Welcome!

CAREWare Quick Start guides will walk you through the basics of setting up, managing and using the main CAREWare functions. It is intended for non-technical users who just need to get basic information in and out of CAREWare.

About This Guide #6:
Working with Prebuilt Reports (Including the RSR)

PLEASE NOTE: The client data used in these manuals is purely fictional.

Guide in this series:

1. *Downloading and installing CAREWare*
2. *Creating contracts and services*
3. *Entering Clients and their Service and Clinical Data*
4. *Customizing tabs and fields*
5. *Customizing clinical data*
6. *Working with prebuilt reports (including the RSR)*
7. *Creating basic custom reports*
8. *Creating more advanced reports*
9. *User and System Administration*

For additional information:

Please refer to the **Frequently Asked Questions** page on the CAREWare programmers' website:

http://www.jprog.com/wiki/

Or contact the help desk at cwhelp@jprog.com.

Revision date: September 21, 2012

First Things First

What do I need to get started?

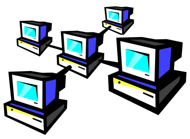
- You must have the appropriate user privileges to run reports.
- You should have a number of clients entered in the system so you can see how your reports will look.

Running "Prebuilt" reports

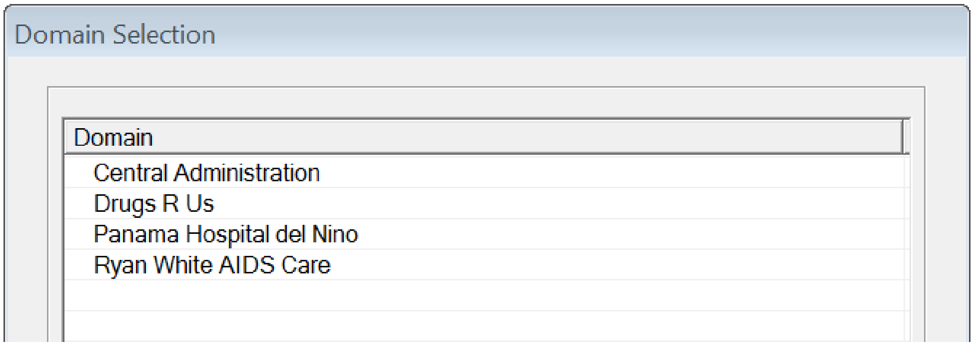
CAREWare comes prepackaged with a number of clinical and service reports. We'll cover all of them here, then take a look at running the RSR for both reporting and quality assurance purposes.

Custom reports are covered in guides #7 and 8.

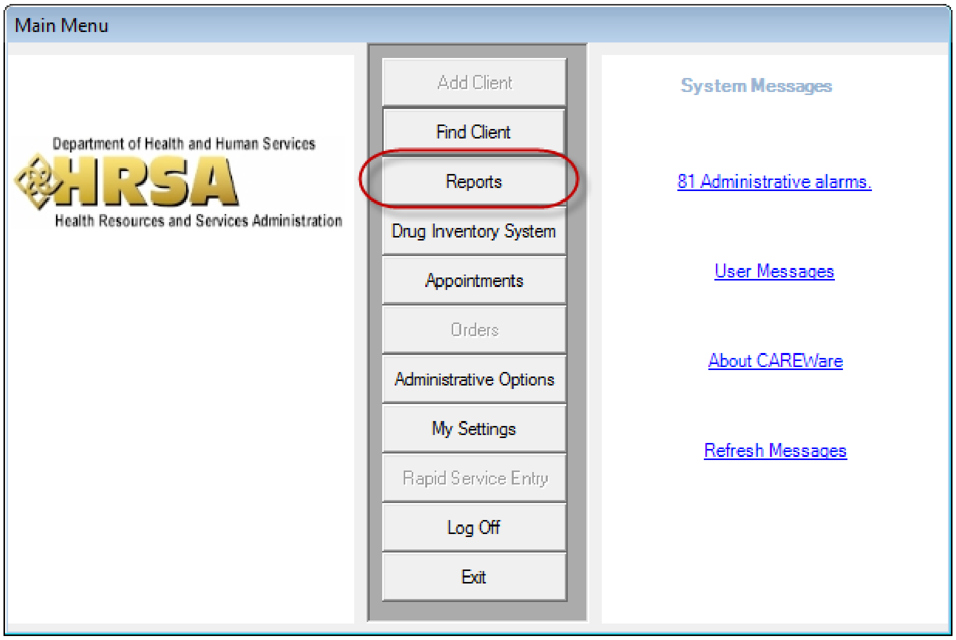
1. Log into CAREWare. If you have administrative privileges and are asked to choose between Central Administration and Provider ("Default" until you change the name), you can log in as either a Provider or Central Admin. To run reports for multiple agencies within a provider network, log in as Central Admin.



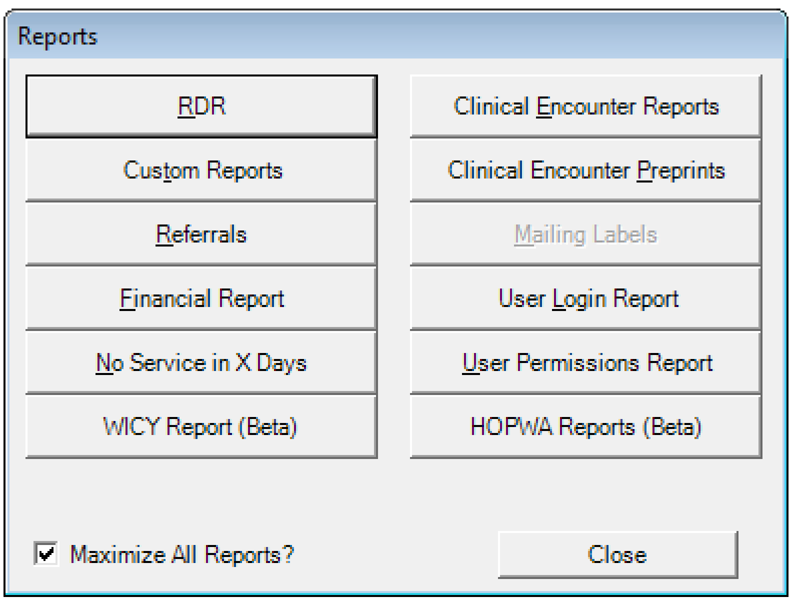
PLEASE NOTE: Some pre-built reports can only be run from the Central Admin and vice-versa. i.e. WICY report (Central); Mailing Labels (Provider).



2. Select **Reports** from the main menu.



The various report categories will appear:



HINT: By selecting the **Maximize All Reports?** check box, reports will open in full screen mode rather than in a reduced-size window.

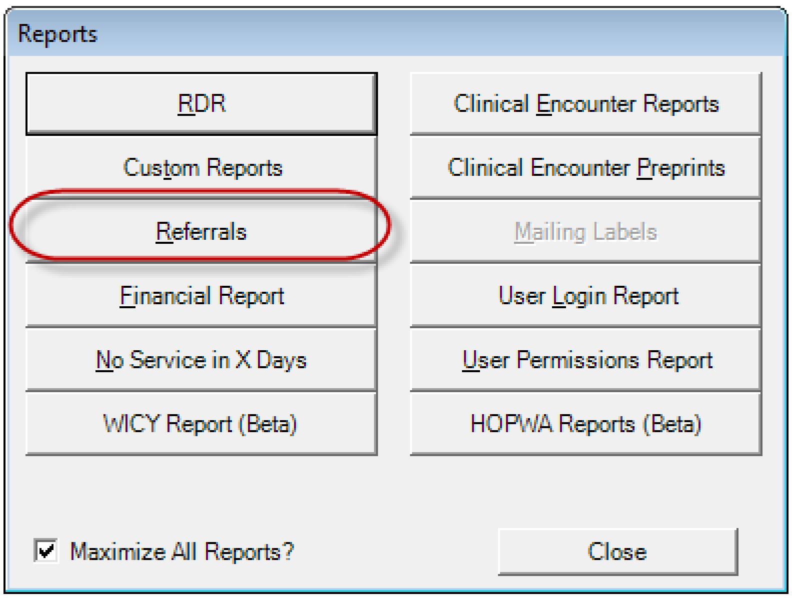
NOTE: Although the Ryan White Data Report (RDR) is no longer required, you may find it a useful summary of your client population.

Running the Referrals Report

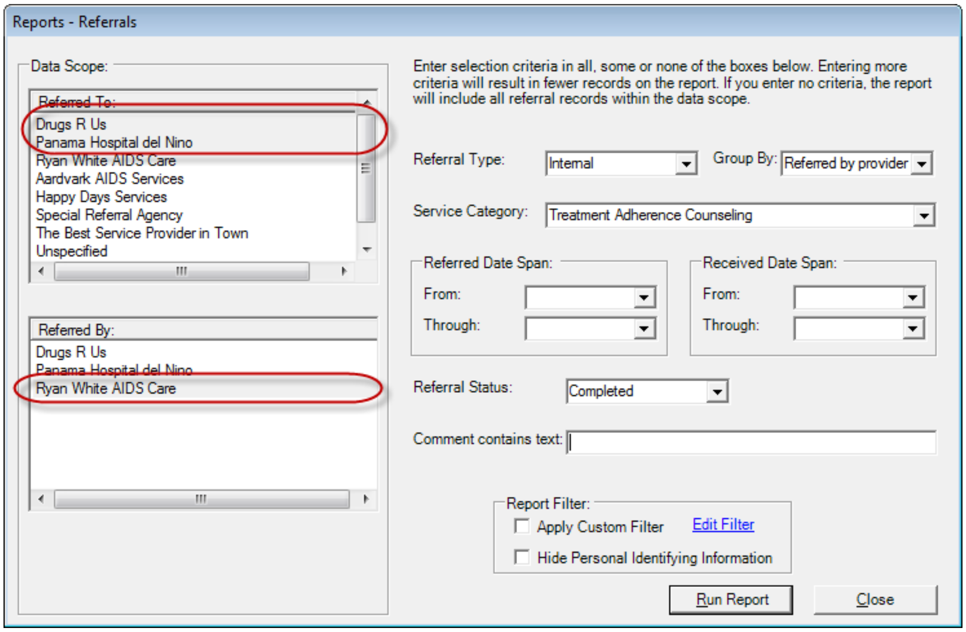
The Referrals report allows you to track the status of referrals for services you've made to other agencies. This allows you to schedule a regular status check on your referrals rather than having to perform chart review to determine if referrals were followed through.

