

Q&A Summary for CAREWare Custom Reports and Performance Measures, 11/19/2014

#	Questions	Answers
1.	Say I reviewed a patient's housing status in Nov 2013. The patient came back in Mar 2014 for a medical visit paid for by Ryan White. I didn't do another housing assessment. The patient doesn't return. If I don't update the housing status, it will be missing for the 2014 RSR because the date is 2013? True?	Correct. The housing status for 2013 would not get reported in the 2014 RSR because it would be outside the calendar year of the RSR report. However, if the client was re-evaluated you could use the "Bring Forward" button to update.
2.	Is there a list of calculated fields with an explanation of what they are and how to use them?	There is not a standalone list. Under Custom Reports, Field Selection, sort by Key Word. Calculated fields will be under Key Word Demographics.
3.	It sounds like using the Custom Reports you can see a value over time for one client, such as CD4 or Viral Load. What if you have a list of clients and want to see values for the entire list?	First, if you wanted to look at all lab values, you would not run a Demographic Report, but rather a Lab Report sorted by date. A Custom Report could, for example, be used to identify the lowest and highest values for a date range. For support in designing the custom reports, you can use the CAREWare Listserv , contact the HelpDesk or John Milberg directly.
4.	Can reports be individually filtered per case manager?	Yes, they can. As long as anything is a field in CAREWare, you can filter by it.
5.	Why is it necessary to identify reports as either demographic or service? That limits the available fields that can be used under each distinction.	A Demographic Report will result in one line per client being returned. In a Service Report, each line is a service. You could create a Custom Report to sum all visits per client, where each row would be the number of service visits per client.
6.	Currently, CW evaluates performance measures by domain. As a State we have our agencies divided into regions. We would like to evaluate these performance measures not only by domain/provider but also regionally. Is this possible or do you think it will be in the near future?	Yes, it may already be possible. Within Custom Reports, within Central Administration, you can include multiple domains in one report.

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7.	One of the things that we are interested in doing in my TGA is geocoding clients so that we can look at performance measure outcomes by geographic area, in order to pinpoint areas where we could better engage clients who are not linking to care, achieving viral suppression, etc. Is there a way that the census tract (http://factfinder2.census.gov/faces/nav/jsf/pages/searchresults.xhtml?ref=addr&refresh=t) can be added as a calculated variable in CAREWare? All the components needed to find this information are collected in CAREWare, and having that value would be incredibly helpful.	That is great that you are doing that! There is unfortunately not a way for CAREWare to select clients based on geographic parameters. If you have the client's zip code entered, you could run a report of this field in CAREWare, export it as Excel and analyze it in another program.
8.	Is it possible to add fields from various report types (service, demographics, case notes, etc.) into one custom report?	Yes. For example, in a Demographic Report you get one line per client, in a Lab Report, you get one line per lab test. So you would need to use a calculated variable and run a report on that.
9.	Where is the list of required field inputs per services provided, mentioned in the start of this session?	Service definitions are available in the main RSR manual here: https://careacttarget.org/library/ryan-white-hiv-aids-program-services-report-rsr-instruction-manual To set up contracts and define services in CAREWare, use the Quick Start Guide #2 available on the website at: http://hab.hrsa.gov/manageyourgrant/careware.html
10.	Would I be able to obtain # of clients who have obtained VL suppression and # of clients who have stable or increased CD4?	Yes. Create a performance measure with a denominator including all clients with a viral load in a specified time period and a numerator defined as those whose last viral load in that period is less than 200 copies. To assess stable or increased CD4 you would have to look at changes over time. Contact helpdesk for specific questions on this.
11.	When will the quick start guides be updated?	No plans right now, but they are pretty accurate even if slightly outdated.
12.	Could you please go over how to correctly filter the custom reports and performance measures by funding	If you add a filter to a custom report, type in the word "fund" in the search box and a number of fields will show. Most of these will allow you to filter on funded

