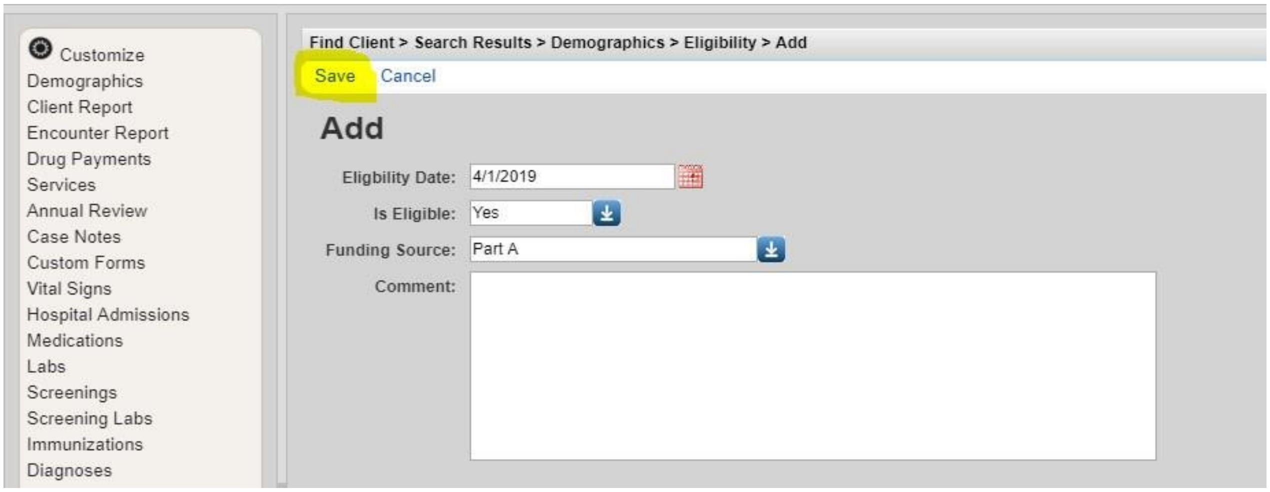
5. Select **Save.**



6. Once you save the record, the client will be marked as eligible.

Clients may receive Ryan White funding from multiple sources. An eligibility record must be created for each funding source in which the client is being served. Once you add a record, CAREWare will create a history that will allow you to track all funding sources over time.

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. **YOU DO NOT WANT THIS.**
3. When you return to the demographics page, the client record will be updated.

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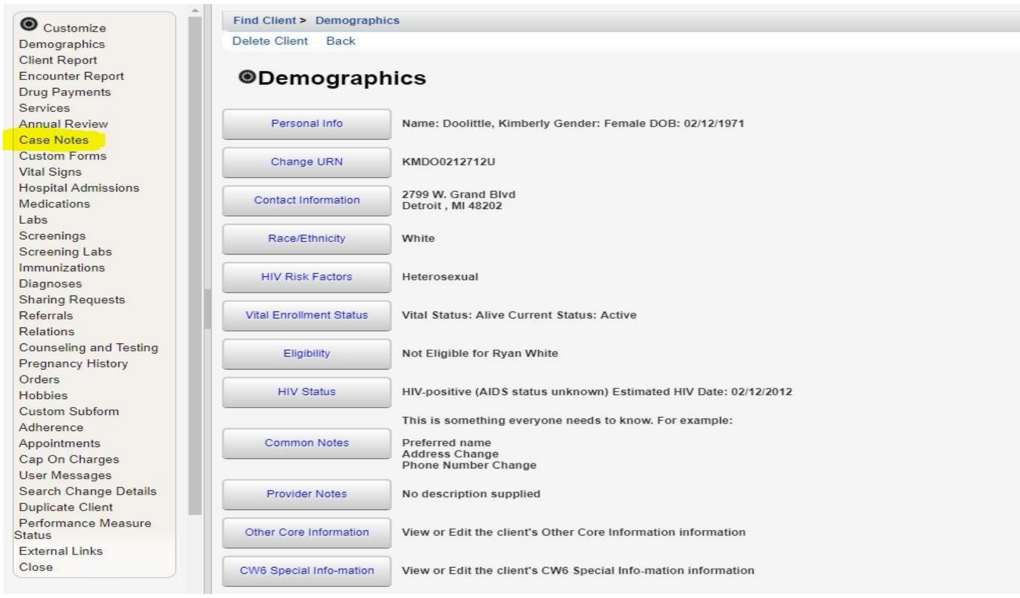
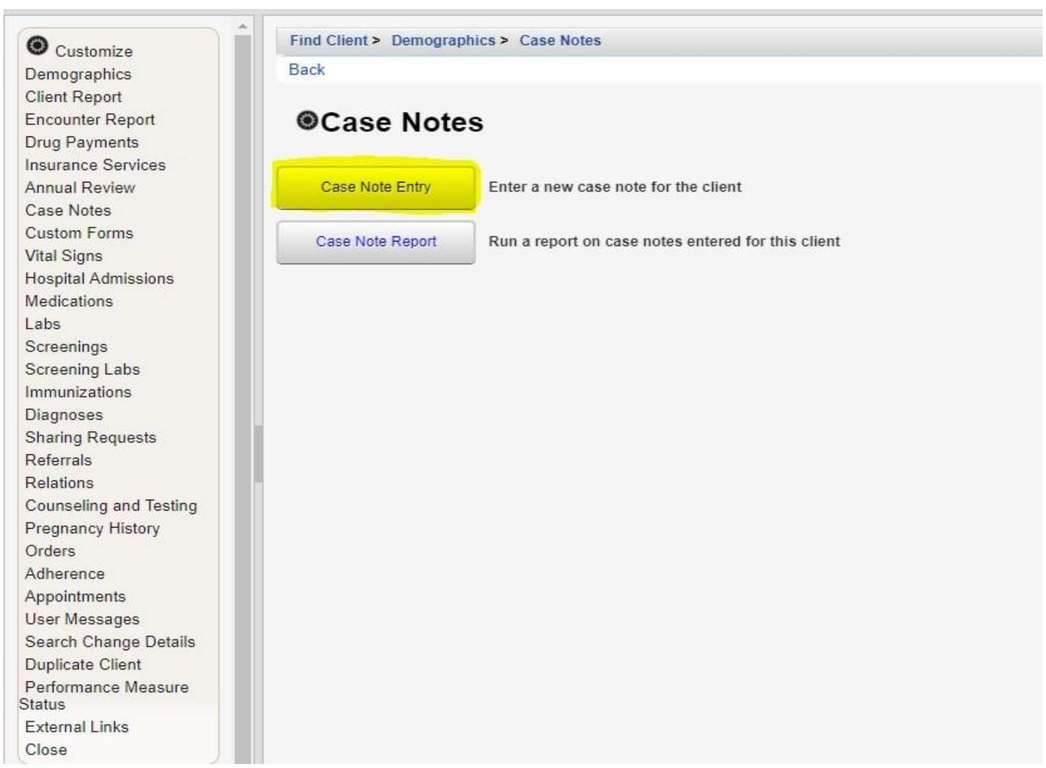
How To Add Case Notes

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.**



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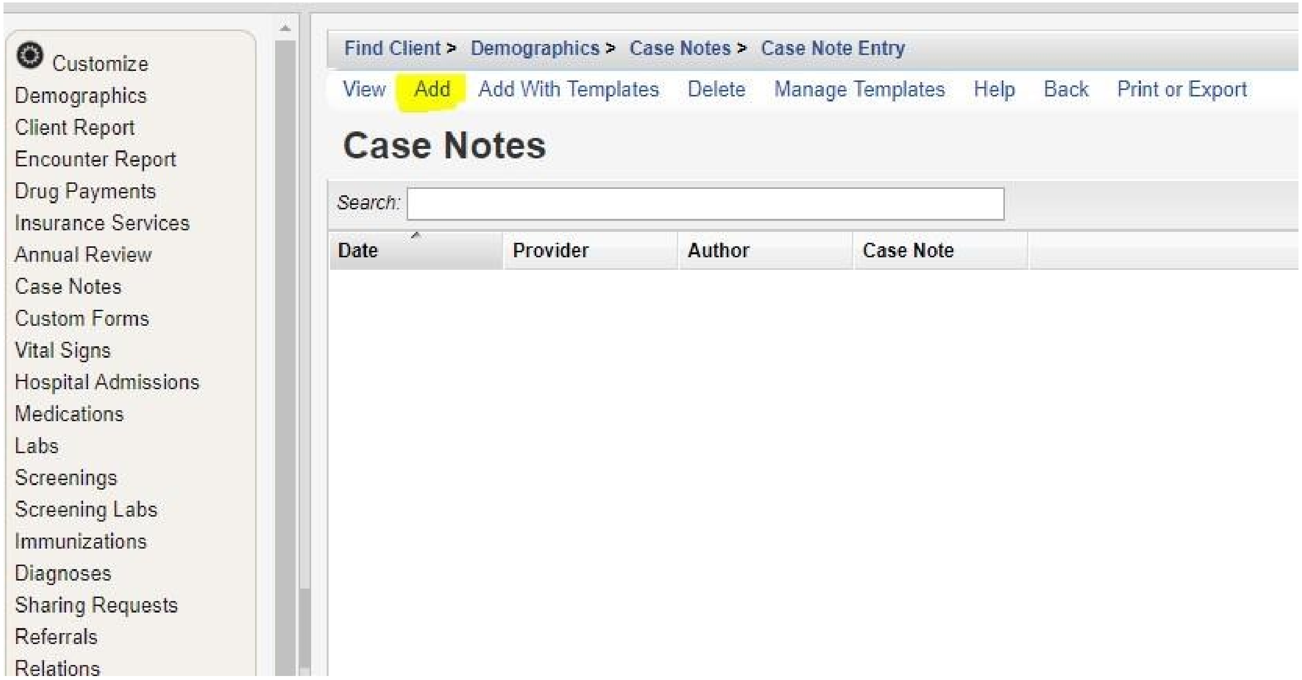
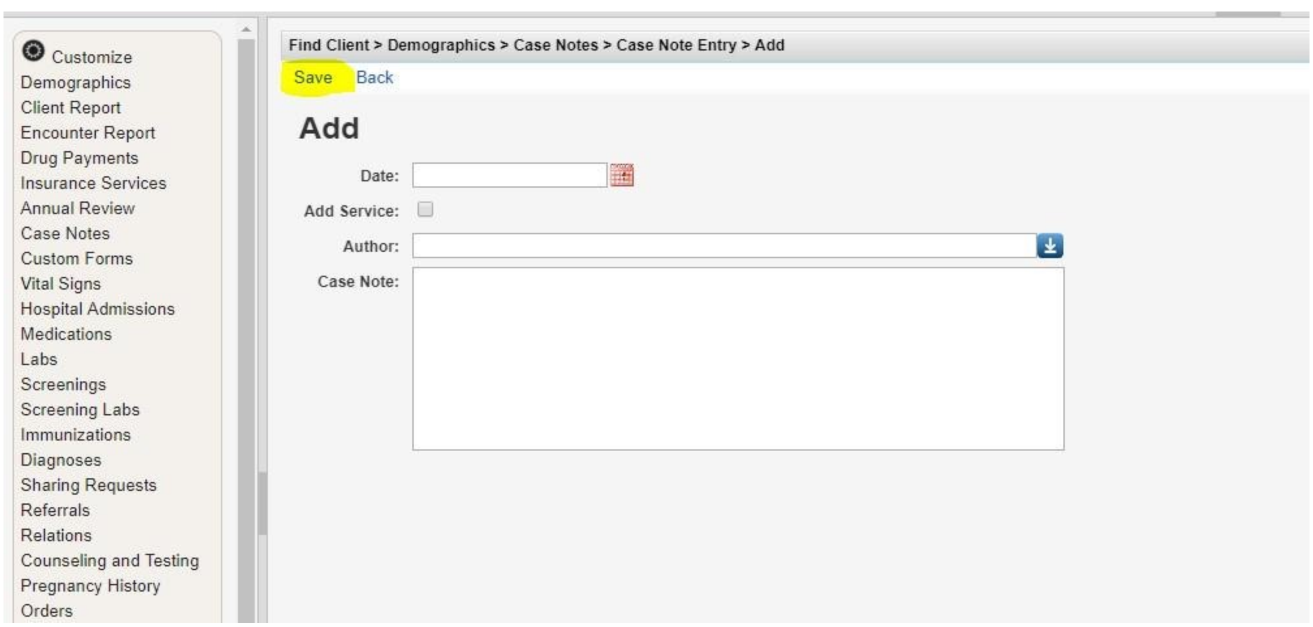
4. Select **Add.**



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.

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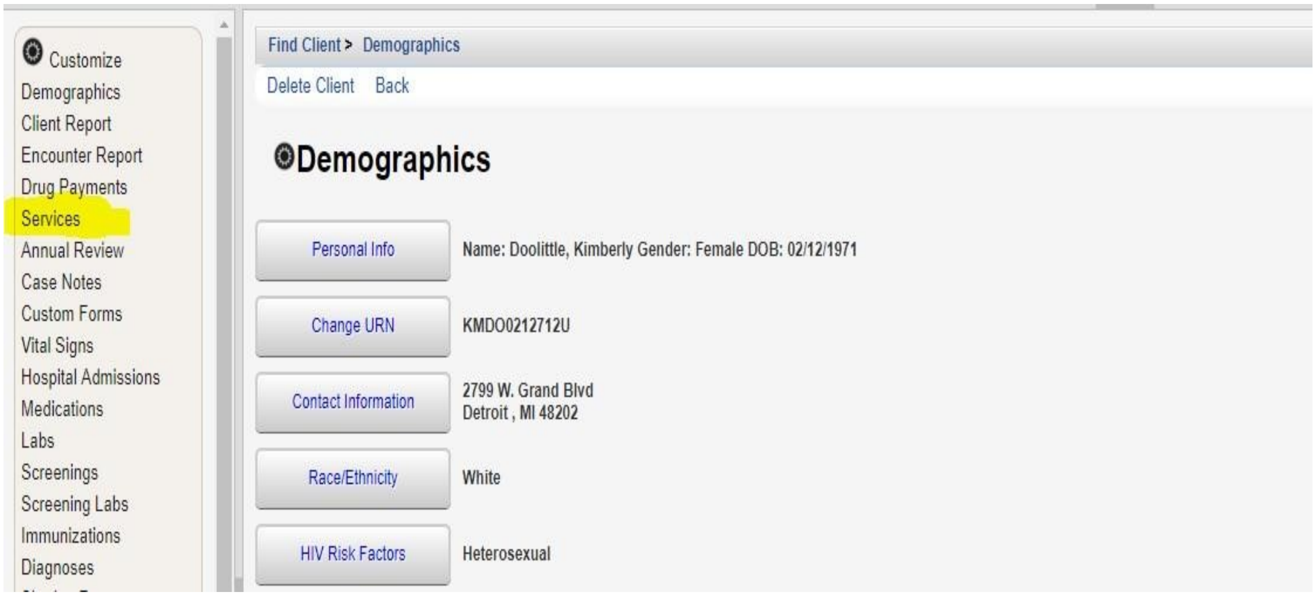
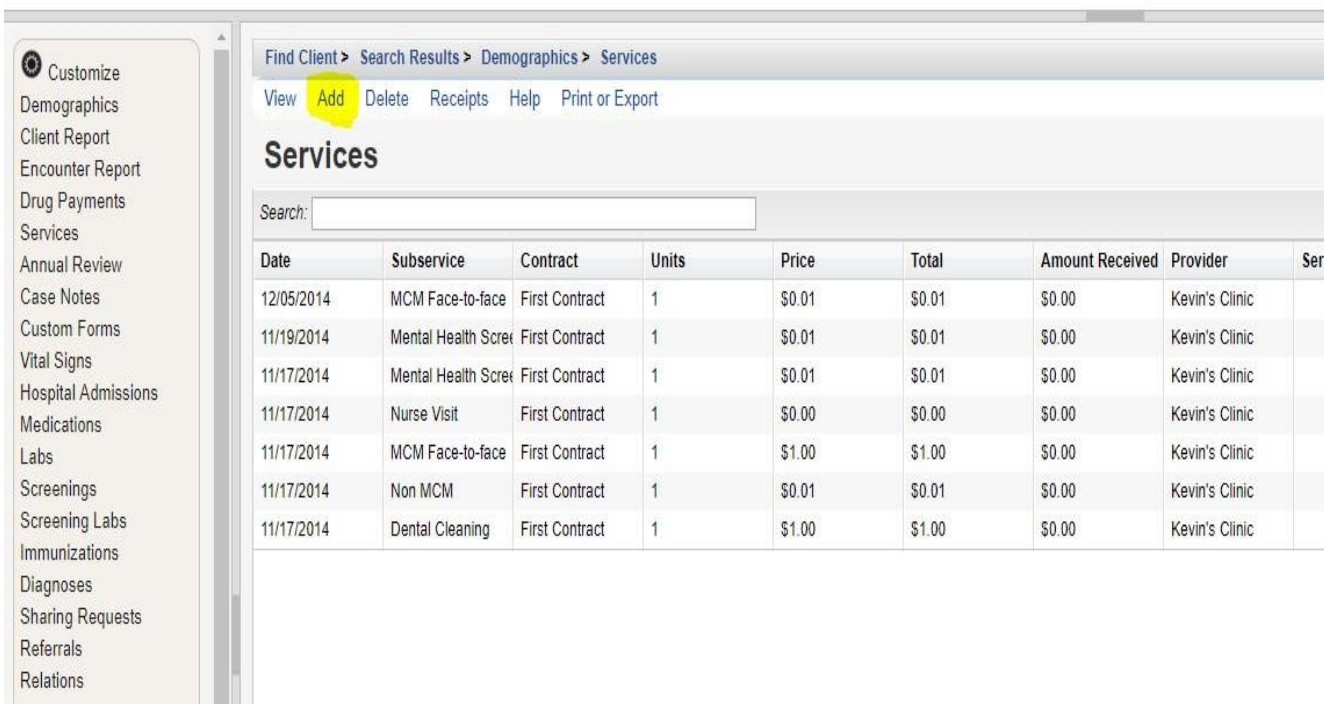
How To Add a Service

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.**



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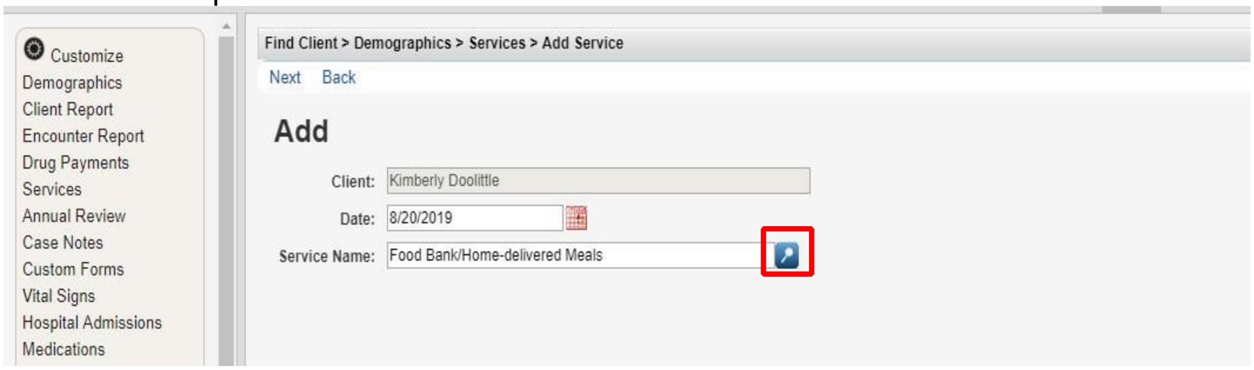
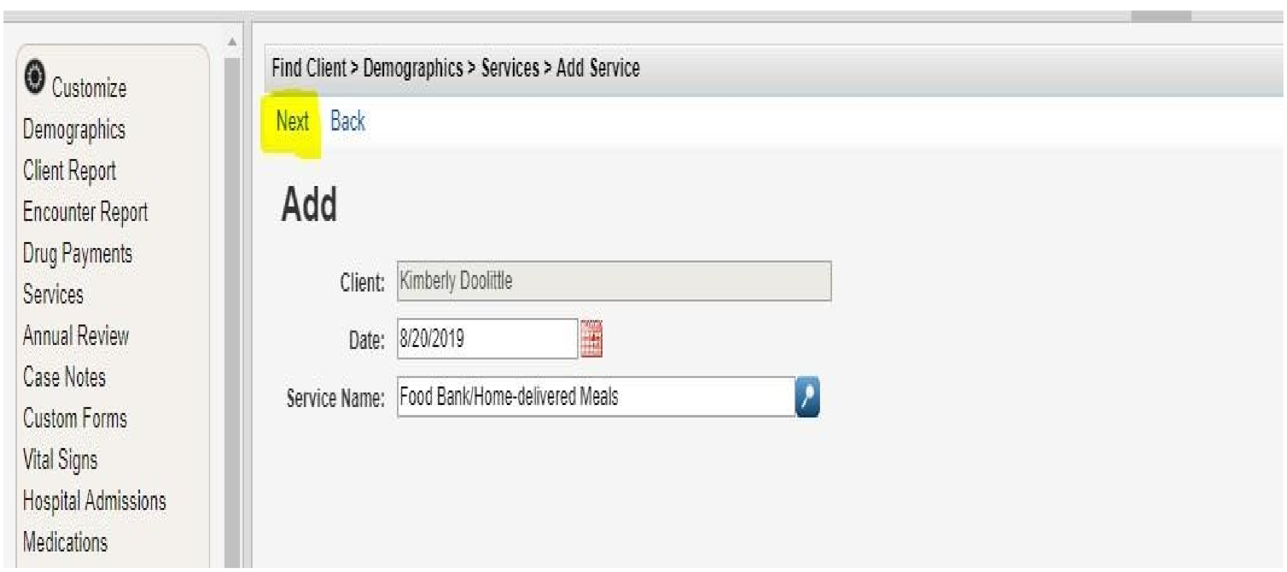
3. Enter the **Date** the service was provided and select the **Service Name** from the subservice drop-down list.



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.



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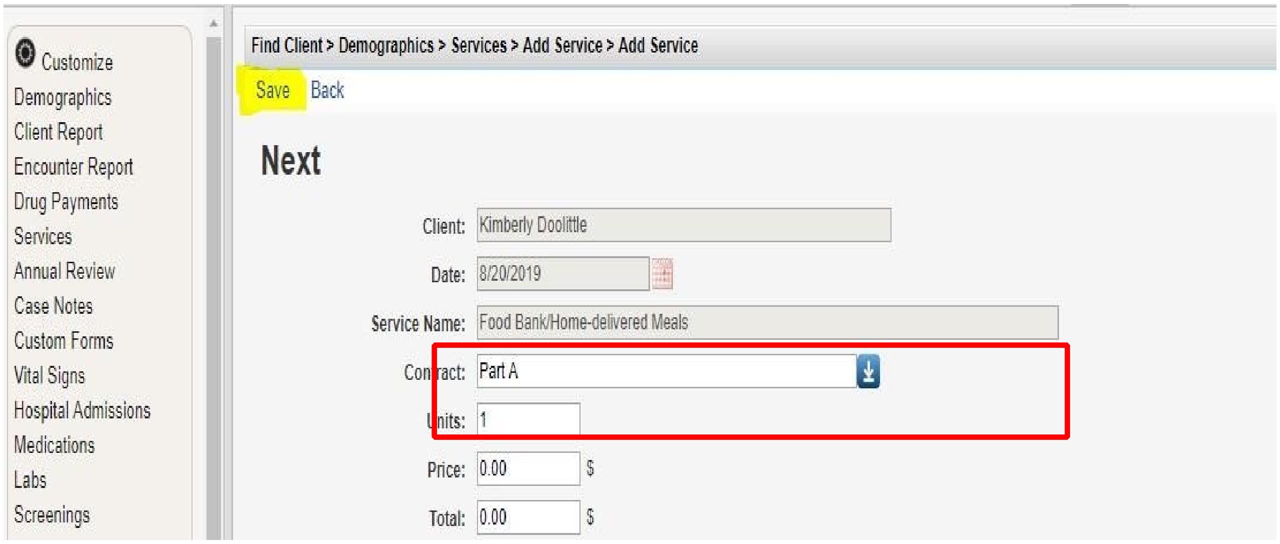
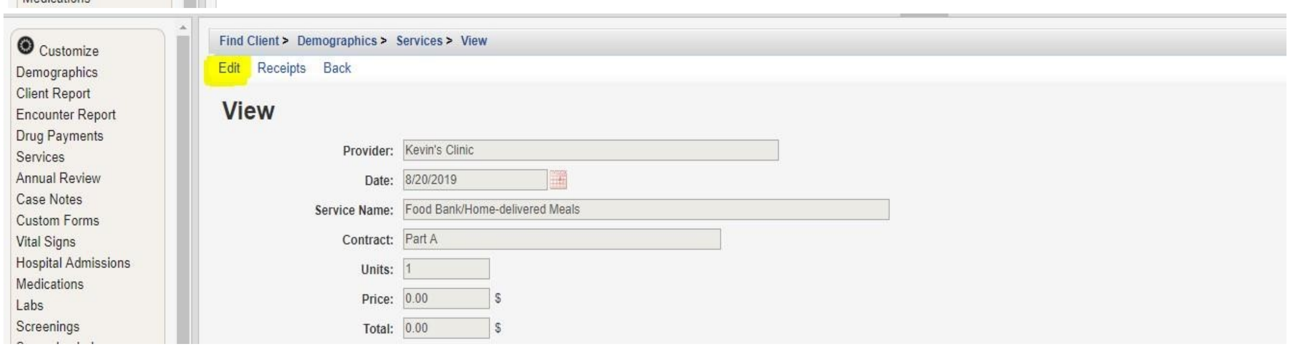
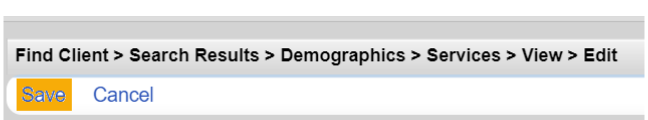
5. Enter the correct **Contract** and **Units.**
6. **Save**



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. After you have completed your edits, click **Save.**



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How to Navigate the Annual Review Tab

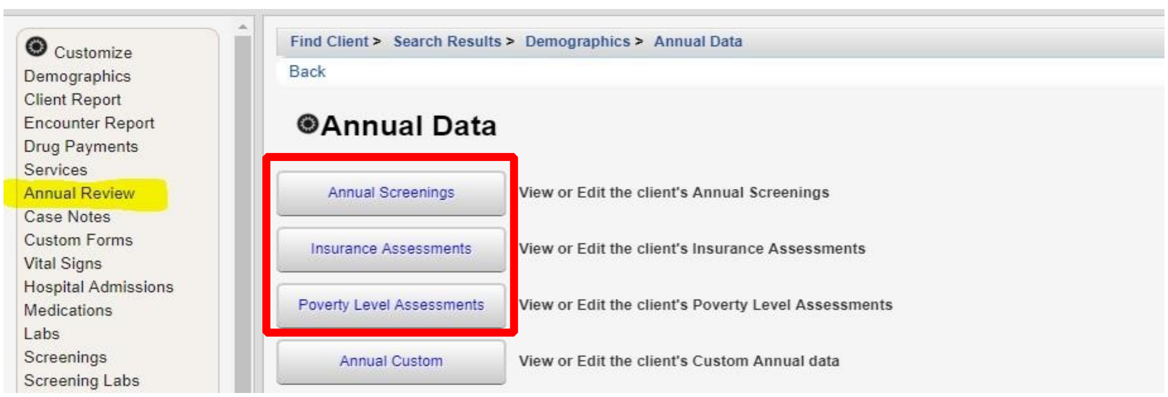
Annually, CAREWare users are required to review and update a series of fields. These include the following:

- **Insurance**
- **Federal Poverty Level**
- **Housing Arrangement**
- HIV Risk Reduction Counseling
- Mental Health and Substance Abuse Screenings
- HIV Primary Care Visits

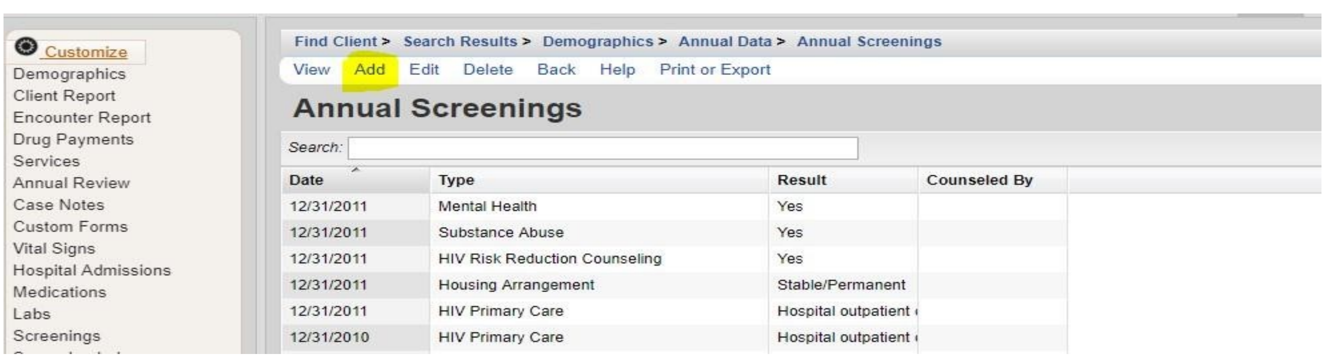
The three bolded fields are RSR-required and must be completed for any client who received a Ryan White funded service during the reporting year.

Entering Annual Review Data

1. Open a client record. Select the **Annual Review** tab from the menu of links on the left-hand side of the client record.
2. Select the field in which you would like to add a record.



3. Select **Add**



4. Enter the **Date**, and select **Type**, **Result**, and **Counseled By** (if applicable).

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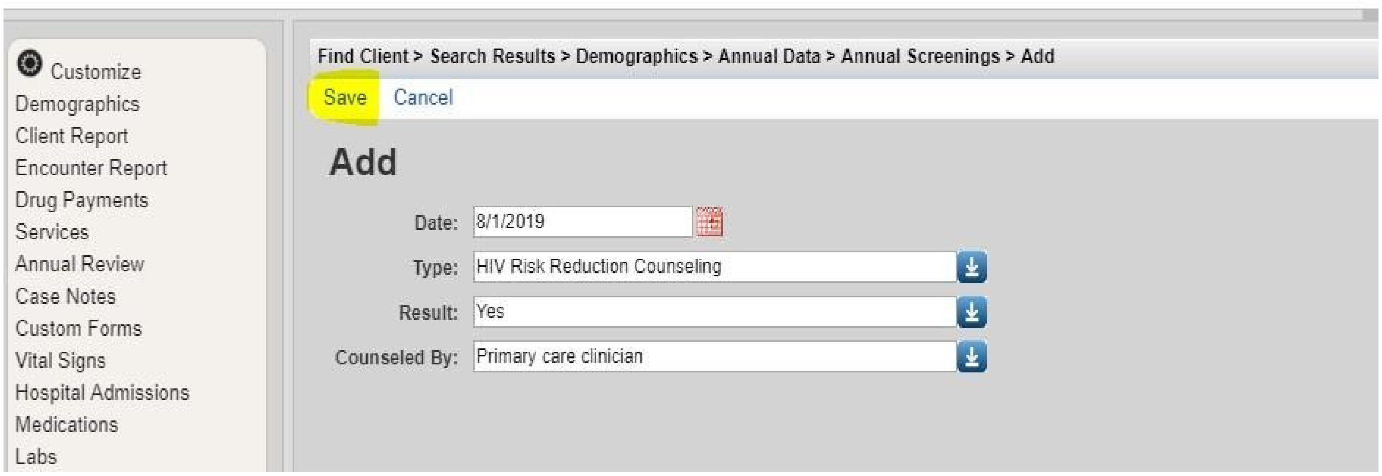
5. **Save.**



6. If you need to edit an annual review record, select the record in which you would like to edit and then select **Edit.**

That will take you back to the field and will allow you to make all the necessary changes. After making the changes, select **Save.**

Note: CAREWare 6 works by navigating tabs, and there are tabs within tabs. If you need to navigate while in a tab, you will need to use the subtabs. Below is what a subtab looks like. Click the back or next button in order to move through the different phases.