Creation and management of referrals is not covered in these Quick Start guides. Please see the full user manual for more information.

1. From the **Reports** menu, select the **Referrals** report.



2. Make your selections as detailed below:



Data Scope allows you to choose the “Referred By” provider (incoming referral) or “Referred To” (outgoing referral) providers. Referrals are **Outgoing/External** unless you’re part of a provider network sharing a CAREWare database over a wide area network, in which case **Internal** referrals may be what you are using. Shown here are internal referrals from one agency on a network to another.

Referral Type is either “Internal” or “External.” If the provider is part of your grantee network and shares this database on the same central server, the referral is internal and an electronic referral has been made. If the provider is outside your database, the referral is external, and it’s been made by phone, fax, or mail.

Group by allows you to group results by provider, either **Referred by** or **Referred to**.

Service Category is the type of HRSA service category for which the referral was made.

Referred and Received Date Spans are, respectively, the dates within which the referrals were made, and the dates within which the referrals were received by the receiving agency. Leave blank to include all dates.

Referral Status is either Pending, Completed, Lost to Follow-up, or Rejected.

You can also search the **Comment** fields of referrals for information.

You can **Apply Custom Filter** to use a custom report filter on your data to get more granular results than this menu will provide.

Click **Hide Personal Identifying Information** to replace client names with the encrypted URN.

The more criteria you enter, the more specific the report will be. Entering no criteria will result in ***all*** referrals being listed.

3. Click **Run Report**. A sample result is shown below.

Referrals Report.

Report Criteria:

Group By:	**Referring Provider**
Referred By:	**Ryan White AIDS Care**
Referred To:	**Drugs R Us, Panama Hospital del Nino**
Referral Type:	**Internal**
Referral Category:	**Treatment Adherence Counseling**
Referral Status:	**Completed**

Name:	Srv Category:	Referral Date:	Referral Status:	Received Date:	Referral Comment:
Appleseed, JOSEPH	Treatment Adherence Counseling	5/29/2012	Completed	5/29/2012	

Number of Records 1

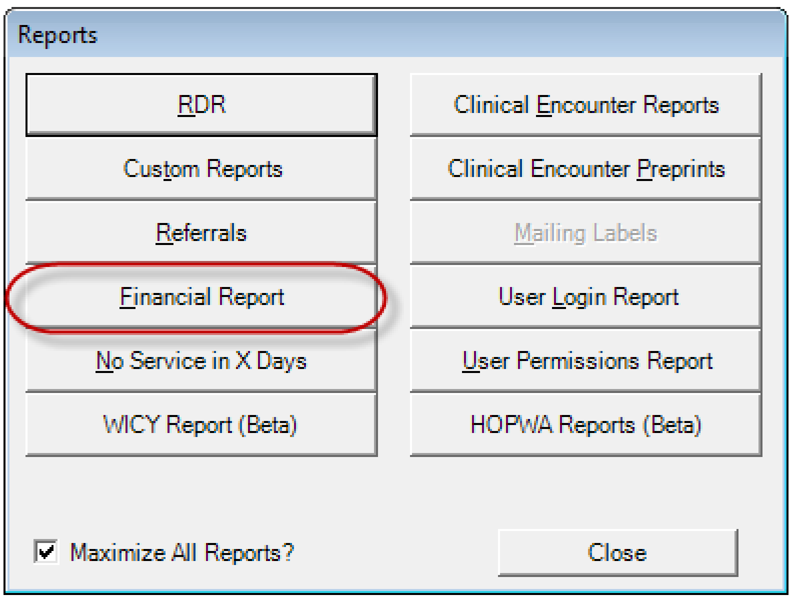
Running the Financial Report

The Financial Report can be run to determine how much you've expended in a specific time frame for any or all service categories and subservices, if you have specified a service cost when you set up your contracts and services.

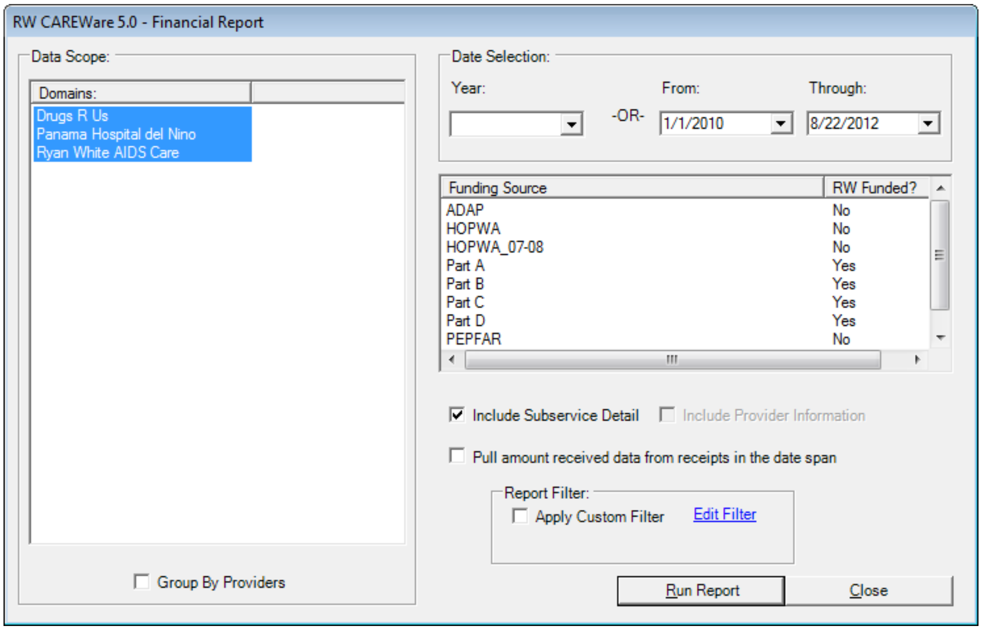
Even if you aren't tracking cost information, the Financial Report is an easy way to get a quick summary of unduplicated clients served within a specific date span, as well as a distribution of the number of clients for each HRSA Service Category.

The Financial Summary report can also display client totals and services for a single or multiple Funding Source(s).

1. From the **Reports** menu, select the **Financial Report**.



2. Make your selections as detailed below.



The **Domain** is only applicable if you are part of a multi-provider network. From Central Admin, you can select one or more Domains to report on.

The **Date Selection** can be a calendar year, or a specific date range.

Select one or more **Funding Sources**; if you do not, the report will run for all funding sources. Use **Ctrl+Click** to select multiple sources.

Include Subservice Detail if you wish to see service category information broken down to the subservice level.

Include Provider Information is only relevant when you run a report on one provider; it includes provider address and phone number.

You can **Apply Custom Filter** to use a custom report filter on your data to get more granular results than this menu will provide.

3. Click **Run Report**. A sample result is shown below.

Financial Report

Friday, January 01, 2010 through Wednesday, August 22, 2012

Report Criteria:

Provider(s): Drugs R Us, Panama Hospital del Nino, Ryan White AIDS Care

Funding Sources: ADAP, HOPWA, HOPWA_07-08, Part A, Part B, Part C, Part D, PEPFAR, Private Donations

Include subservice detail: True

Results:

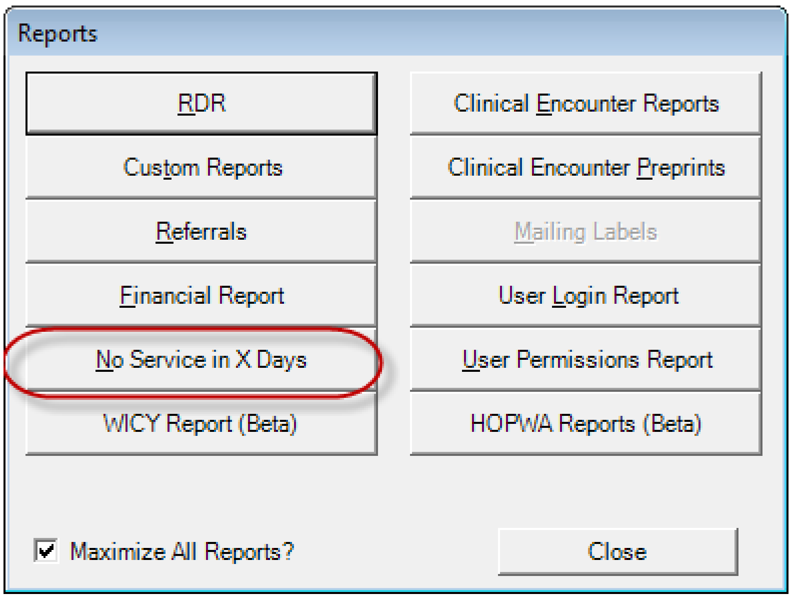
ADAP Insurance	**Clients:**	**Units:**	**Total:**	**Amount Received:**	**Not Received:**
High-risk insurance co-payments (ADAP)	1	1	$0.00	$0.00	$0.00
Medicare supplement co-payments (ADAP)	1	1	$20.00	$0.00	$20.00
ADAP Insurance Totals:	**1**	**2**	**$20.00**	**$0.00**	**$20.00**
Case Management (non-medical)	**Clients:**	**Units:**	**Total:**	**Amount Received:**	**Not Received:**
Counseling/CM	10	12	$20.00	$0.00	$20.00
Case Management (non-medical) Totals:	**10**	**12**	**$20.00**	**$0.00**	**$20.00**
Client Advocacy	**Clients:**	**Units:**	**Total:**	**Amount Received:**	**Not Received:**
Buddies	1	1	$20.00	$0.00	$20.00
Client Advocacy Totals:	**1**	**1**	**$20.00**	**$0.00**	**$20.00**
Emergency Financial Assistance	**Clients:**	**Units:**	**Total:**	**Amount Received:**	**Not Received:**
Utility assistance/EFA	2	2	$0.00	$0.00	$0.00
Emergency Financial Assistance Totals:	**2**	**2**	**$0.00**	**$0.00**	**$0.00**
Food Bank/Home-delivered Meals	**Clients:**	**Units:**	**Total:**	**Amount Received:**	**Not Received:**
Food Box	1	2	$0.00	$0.00	$0.00
Home Meals	3	22	$220.00	$0.00	$220.00
Food Bank/Home-delivered Meals Totals:	**3**	**24**	**$220.00**	**$0.00**	**$220.00**

