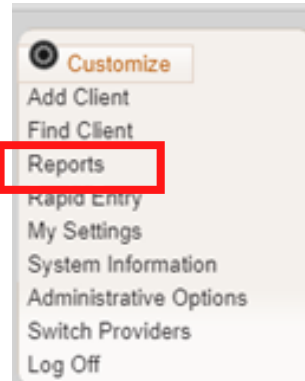


HOW TO CREATE CUSTOM REPORTS

01 Select **Reports** from the Main Menu.



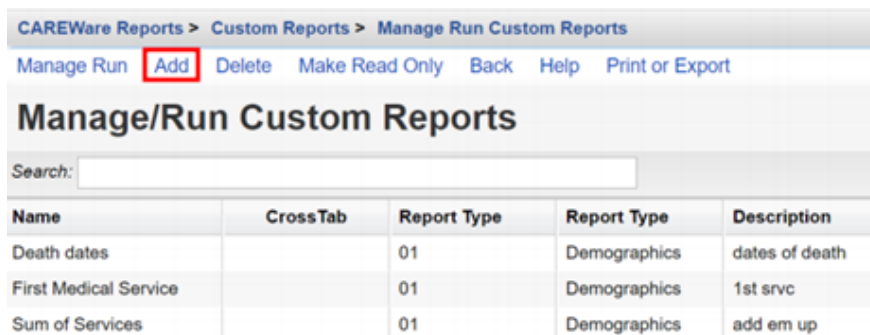
02 Select **Custom Reports** from the link menu.



03 Select **Manage/Run Custom Reports** from the link menu.

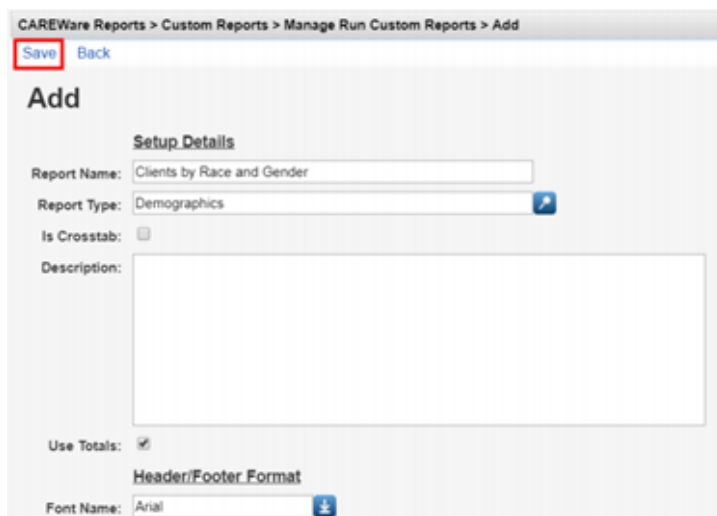


04 Select **Add**.



HOW TO CREATE CUSTOM REPORTS

- 05 Enter in the following information (as applicable) and click **Save**.
- Report Name
 - Report Type
 - Is Crosstab (checkbox)
 - Description (optional)
 - Use Totals (checkbox – will automatically sum total fields in the report)
 - Header/Footer Format (optional)



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Add

Save Back

Add

Setup Details

Report Name: Clients by Race and Gender

Report Type: Demographics

Is Crosstab:

Description:

Use Totals:

Header/Footer Format

Font Name: Arial

- 06 After clicking save, you will be on the custom report's menu. Select **Field Selection**.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender

Back

☉Clients by Race and Gender

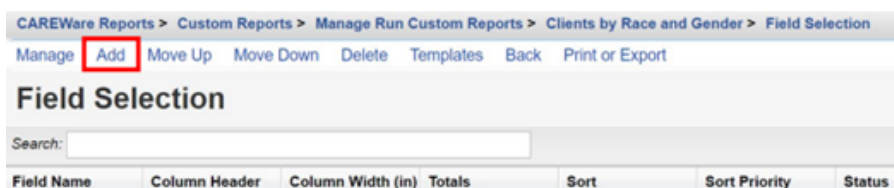
Run Report Start Date : 03/27/2018, End Date : 03/27/2019, Clients with services, Report Display as : Open in New Window

Report Layout Clients by Race and Gender, Demographics

Field Selection No fields selected

Report Filter Report Filter is empty

- 07 Select **Add**.



CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Field Selection

Manage **Add** Move Up Move Down Delete Templates Back Print or Export

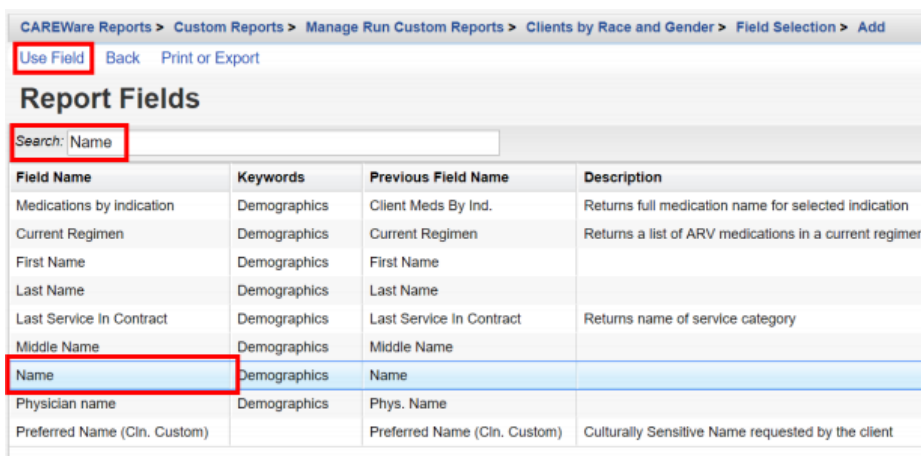
Field Selection

Search:

Field Name	Column Header	Column Width (in)	Totals	Sort	Sort Priority	Status
------------	---------------	-------------------	--------	------	---------------	--------

