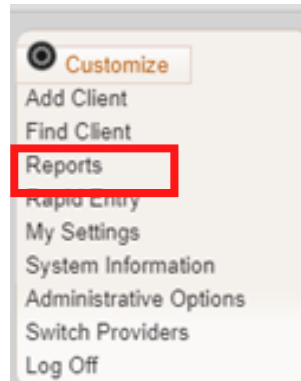


HOW TO RUN CUSTOM REPORTS

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 **Run Report**.

HOW TO RUN 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.