No Service in X Days Report

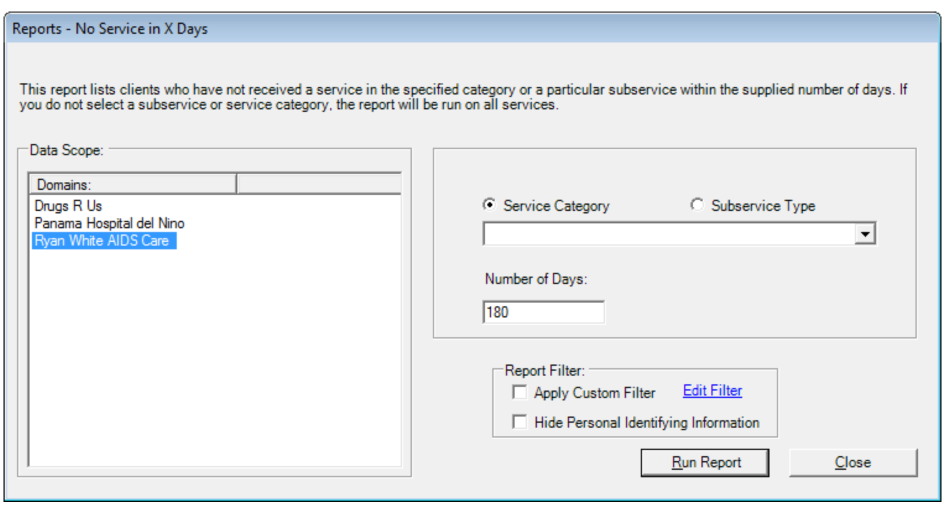
This report can assist you in locating clients who have fallen or are in danger of falling out of care. As a general rule, clients who have not been seen in six months or more are often considered out of care. This report allows you to examine the records of individual clients and determine if action is necessary.

Note that this report **does not include Closed** or **Deceased** clients.

1. From the **Reports** menu, select the **No Service in X Days** report.



2. Make your selections as detailed below.



Data Scope is only applicable if you are part of a multi-provider CAREWare network. Select the Provider(s) to report on (only applicable from Central Admin).

HINT: If the Service Category is left blank, the report will list clients who have not received ANY service within the selected Number of Days.

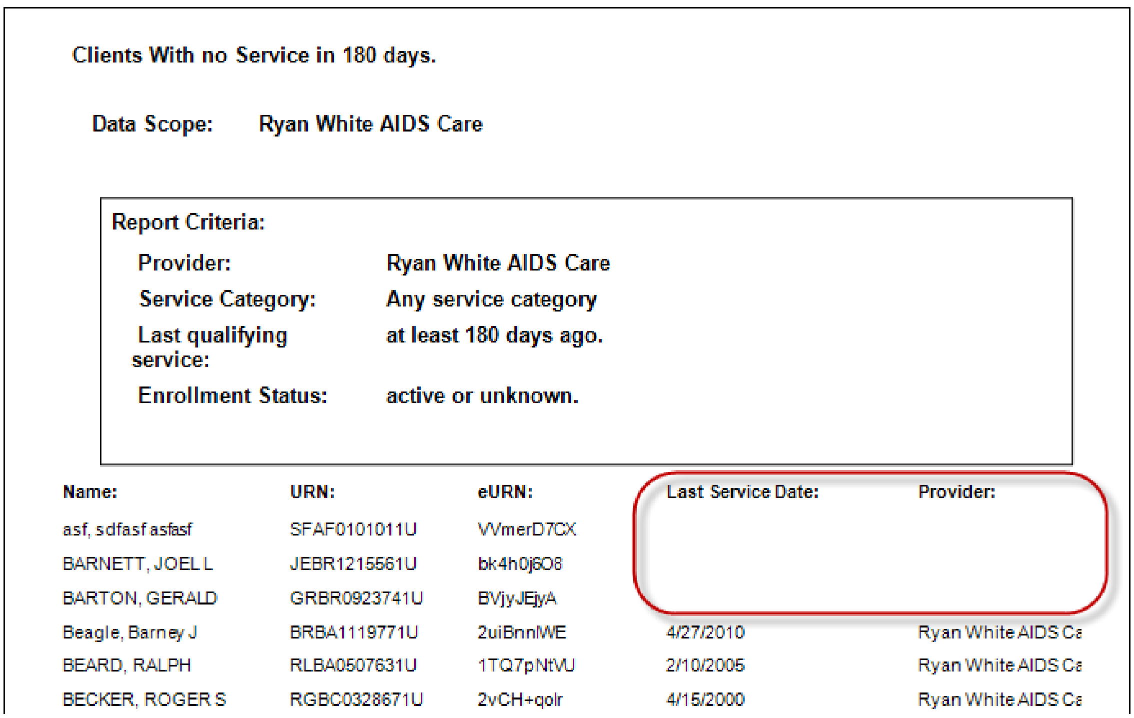
Choose a **Service Category** or a **Subservice Type** (specific subservice) on which to report.

Enter the **Number of Days** since the last instance of the selected category or subservice encounter.

You can **Apply Custom Filter** to use a custom report filter on your data to get more granular results than this menu will provide.

Click **Hide Personal Identifying Information** to replace client names with the encrypted URN.

3. Click **Run Report**. A sample result is shown below.



Clients With no Service in 180 days.

Data Scope: Ryan White AIDS Care

Report Criteria:

Provider:	Ryan White AIDS Care
Service Category:	Any service category
Last qualifying service:	at least 180 days ago.
Enrollment Status:	active or unknown.

Name:	URN:	eURN:	Last Service Date:	Provider:
asf, sdfasf asfasf	SFAF0101011U	VVmerD7CX		
BARNETT, JOEL L	JEBR1215561U	bk4h0j6O8		
BARTON, GERALD	GRBR0923741U	BVjyJEjyA		
Beagle, Barney J	BRBA1119771U	2uiBnnlWE	4/27/2010	Ryan White AIDS Ca
BEARD, RALPH	RLBA0507631U	1TQ7pNtVU	2/10/2005	Ryan White AIDS Ca
BECKER, ROGER S	RGBC0328671U	2vCH+qolr	4/15/2000	Ryan White AIDS Ca

NOTE: Blank service date records indicate that a client record was created, but no service was entered. This could be either a data entry problem, where service information needs to be entered, or an indication that clients have been registered but not returned for service. You can use this tool to perform chart review to determine the cause of the blank records.

Running Clinical Encounter Reports

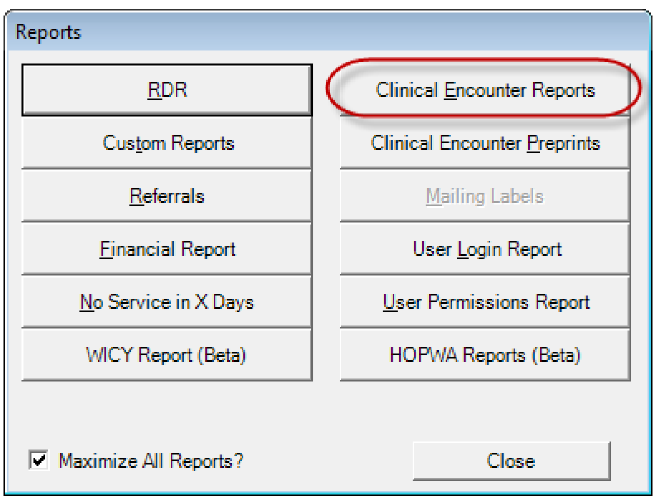
Clinical encounter reports are a quick way of finding clients who need to be flagged for attention. These prebuilt reports address key markers of care for persons with HIV/AIDS, both for preventive care and routine clinical follow-up.

Clients with no encounter in X days

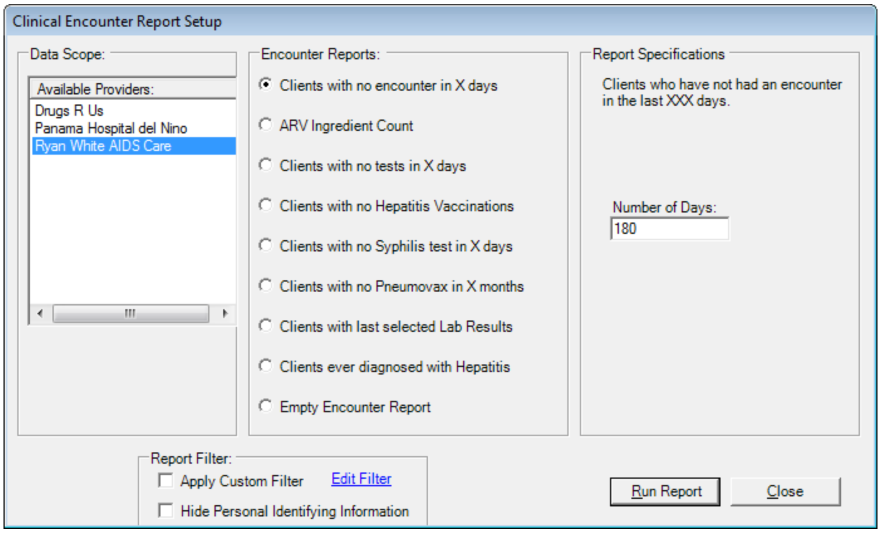
Unlike the **No Service in X Days** report, appearing on this report does not mean that a client has not had any CARE Act service, only that they have not had a clinical encounter. If you use “rapid entry” to enter clinical data instead of explicitly creating an encounter in the database, a clinical encounter is **not created** unless some vital sign information is entered at that time.

Note that this report **does not include Closed** or **Deceased** clients, or clients with an HIV Status of **Negative (affected)** or **Unknown**, or an Enrollment Status other than **Active** or **Unknown**.