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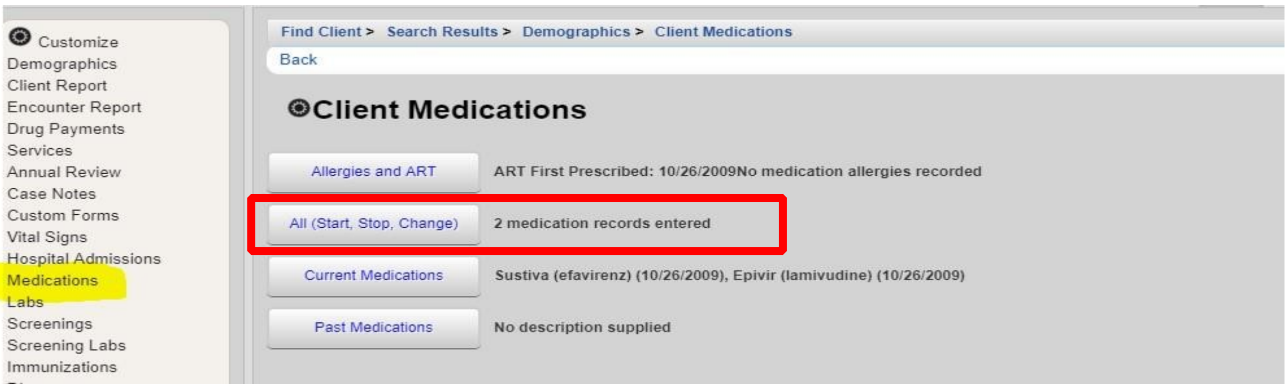
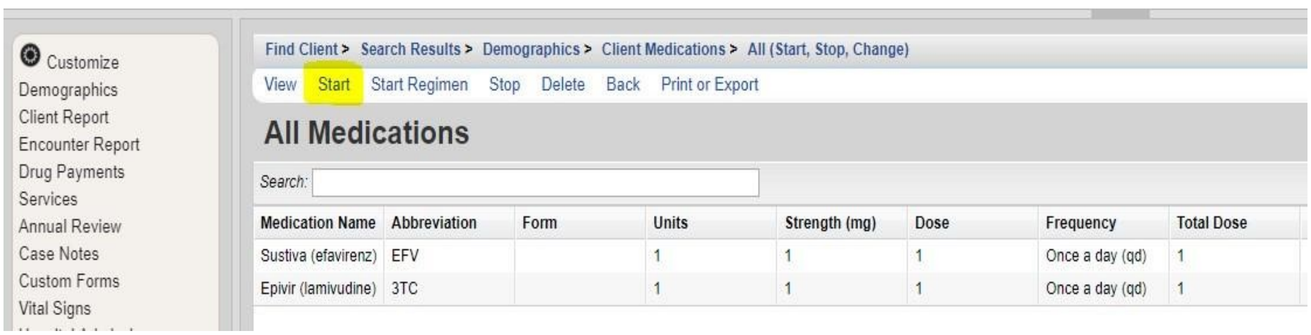
How To Add a Medication

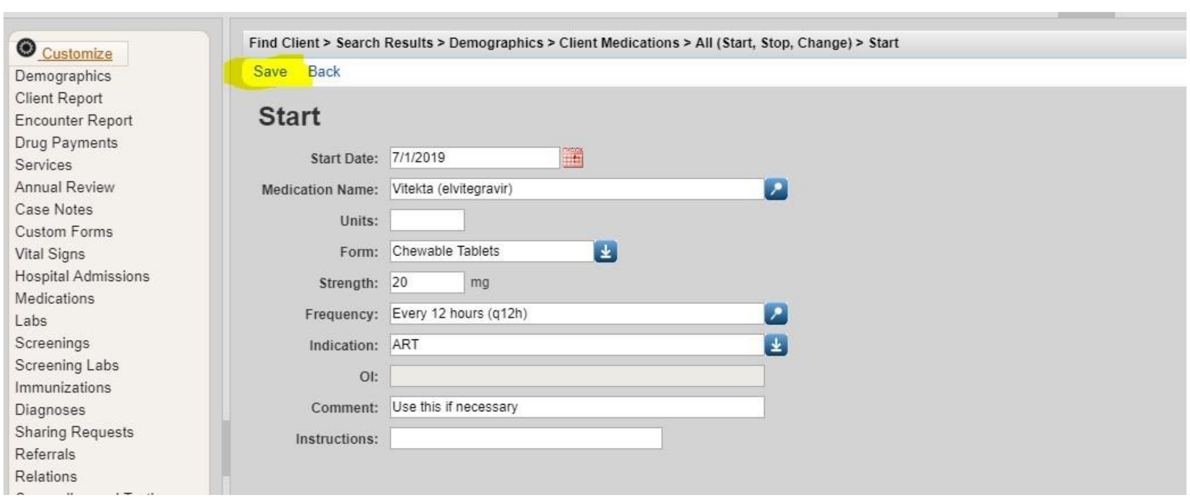
1. Open a client record. Select the **Medications** from the menu of links on the left-hand side of the client record.
2. You can view the client's current medications, past medications, allergies, and add new medications. To add or edit a medication, select **All (Start, Stop, Change).**



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.**



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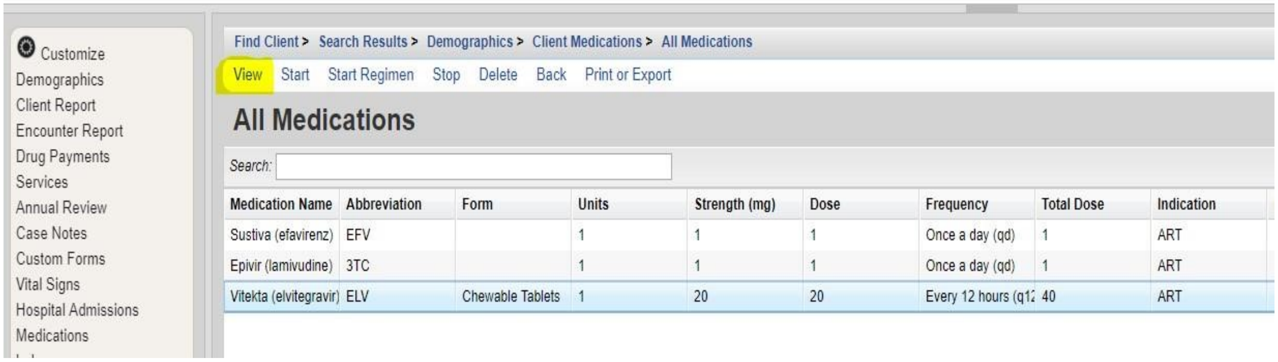
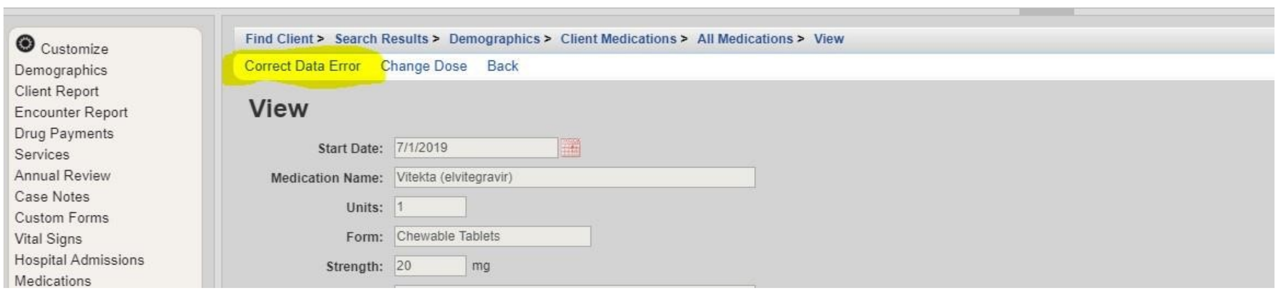
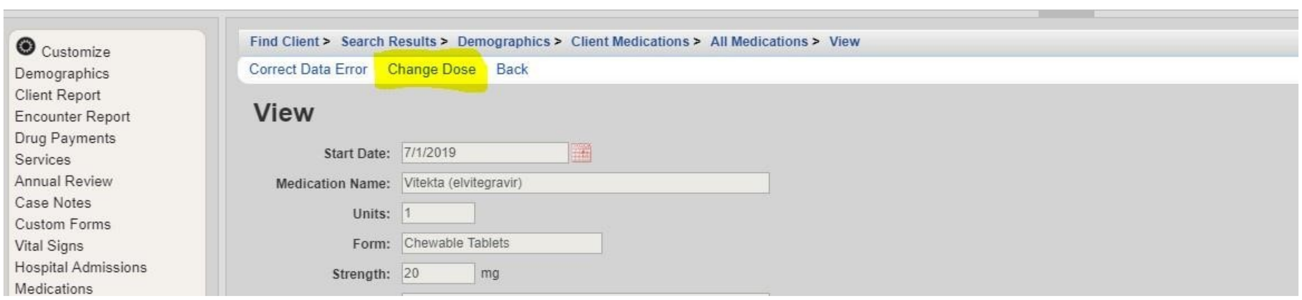
How To Edit a Medication

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

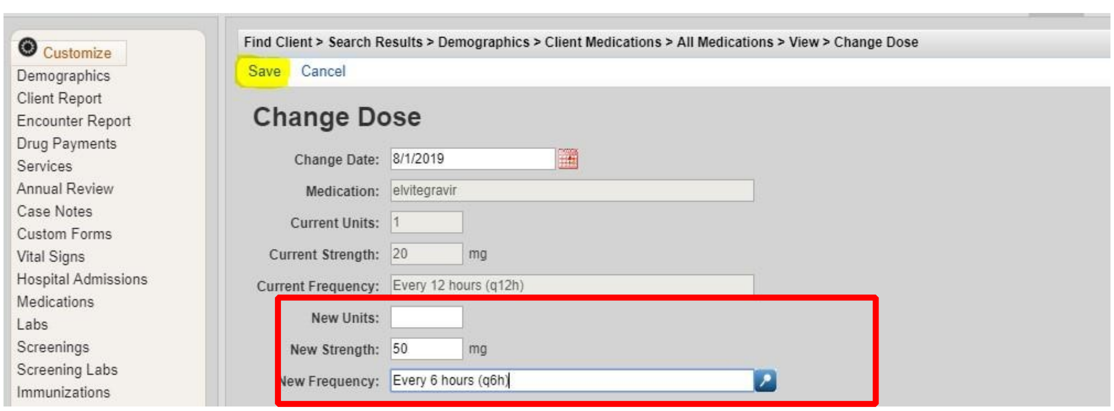


2. From there, you can either correct a data error or change the dose.
3. Either select **Correct Data Error** or **Change Dose.**





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



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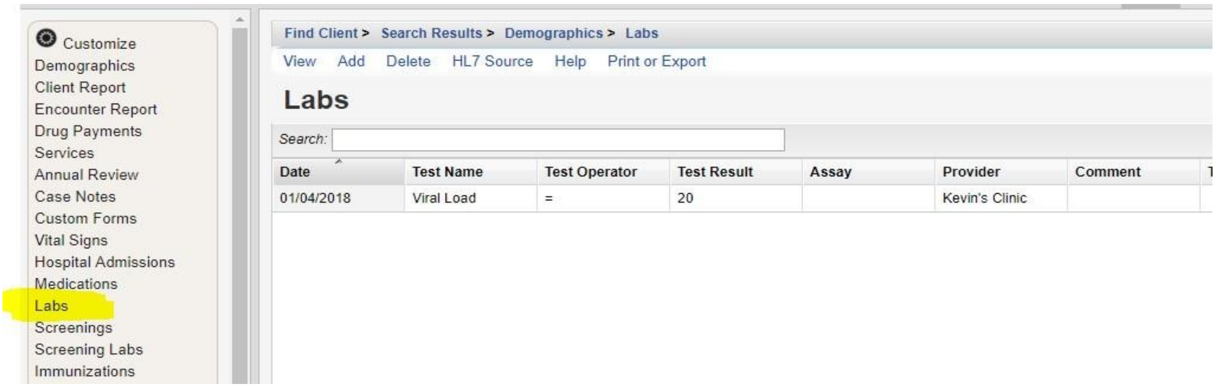
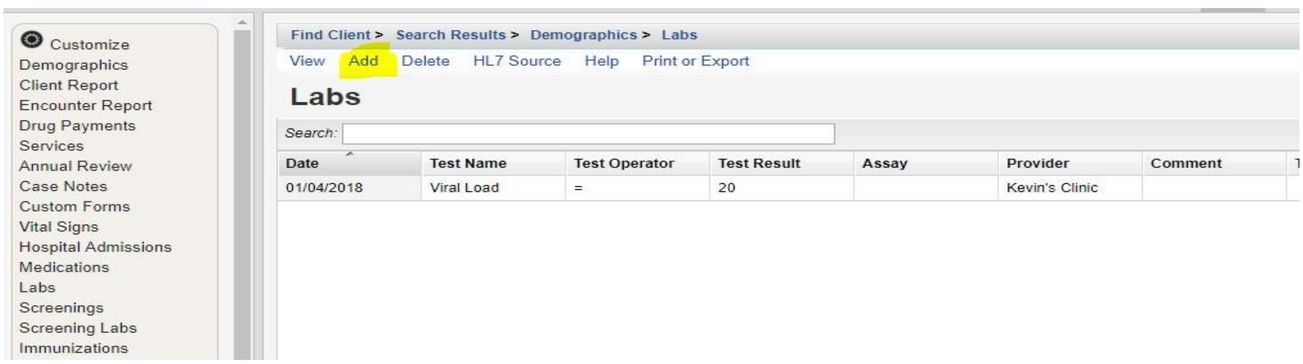
How To Add a Lab/Screening Lab/Screening

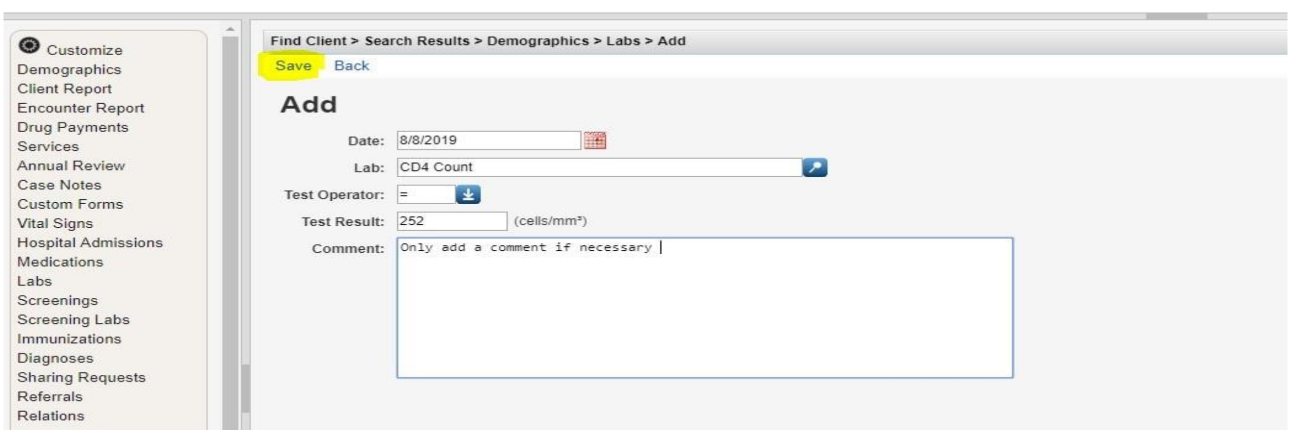
1. Open a client record. Select **Labs** or **Screening Labs** or **Screenings** from the menu of links on the left-hand side of the client record. Each is a different tab, but the information is entered the same way.



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.

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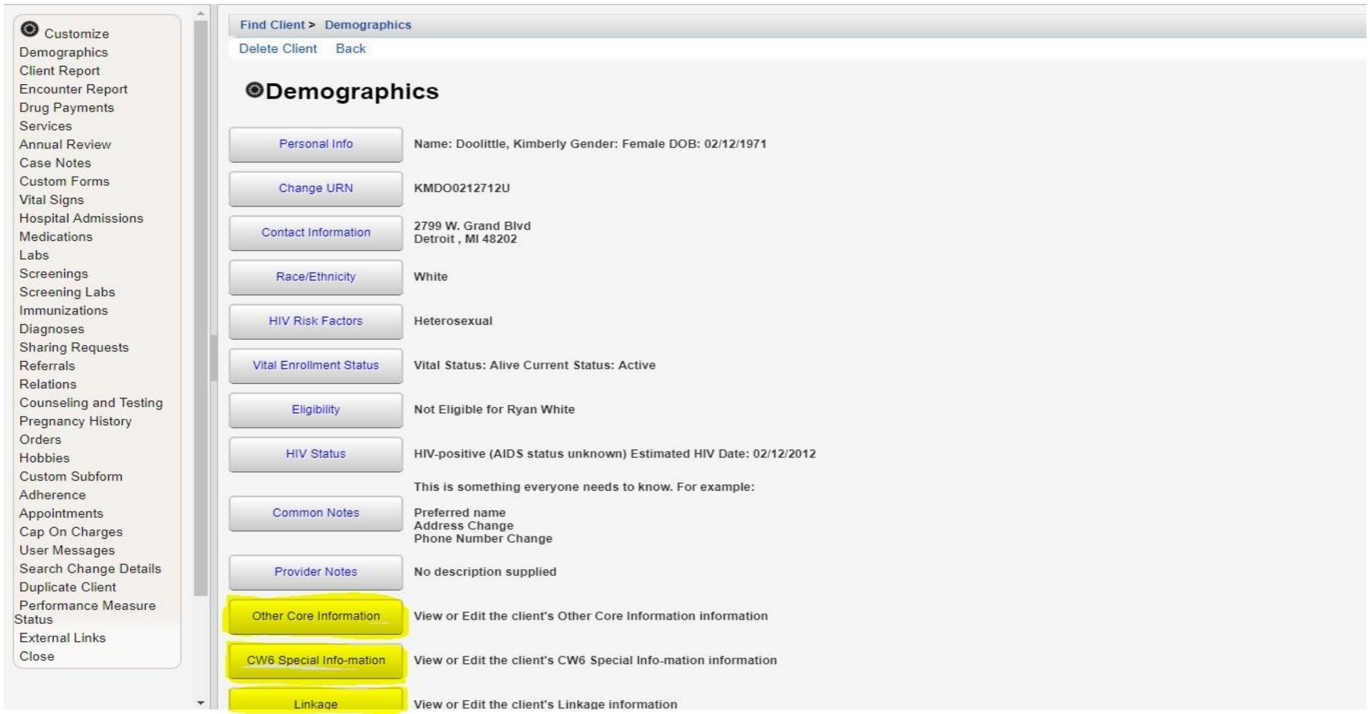
How To Navigate a Custom Tab/Field

Some agencies utilize custom tabs. In CAREWare 6, custom tabs are the last three links at the bottom of the demographics page. However, the names of the tabs have not changed. Therefore, the name in CAREWare 6 will be the same name that was in CAREWare 5.

If your tab was never given a name, then the default name will be Custom Tab 1, Custom Tab 2, or Custom Tab 3.



Every custom tab will look different, but the way you enter a record will be the same. Just remember the following:

1. If a custom tab has a drop-down menu, you must select a field from that menu.
2. You cannot scroll through the drop-down list. Therefore, type in the first couple of letters of the field name and it will appear.
3. If a custom tab requires a check mark, all you have to do is check the appropriate box.
4. If you want to close out of a custom tab before completion, simply click **Cancel.** That will take you back to the demographics page of that client's record.

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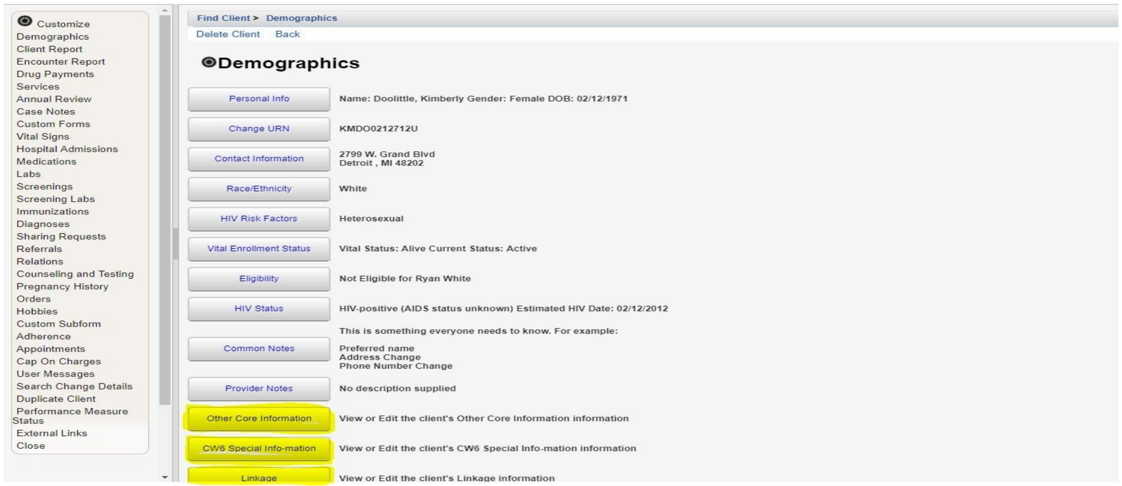
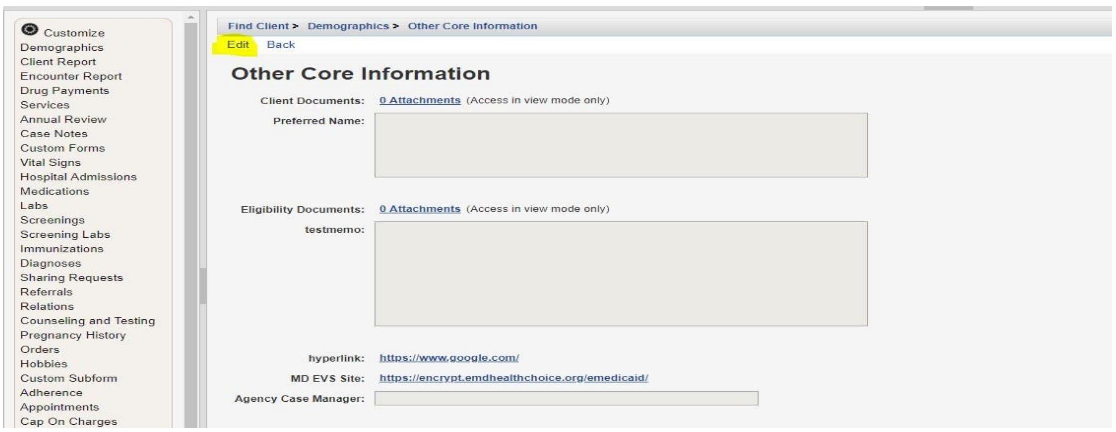
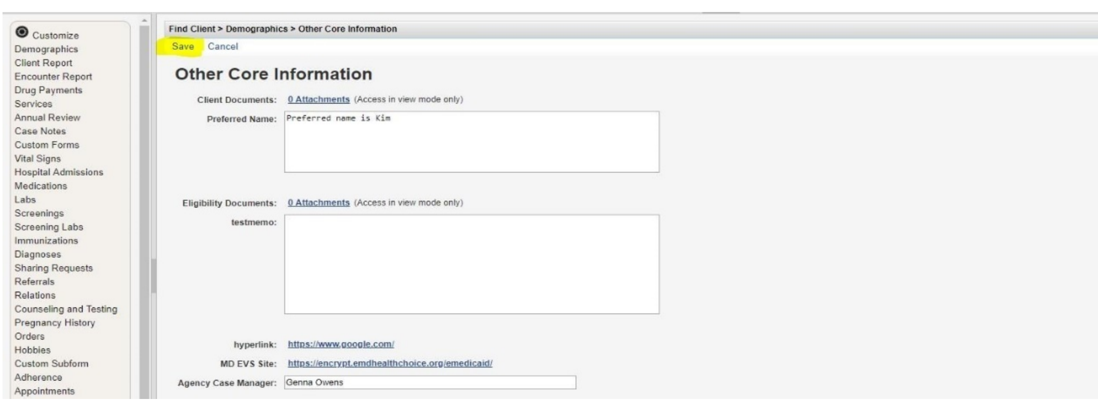
How To Enter a Custom Tab/Field Record

1. Click the custom tab that you need to access.
2. Click **Edit.**





3. Add all of the necessary information.
4. **Save.**



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Adding Attachments

Space has been created in CAREWare within the Annual Review tab to store PDF attachments with the primary purpose of reducing the burden of documenting Ryan White eligibility. There are five categories/folders:

Income Documentation

Insurance Documentation

Residency Documentation

Status Documentation

Miscellaneous Documentation (ex. License, lab report, etc.)

Think of attachments like any other information in the annual review tab. Other providers that serve the same client will have access to this information. Additionally, anyone serving that client can delete the attachments regardless of who added them into CAREWare. Therefore, please do not delete any attachments that are not your own.

Attachments Parameters

File Type: PDF files are the only file type supported in these folders.

Number of Attachments: Each Provider may upload two attachments per category for each year. This means that you may upload two income documentation attachments and two insurance documentation attachments every year; however, if you want to upload a third in any category, then you must delete one of your previous two. Keep in mind that some clients are served by multiple providers, so there may be more than two in each category as each provider may upload two.

Page Limit for Attachments: Each PDF should be no more than three pages.

File Naming: In order to keep things consistent across providers, include your agency name and the document name in your title. The date of the upload is automatically provided in the description, so it isn't necessary in the file name. Here are a few examples:

Income WSU Adult

March 2019 Income WSU Adult

HIV Status Matrix

Using Attachments for Eligibility: Providers may use documentation from other providers to prove eligibility. However, an attachment could accidentally be deleted, so we strongly recommend that you save a copy elsewhere. For example, let's say WSU Adult is serving a client and is getting ready for reassessment. They can see that HELP has already assessed and uploaded proof of residency and income. Because an updated income document has already been uploaded, WSU can utilize that information for their reassessment as well. We would advise that WSU Adult download those documents and save in their client record.

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Deleting Attachments: Only delete attachments that were uploaded by your agency. If you have a question about one of the attachments, contact MDHHS – Bureau of HIV/STD Programs (MDHHS-SHOARS-SUPPORT@michigan.gov), or the provider that uploaded the attachment. Once a document is deleted, it cannot be recovered.

Uploading Attachments (Basic Overview)

1. Login to CAREWare.
2. Select Find Client and search for the correct one.
3. Once the client file is open, select Annual Review from the menu of links on the left-hand side.
4. Select Annual Custom.
5. From there, you have a few options. More than likely, the page will be blank, which means you will need to add the year in order to add an attachment. If the year is already there, then you can select View. However, if there is no year, select Add.
6. Select the current year. Then select Save.
7. Double-click the year again. Everything will be grayed out. (It is supposed to look like that, so don't be alarmed). Do not select edit. Instead, select the category that you want to add an attachment (ex. HIV Status Documentation).
8. Select Add.
9. Select Choose Files and choose the correct file. Again, make sure it is a PDF.
10. After selecting the file, make sure it says Upload Completed Successfully. Then select Next.
11. Under content type, select PDF from the drop-down menu. You can also add a comment.
12. Select Save.
13. You will be taken back to the main page of that attachment category. You can add another document under that category if needed. If you don't need to add any additional documents, then select Back.
14. Follow steps 7-13 to add a document under other categories.

Note: If you need to delete an attachment, click the attachment (one time) and select **Delete** at the top of the page. It will ask you to confirm. Select **Confirm.** Once you do that, the attachment will be deleted.

GoTo Top of the Document

Viewing Other Agency Attachments (Basic Overview)

1. Login to CAREWare.
2. Select Find Client and search for the correct one.
3. Once the client file is open, select Annual Review from the menu of links on the left-hand side.
4. Select Annual Custom.
5. From there, you have a few options. More than likely, the page will be blank, which means you will need to add the year in order to add or view any attachments. If the year is already there, then you can select View. However, if there is no year, select Add.
6. Select the current year. Then select Save.
7. Notice that it still says zero attachments. In order to see if another agency has already added an attachment, either double-click the year or click once and select View.
8. If an attachment has been added, there will be a number next to the category. For example, if it says 1 Attachments next to income documentation, that means that one attachment has been uploaded.
9. To view the attachment in that category, click it. The attachment page will open and show all of the attachments under that category.
10. Double-click the attachment to view it in detail. Then click the name of the file. It will open in a separate tab.
11. Print or download the document for your records.
12. Exit the tab when you are done viewing the document. That will take you back to CAREWare.
13. Select Back to return to the main page.

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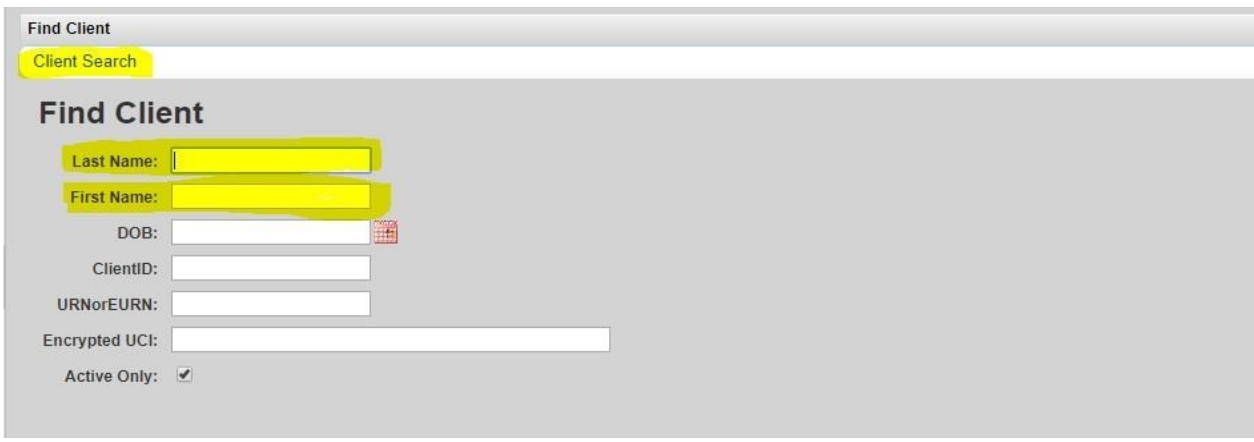
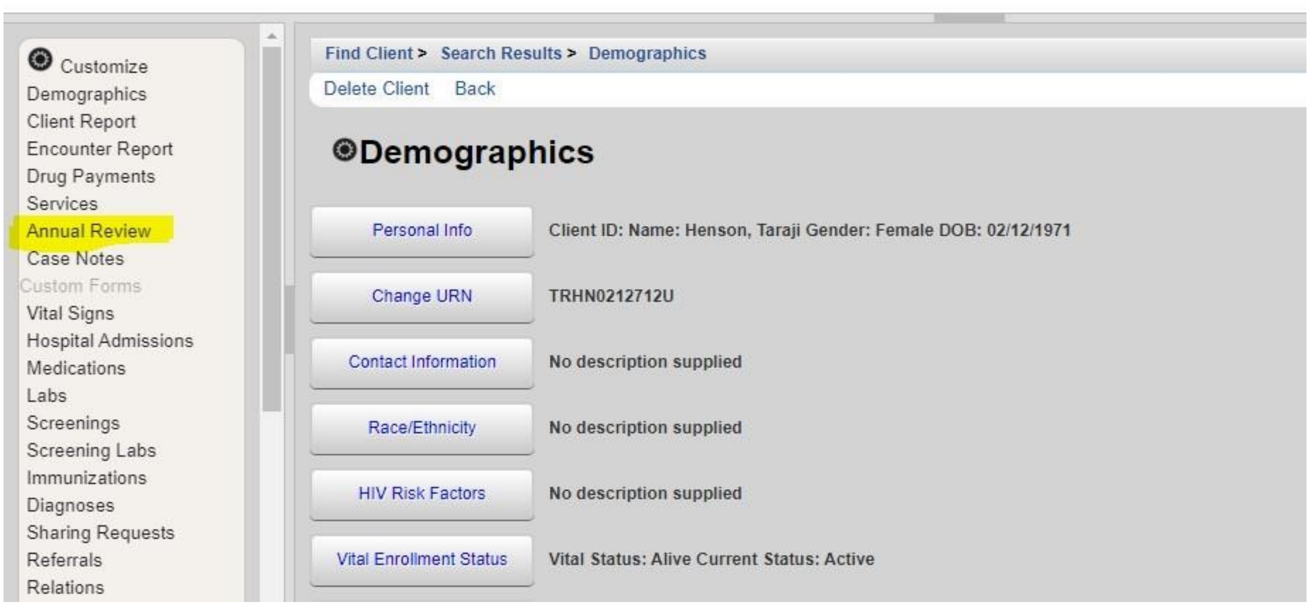
Uploading Attachments (Detailed Overview)