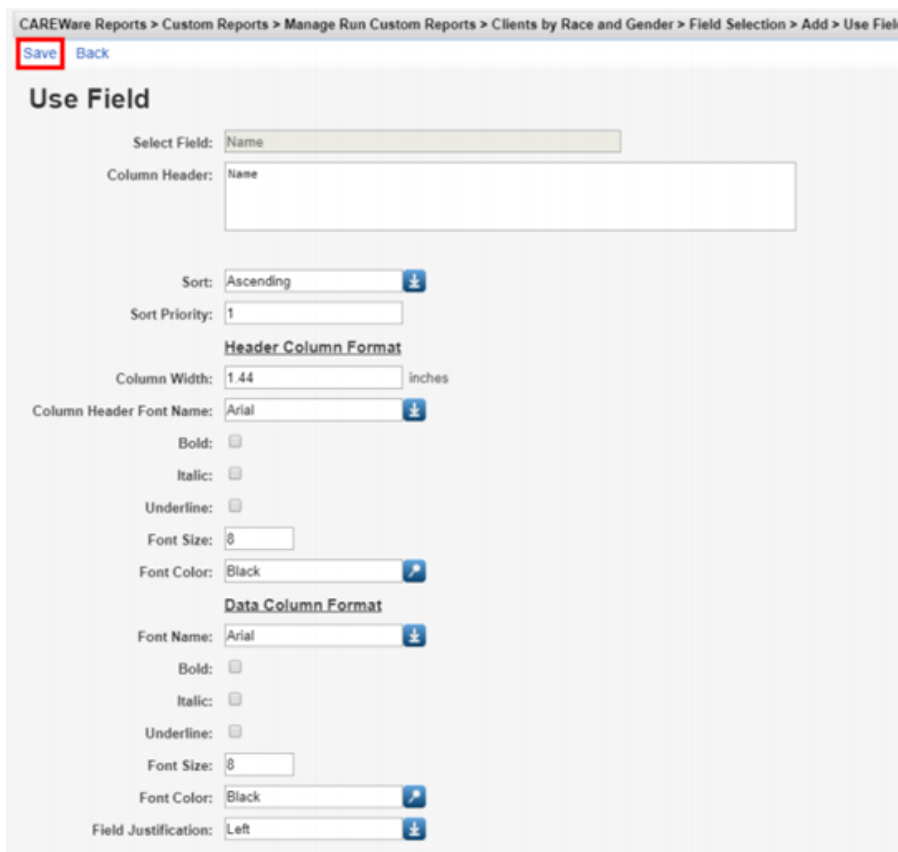
HOW TO CREATE CUSTOM REPORTS

08 Use the Search box to find the fields to display in the report. In this example, “Name” was entered. Since the complete client name is desired for the report, the Name field has been selected. Click **Use Field**.



09 You will now be on the Use Field menu. Enter in the following information (as applicable) and click Save.

- Column Header
- Sort
- Sort Priority
- Header Column Format
- Data Column Format

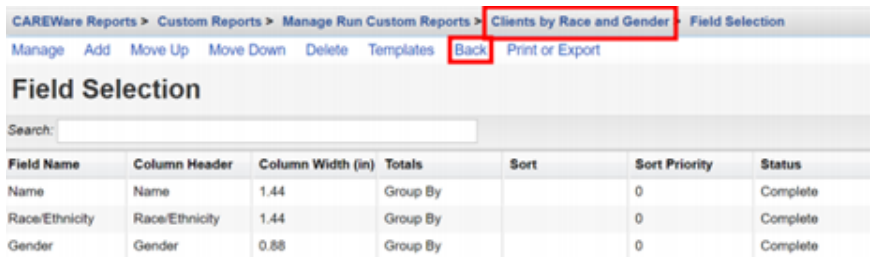


HOW TO CREATE CUSTOM REPORTS

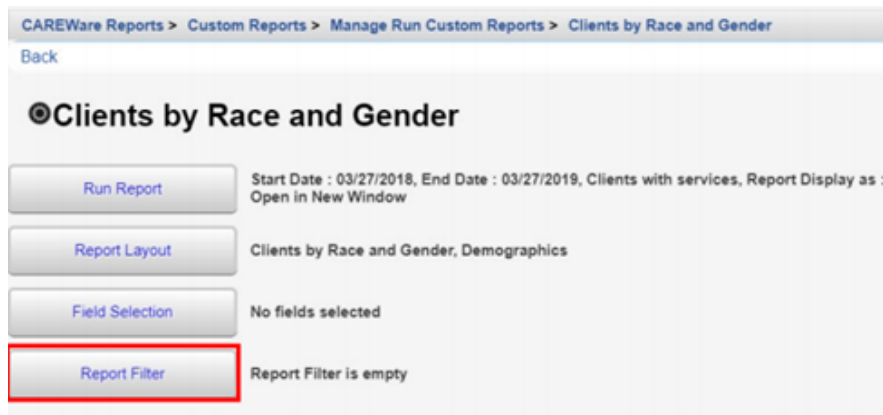
10 After clicking save, you will be on the selected field’s menu. Return to the Field Selection menu by clicking **Field Selection** within the breadcrumb trail. Repeat steps 8 through 10 to add additional Report Field selections (such as Race/Ethnicity and Gender).



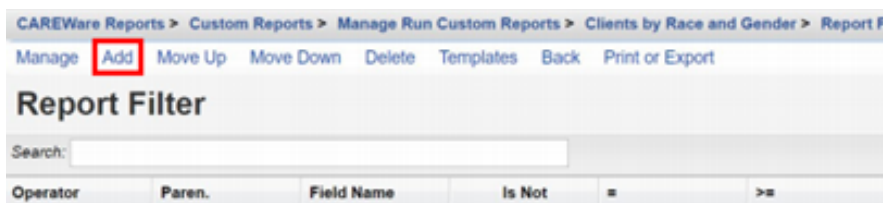
To Return to the custom report’s menu, click the name of the custom report in the breadcrumb trail (in this example, “Clients by Race and Gender”) or click **Back** from the Field Selection menu.