1. From the **Reports** menu, select **Clinical Encounter Reports**.



2. Make your selections as detailed below.



3. Select the **Clients with no encounter in X days** button.

4. Enter the **Number of Days** since the last encounter.

5. **Apply Custom Filter** or **Hide Personal Identifying Information** as required.

6. Click **Run Report**. A sample report is shown below.

Clients who have not had an encounter within last 180 days.

Data Scope: **Ryan White AIDS Care**

Report Criteria:

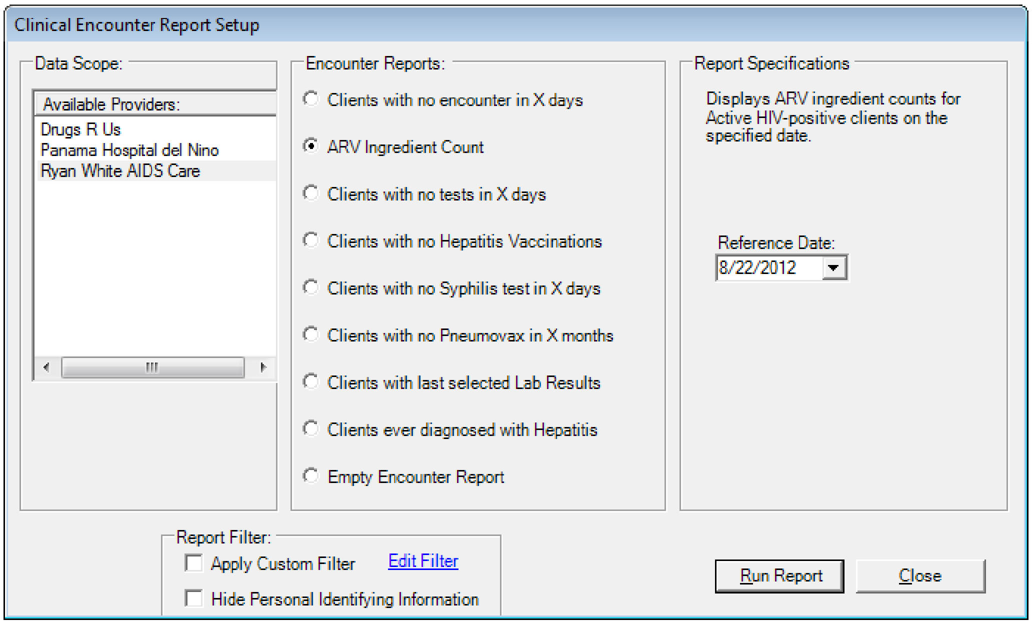
The client:	**has not had an encounter at the provider in the last 180 days.**
Or the client:	**has not had an encounter at the provider.**
Client enrollment status:	**is active or unknown**
HIV Status:	**Not equal to Negative or Unknown**

Name:	URN:	Encounter Date:	Provider Name:
Applebee, John c	JHAP0110471U		
BARKER, ALLEN	ALBR0614501U	4/27/2010	Ryan White AIDS Care
BARTON, GERALD	GRBR0923741U		
Beagle, Barney J	BRBA1119771U	4/27/2010	Ryan White AIDS Care
BEARD, RALPH	RLBA0507631U		
BECKER, ROGER S	RGBC0328671U		
Bellhop, WENDY	WNBL0319632U	7/4/2007	Ryan White AIDS Care
BELTON, JEFF	JFBL1216611U	4/20/2002	Ryan White AIDS Care
BISHOP, RUBY	RBBS0404592U		
BLACK, RICHARD	RCBA0216591U		
BLOWFISH, CHRISTINA	CRBO0920792U	10/4/2007	Ryan White AIDS Care

ARV Ingredient Count

This report will generate a list of active HIV-positive clients and their antiretroviral medications, sorted by the number of ARV active ingredients they are taking on the day specified. If a client is on Combivir, for instance, that will be counted as two ingredients.

1. Make your selections as detailed below.



2. Select the **ARV Ingredient Count** button.

3. Select the **Reference Date** (the date for which the count is to be made, usually today).

4. **Apply Custom Filter** or **Hide Personal Identifying Information** as required.

5. Click **Run Report**. A sample report is shown below.

ARV Ingredient Report

Report Criteria:

Vital Status:	**Active**
Enrollment Status:	**Active**
HIV Status:	**Not equal to Negative or Unknown**
Reference Date:	**08/22/2012**

Ryan White AIDS Care - Clients on 4 or more ARVs:

Name	Medications
ALLEN, LAWRENCE	RTV, ATV, TDF+FTC
Appleseed, JOSEPH	NVP, APV, FTC, TDF, AZT+3TC, NVP, APV
BARKER, ALLEN	, AZT+3TC, NVP, NFV
Birdbrain, Thomas	AZT+3TC, 3TC, ATV
Cottontail, WILLIAM	AZT+3TC, EFV, RTG
Doe, Susan K	IDV, AZT+3TC, SQV(S), FTC, FPV
Finn, Huckleberry Sean	, AZT+3TC, EFV
Hispanico, Geraldo	, 3TC, d4T
Zoology, Benjamin	TPV

Record Count: **9**

** Count is unduplicated within the provider*

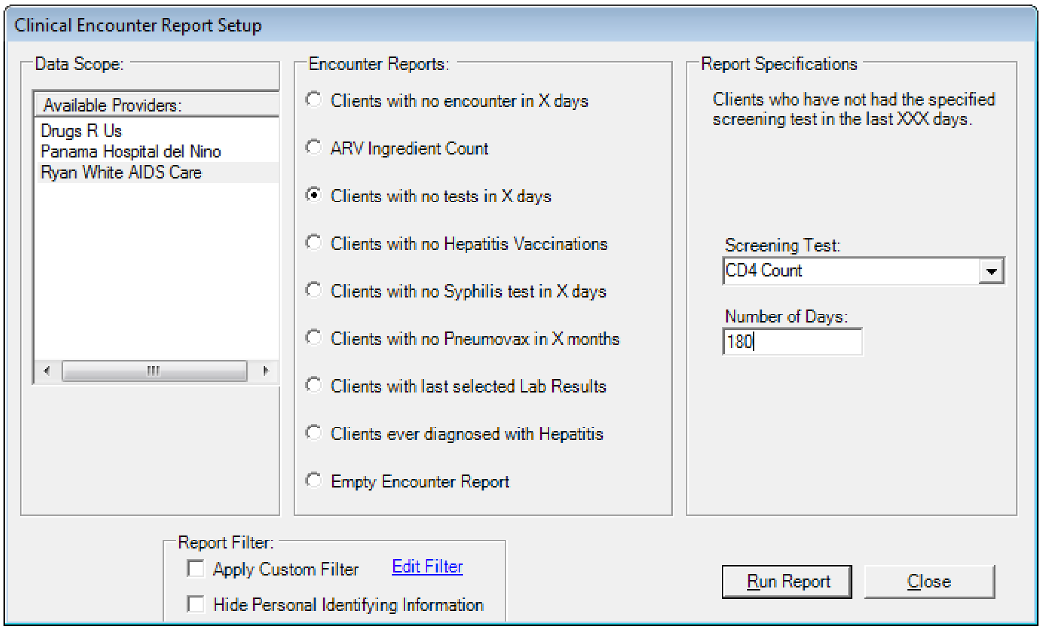
Ryan White AIDS Care - Clients on 3 ARVs:

Name	Medications
Beagle, Barney J	TPV, AZT+3TC
BISHOP, RUBY	AZT+3TC, EFV
BLOWFISH, CHRISTINA	ABC, 3TC, SQV(H)
Captain-Hook, JEFF	AZT+3TC, EFV
JONES, JENNIFER	3TC, AZT, NVP
Man, Snow	, AZT+3TC, NVP
Motherboard, JACOB	AZT+3TC, NVP

Clients with no tests in X days

This test identifies clients who have not had any lab, screening or screening lab in a specific number of days.

1. Make your selections as detailed below.



2. Select the **Clients with no tests in X days** button.

3. Select the test from the **Screening Test** drop down menu.

4. Enter the **Number of Days**.

5. **Apply Custom Filter** or **Hide Personal Identifying Information** as required.

6. Click **Run Report**. A sample report is shown below.

Clients who have not had a CD4 Count within last 180 days.

Data Scope: **Ryan White AIDS Care**

Report Criteria:

Provider:	**Central Administration**
The client:	**has not had a CD4 Count screening at the provider in the last 180 days.**
Or the client:	**has not had a CD4 Count screening at the provider.**
Client enrollment status:	**is active or unknown**
HIV Status:	**Not equal to Negative or Unknown**

Name:	URN:	Last Lab Result:	Last Screening Date:	Provider Name:
Applebee, John c	JHAP0110471U			
BARKER, ALLEN	ALBR0614501U			
BARTON, GERALD	GRBR0923741U	408	12/29/2002	Ryan White AIDS Care
Beagle, Barney J	BRBA1119771U	111	11/29/2007	Ryan White AIDS Care
BEARD, RALPH	RLBA0507631U			
BECKER, ROGER S	RGBC0328671U			
Bellhop, WENDY	WNBL0319632U			
BELTON, JEFF	JFBL1216611U			
Birdbrain, Thomas	TOBR1005821U	198	2/1/2008	Ryan White AIDS Care
BISHOP, RUBY	RBBS0404592U	130	9/1/2007	Ryan White AIDS Care
BLACK, RICHARD	RCBA0216591U			
BLOWFISH, CHRISTINA	CRBO0920792U	421	10/4/2007	Ryan White AIDS Care

Clients with no Hepatitis Vaccinations

Use the steps documented above, select **Hepatitis A or B**. This report will list clients with no vaccinations, or those who have only received a partial series.