1. Select **Find Client.**



2. Once the client file is open, select **Annual Review** from the menu of links on the left-hand side.



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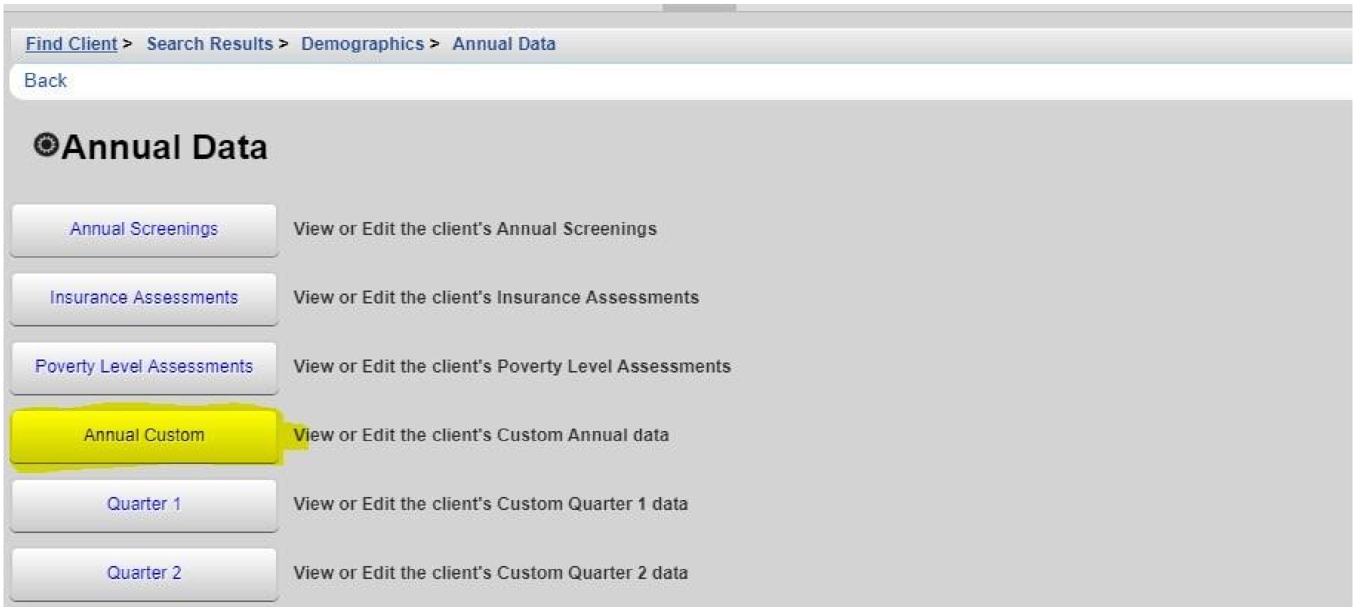
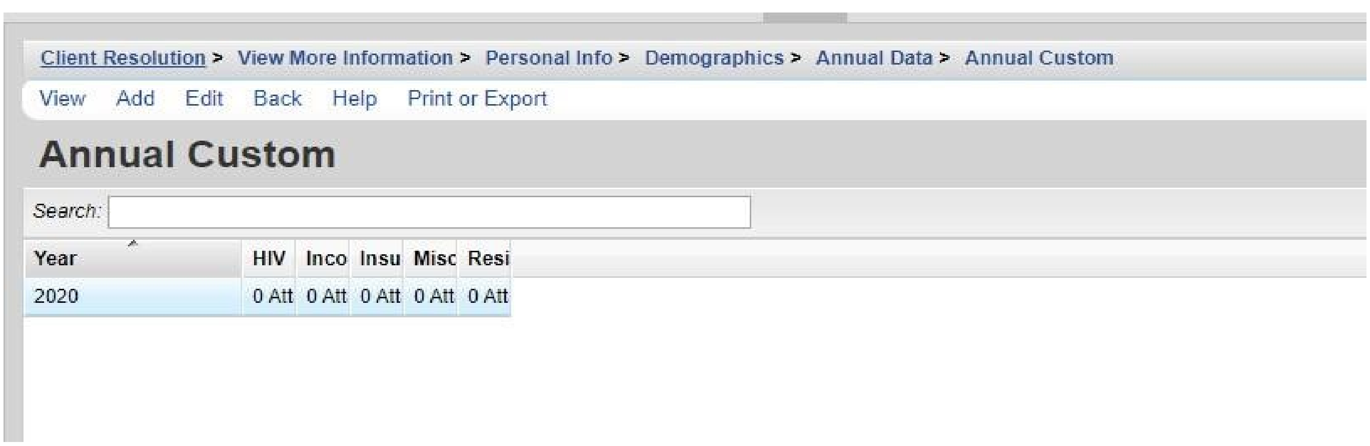
3. Select **Annual Custom.**



4. If the page is blank, select **Add.**

4A. If there is a year available, either double-click the year or click once and select **View.**



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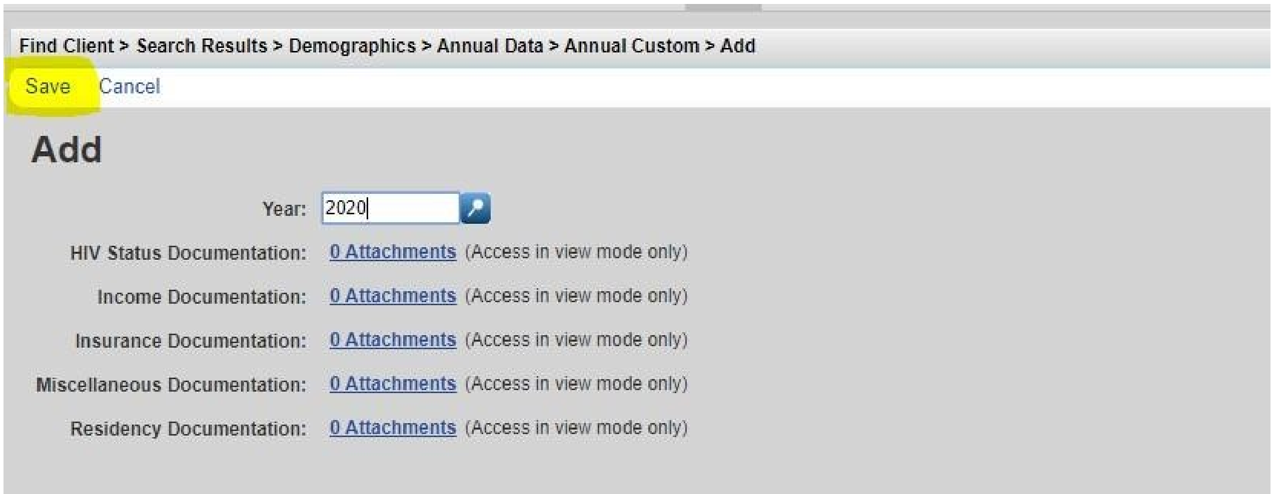
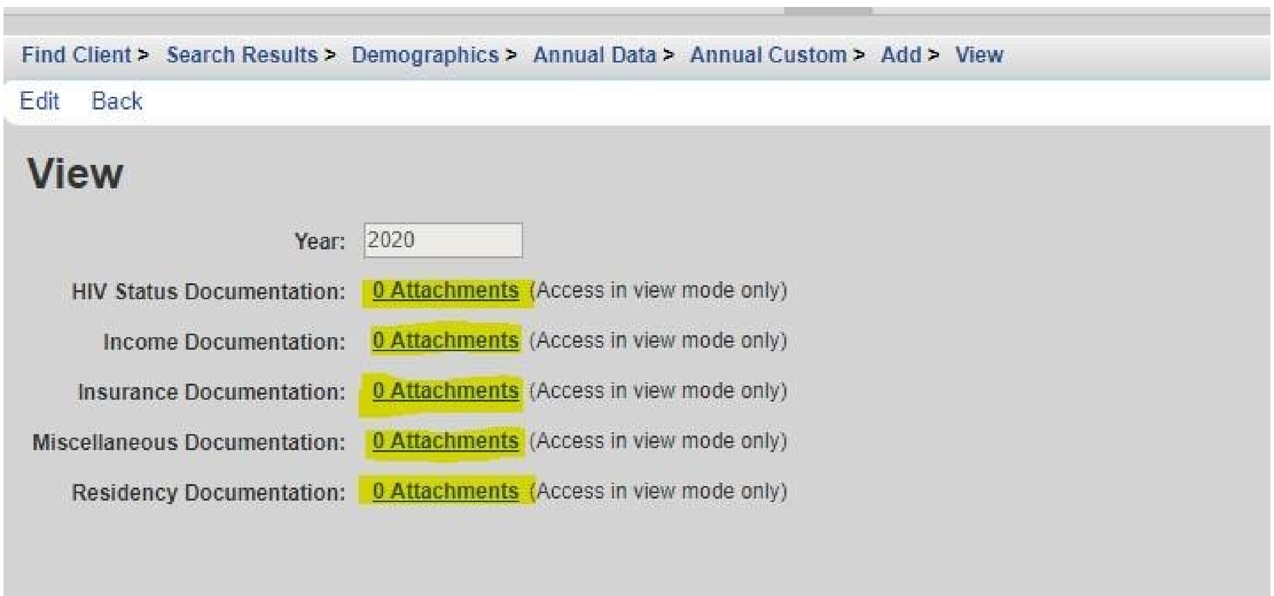
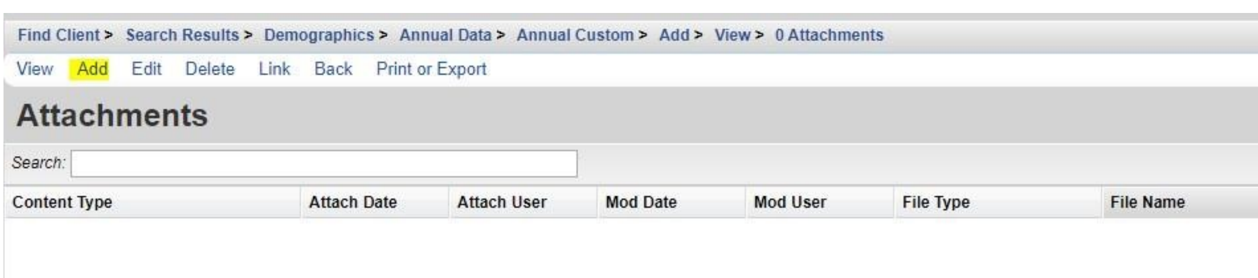
5. Select the **current** year. Then select **Save.**



6. Double-click the year again. Everything will be grayed out. (It is supposed to look like that, so don't worry.) **Do not** select edit. Instead, select the category that you want to add an attachment.



7. Select **Add.**



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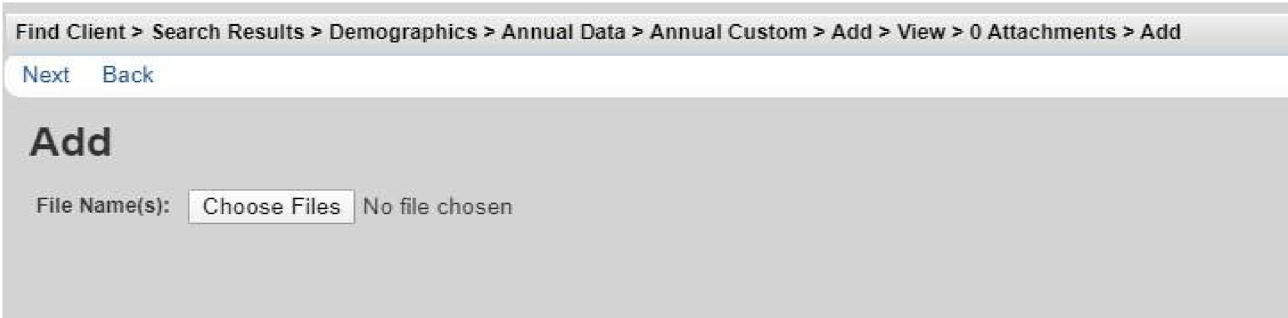
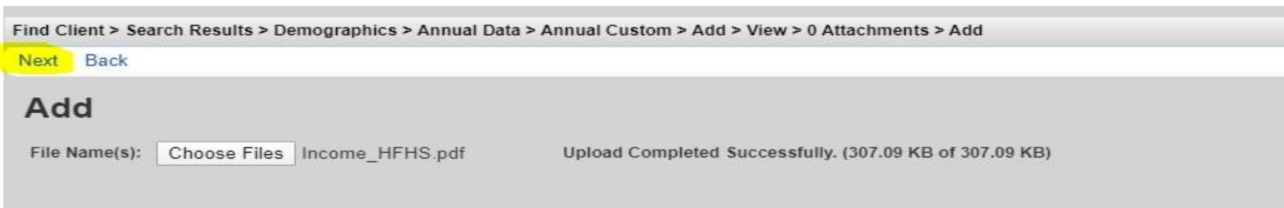
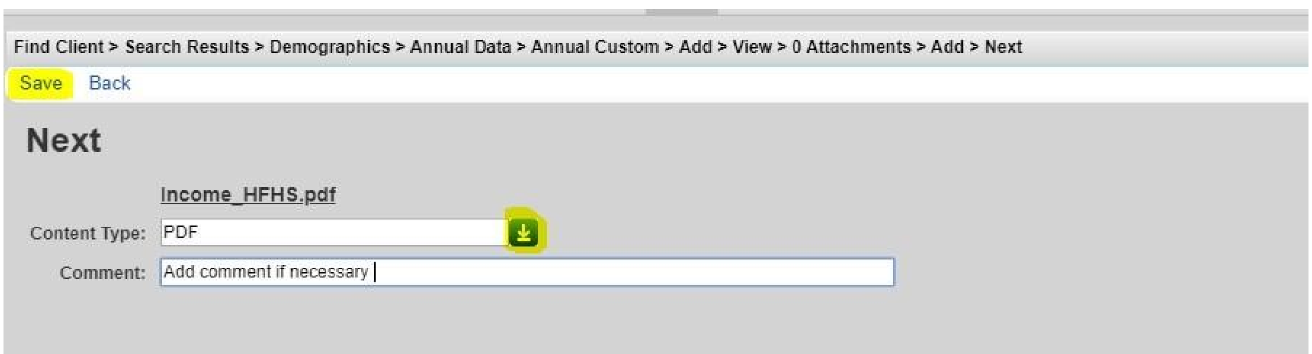
8. Select **Choose Files** and choose the correct file. Again, make sure it is a PDF.



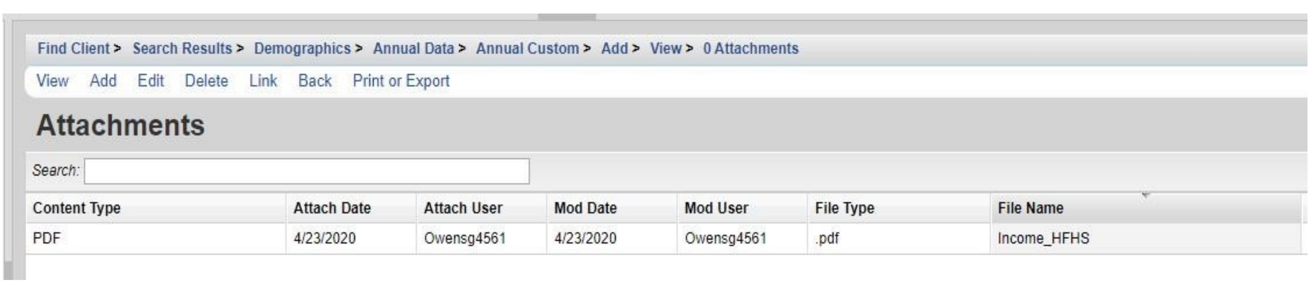
9. After selecting the file, make sure it says **Upload Completed Successfully.** Then select **Next.**



10. Under content type, select **PDF** from the drop-down menu. You can also add a comment. When complete, **Save.**



This is what a fully submitted attachment looks like. If you need to add another under the same category, follow steps 4 -10.



If you don't need to add any additional documents, then select **Back.**

GoTo Top of the Document

11. If you need to delete an attachment, click the attachment and then select **Delete.**

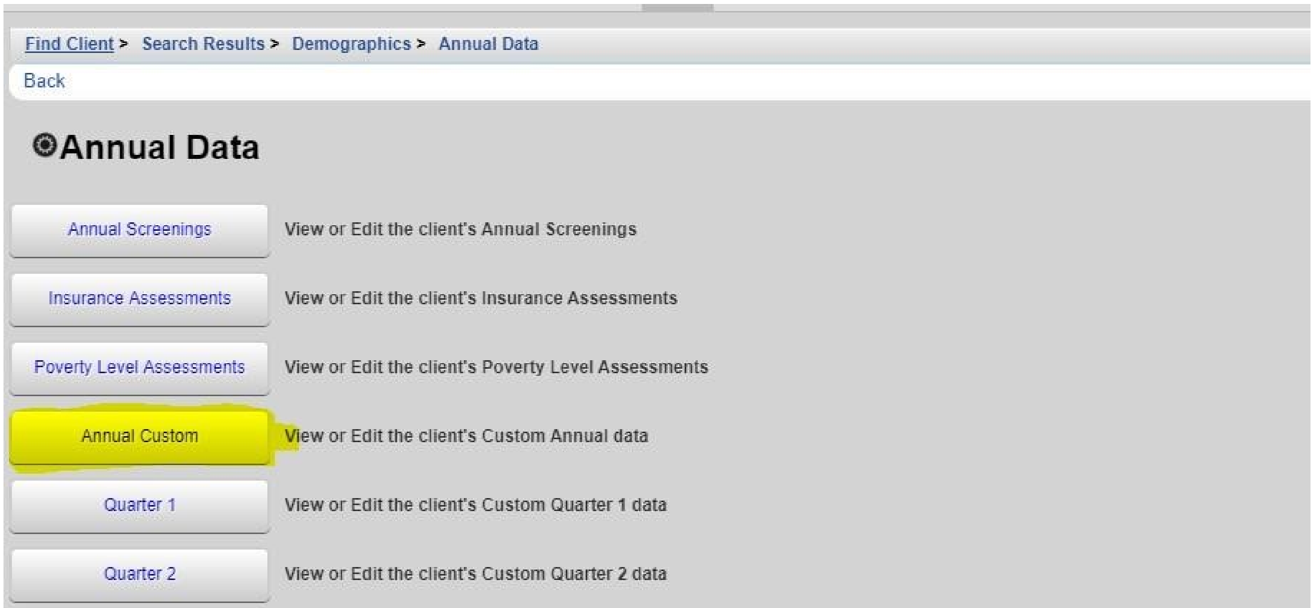
12. You will be asked to confirm. Select **Confirm.**

13. Once you confirm, the attachment will be deleted.

[GoTo Top of the Document]

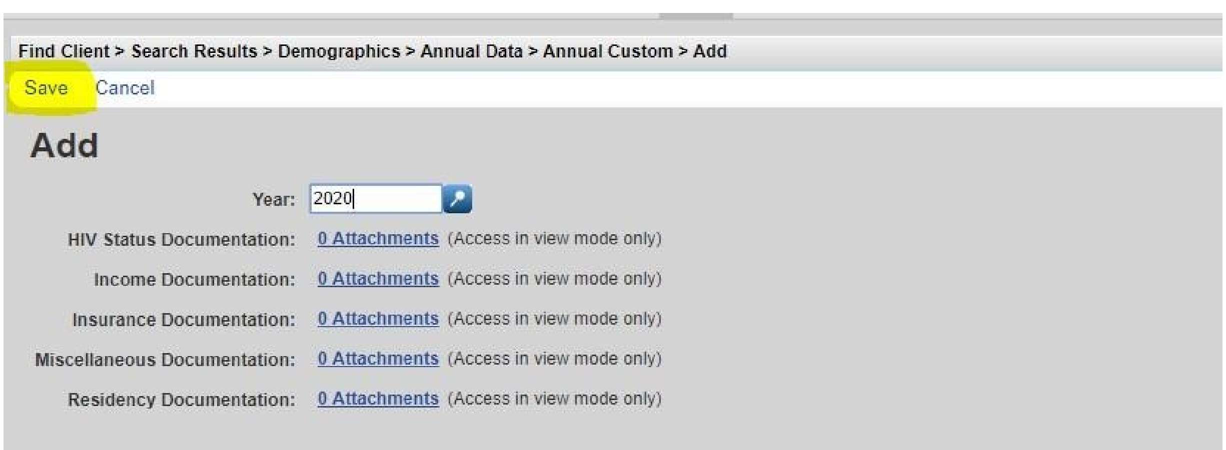
Viewing Other Agency Attachments (Detailed Overview)

1. Select **Annual Custom**.



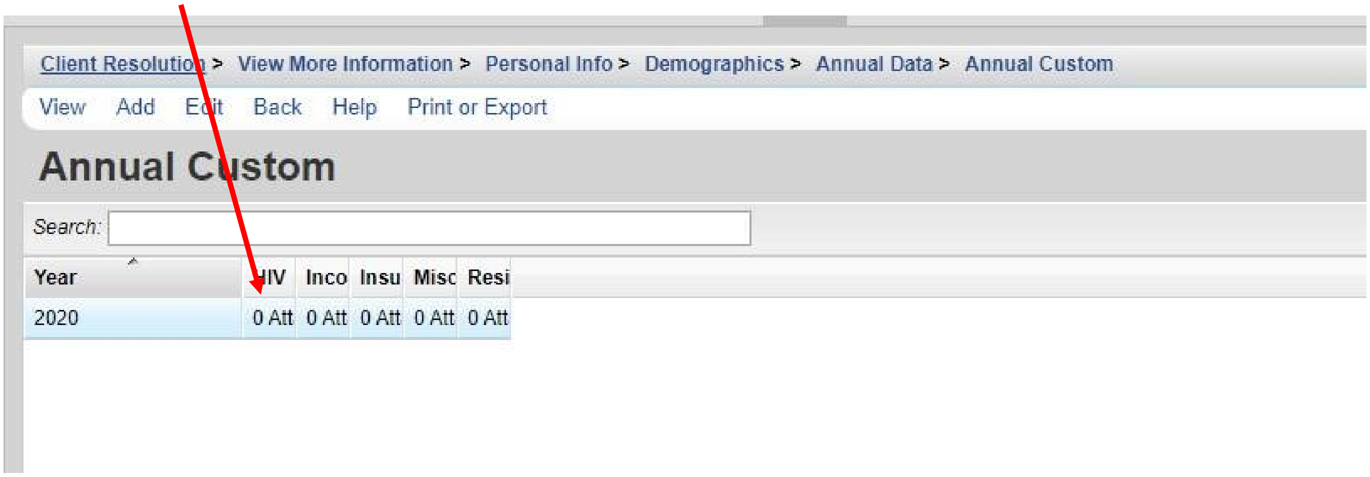
2. You will need to add the current year in order to see any attachments that have been uploaded. Select **Add.**

3. Select the current year. **Save**.

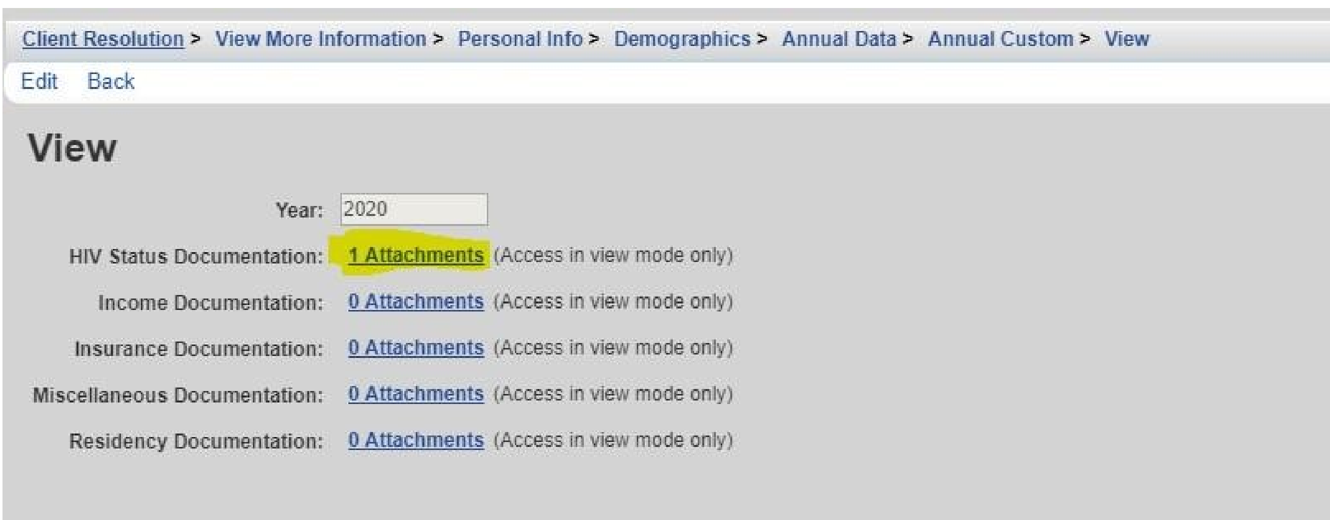


GoTo Top of the Document

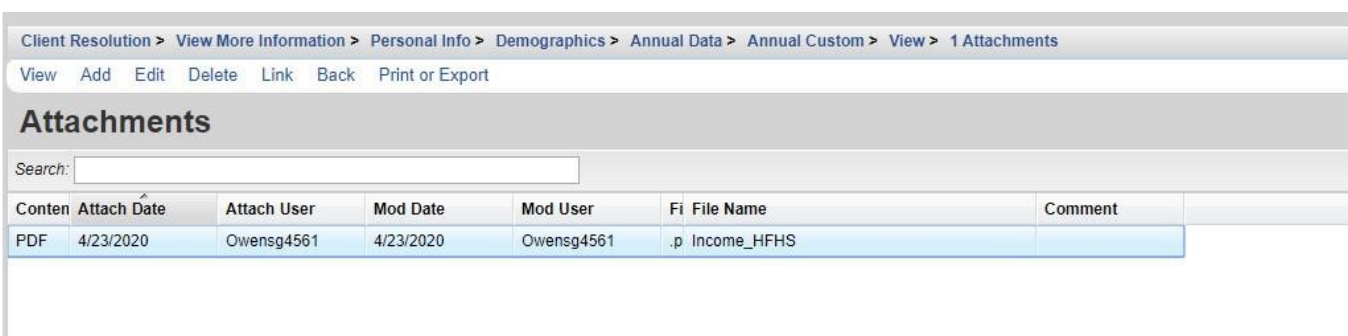
4. Notice that it still says zero attachments. In order to see if another agency has already added an attachment, either double-click the year or click once and select **View.**



5. Now, you will be able to see if an attachment has been added to any of the categories. Click the attachment.



6. To view the attachment, either double-click or click once and select **View**.



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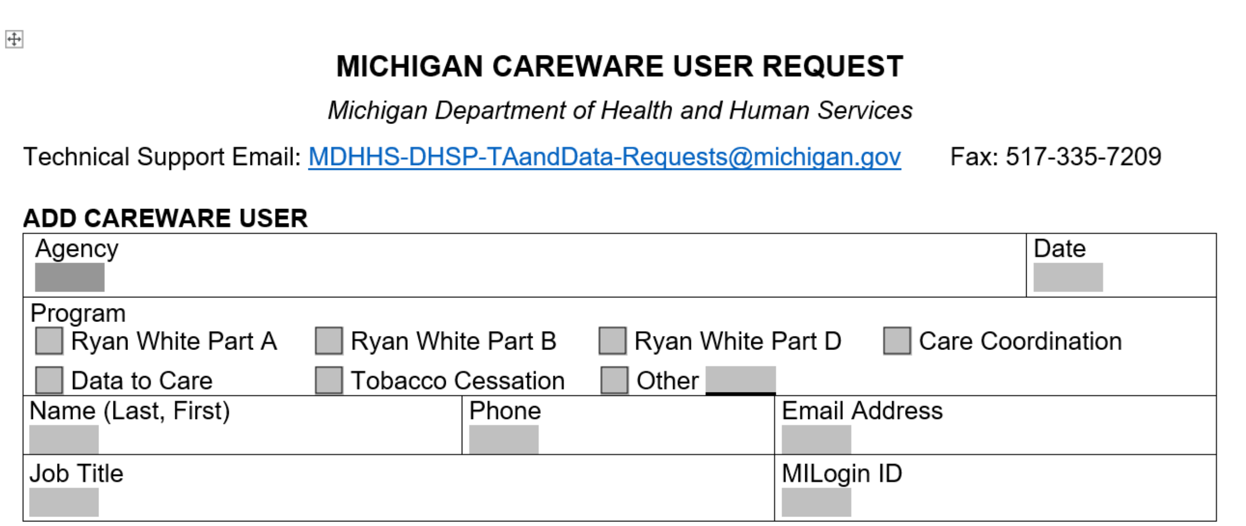
7. Click the name of the file.

8. The file will open in a separate tab. Print or download the document for your records.



MICHIGAN CAREWARE USER REQUEST

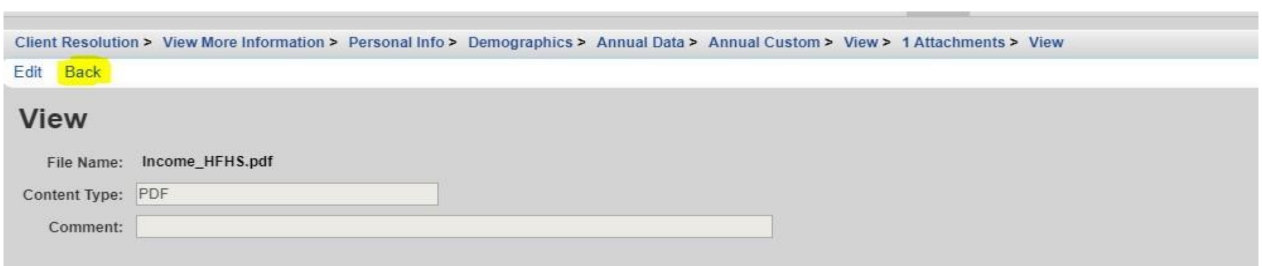
Michigan Department of Health and Human Services

Technical Support Email: MDHHS-DHSP-TAandData-Requests@michigan.gov Fax: 517-335-7209

ADD CAREWARE USER

Agency	Date
Program ☐ Ryan White Part A ☐ Ryan White Part B ☐ Ryan White Part D ☐ Care Coordination ☐ Data to Care ☐ Tobacco Cessation ☐ Other	
Name (Last, First) / Phone	Email Address
Job Title	MILogin ID

9. Exit the tab when you are done. That will take you back to CAREWare. Select **Back** to return to the main page.



Note: Do not select Edit. This is only needed if you want to edit the document. The only time you will need to use this function is if you need to edit a document you have uploaded.

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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.