11 Click **Report Filter**.



12 Click **Add**.



HOW TO CREATE CUSTOM REPORTS

- 13 Enter “Gender” in the Search box to limit available Field Names. Chose the appropriate Field Name and select **Use Field**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Report Filter > Add

Use Field Back Print or Export

Report Fields

Search: Gender

Field Name	Keywords	Previous Field Name	Description
ADR Gender		ADR Gender	
Gender	Demographics	Gender	

- 14 Select Female from drop-down box. Click **Save**.

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Report Filter > Add > Criterion Details

Save Back

Use Field

Field Name: Gender

Is Not:

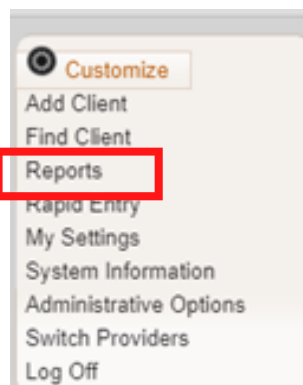
Female

Null:

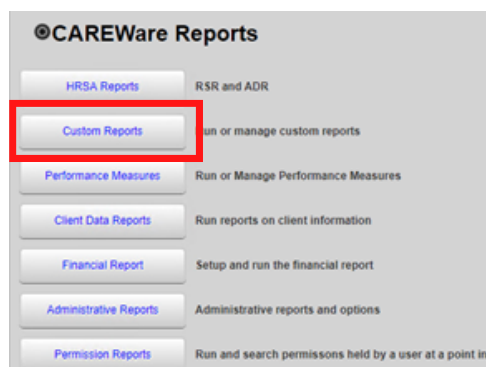
HOW TO CREATE CUSTOM REPORTS

RUNNING A CUSTOM REPORT

01 Select **Reports** from the Main Menu.



02 Select **Custom Reports** from the link menu.



03 Select **Manage/Run Custom Reports** from the link menu.



04 Select **Run Report**.

HOW TO CREATE CUSTOM REPORTS

- 05** Click **Edit**. Select the following report parameters and click **Save** (will be visible after clicking Edit).
- Date From
 - Date Through
 - Clinical Review Year (optional – typically matches the reporting year)
 - Output Display – Download as CSV – Open in New Window – Open as PDF
 - Show New Client only (check box)
 - Show Clients with Service only (check box – will only list clients with services within date span)
 - Show Specifications (check box – to list report criteria)
 - Sum Numeric Fields (check box)
 - Domain Sharing Settings (default value)

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Run Report

Edit Run Report Back

Run Report

Parameters

Date From: 3/27/2018

Date Through: 3/27/2019

Clinical Review Year: 2019

Output Display: Open in New Window

Show New Clients only:

Show Clients with Service only:

Show Specifications:

Sum Numeric Fields:

Domain Sharing Settings

Show Shared Service Records:

- 06** Click **Run Report** and then click **View** [name of report] (in this example, View Clients by Race and Gender).

CAREWare Reports > Custom Reports > Manage Run Custom Reports > Clients by Race and Gender > Run Report

Edit **Run Report** Back

Run Report

Parameters

Date From: 1/1/2019

Date Through: 12/31/2019

Clinical Review Year: 2019

Output Display: Open in New Window

Show New Clients only:

Show Clients with Service only:

Show Specifications:

Sum Numeric Fields:

Domain Sharing Settings

Show Shared Service Records:

Show Shared Clinical Records:

Show Shared Custom Subform Records:

Show Shared Case Notes:

Report generation complete.

View Clients by Race and Gender

The report will appear in a new tab within your browser.