Clients with no Syphilis test in X days

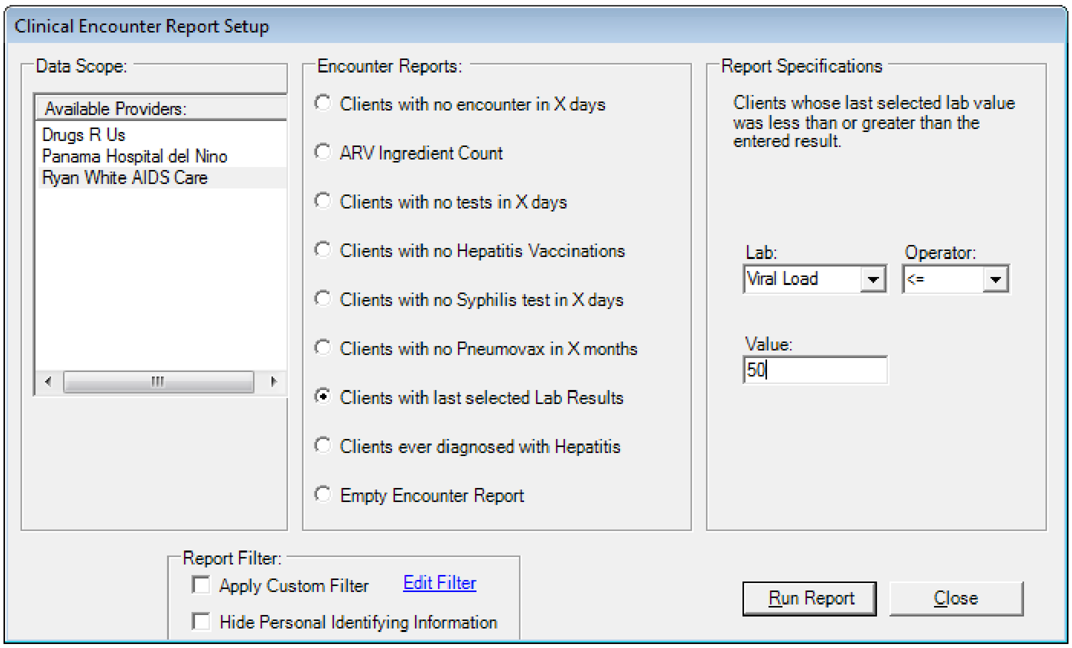
Use the steps documented above; select **Number of Days** since last test.

Clients with no Pneumovax in X months

Use the steps documented above; select **Number of Months** since last pneumonia vaccination.

Clients with last selected lab results

1. Make your selections as detailed below.



- Select the **Lab** to report on from the drop down menu.
- Choose the **Operator** (<=, =, or >=).
- Enter the numeric **Value**.
- **Apply Custom Filter** or **Hide Personal Identifying Information** as required.
- Click **Run Report**. A sample report is shown below.

Clients with Viral Load <= 50 at last test.

Data Scope: **Ryan White AIDS Care**

Report Criteria:

The client's:	**last Viral Load result was <= 50.**
Client enrollment status:	**is active or unknown**
HIV Status:	**Not equal to Negative or Unknown**

Name:	URN:	Last Lab Result:	Last Lab Date:	Provider Name:
ALLEN, LAWRENCE	LWAL0925561U	50	12/13/2011	Ryan White AIDS C
Salamander, Jose	JSSL0115711U	50	8/22/2012	Ryan White AIDS C

Number of Records **2**

(Count is unduplicated across providers)

* - *Restricted Field*

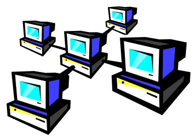
Empty Encounter Report

This lists clients for whom clinical encounters were created, but which were not populated with any clinical data. You can specify a date range or leave it blank to see all clients with empty encounters. This is a “quality check” feature that allows you to delete mistakenly entered encounters, or populate encounters with the relevant data.

1. Use the steps documented above; select a date range or leave blank to find all empty encounters.

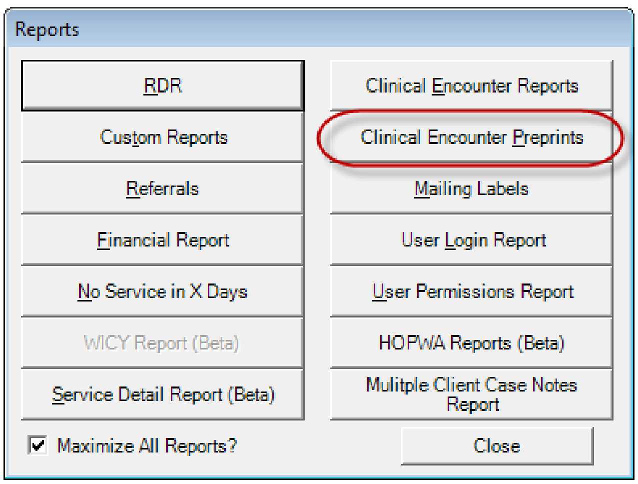
Clinical Encounter Preprints

Clinical encounter preprints are “flow sheets” many clinics use as a snapshot of a client’s most recent clinical data. You can use them as “preprints” to be marked up during an appointment, and/or as a flow sheet to be inserted in the chart after the information from the encounter is entered into CAREWare.

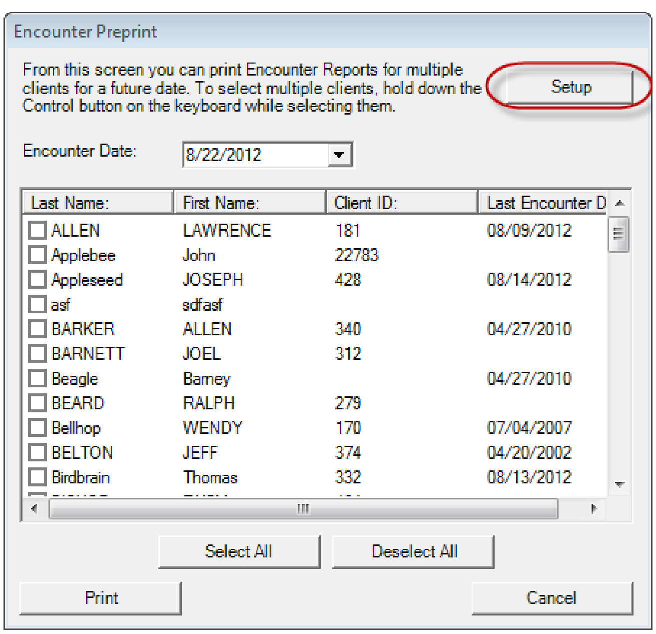


PLEASE NOTE: These can only be run from the Provider domain.

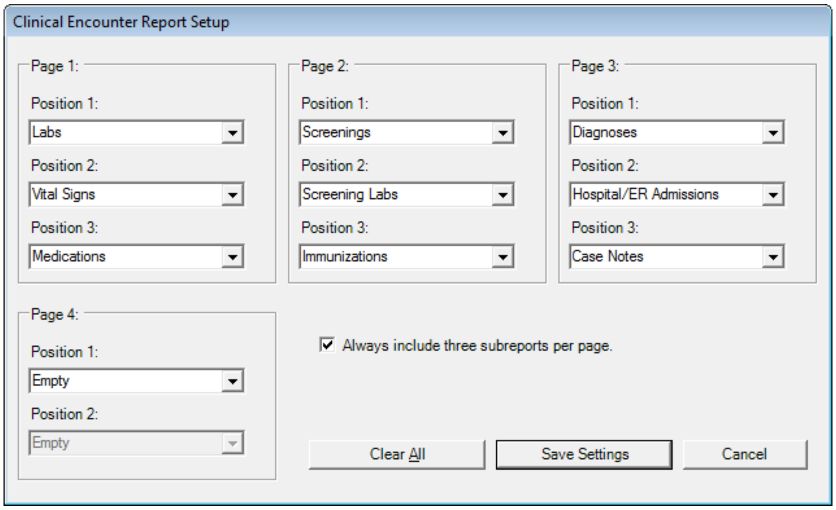
1. From the **Reports** menu, select **Clinical Encounter Preprints**.



2. Click **Setup** to set up the information provided on your preprints.



3. Make your selections as indicated below. Shown is a typical setup.



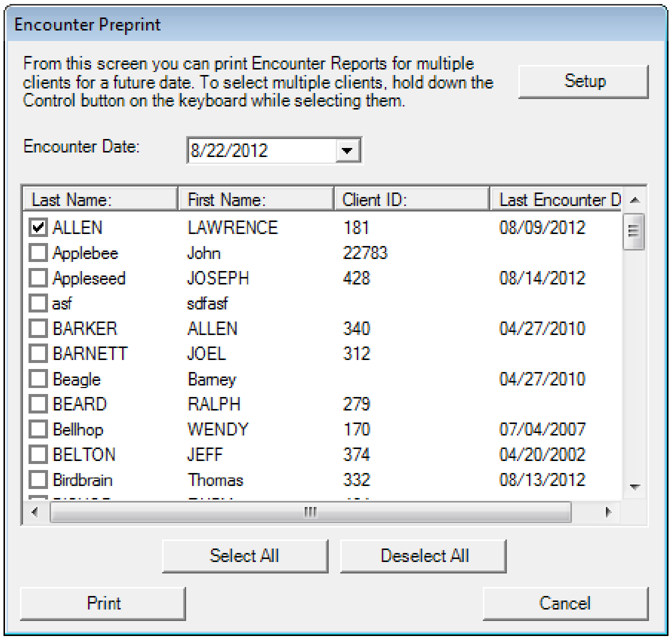
Each preprint can hold some or all clinical encounter data. Positions correspond to a related Encounters subtab – medications history, labs history, etc.

As each item is selected for a position on the page, it decreases the selections available for the following positions. You can select up to three subreports per page, however; if you have a large chart, or a long list of available lab tests, this may truncate the information on screen.

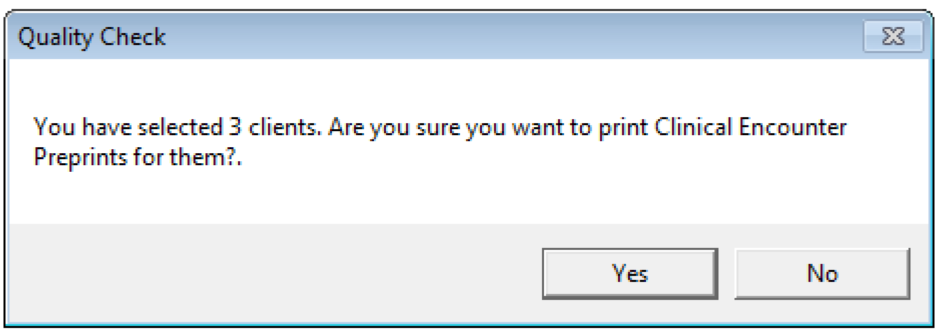
4. Several graphing options are available, for which an ellipse button appears when selected.