In order to limit the amount of data clean up 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 must be entered 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

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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 & 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)

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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 & 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.**

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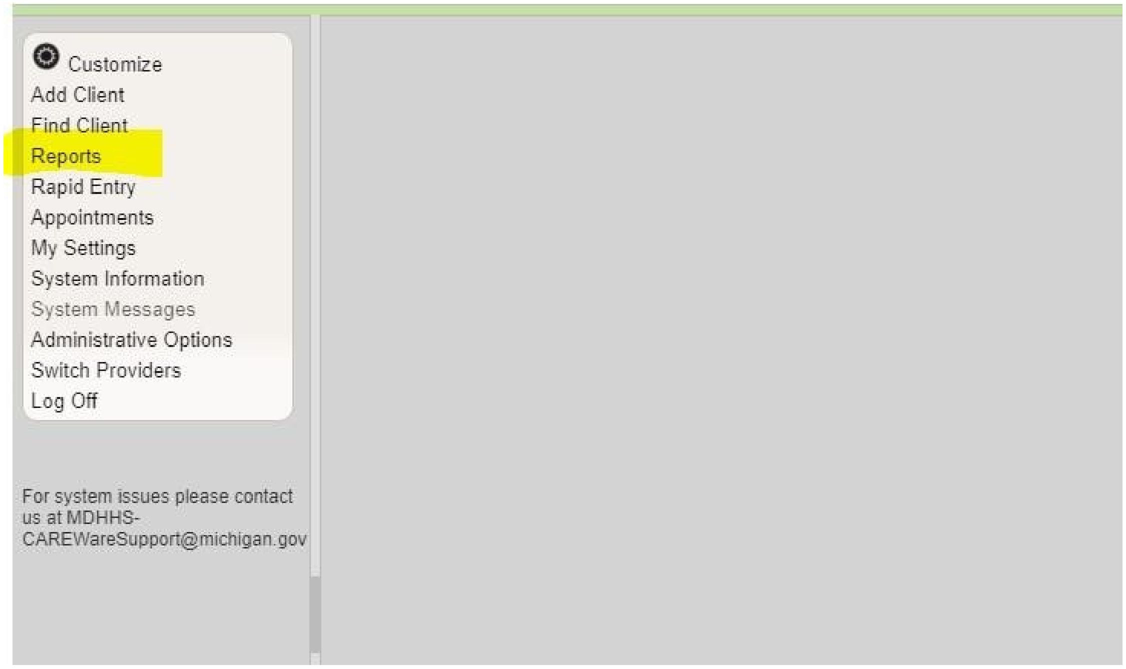
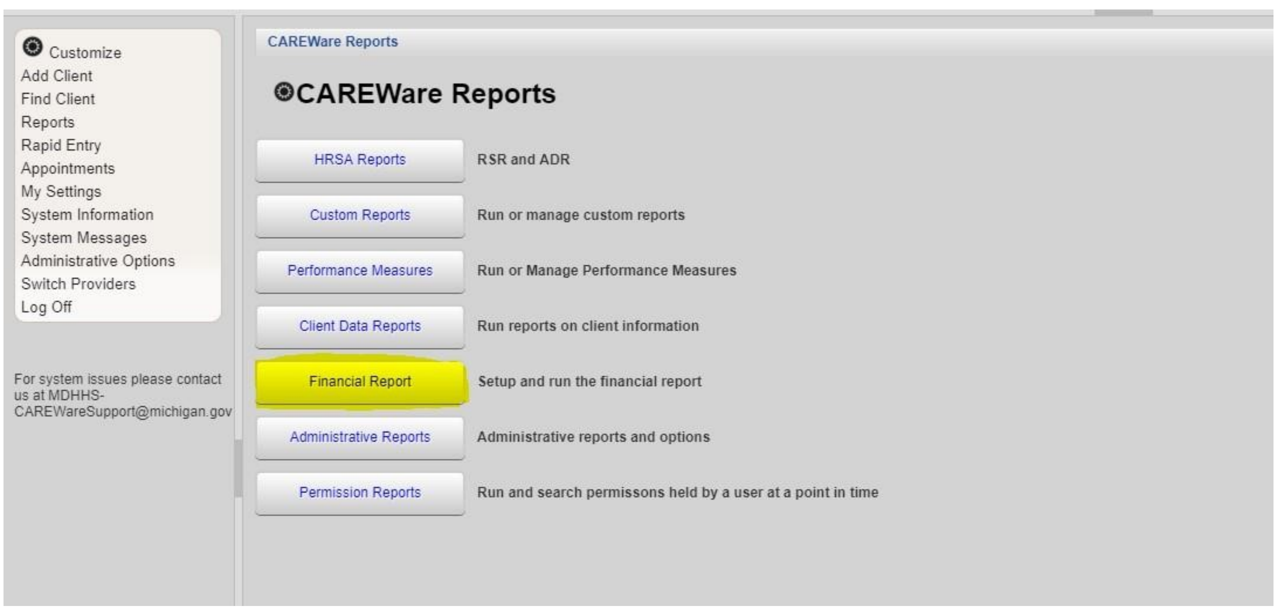
Running a Basic Financial Report (Detailed Overview)

1. Select the **Reports** tab.



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



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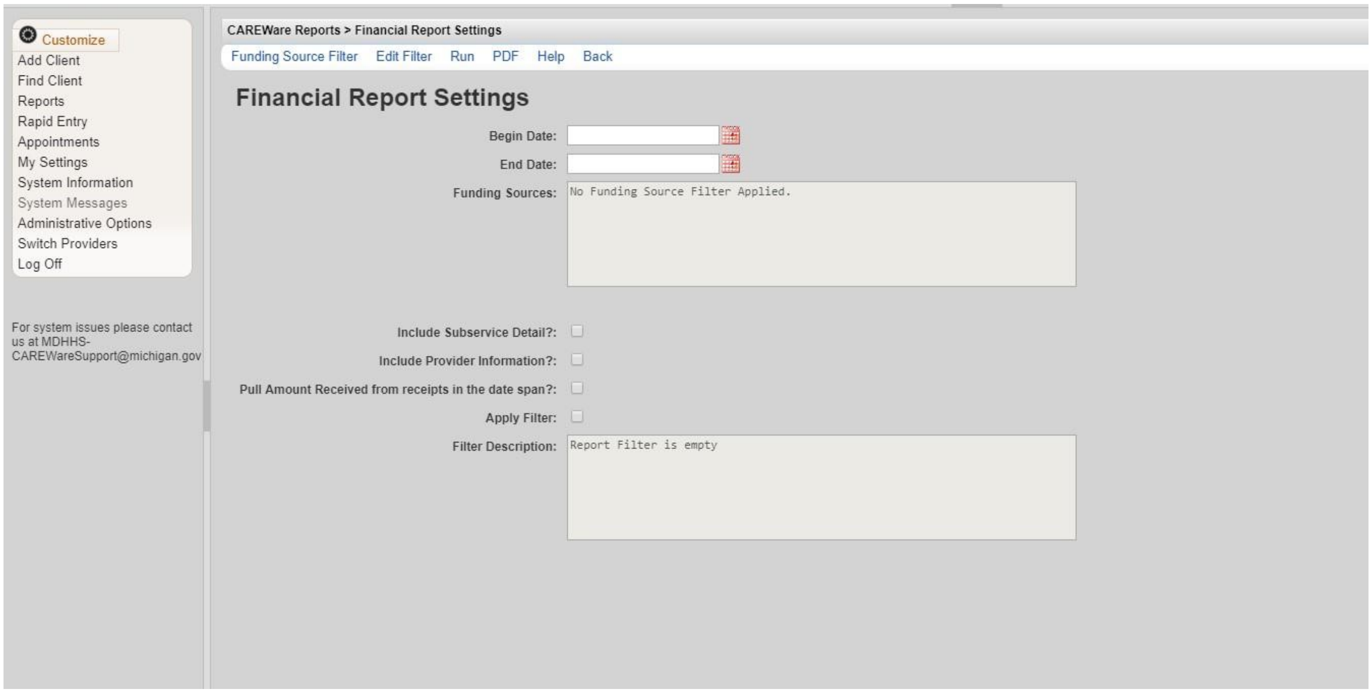
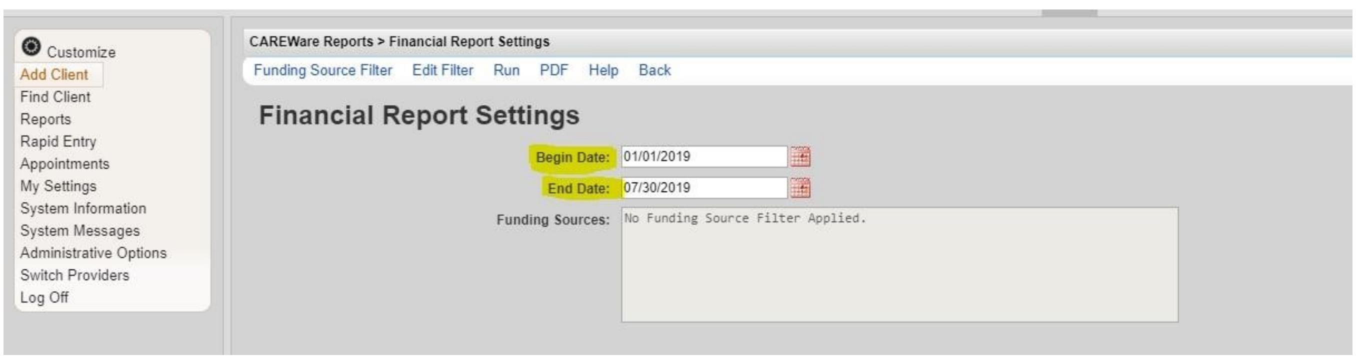
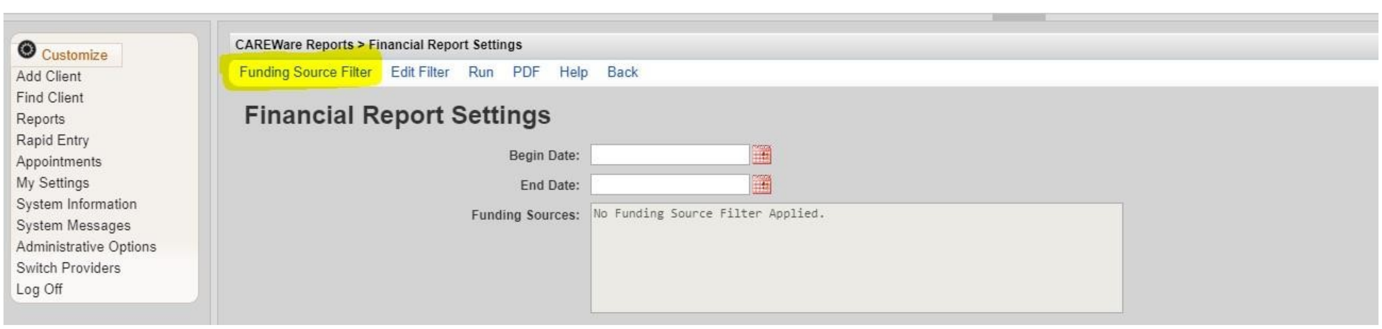
This will take you to the main page for financial reports.



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



4. Select **Funding Source Filter.**



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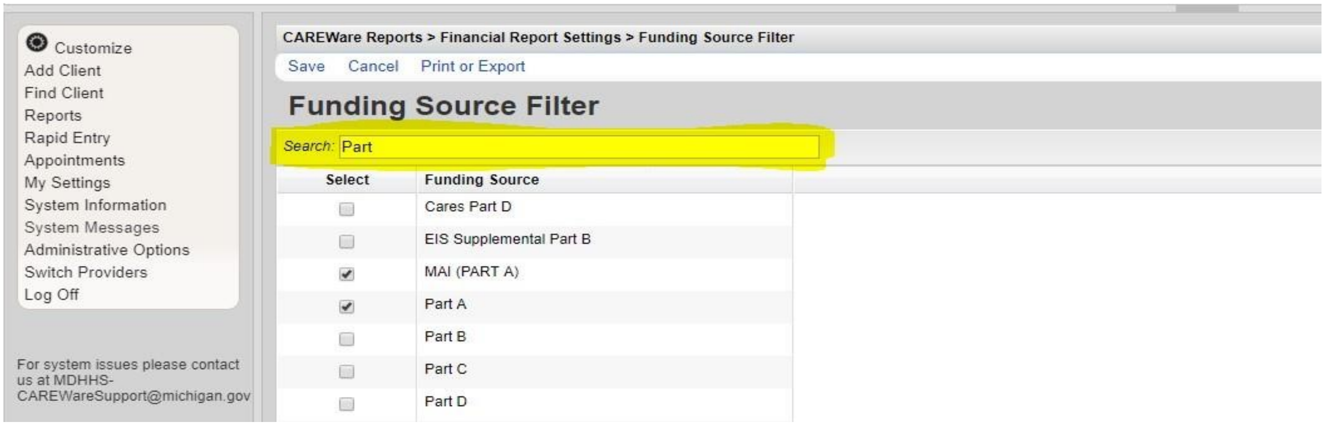
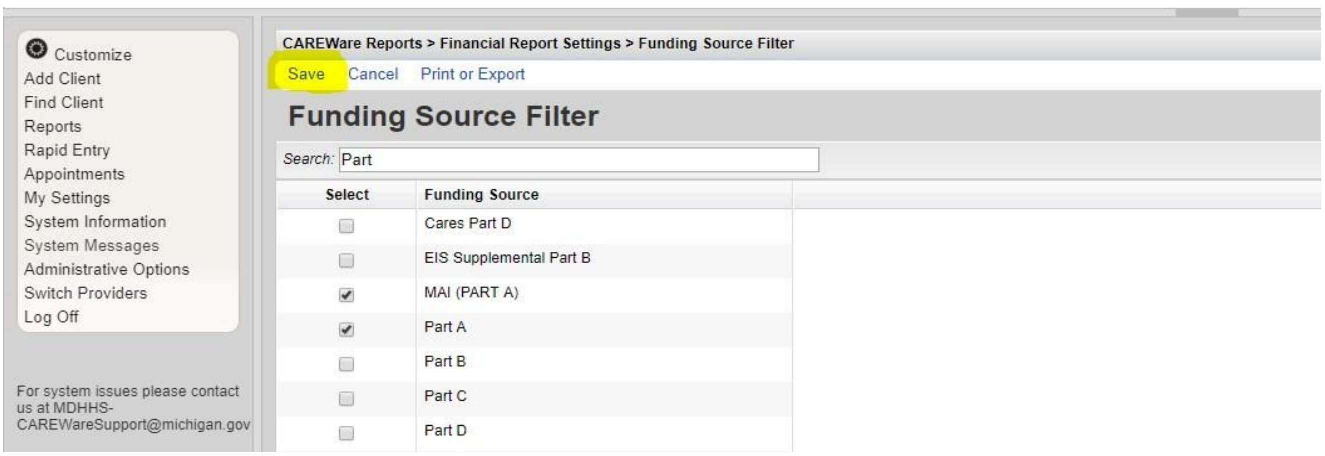
5. Choose **Funding Source.**

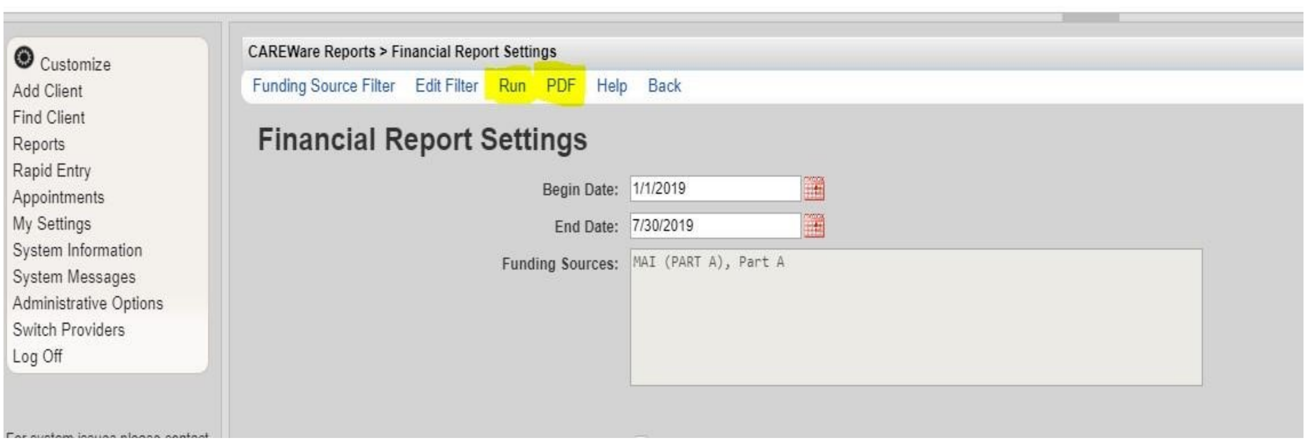


Note: You can type the funding source into the search bar to narrow down the list. You can also check multiple funding sources.

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**.



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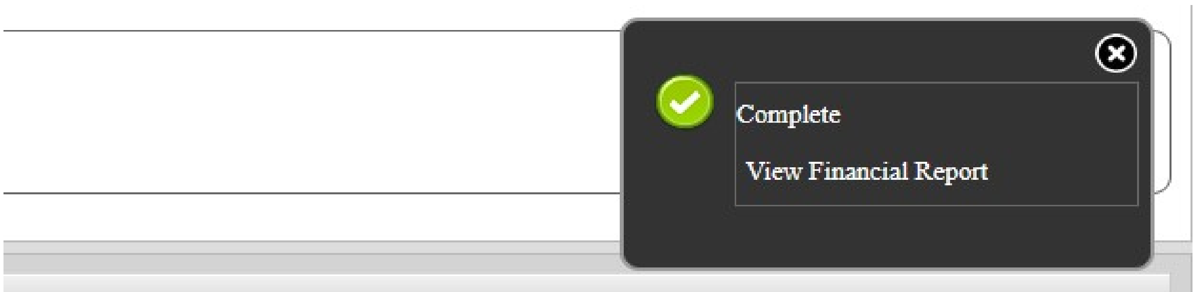
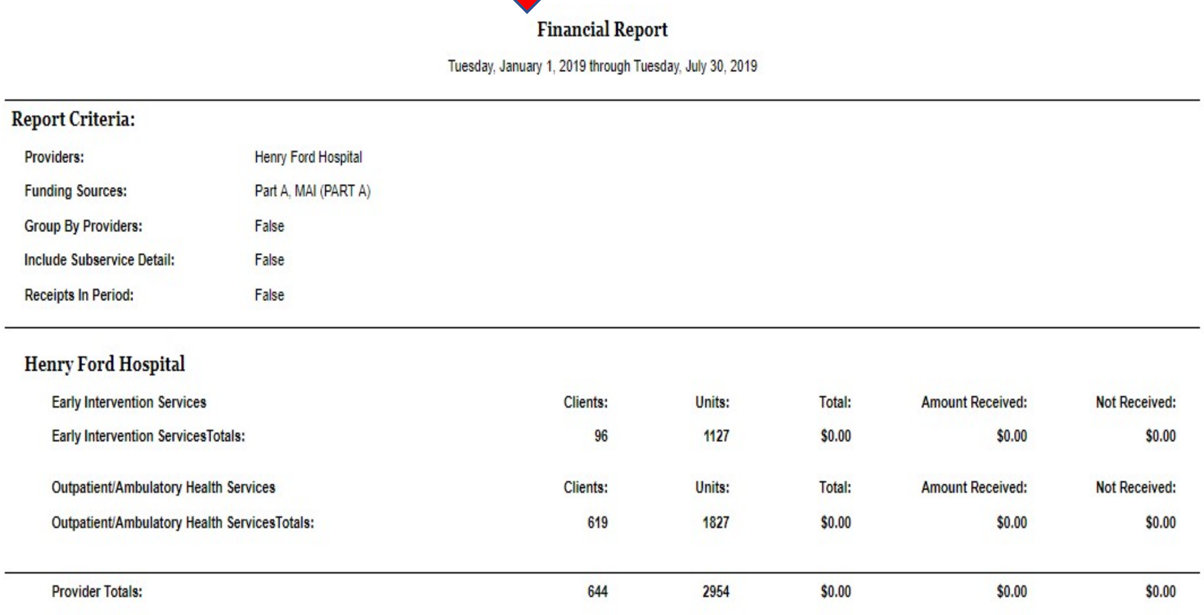
8. On the upper right-hand side, you will see a box that lets you know the report is **Running**. You want to see this box.

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



10. Your 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

Early Intervention Services	Clients:	Units:	Total:	Amount Received:	Not Received:
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.

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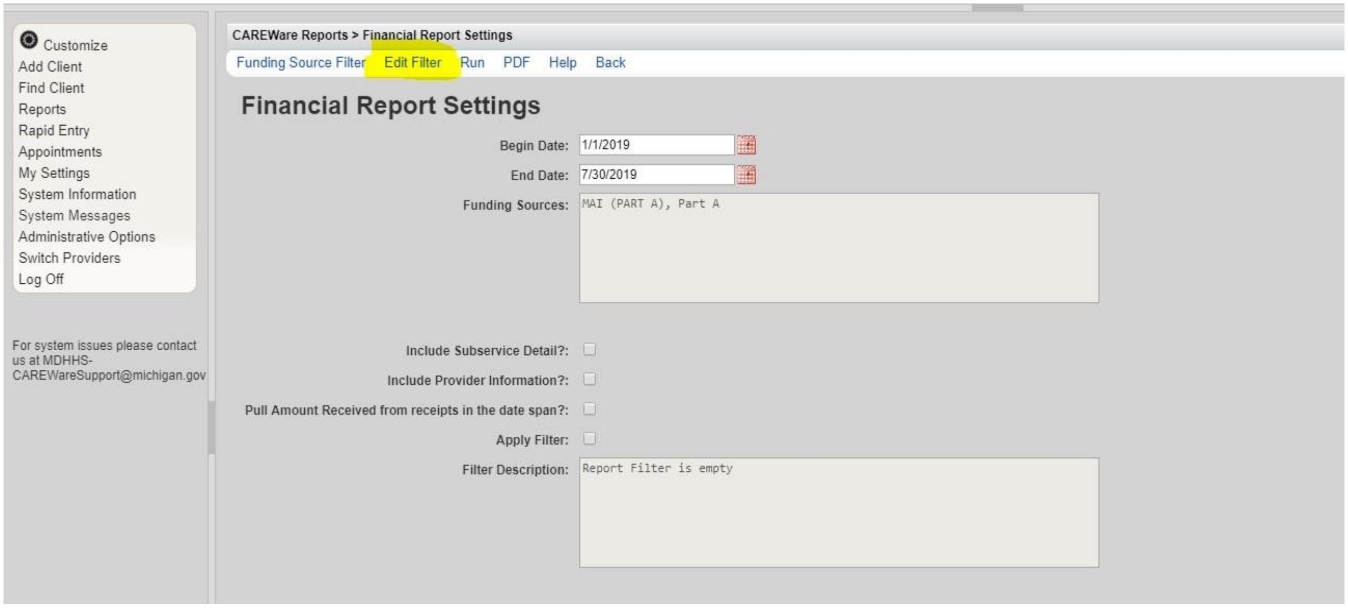
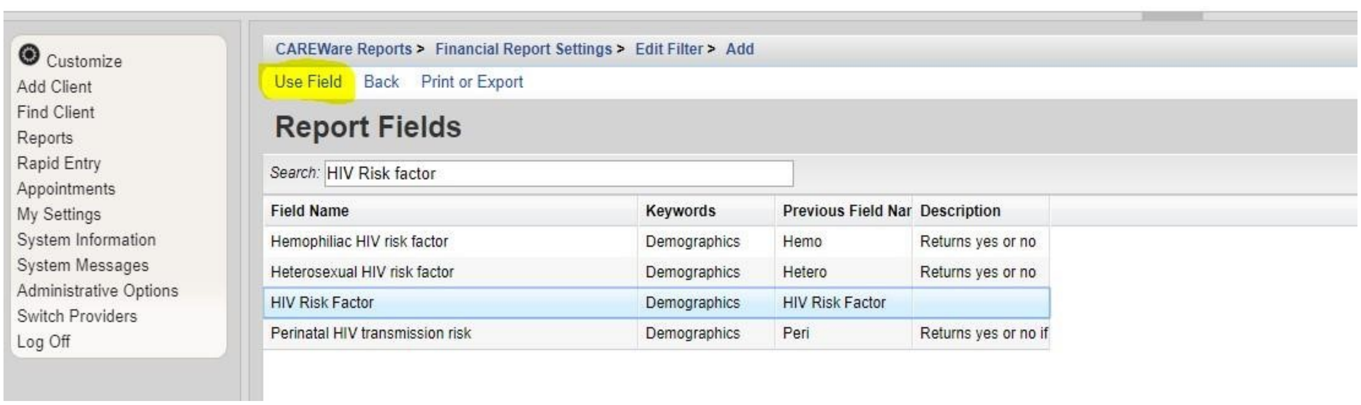
Adding a Filter to the Financial Report

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.



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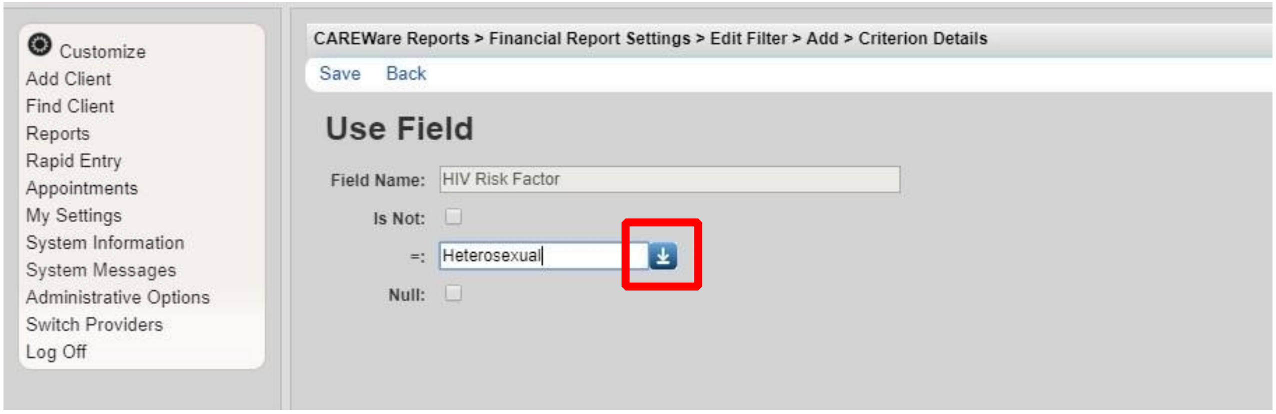
4. Most filters will require you to set parameters (provide more information because the field has a wide range of options). Click the drop-down menu to set those parameters.

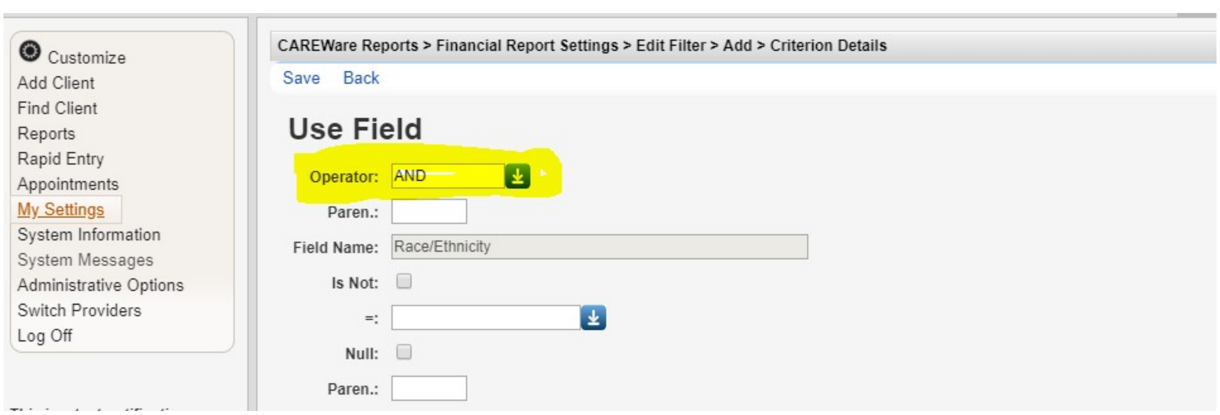


5. **Save**

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 of criteria has to be met in order to pull in clients.

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



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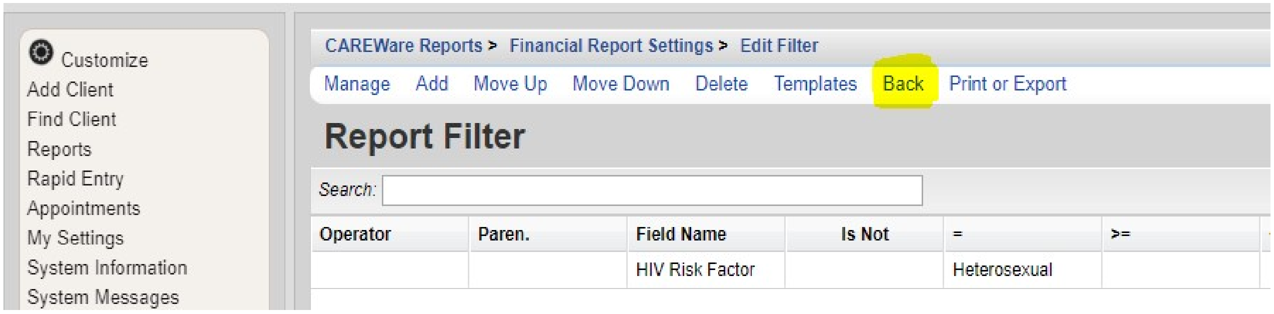
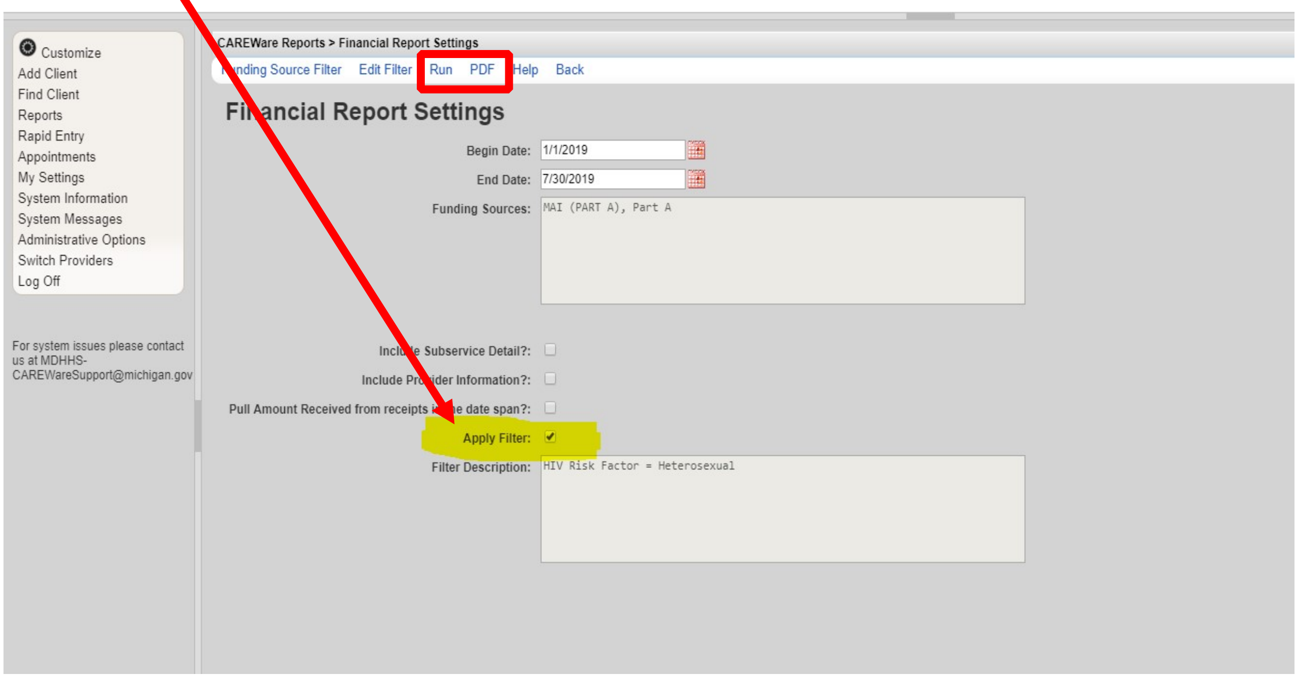
7. Once you are done adding all of your filters, click **Back.** This will take you back to the financial report main page.



like.

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



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.

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10. 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

Note: This is how you know the filter has been applied to the report.

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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
  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 has 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**.**

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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.**

Note: If you run the report as a separate document, you will receive a message on the right-hand side that says the report is generating and lets you know once you can view it.