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	sources as we have A,B,C,D funded sites on our server?	services. The field "Subservice count by funding" allows you to select by funding source.
13.	How do you get the history of, say, insurance coverage from the Annual Review tab?	Create an Insurance Assessment custom report. You should be able to use the field Primary Insurance Assessment.
14.	On the ANNUAL REVIEW's Annual subtab's Insurance data: I've been updating one record through the year and listening to you today I heard that I should NOT be updating record, rather ADD a new record and date. Yes?	The annual review tab was updated a few years ago to allow you to update these items as much as needed. Previously, you could only enter one value per year. Now you can enter as many as you want, and give them a date. Note that for the RSR, we often take the last value in the year for Income level etc.
15.	HAB is now asking Part B grantees to report Performance Measures by service category (e.g., reporting the Viral Suppression PM for clients who received housing services). Can CAREWare do this? How does CAREWare handle those housing clients who may not have had the medical visit that would qualify them to be included in the denominator?	Yes. You would need to create a denominator that selects only those clients that meet the criteria of interest. For example, where there is at least one housing service in the year. Remember that you can copy and edit the copy of any of the HAB measures to meet your specific needs.
16.	I sometimes get the following error message when creating filters for my custom reports: "The not feature cannot be used with the first filter in list." Any suggestions in how to fix this error? Especially if I only have one filter that must use the "Not" feature.	Many of these should be standard referral to the CW Help Desk. These are specific "asks" rather than questions about John's presentation.
17.	Which value viral load or CD4 supersedes when the domain wide report is run? For example if the Medical Case manager enters 200 for CD4 and the Provider enters 202 for CD4 which is the one the system picks up. Same date same test.	Well, that's a tough one; something is wrong with the data as you should never have two different lab results for the same date, same test, same client! If you think this is occurring, you might take the maximum or minimum value per test per day. But it should be extremely infrequent and might be a time to clean the data.

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18.	Can you tell me why does CAREWare not include a re-engagement date in the service tab? For example Mr. John Doe was active with medical care in 2012 but was incarcerated all of 2013 and re-engaged medical care in 2014. What I've noticed is that we (medical provider) are still showing the patient under certain performance measure even if we change the status to inactive. Why can't CAREWare include a re-established field that way it will not count that 2013 as "not meeting performance measure" when in reality the medical provider had not control?	Good question. Really it is an issue of fixing the performance measure so that these individuals are excluded once they become inactive, ASSUMING you have entered a date that they became inactive. I think the issue is that CAREWare requires a DATE case closed to know when it should exclude a specific individual.
19.	How different is custom report of the current build from build 823?	No change in custom reports although in the last year or so new types of custom reports have been made available, for example for insurance records.
20.	How do you create field in CAREWare to collect data such as Email address and alternate phone numbers?	Those would lend themselves nicely to custom fields. See quick start guide #4 for this.
21.	Can you export the data saved in the common note section?	You should be able to if it is a field in a custom report. Save the report as an Excel file or text file.
22.	Can the common note section be added to a custom report?	Yes. The fields are "Memo" and "Provider Memo." Remember, these can be very long text fields.
23.	I think "sex at birth" is labeled under "birth gender" when searching in the custom reports.	Yes, these were mislabeled and will be fixed in the next build.
24.	When building a demographics custom report, when is the "Has RW-Funded Service" filter required? Doesn't the custom report by default only include those clients who have had a service in the specified timeframe?	No field is required in custom reports. That field would restrict the specific report to clients that had a RW funded service which depends on how your contracts are set up. The general date filter on the front screen does select only clients with a visit in the date range, but not necessarily a FUNDED visit.
25.	Are there any plans to make updates to the Core performance measures? In a HRSA HAB email, it was mentioned that this may occur Fall 2014.	Not sure. If so, this would be announced on the Listserv.

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26.	Are there plans to add the Appointment/Scheduling fields to the field list for Custom Reports?	The schedule module itself allows you to run a number of such reports. In custom reports there are calculated fields called "Days between appointments", "Number of missed appointments by subservice", "Number of missed appointments in span", "Num appts by subservice", and "Number of appts" that are also available in the Demographic Field Dictionary.
27.	Is there a dental component to CAREWare for dental providers?	No. But there is nothing to stop you from using CAREWare to collect client level dental data and customize subservices to capture detailed dental services.