5. Click **Save Settings** to continue.

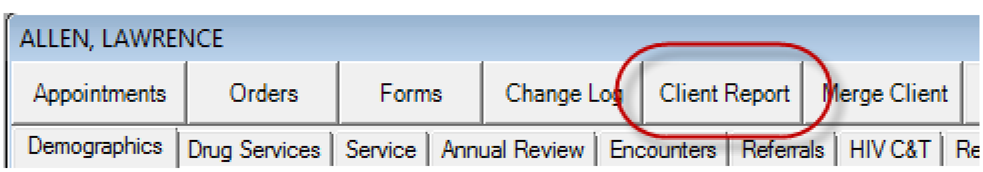
You can now select some or all client records to print. If you are using the form as a flow sheet, use the check boxes next to the clients to indicate the records to be printed, and select the date of their next encounter. Many clinics print client sheets for the next day's visits at the end of the day.

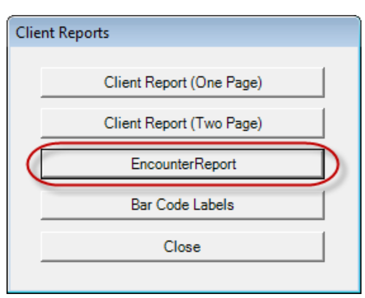


6. Click **Print** to print these encounter reports. You'll be prompted if you wish to proceed. <u>These encounters do not preview on screen but go directly to your default printer.</u>



HINT: You can run the Client Report directly from the client record to see an encounter report onscreen without printing it.



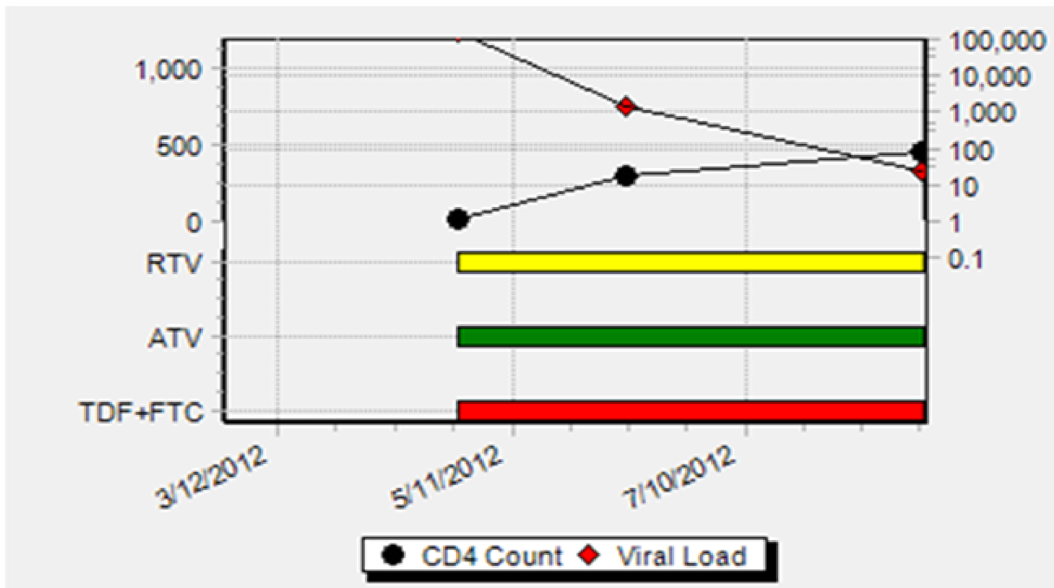


7. A sample is shown below.

Encounter Report

Client:	ALLEN, LAWRENCE	Client URN	LWAL0925561U
Visit Date:	8/25/2012	Birth Date:	9/25/1956
		Last Visit Date:	8/9/2012

CD4 & VL **From: 2/27/2012** **Through: 8/25/2012**



Immunizations

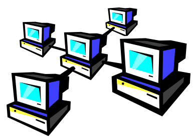
Vaccine:	Prior:	Prior Date:	Received:	Immunity:
Gardisil				
Hep A/Hep B (Twinrix)(1)				
Hep A/Hep B (Twinrix)(2)				
Hep A/Hep B (Twinrix)(3)	Yes	5/29/2012		
Hepatitis A (1)				
Hepatitis A (2)				
Hepatitis B (1)	Yes	3/1/2012		
Hepatitis B (2)				
Hepatitis B (3)				
Influenza	Yes	1/1/2012		
MMR				
Pneumovax (Pneumococcal pneumonia)				
Tetanus Toxoid				
tickling level				
Varicella (Chicken pox)				

If column sizes on the clinical encounter report are too narrow or too wide, go into a client's encounter screen and resize the field to the desired width. Rerun the report and the new width will be reflected in the report. The new width that you have established will be stored for the next time you run the report.

Mailing Labels

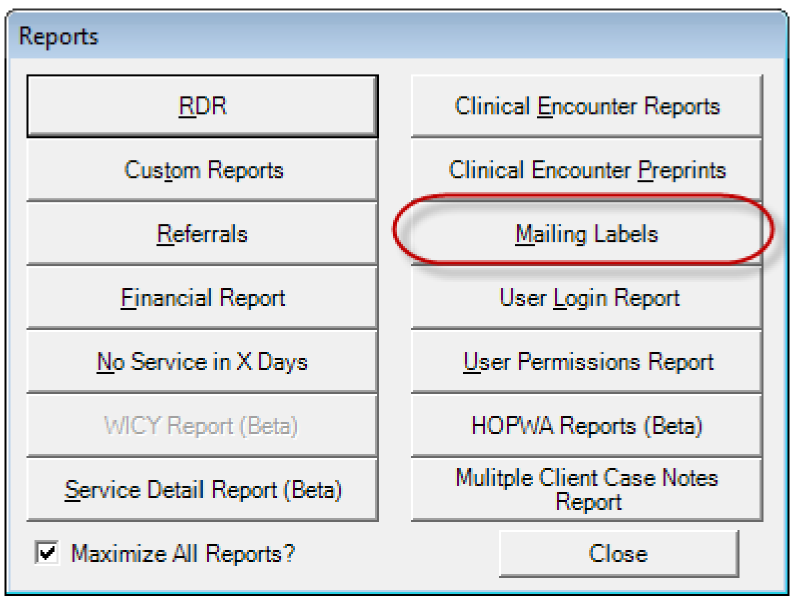
You can generate mailing labels for clients with this report, which pre-formats client names and addresses to the Avery 5160 layout.

Only clients who have the "Include on Label Report" box checked on their Demographics screen will be included. To screen out clients who do not wish to receive mail, uncheck this box in their record.

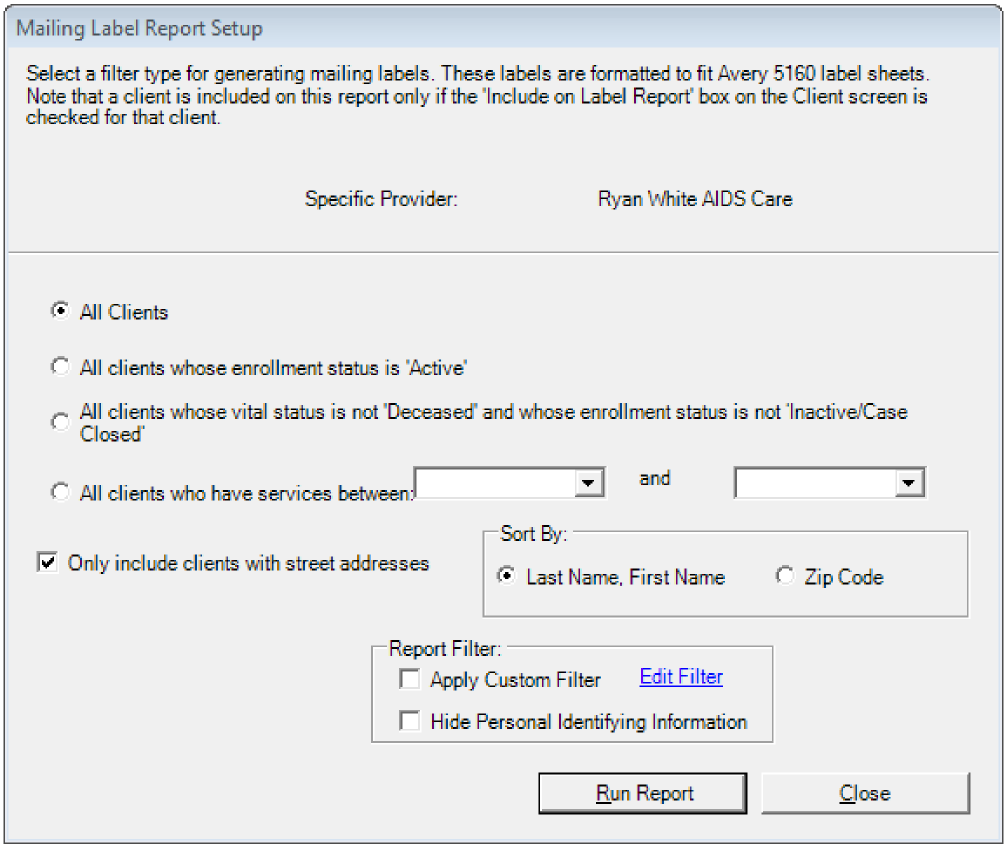


PLEASE NOTE: These can only be run from the Provider domain.