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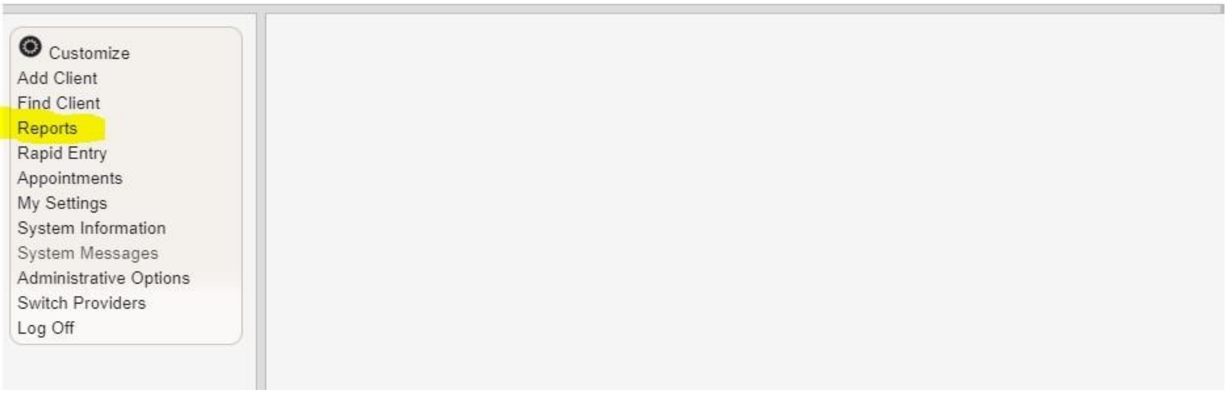
Detailed Overview: Running Basic Performance Measure

1. Select the **Reports** tab.



2. Select **Performance Measures.**

3. Select **Run Performance Measures**.

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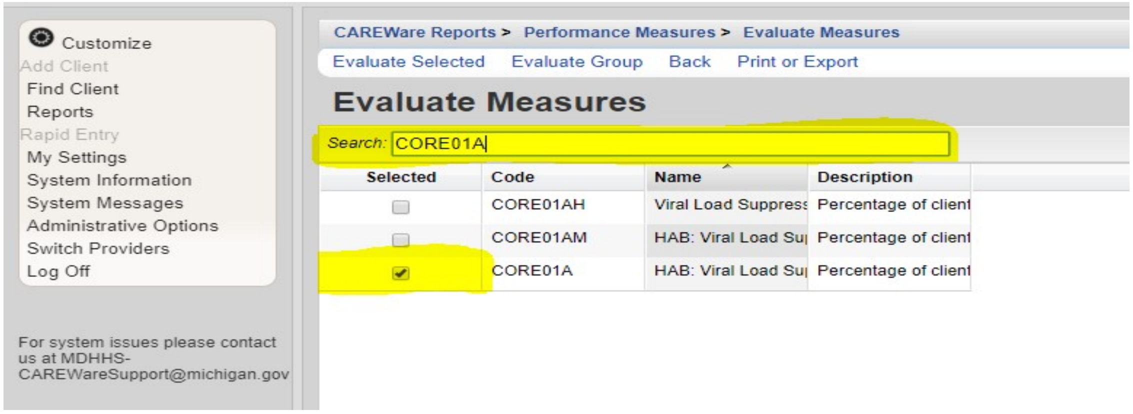
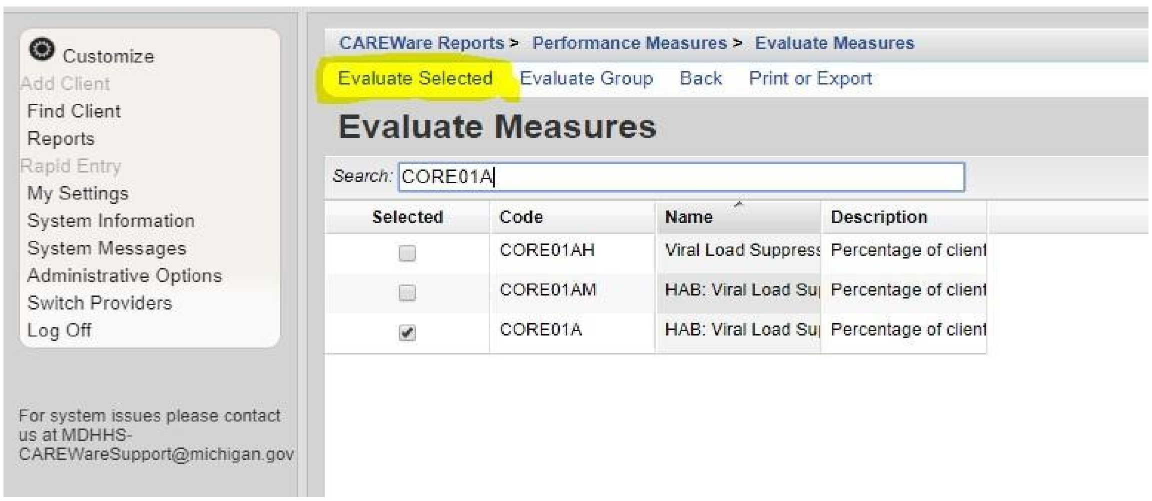
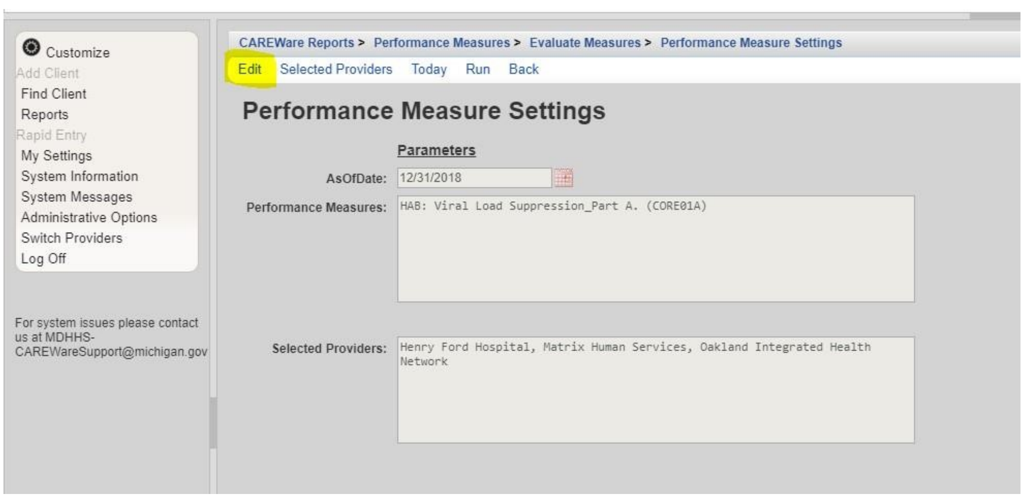
4. A list of all performance measures will appear. Select the performance measure you want to run. You can use the search box to narrow down your search.



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 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).

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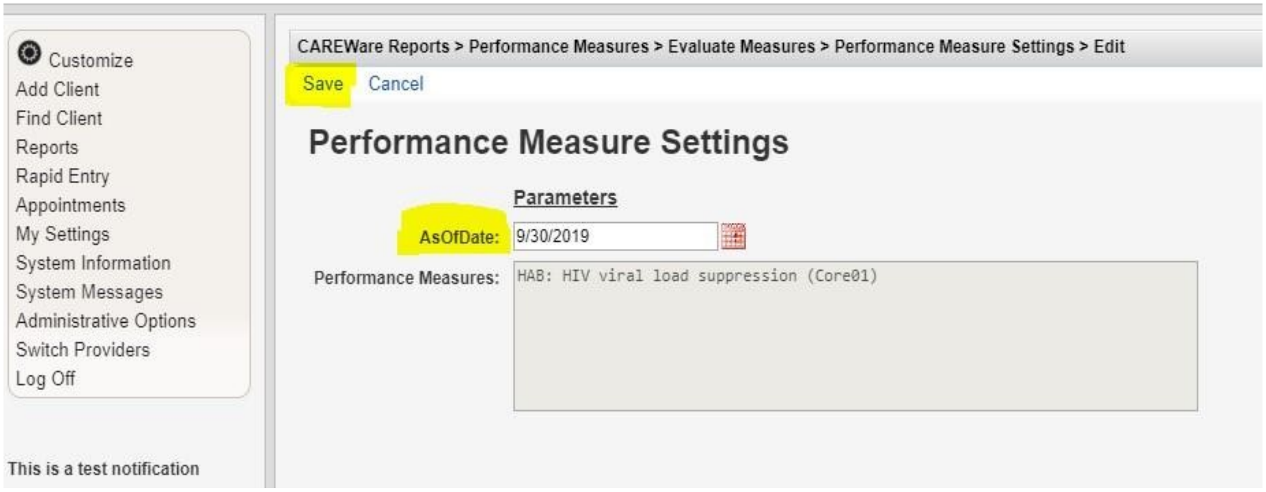
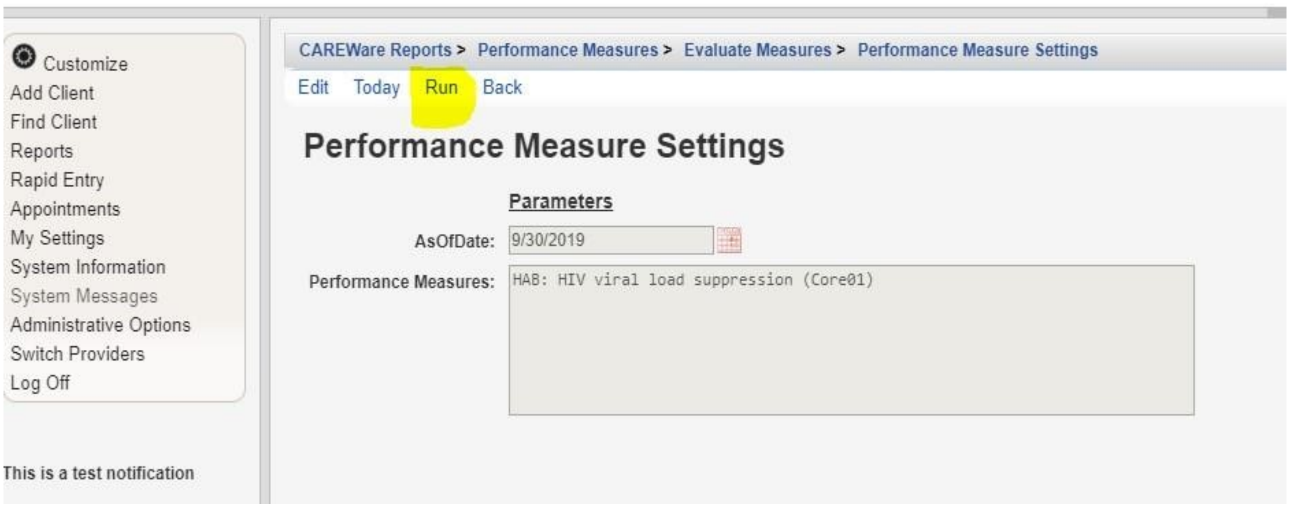
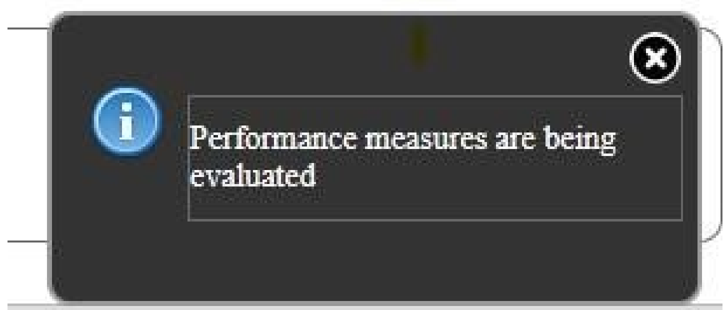
8. **Save.**



9. **Select Run.**



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



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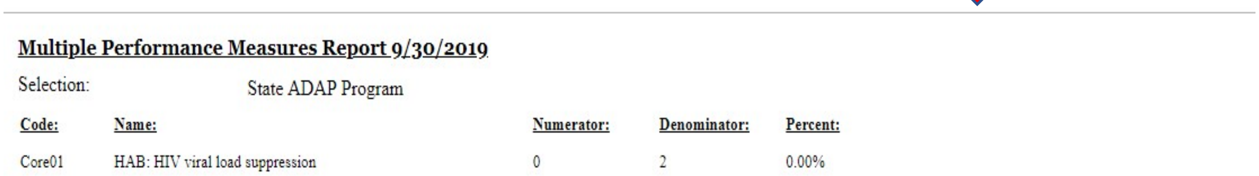
10. **Once** the report has generated, you will receive a message that says **Report Generation Complete** (on the right-hand side too). Select **View Report.**

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%

In order to get back to CAREWare, simply exit the tab. That will take you back to the performance measure tab.

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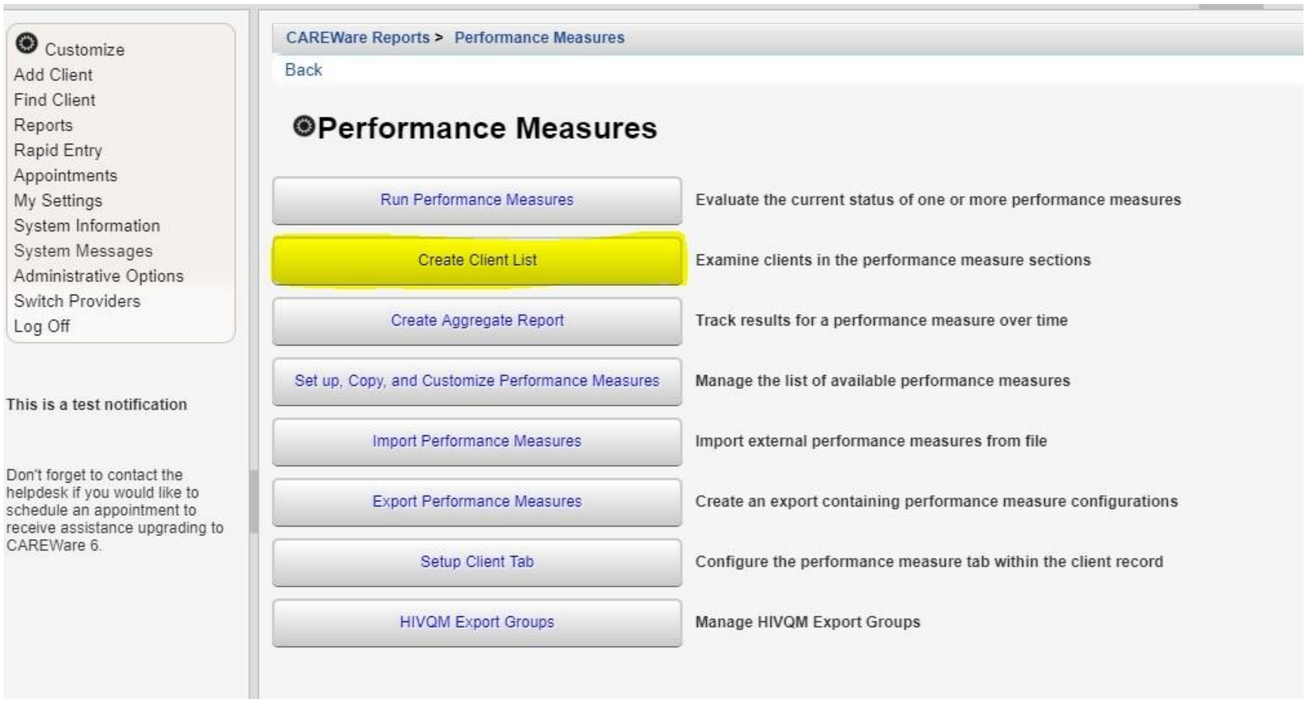
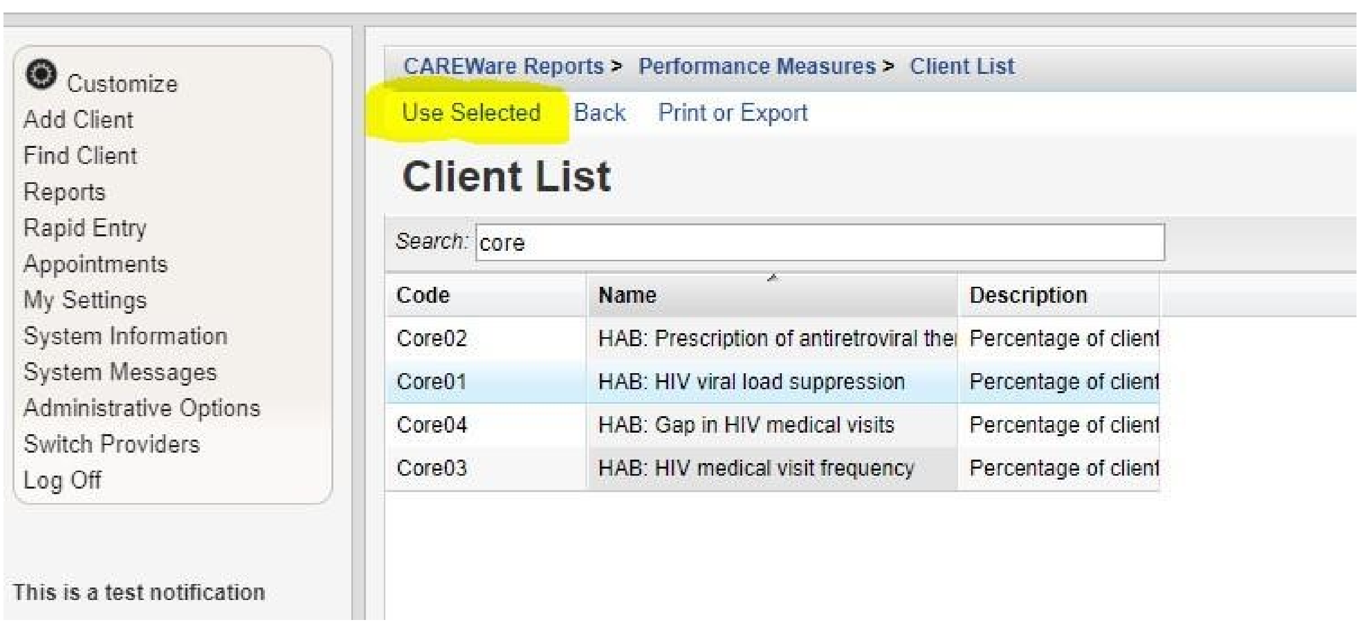
Detailed Overview: Running a Performance Measure Client List

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.**



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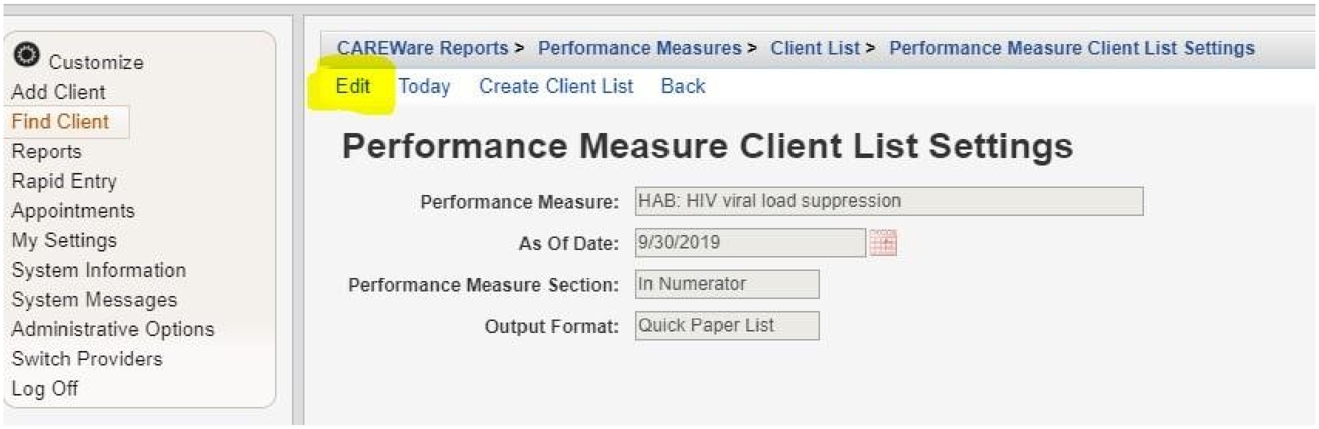
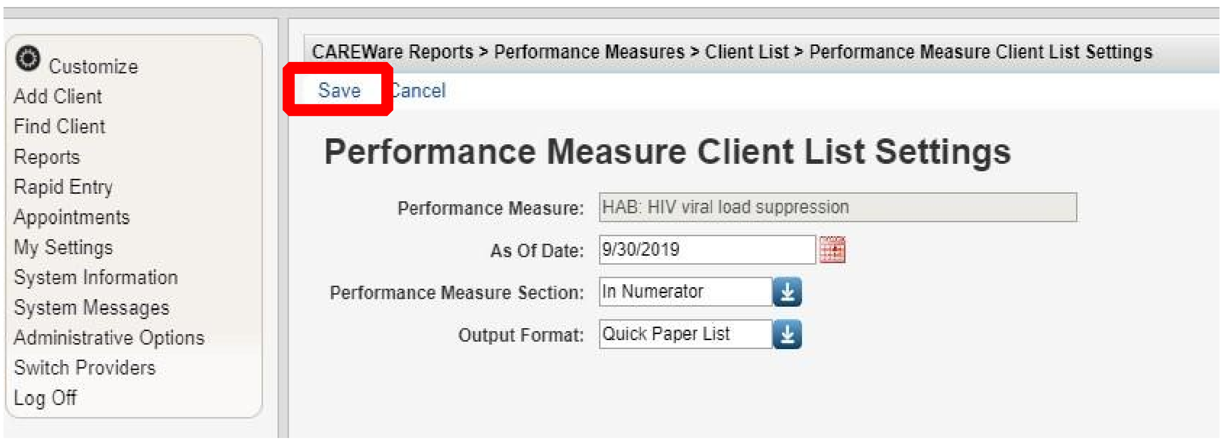
5. This will take you to the page to set parameters for your report. Select **Edit.**



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

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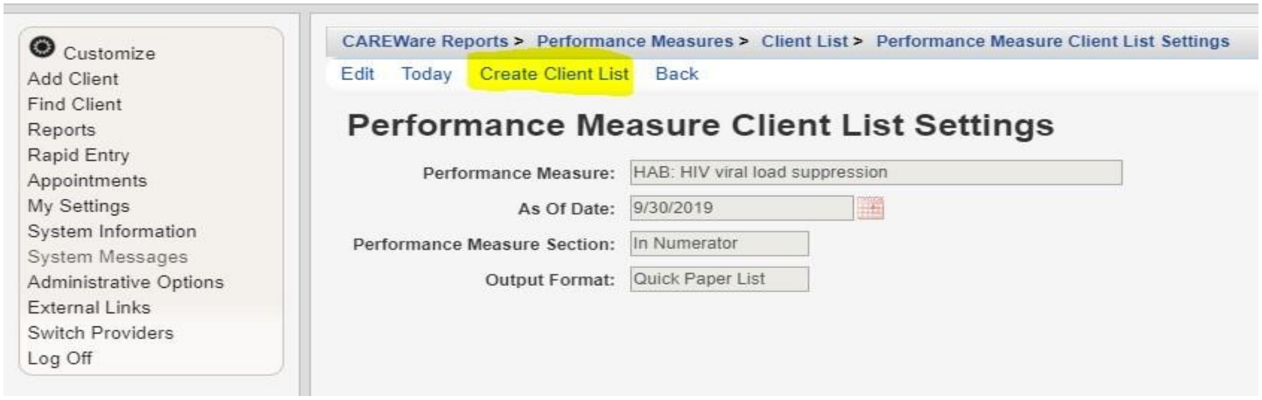
For **Output Function,** you have two options:

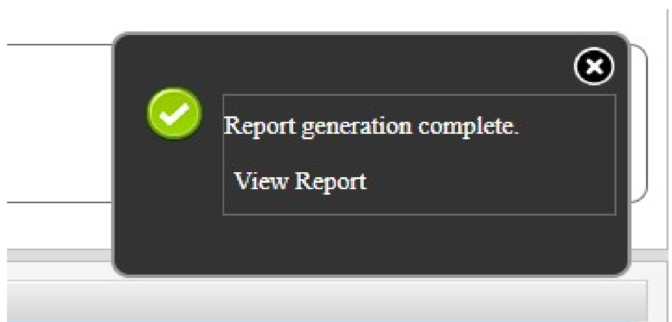
1. Real-time Lookup List allows you to click on client in the list and go to their CAREWare file. There is no need to exit the performance measure tab.
2. Quick Paper List generates a report that can be viewed, saved, or printed.

8. Select **Create Client List.**

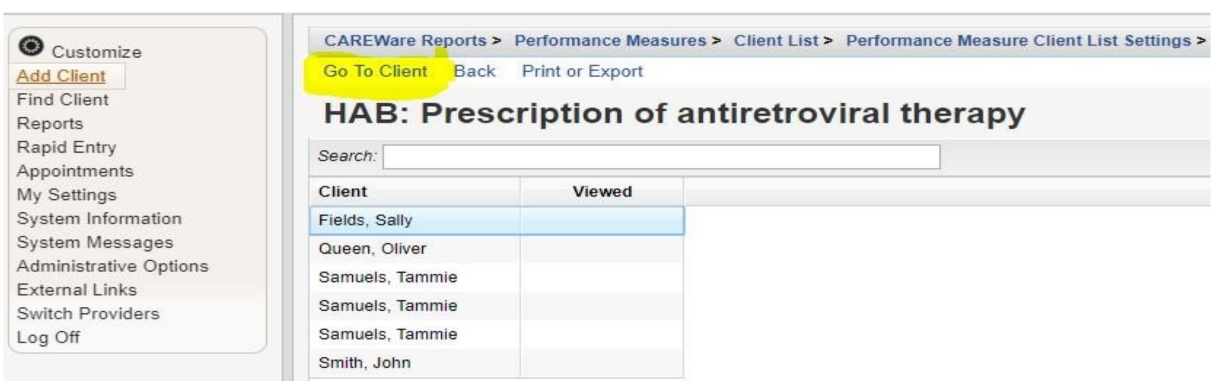


9. Once the report generates, you will receive a message that says **Report generation complete** (on the right-hand side)**.** Click **View Report.** The report will open in a separate tab.

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.



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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.

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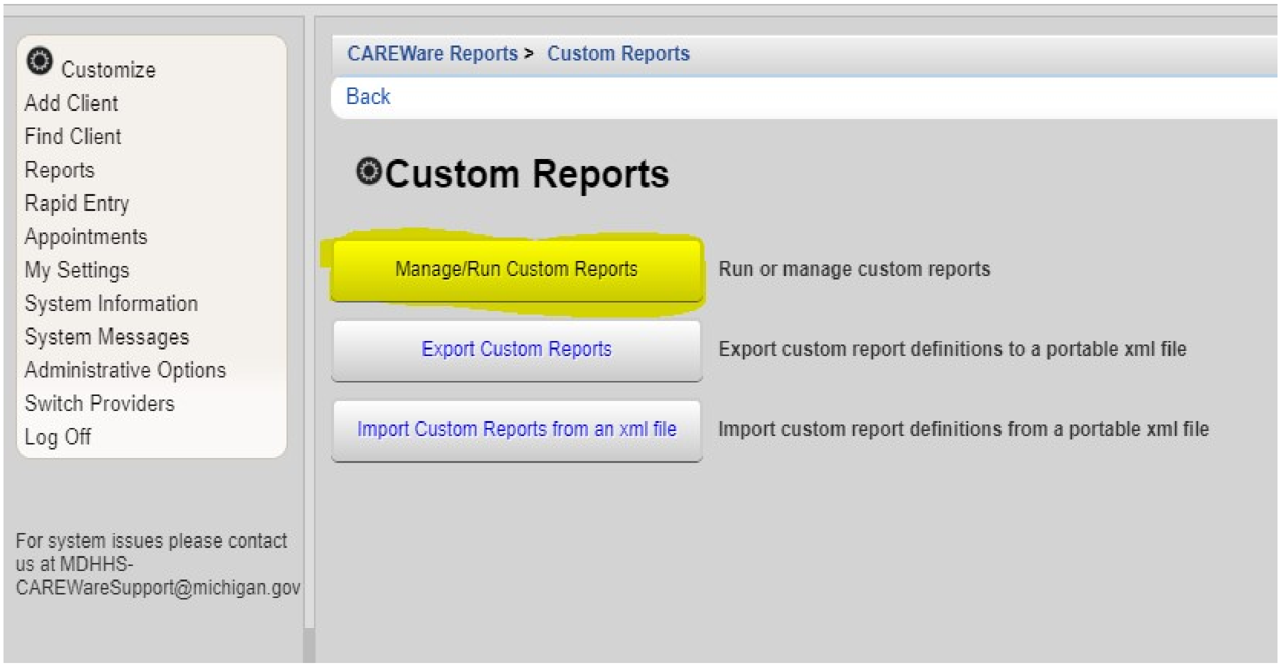
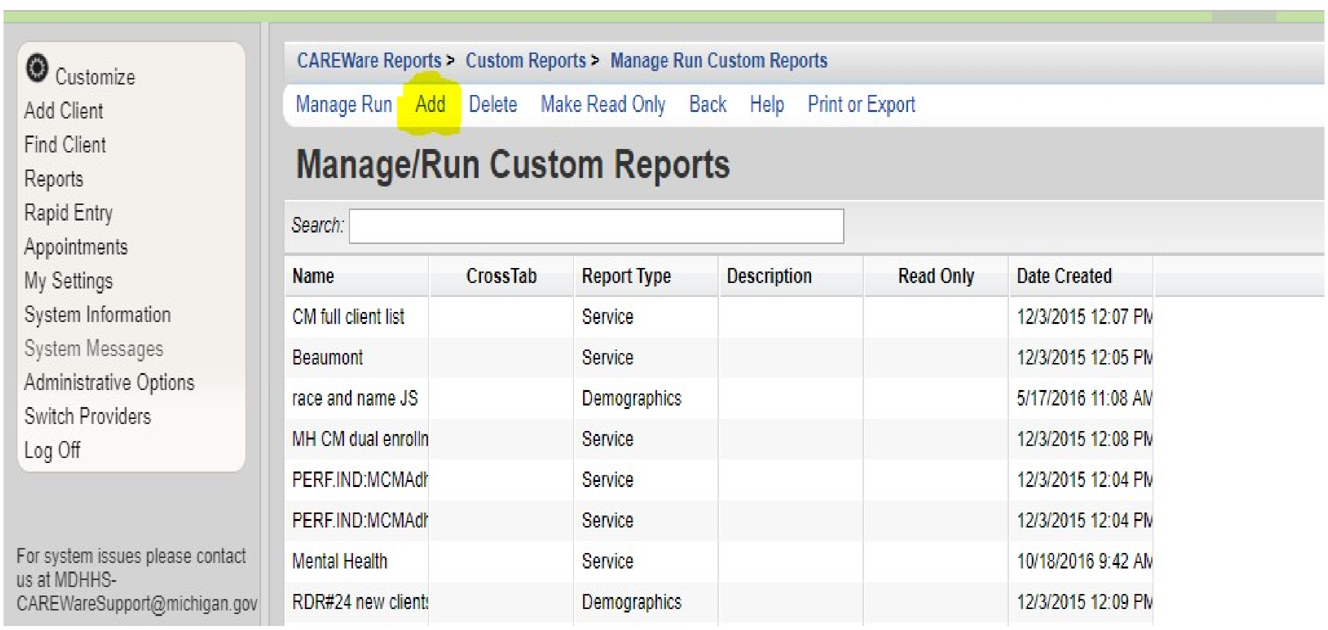
3. Select **Manage/Run Custom Reports**.



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.**

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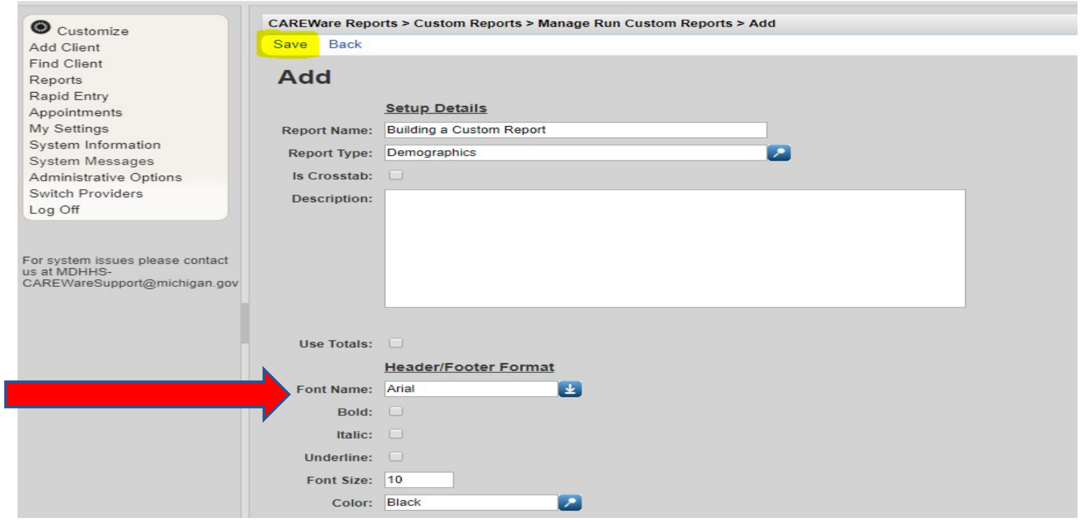
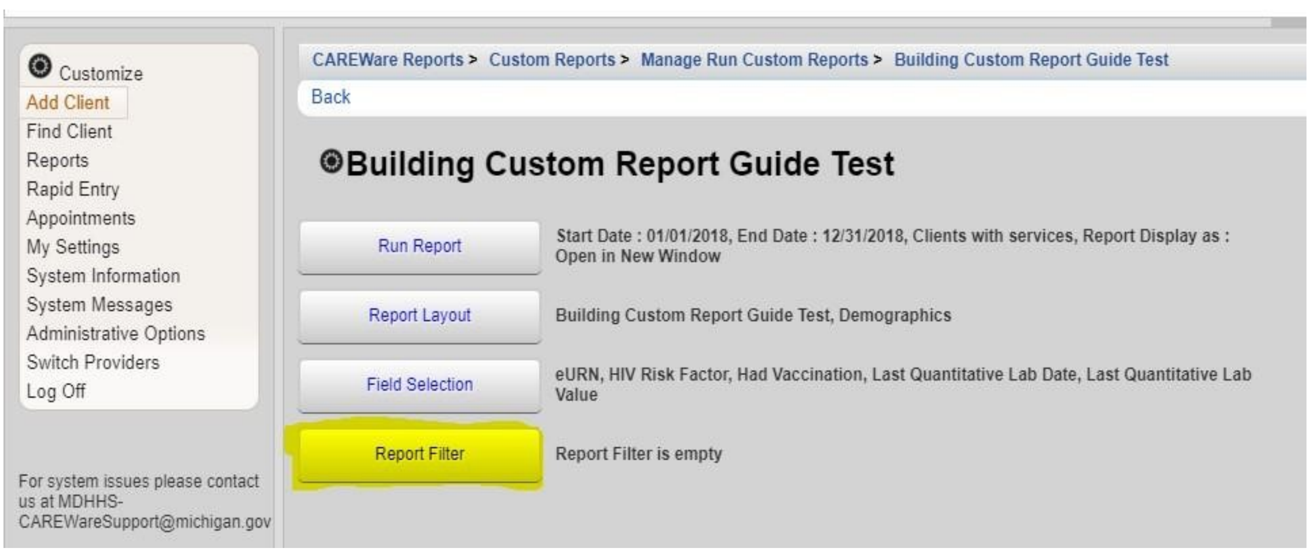
New Feature: You can change the font size and font color of your report.



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.

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.



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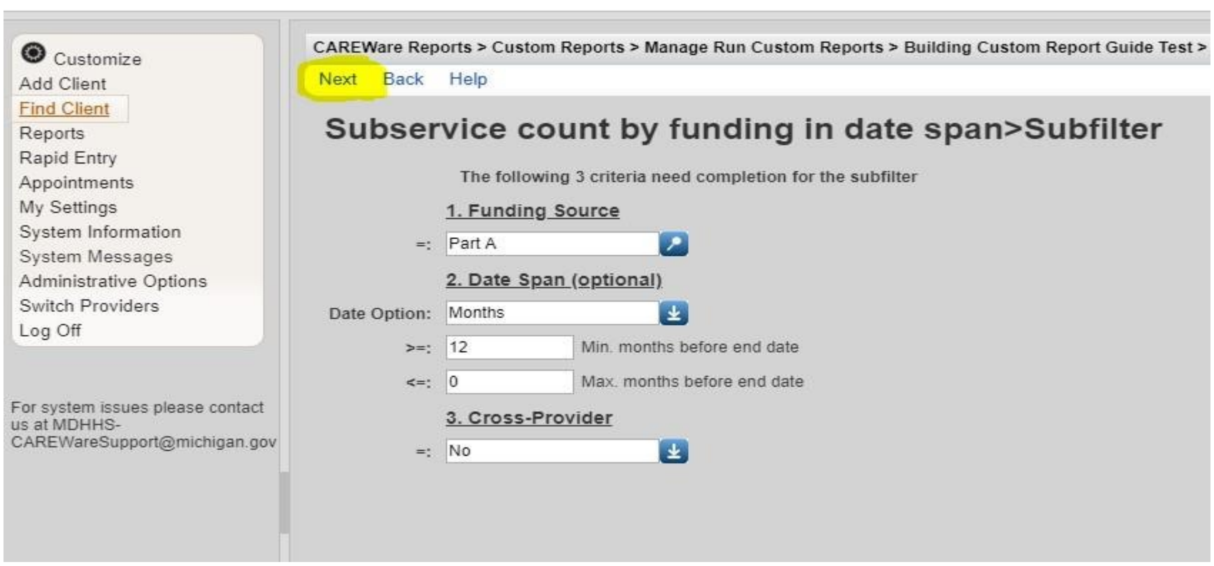
7. To add a filter, select **Add.**

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.



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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.

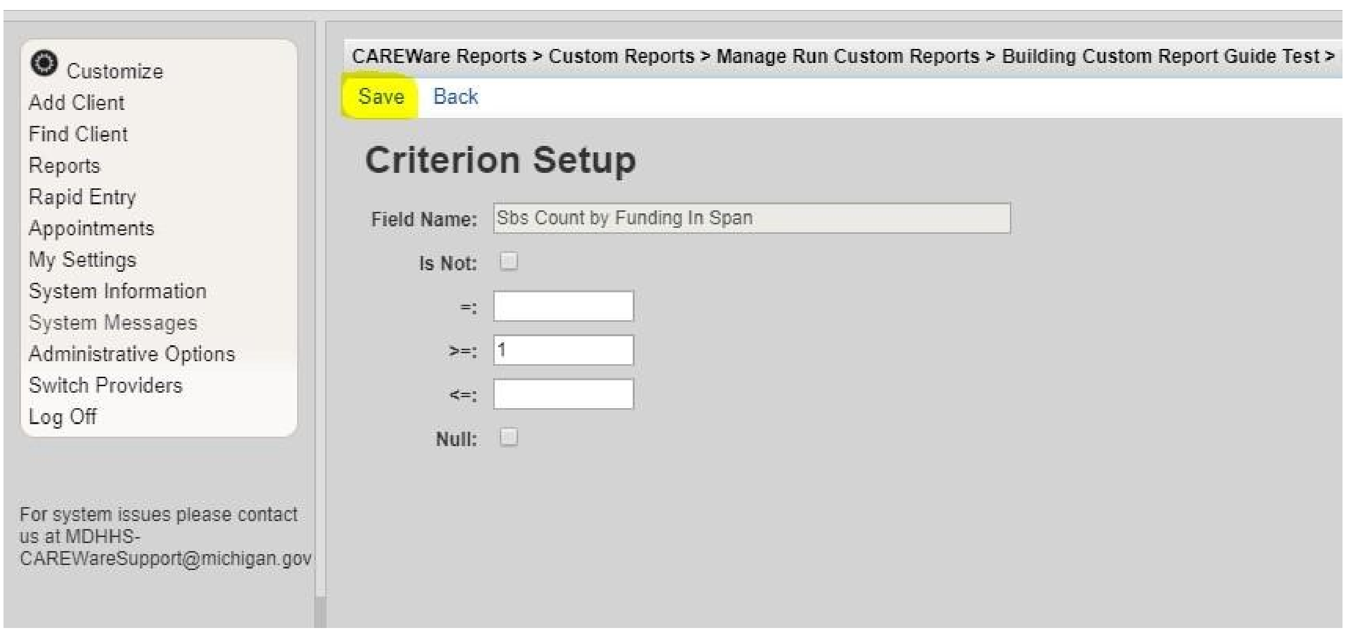
11. This is where you indicate the number of services a client needs to receive in order to be included in this report. For the purposes of most reports, a client needs to receive at least <u>one</u> service. If that is the case, then indicate "1" in the >= box.

    <= 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.**



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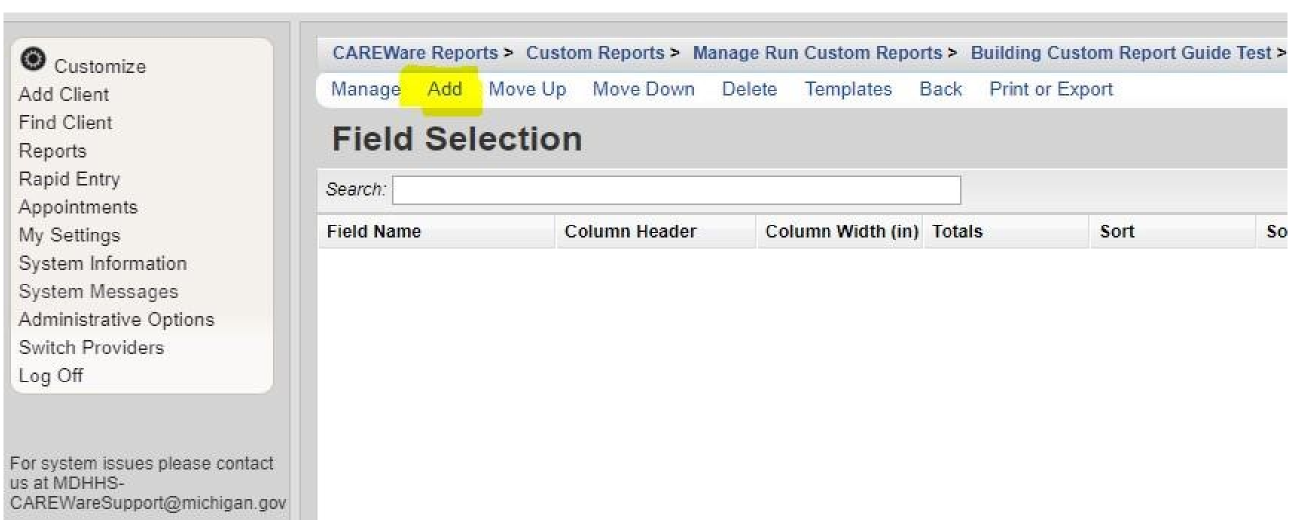
13. This will **take** you back to the report filter page. Add as many filters as needed. Once you are done adding your filters, select **Back.**

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.**



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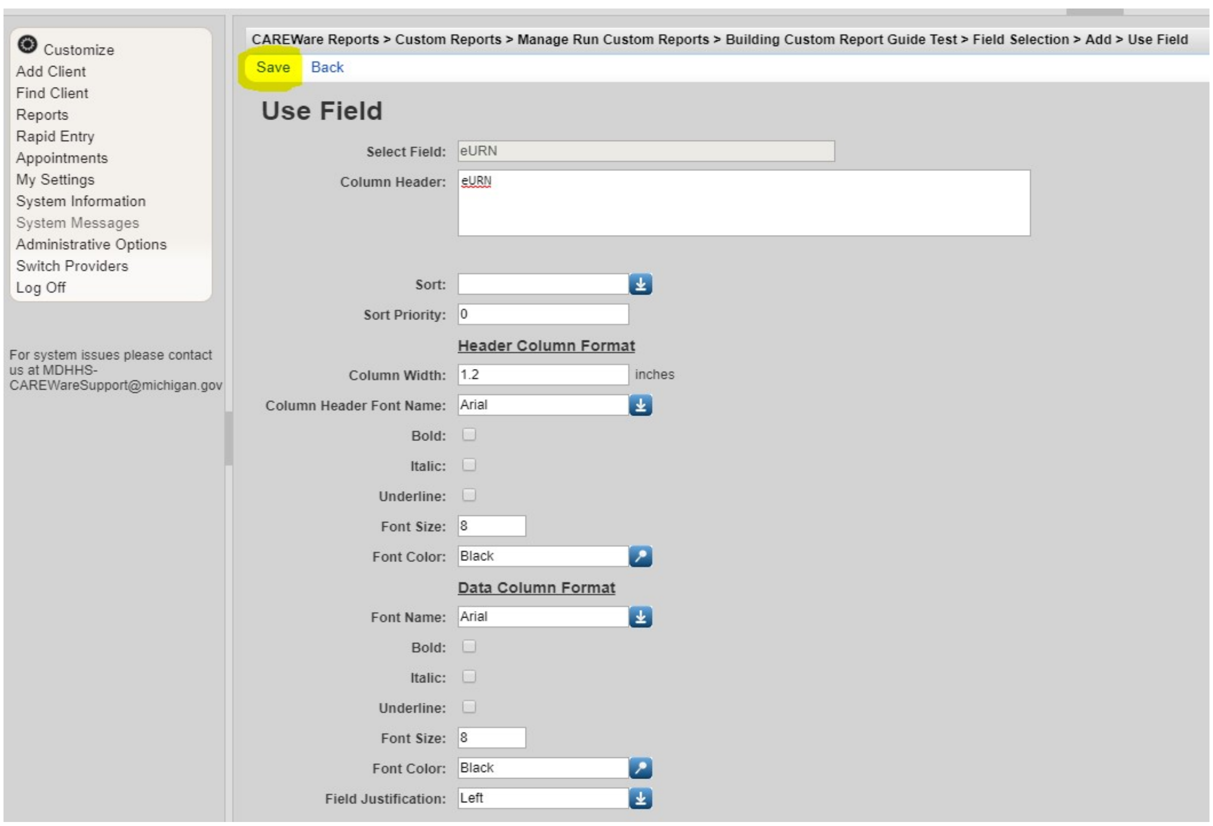
16. For this report, we want to know four things: eURN, race, last viral load date & value. Let's start with eURN. To search for the field, type the name in the search bar. Select the field and click **Use Field.**

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.



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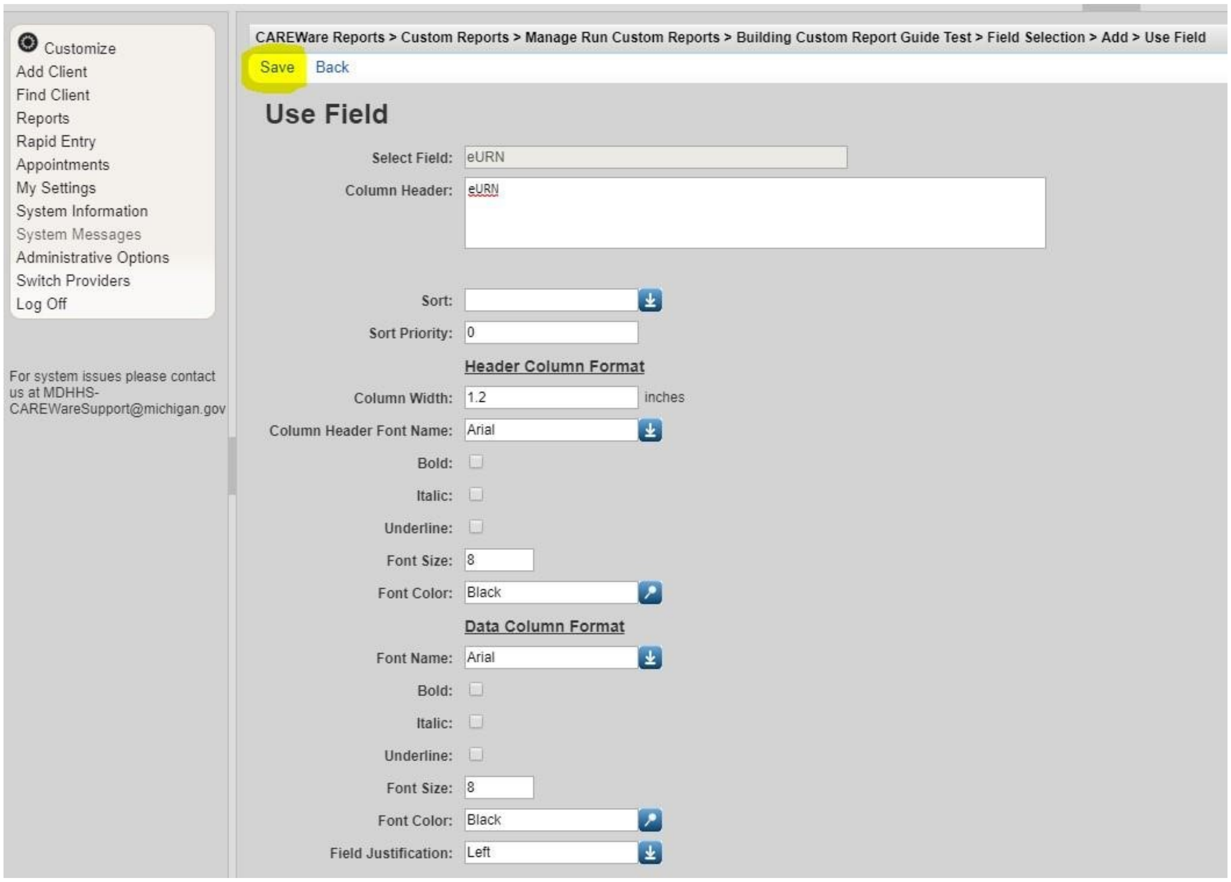
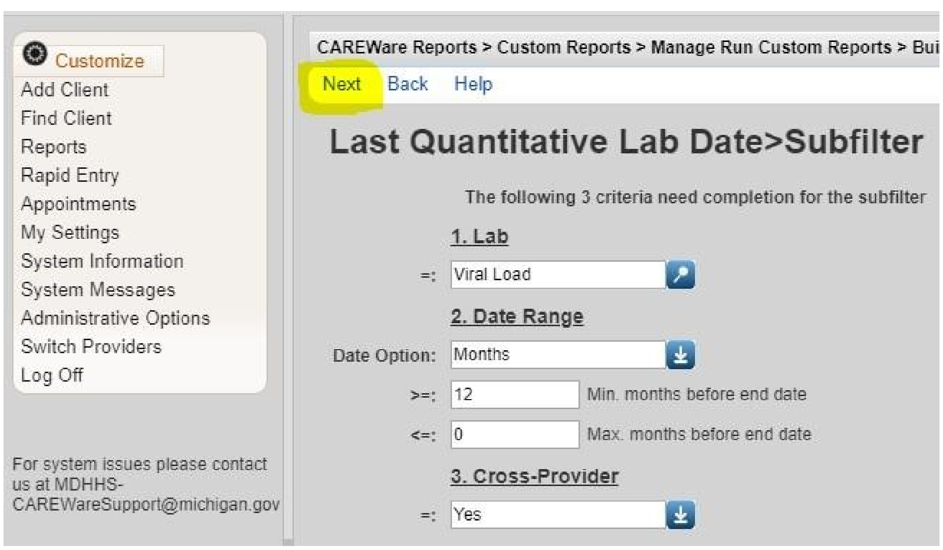
18. Save.



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).**



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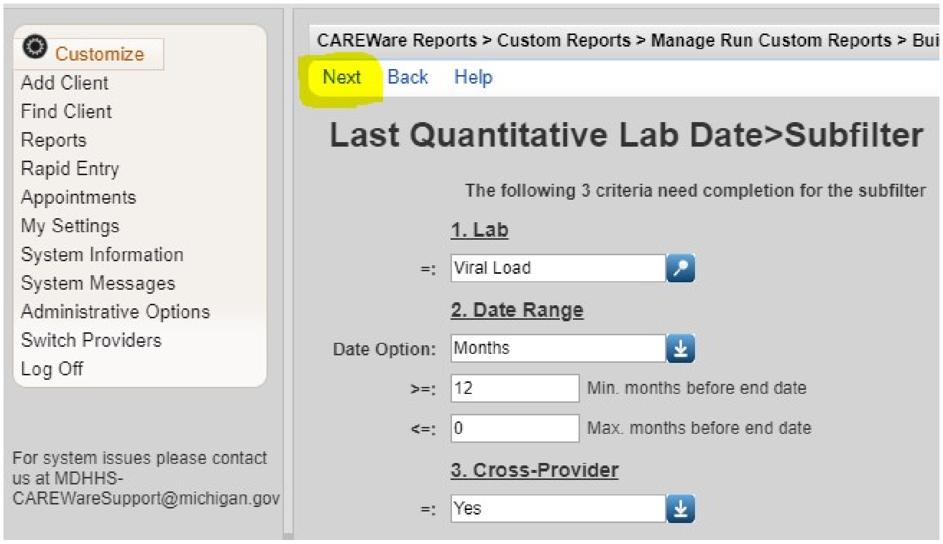
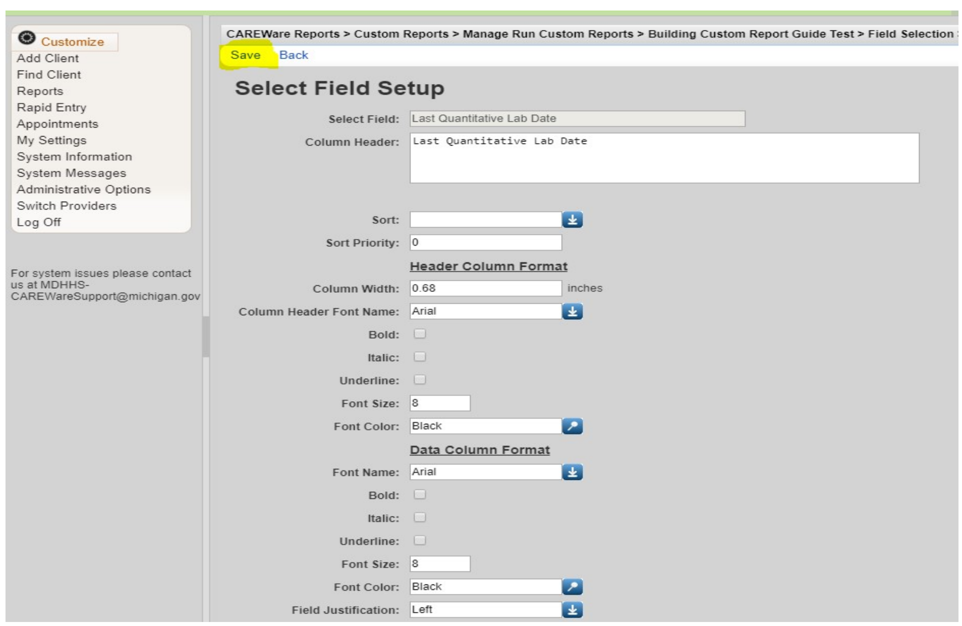
21. Repeat Step 15-16. Select **Add.** From the list, select **Last Quantitative Lab Date.** This will take you to a sub-filter. For **Last Quantitative Lab Date**, three fields have to be defined: lab, date range, and cross-provider.

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



23. 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.



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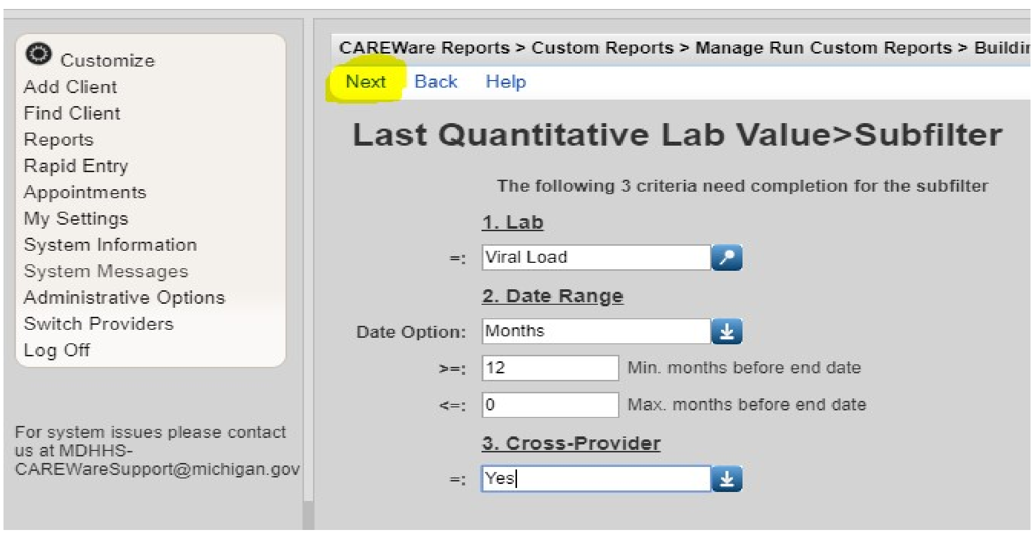
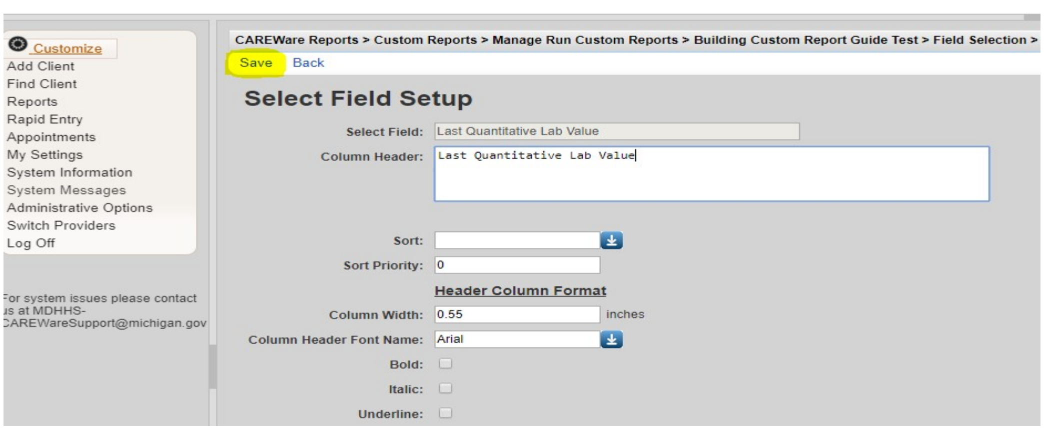
24. A summary of your field selection appears. You can view your field selection or make any edits by clicking the blue link. Once you are done, select **Back.** This will take you back to the field selection page.

25. Repeat Step 15-16. Select **Add.** From the list, select **Last Quantitative Lab Value.** This will take you to a 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.





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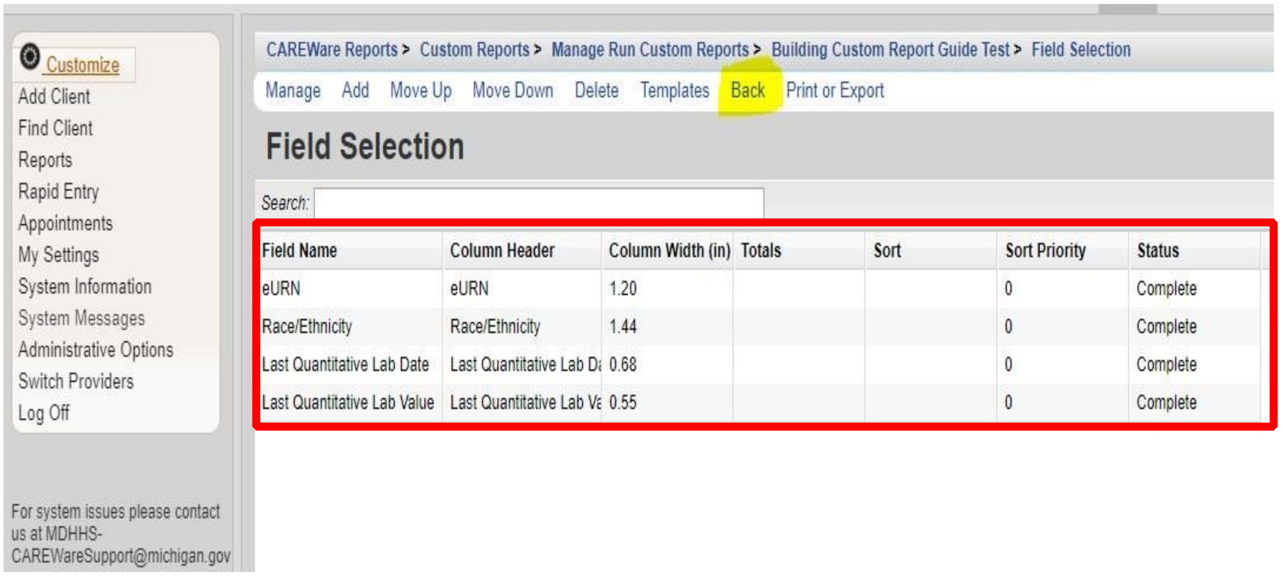
28. You can add additional field selections if necessary. If you don't need to add any additional filters, then this is what the final product will look like. Select **Back** to run your report. This is what the field selection will look like once all fields are added.



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

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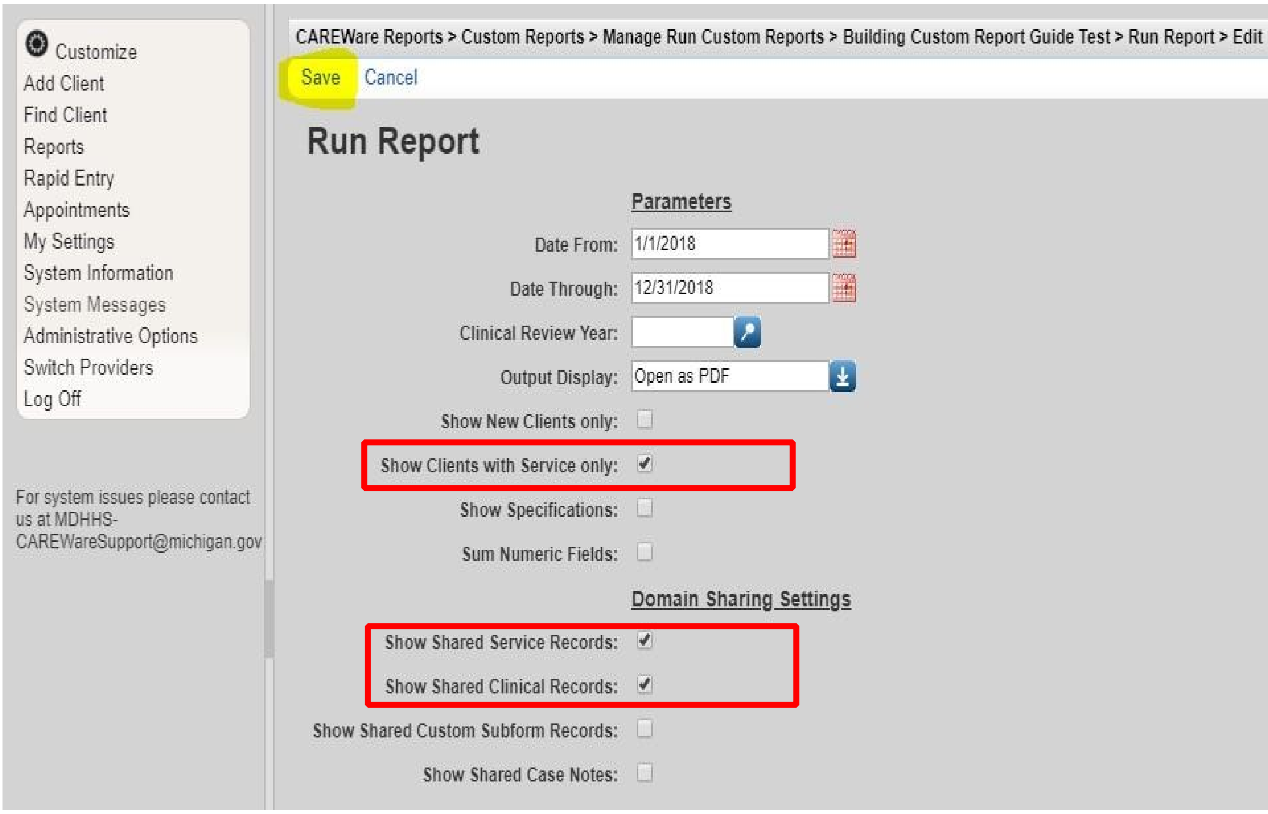
30. Click Edit. Specify the **timespan** and **output display.** Then **Save.**



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.

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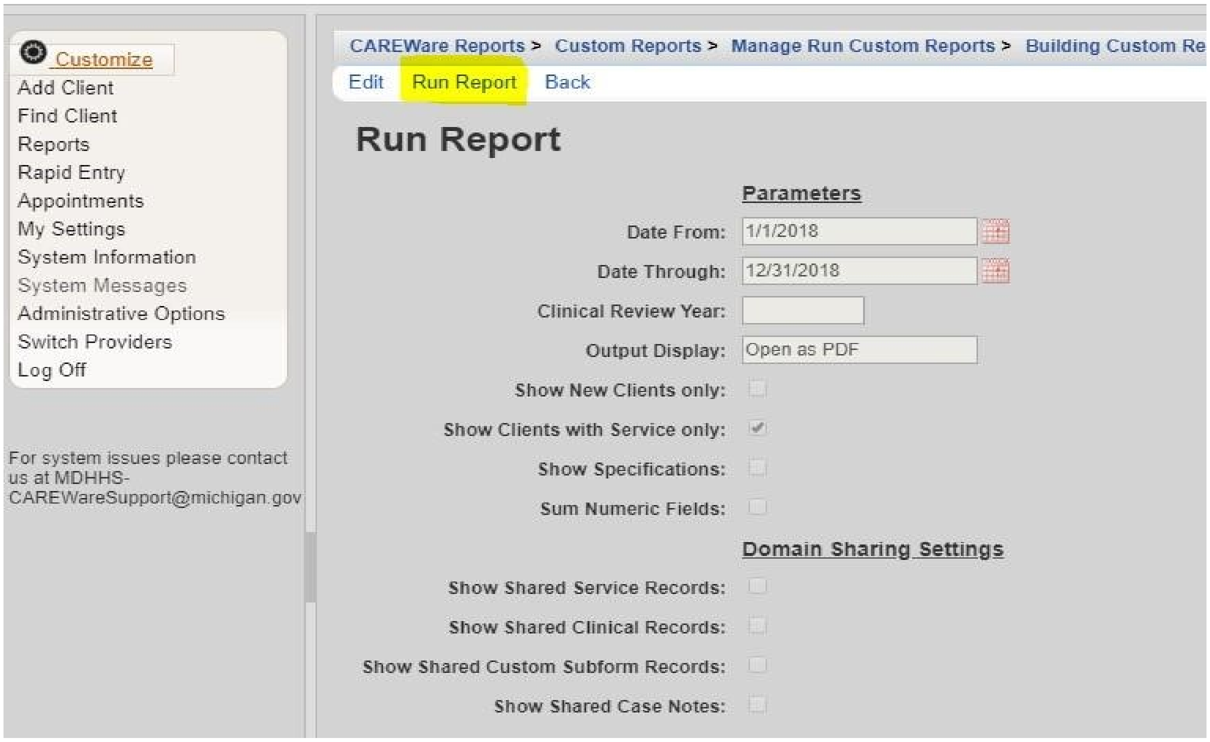
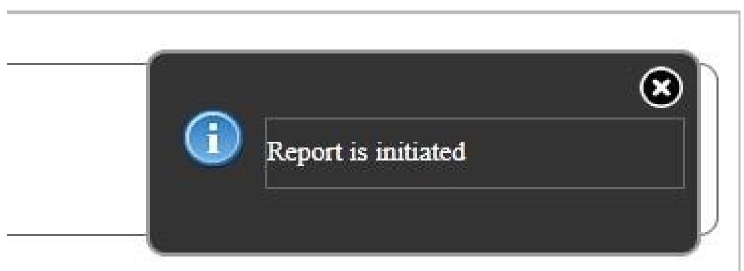
31. Select **Run Report.**



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.**

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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
CHQGADzN	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 9USZSPm	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

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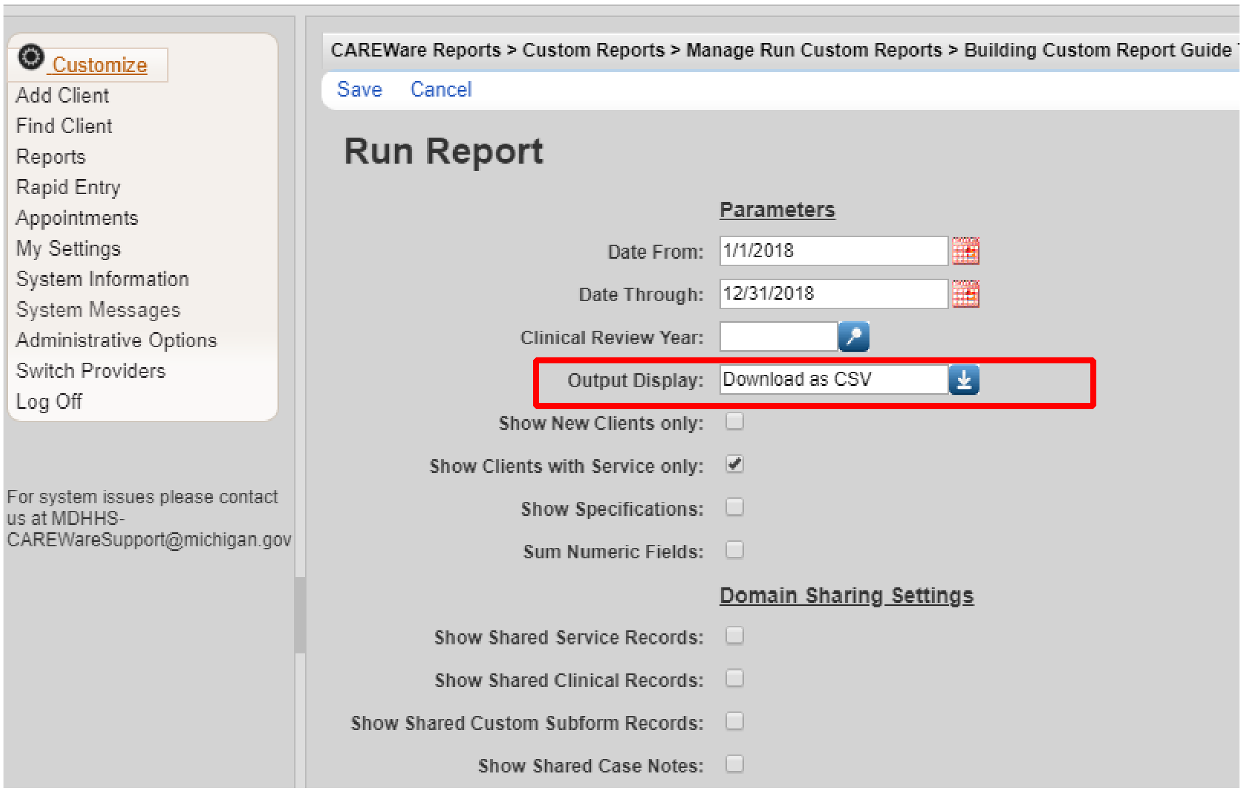
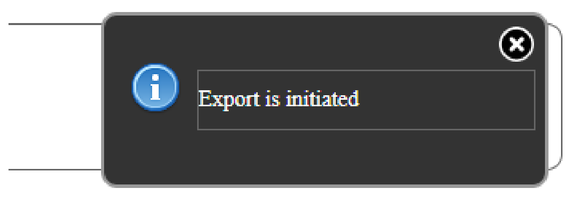
CAREWare: Export into Excel

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

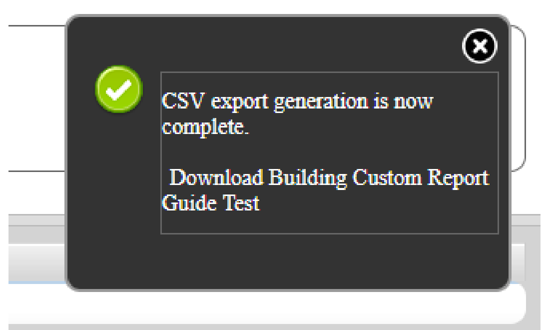
1. On the run report page, you choose the parameters for you report. This includes the date parameters and output. To export, you want to choose **Download as CSV** as your output. Then **Save.**



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.