1. From the **Reports** menu, click **Mailing Labels**.



2. Make your selections as detailed below.



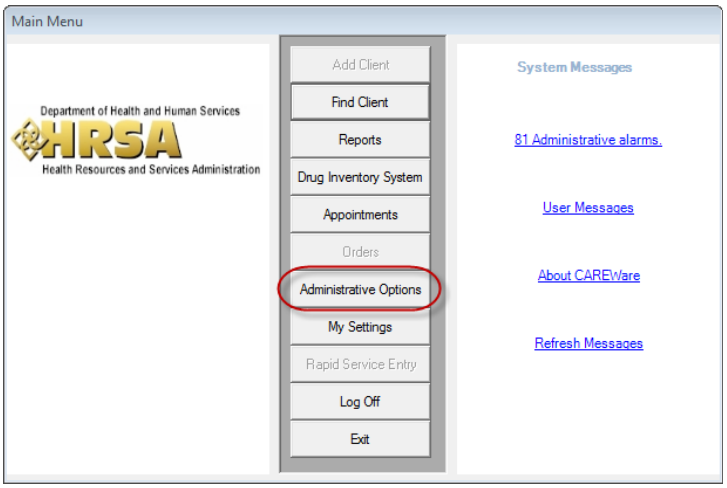
The options above allow you to specify all clients, active clients, or only clients seen between certain dates. You can include only clients with street addresses (this includes PO Boxes), so that if the address line is blank, those clients will be excluded. You can sort by name or by zip code (for providers with large mailings who meter their mail and must sort it by zip).

Do not click **Hide Personal Identifying Information** or this will result in blank labels.

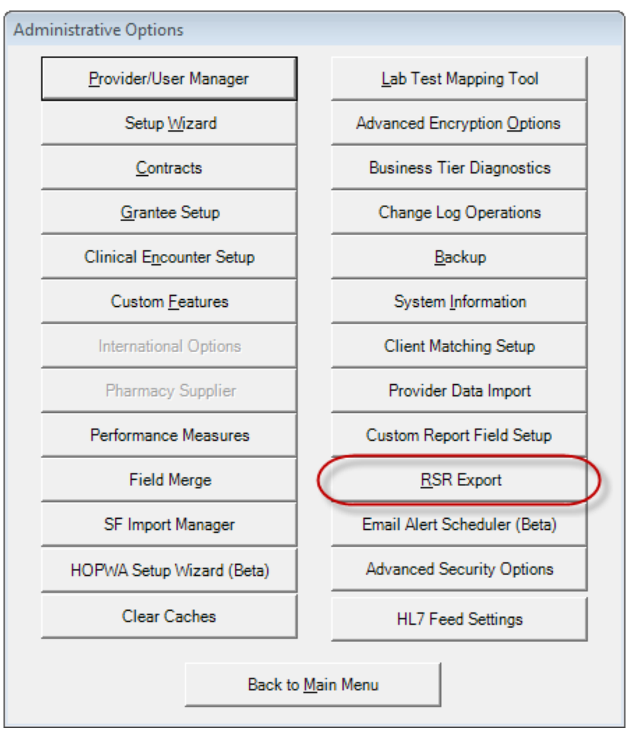
Running the RSR

This section covers running the RSR from the Central Admin domain. It can be created from the Provider domain if desired.

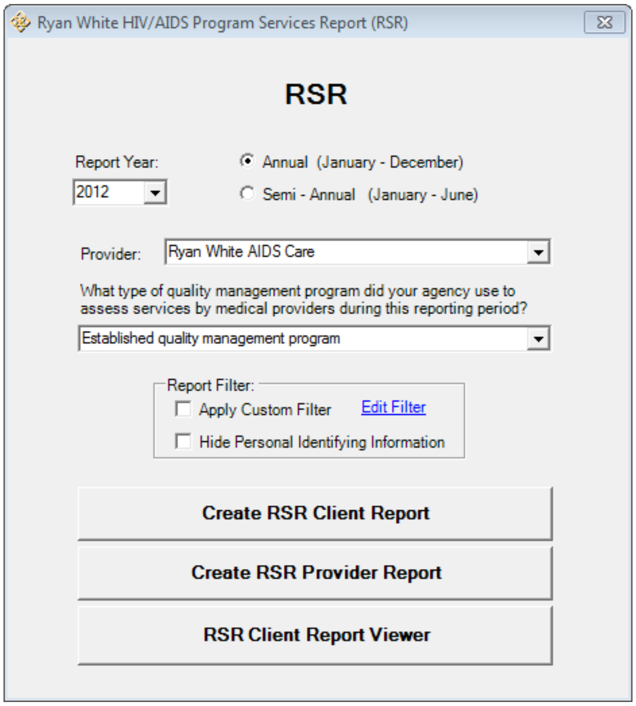
1. Click **Administrative Options**.



2. Select **RSR Export**. (From the Provider domain, select **Export Menu**, then **RSR Export**.)



3. Select the **Report Year**, an **Annual** or **Semi-Annual** time frame, the **Provider** to report on, and the type of quality management program in use. Use a custom filter to report only on selected populations.

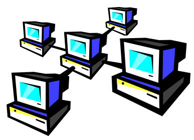


4. Click **Create RSR Client Report** or **RSR Provider Report.** Creating the client report will require you to confirm the process by clicking the **OK** button on the popup.

5. The report will save by default to the RW CAREWare Client Tier folder with the name **CLDClientExport[year]** or **CLDProviderExport[year]**.

Performing Quality Control on RSR Data

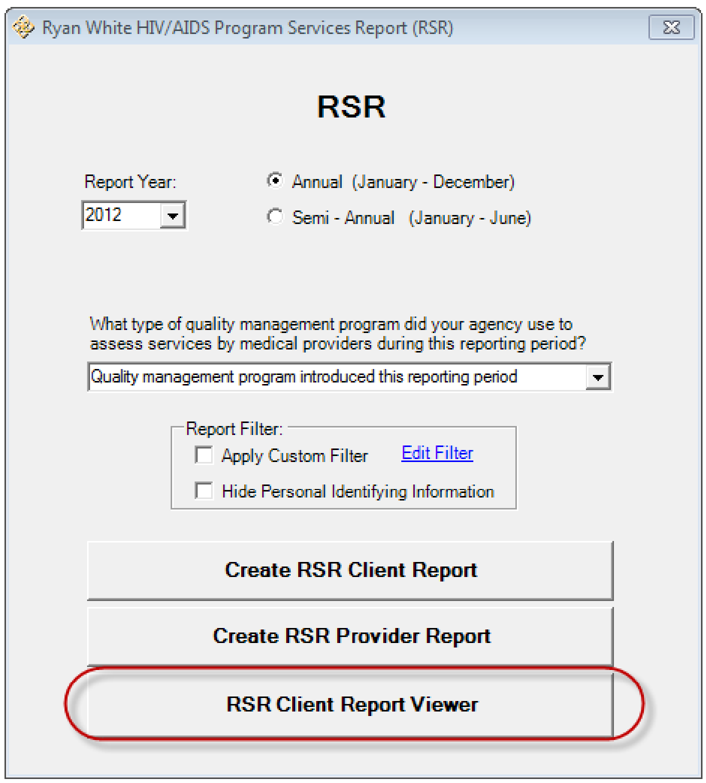
CAREWare allows you to examine your data for missing RSR information at the client level. This enables you to reduce or eliminate the number of “unknown/unreported” responses for key demographic and annual review information.

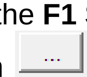


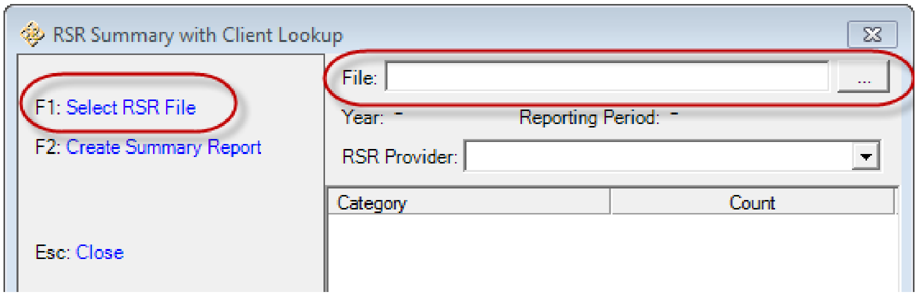
PLEASE NOTE: While you can run the Client Report Viewer at the Central Admin domain, the client records you navigate to will not be available for edit. Run the Viewer at the Provider domain to enable editing.

1. Run the RSR Client Report as directed above.

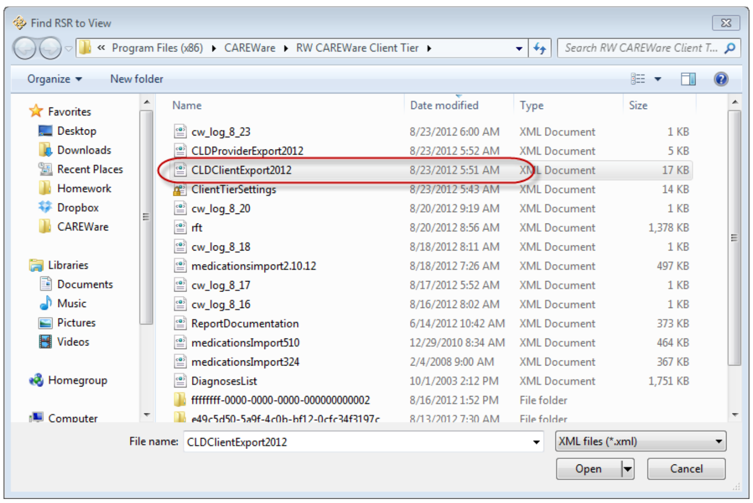
2. From the RSR menu, click **RSR Client Report Viewer**.