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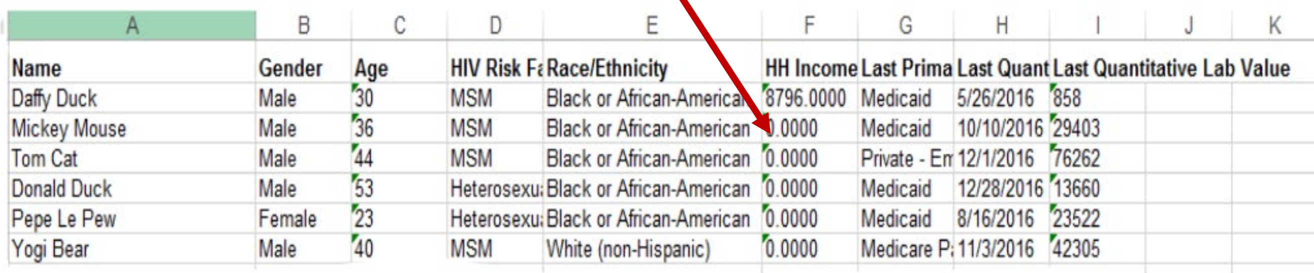
Microsoft Excel Tips

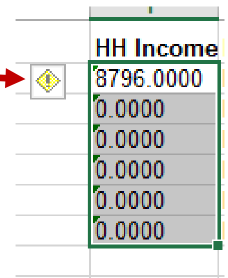
Import Errors

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:



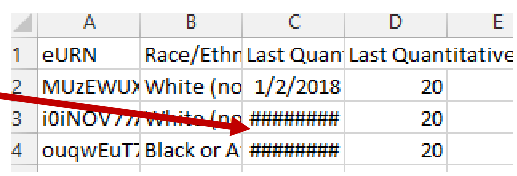
A	B	C	D	E	F	G	H	I	J	K
Name	Gender	Age	HIV Risk Fa	Race/Ethnicity	HH Income	Last Prima	Last Quant	Last Quantitative Lab Value		
Daffy Duck	Male	30	MSM	Black or African-America	8796.0000	Medicaid	5/26/2016	858		
Mickey Mouse	Male	36	MSM	Black or African-American	0.0000	Medicaid	10/10/2016	29403		
Tom Cat	Male	44	MSM	Black or African-American	0.0000	Private - Em	12/1/2016	76262		
Donald Duck	Male	53	Heterosexu	Black or African-American	0.0000	Medicaid	12/28/2016	13660		
Pepe Le Pew	Female	23	Heterosexu	Black or African-American	0.0000	Medicaid	8/16/2016	23522		
Yogi Bear	Male	40	MSM	White (non-Hispanic)	0.0000	Medicare P	11/3/2016	42305		

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.**



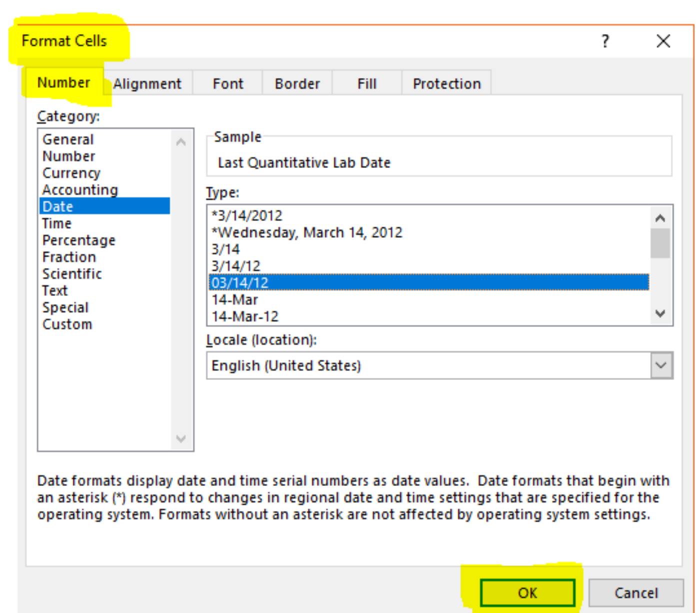
HH Income
8796.0000
0.0000
0.0000
0.0000
0.0000
0.0000

You may also need to convert your dates.



	A	B	C	D	E
1	eURN	Race/Ethn	Last Quan	Last Quantitative	
2	MUzEWUX	White (no	1/2/2018	20	
3	i0iNOV77	White (no	########	20	
4	ouqwEuT7	Black or A	########	20	

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.



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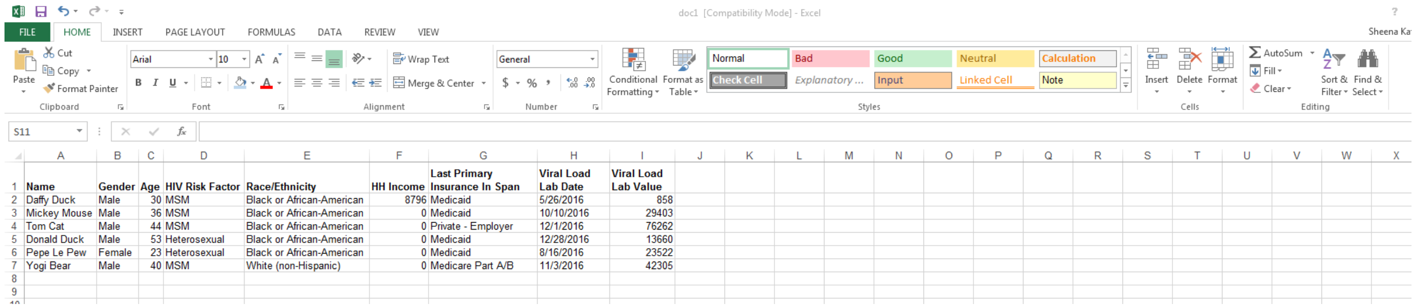
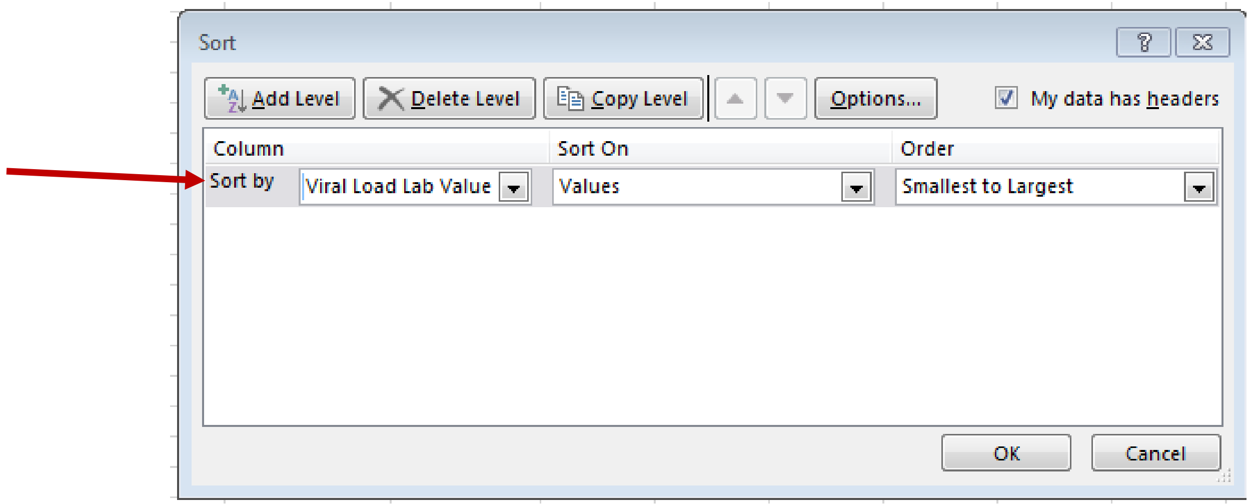
Sorting Your Data

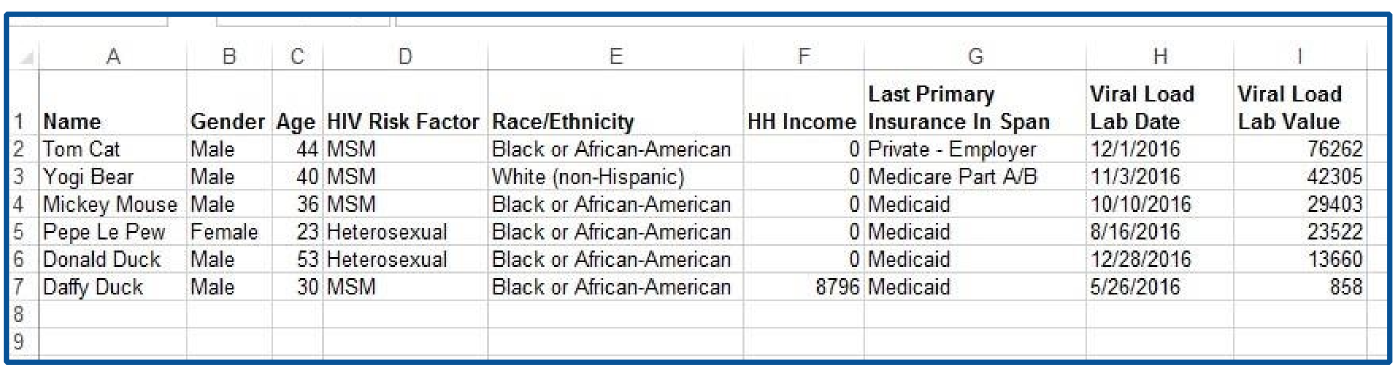


Name	Gender	Age	HIV Risk Factor	Race/Ethnicity	HH Income	Last Primary Insurance In Span	Viral Load Lab Date	Viral Load Lab Value
Daffy Duck	Male	30	MSM	Black or African-American	8796	Medicaid	5/26/2016	858
Mickey Mouse	Male	36	MSM	Black or African-American	0	Medicaid	10/10/2016	29403
Tom Cat	Male	44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

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
Tom Cat	Male	44	MSM	Black or African-American	0	Private - Employer	12/1/2016	76262
Yogi Bear	Male	40	MSM	White (non-Hispanic)	0	Medicare Part A/B	11/3/2016	42305
Mickey Mouse	Male	36	MSM	Black or African-American	0	Medicaid	10/10/2016	29403
Pepe Le Pew	Female	23	Heterosexual	Black or African-American	0	Medicaid	8/16/2016	23522
Donald Duck	Male	53	Heterosexual	Black or African-American	0	Medicaid	12/28/2016	13660
Daffy Duck	Male	30	MSM	Black or African-American	8796	Medicaid	5/26/2016	858

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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.

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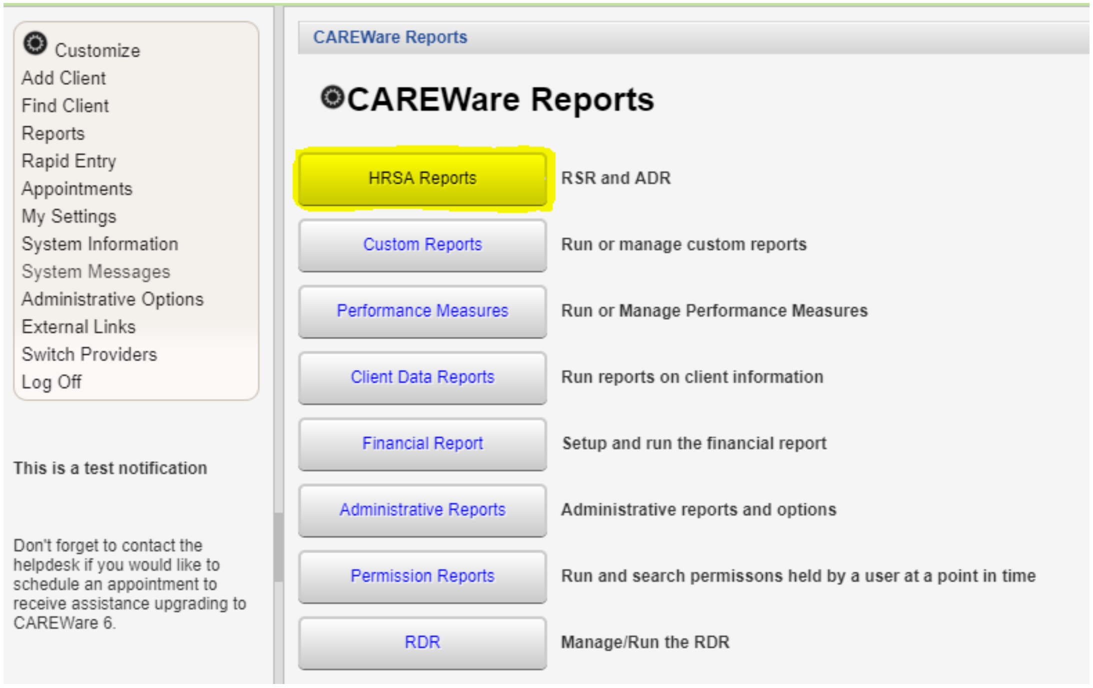
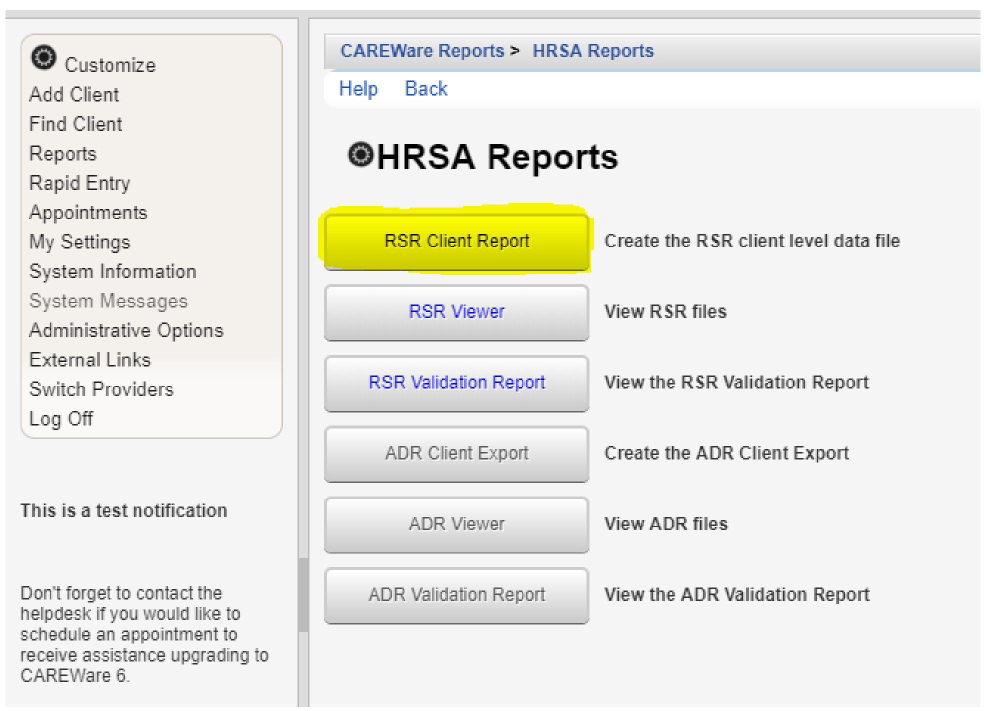
Creating and Running the "Client Report Viewer" Report

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



3. Select **RSR Client Report.**



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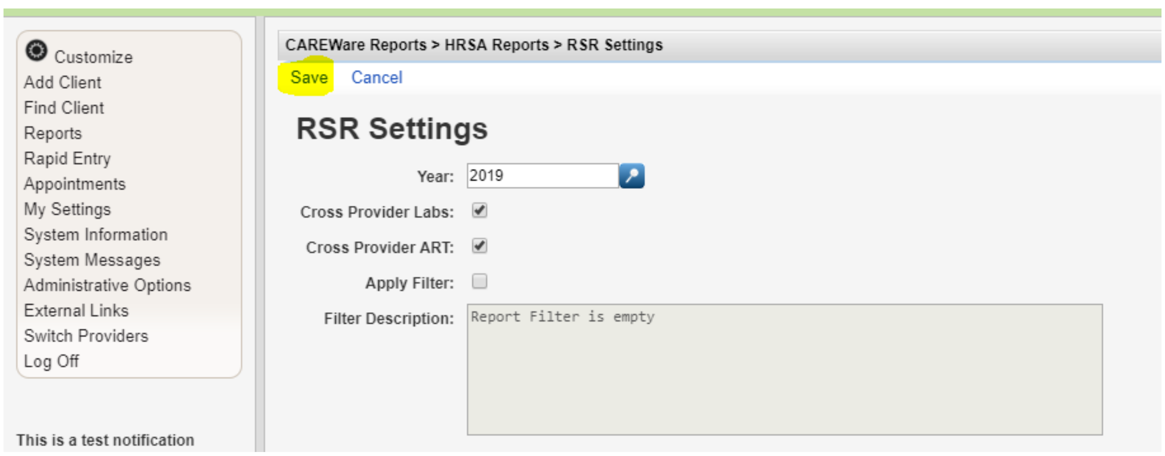
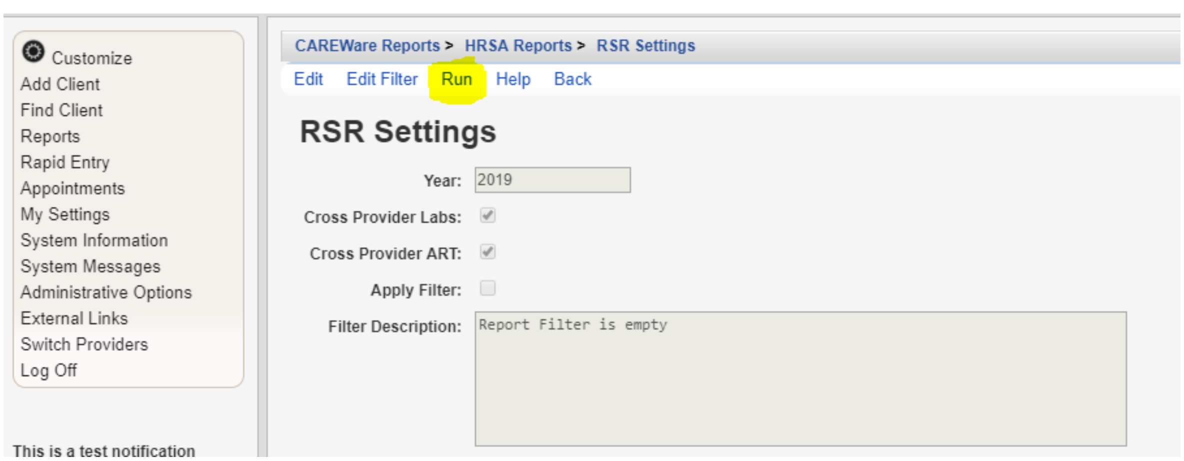
4. This is the main RSR page. Make sure the report year is set to the year in which you want to run the report. Select Edit to change the year of the report.

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.



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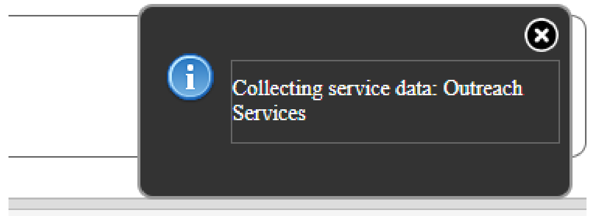
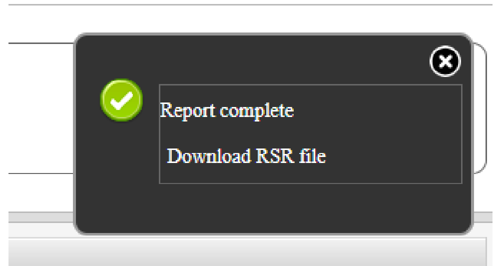
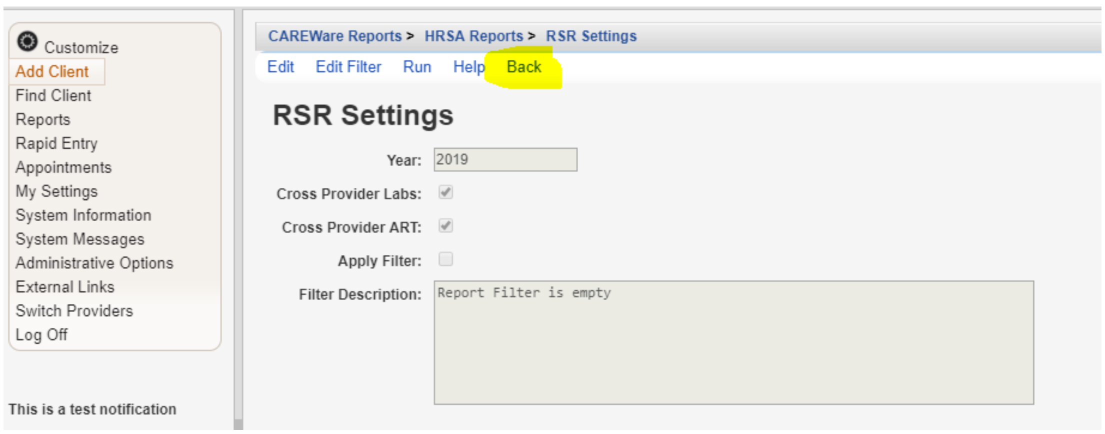
7. On the right-hand side, you will see a box that lets you know the report is running. It will say "Collecting Service Data."



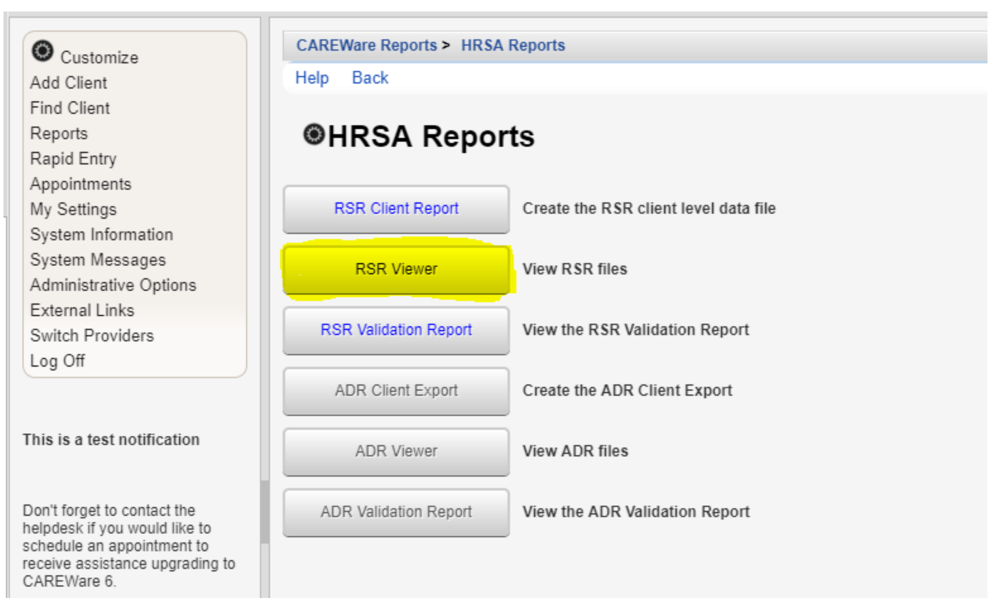
8. Once it generates, you will receive a message that says **Report Complete** (also on the right-hand side)**.** Select **Download RSR file.** It will download as a CSV file.



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.



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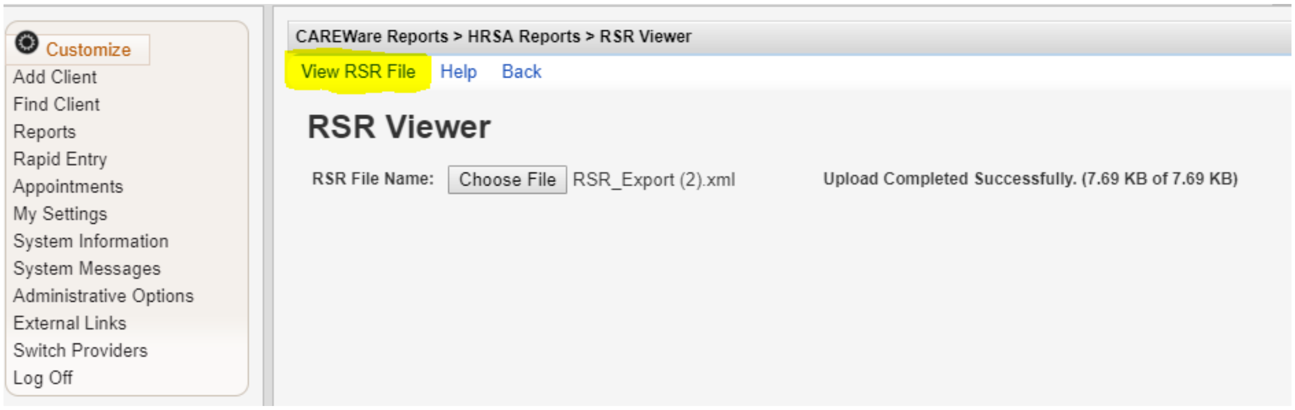
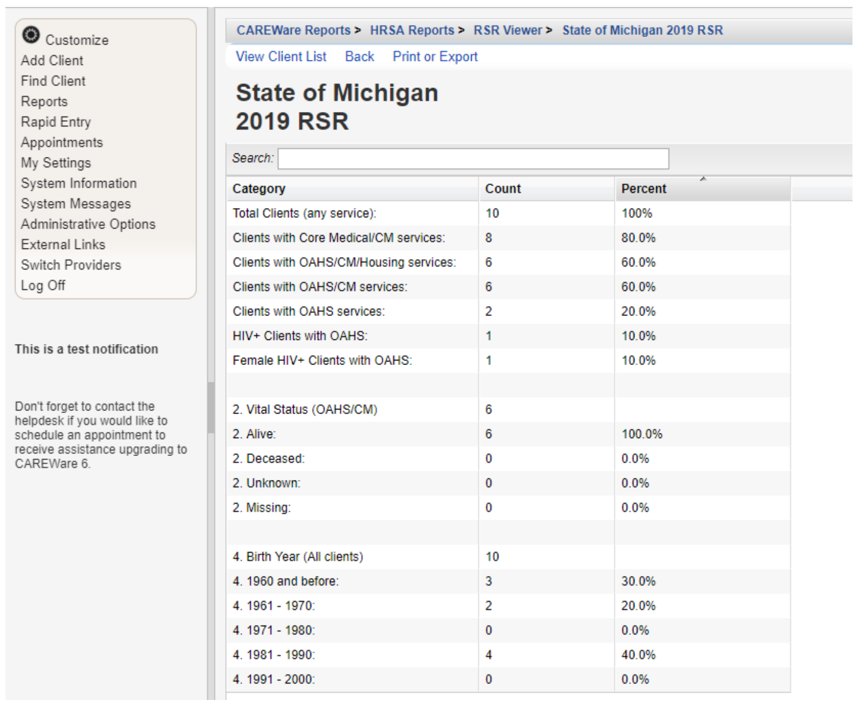
11. Choose the CSV file you just downloaded and then select View RSR File.



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.



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)	6	
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)	10	
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%

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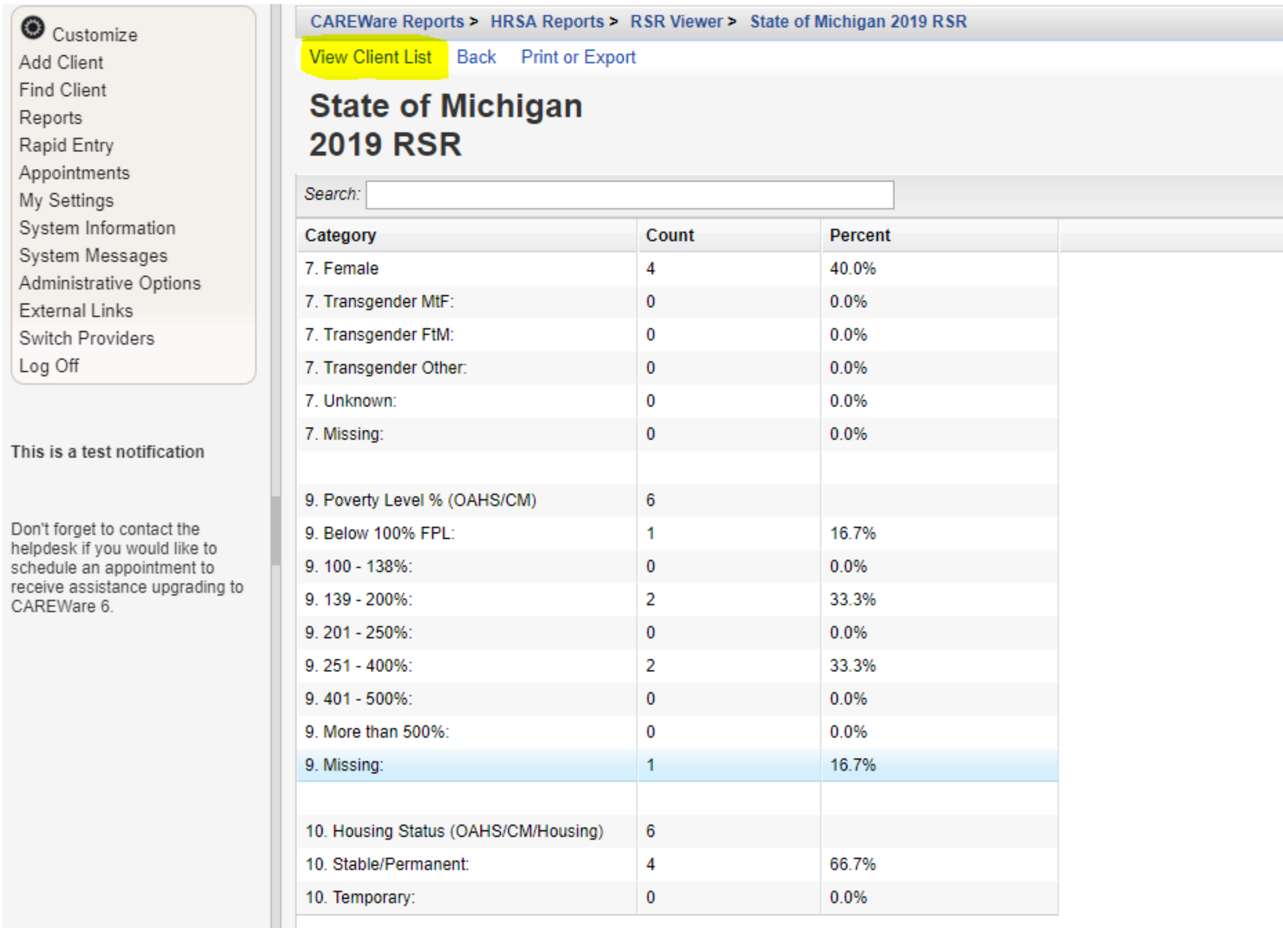
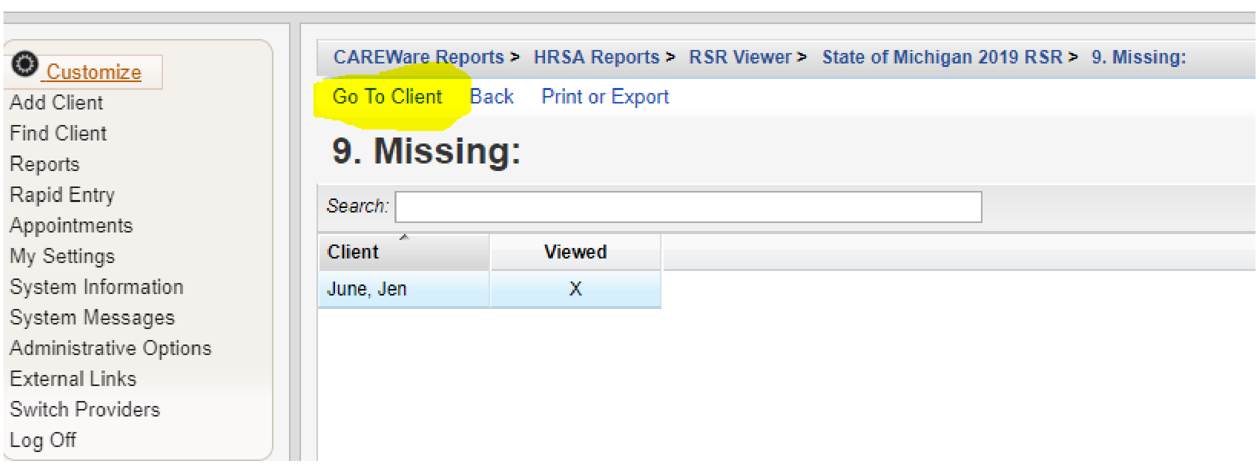
13. To view your missing records, simply select the box and then select View Client List.



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.



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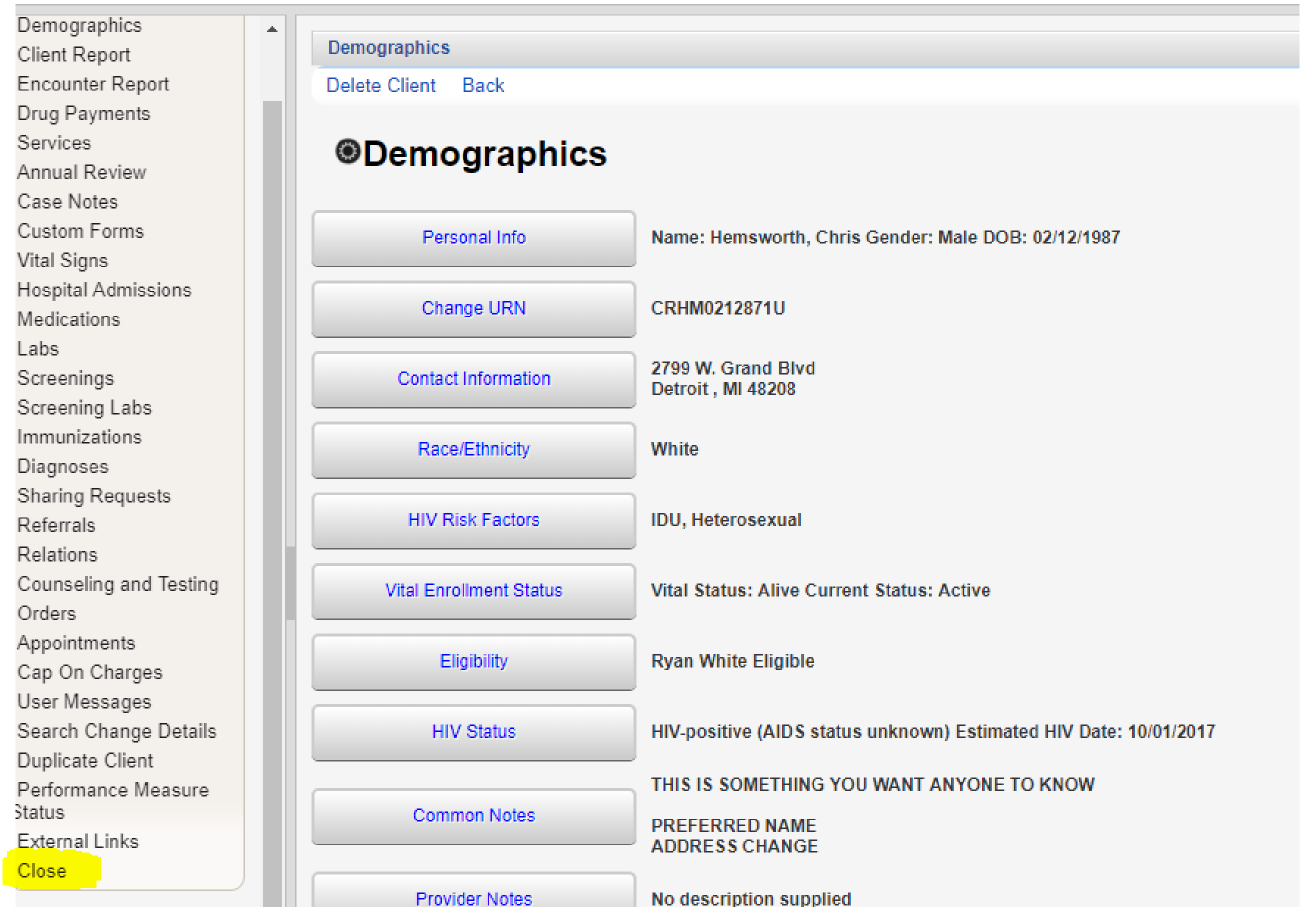
15. The client record will open up in a separate tab. Select the field in which information needs to be added. When you are done adding all of the missing information, close out of the client record.



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.

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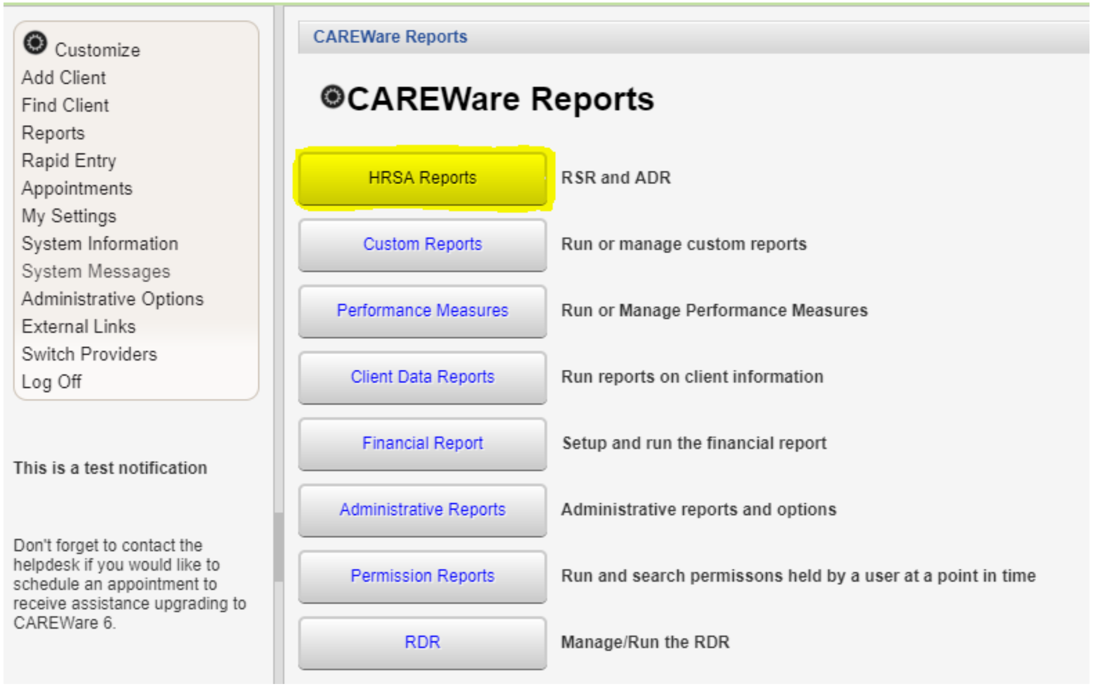
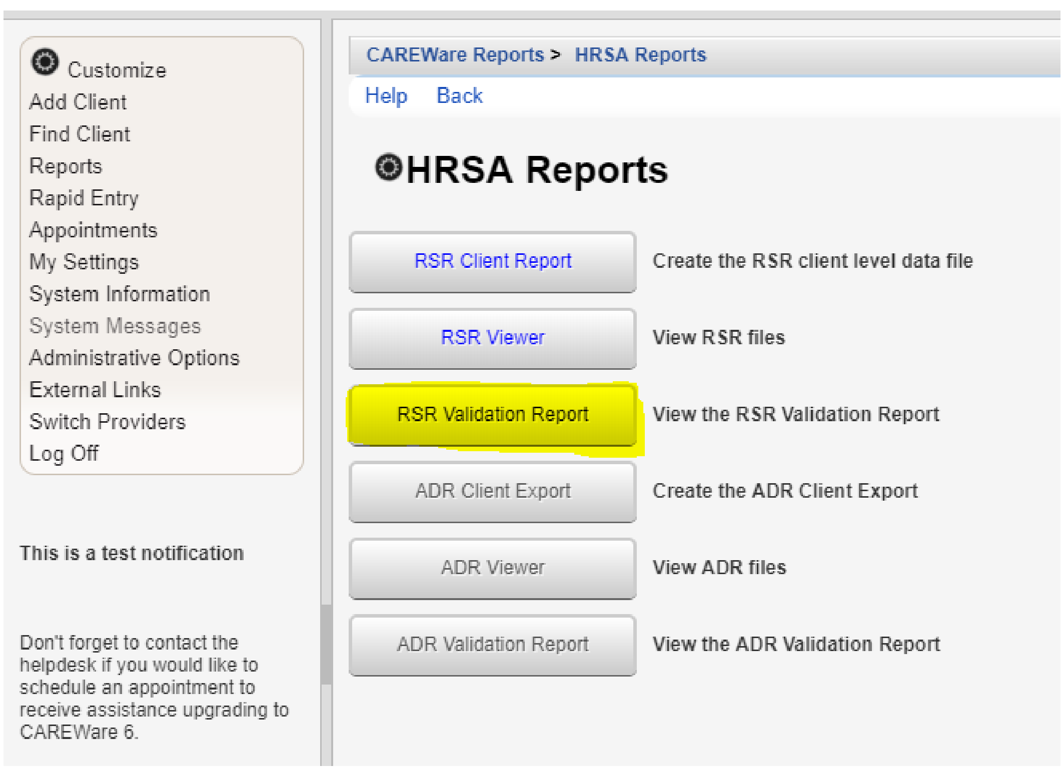
Running Data Validation Reports

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



3. Select **RSR Validation Report.**



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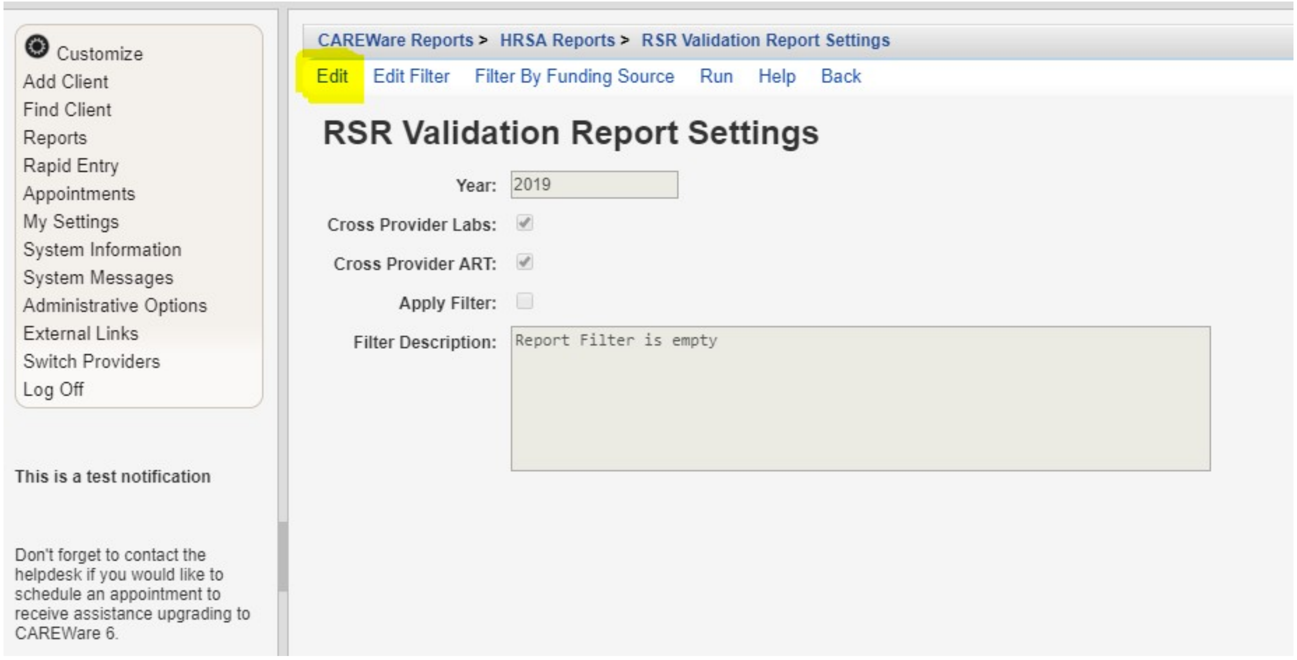
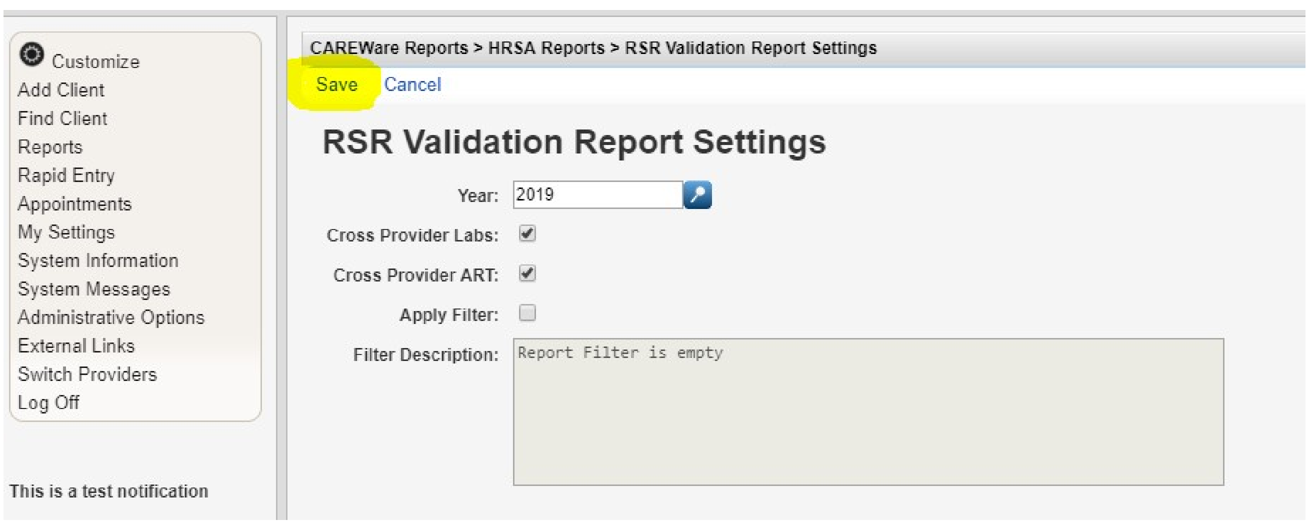
4. Select **Edit**



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**



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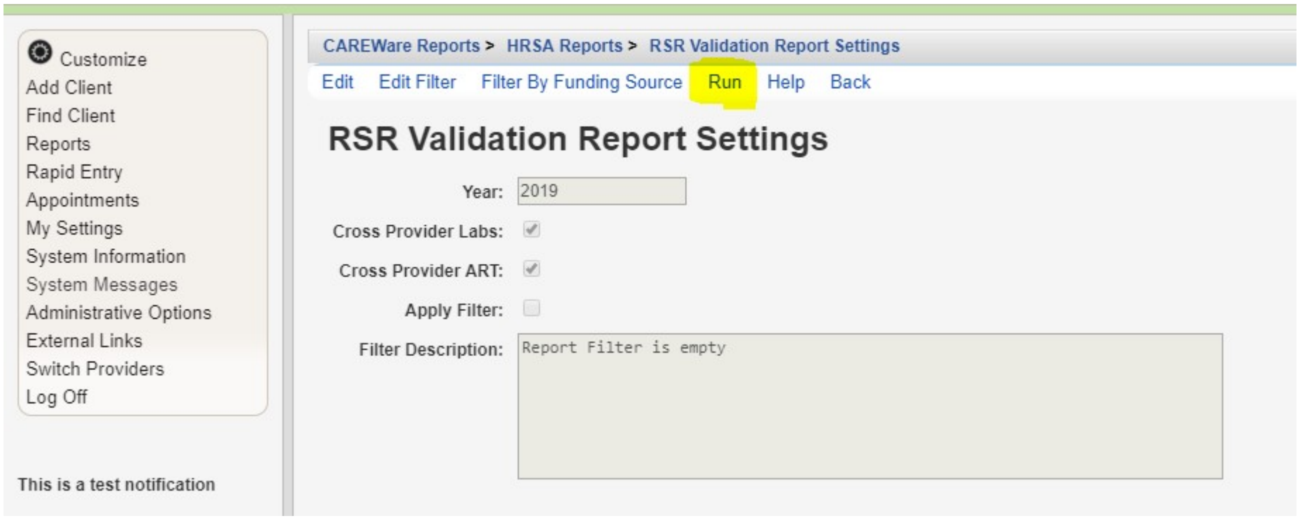
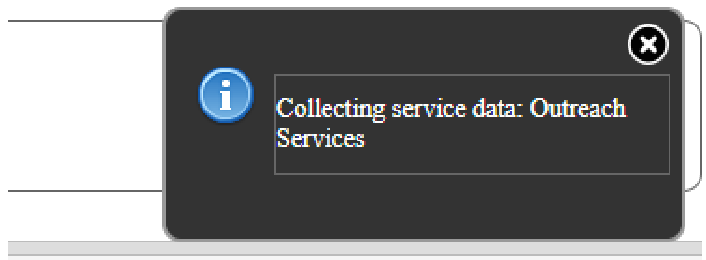
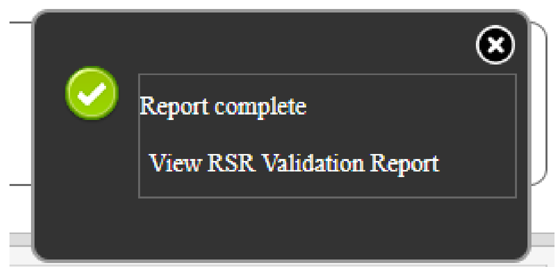
7. Once you save, you can run your report. Select **Run.**



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.



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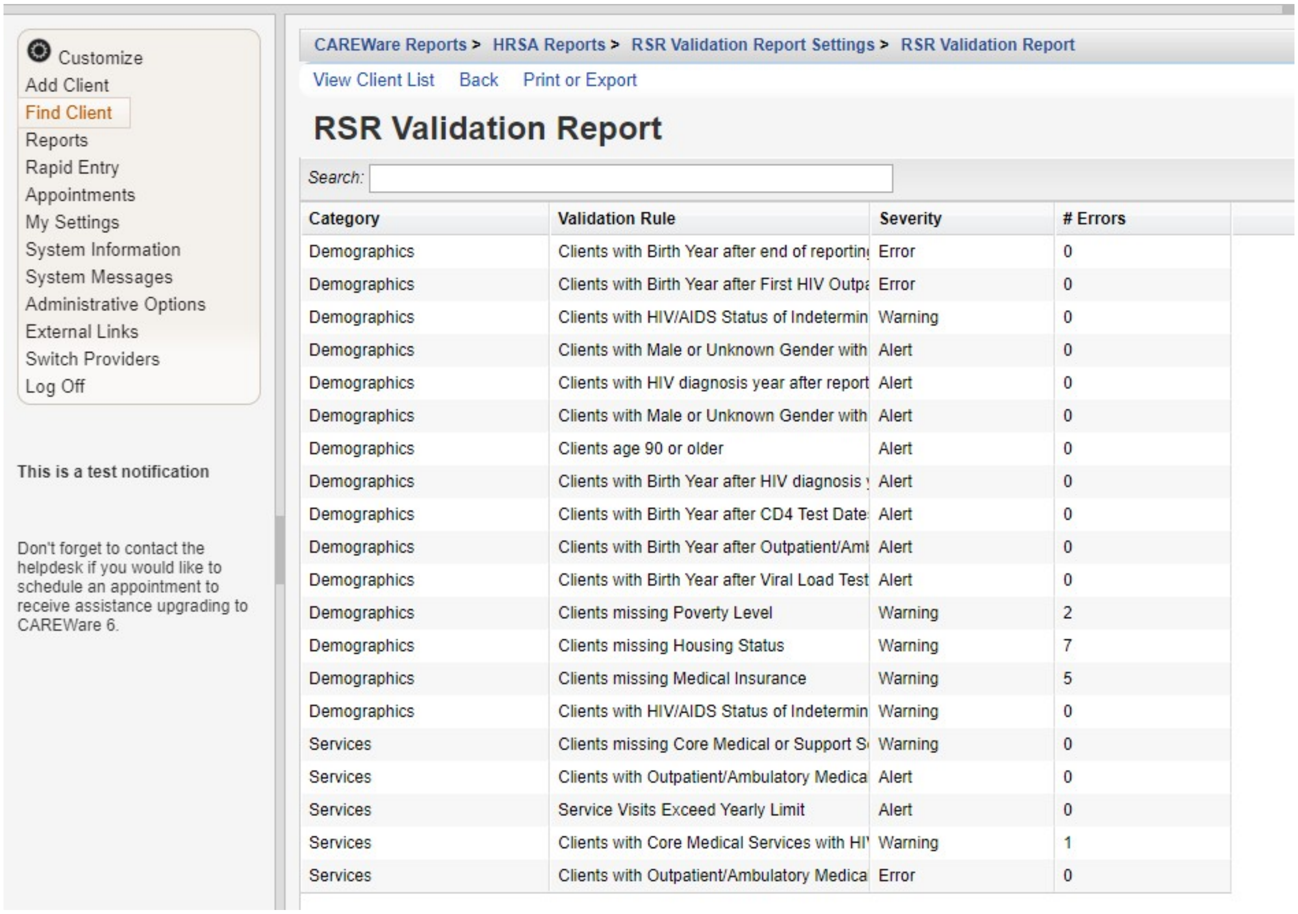
10. This is your validation report.



Category	Validation Rule	Severity	# Errors
Demographics	Clients with Birth Year after end of reportin	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/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 error's 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.

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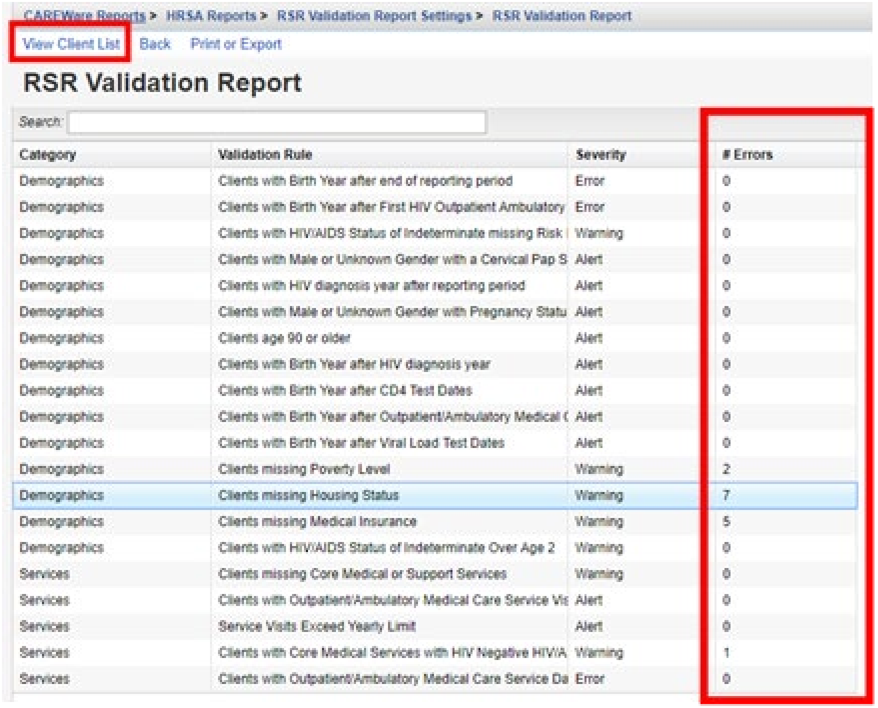
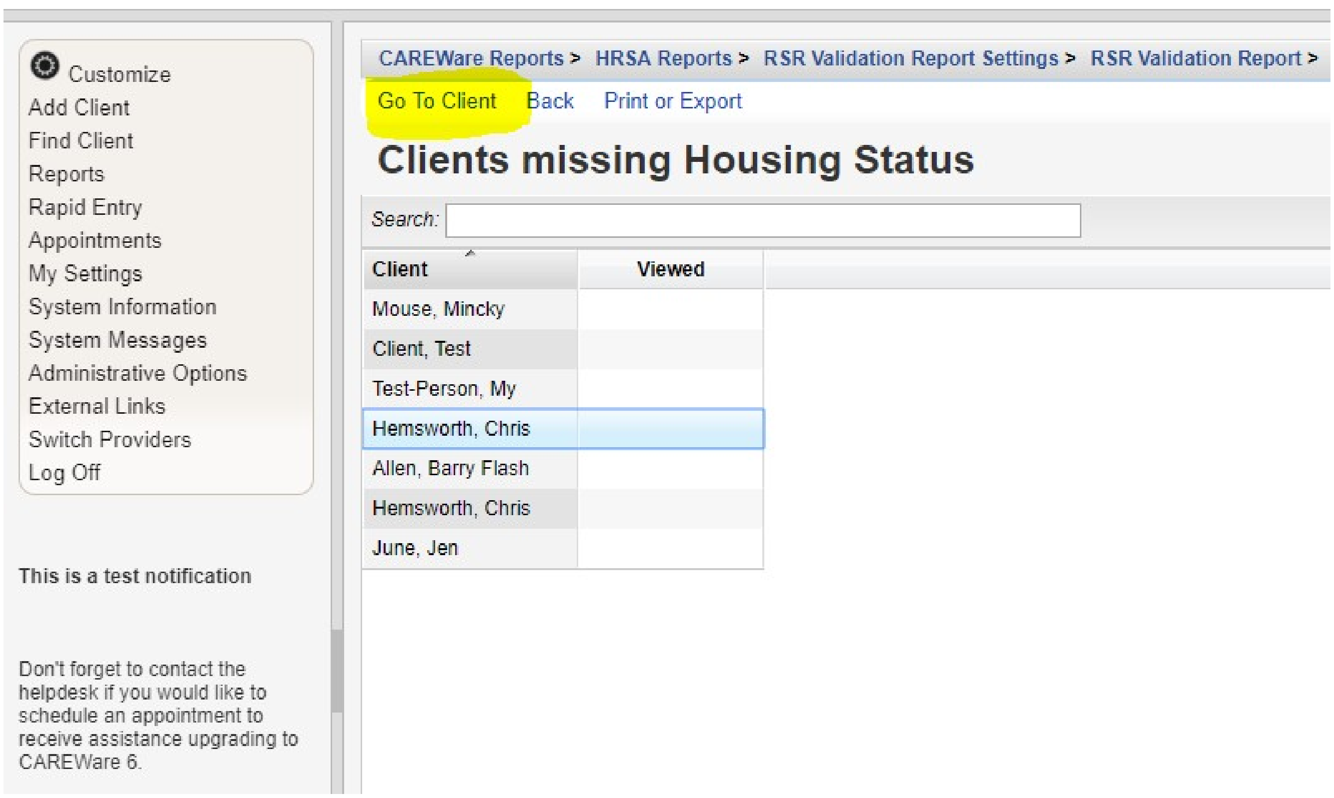
11. The errors column shows the number of clients missing information in the Validation Rule data field. Click the field with the errors and select View Client List



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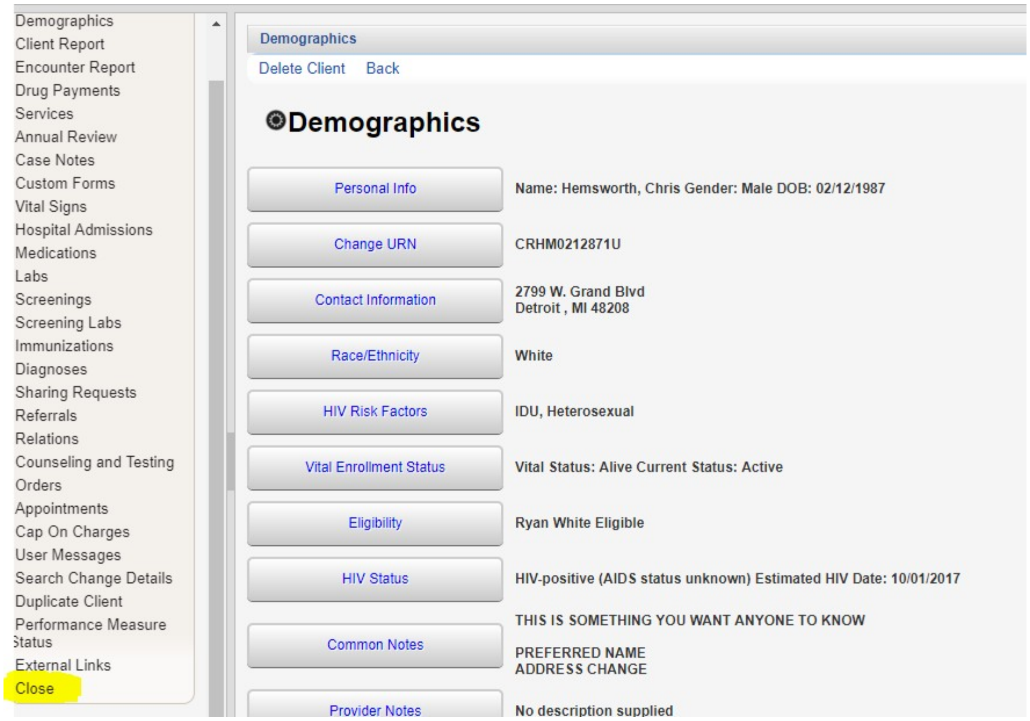
13. The client record will open up in a separate tab. Select the field in which information needs to be added. When you are done adding all of the missing information, close out of the client record.



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.

For any questions, please contact MDHHS - Bureau of HIV/STI Programs @ (MDHHS-SHOARS-SUPPORT@michigan.gov).

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