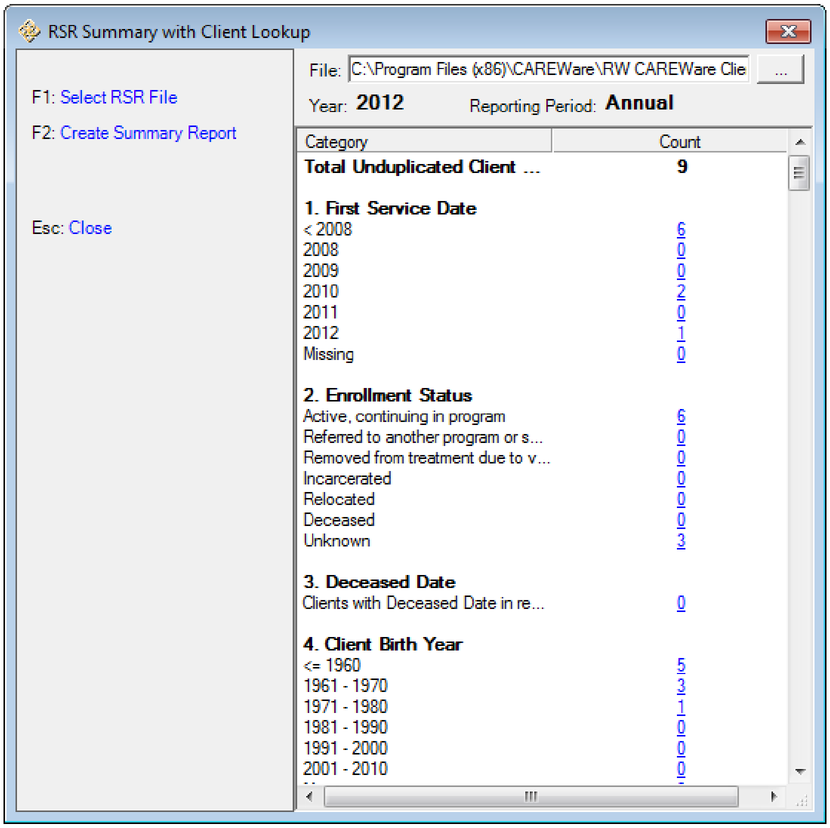
3. Click the **F1 Select RSR File** link (or press F1 on your keyboard), or use the ellipse button  next to the File: line, and select the RSR Client Report to view.



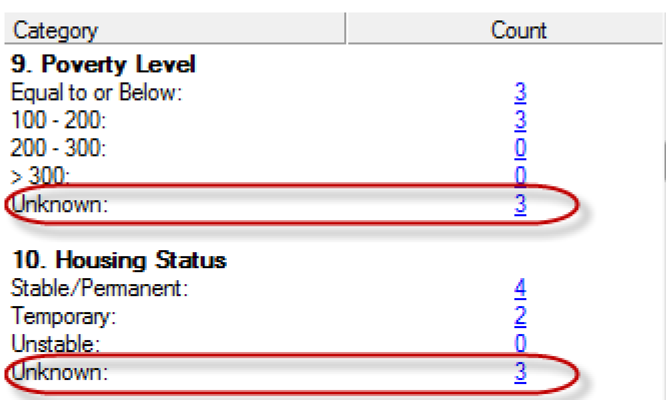
4. Navigate to the RW CAREWare Client Tier folder or other folder if necessary.



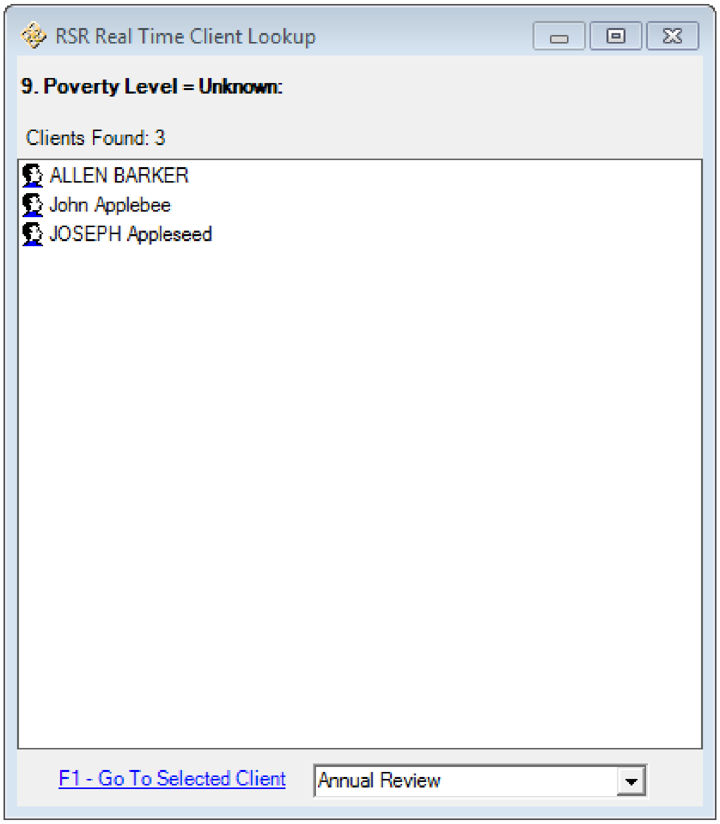
5. Click **Open**. The summary report will display in the window with live links.



6. To update data, scroll through the report and click on a hyperlink next to any "Unknown" line. Seen here are unknown poverty and housing status levels.



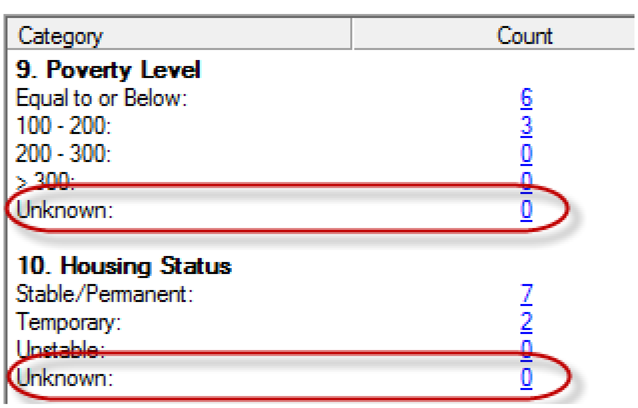
7. Links to the client records matching the "unknown" status will appear in a new window.



8. You can double-click a client record to open it, or highlight it and click the **F1 – Go To Selected Client** link (or click F1). Use the drop down menu to pick a tab to go to directly (in this case, select **Annual Review** to go to poverty level).

9. Your changes are made to the client records as if you were editing through the "normal" process. Edit each record and **Close** it to return to this menu. When done, close this window.

10. You will need to rerun your RSR Client Export to include any changes made. You can then run this Client Report Viewer again to see the changes.



Unknowns are now at 0 for categories where you made your corrections.

11. Check all the remaining categories for accuracy, including clinical information, to see if there are other data entry errors to be corrected.

12. Use the **F2 – Create Summary Report** to create a PDF of this information.

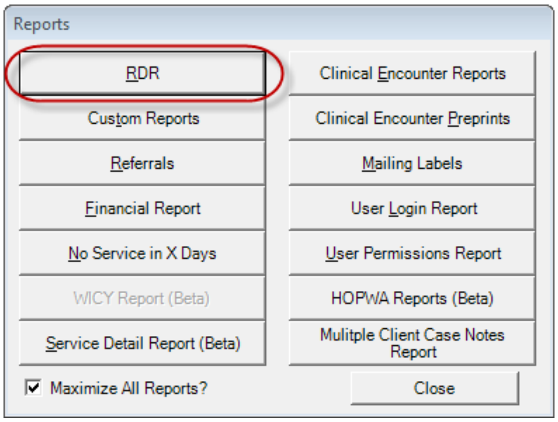
RSR Summary
2012 - Annual

Total Client Count:	**9**
1. First Service Date	
< 2008	6
2008	0
2009	0
2010	2
2011	0
2012	1
Missing	0
2. Enrollment Status	
Active, continuing in program	6
Referred to another program or service	0
Removed from treatment due to violation of rules	0
Incarcerated	0
Relocated	0
Deceased	0
Unknown	3
3. Deceased Date	
Clients with Deceased Date in report period:	0
4. Client Birth Year	
<= 1960	5
1961 - 1970	3
1971 - 1980	1
1981 - 1990	0
1991 - 2000	0
2001 - 2010	0
Missing	0

Running the Ryan White Data Report (RDR)

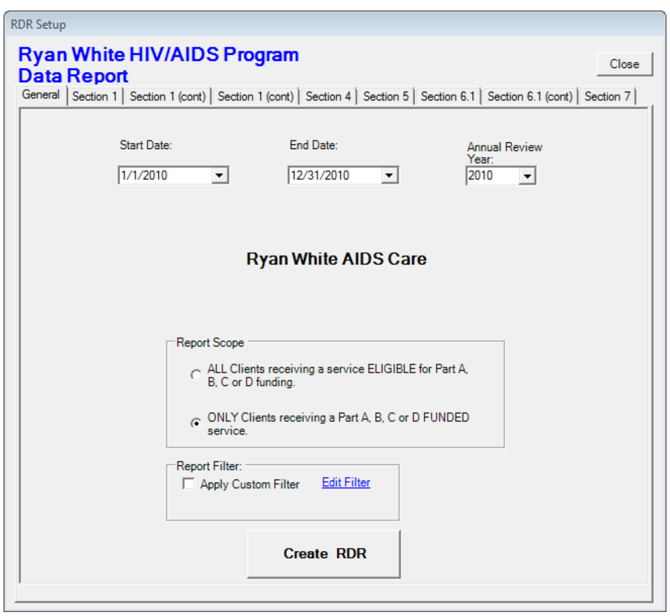
While this report is no longer required by HRSA, it is still available in CAREWare for agencies who wish to use it as an internal tool.

1. Navigate to **Reports** from the main menu, then select **RDR**.



2. Enter the dates for which you'd like run the RDR. This may be a calendar year, a funding year, a quarter, or any other date range.

   If your Start and End Dates span more than one year, you must tell CAREWare which Annual Review Year on which you want to run a report.



3. Select **Report Scope**.

4. Apply a custom filter if desired to narrow the results.

5. Use the remaining tabs, where and if applicable, to fill in funding and target population (Section 1), HIV counseling and testing (Section 4), Medical (Section 5), Part C (Section 6.1) and Part D (Section 6.2). To enter your other agency information, use the Setup Wizard under Administrative Options (See guide #9, “System Administration”).

6. Click **Create RDR**. Processing your RDR may take from a few minutes to considerably longer, depending on the amount of client information to be processed, whether you are running the report over a network, and other factors. CAREWare will keep you informed on the progress by indicating which section is currently being processed: