

Below are the reports suggested to be run for each section of the data check

**Housing Check for Invoice-**

Report Name: "Housing Service Detail Report"- This report lists all housing services with a dollar amount so accuracy can be confirmed before submitting invoices. (Note: this report is not used for the Data Invoice Check portion, but can be a helpful tool for invoice submission.)

**Part B Elig or FPL Entry Required-**

Report Name: "Part B Elig and FPL"- for this section I look at the FPL column and the Eligibility column to see if any of those dates are more than 6 months ago

**HOPWA Elig or FPL Required**

Report name: "HOPWA Served FPL and Elig"- for this section I look at the FPL column and the Eligibility column to see if any of those dates are more than 6 months ago

**Transportation Data Required**

Report Name: "Part B Required Service Fields Transportation" for this section I look for any missing items.

**Other Encounter Data Required**

Report Name: "Part B Required Service Fields CM Other Encounter" for this section I look for any missing items.

**CM FTF Data Required**

Report Name: "Part B Required Service Fields FTF CM"- for this section I look for any missing items.

**Acuity Services Data Required**

Report Name: "Part B Acuity"- for this section I look for any missing items.

**Referrals Service Data Required**

Report Name: "Part B Required Service Fields Referrals" for this section I look for any missing items.

**EFA Services**

Report Name: "Part B EFA Services" for this section I look for any missing items.

**Case Notes Required**

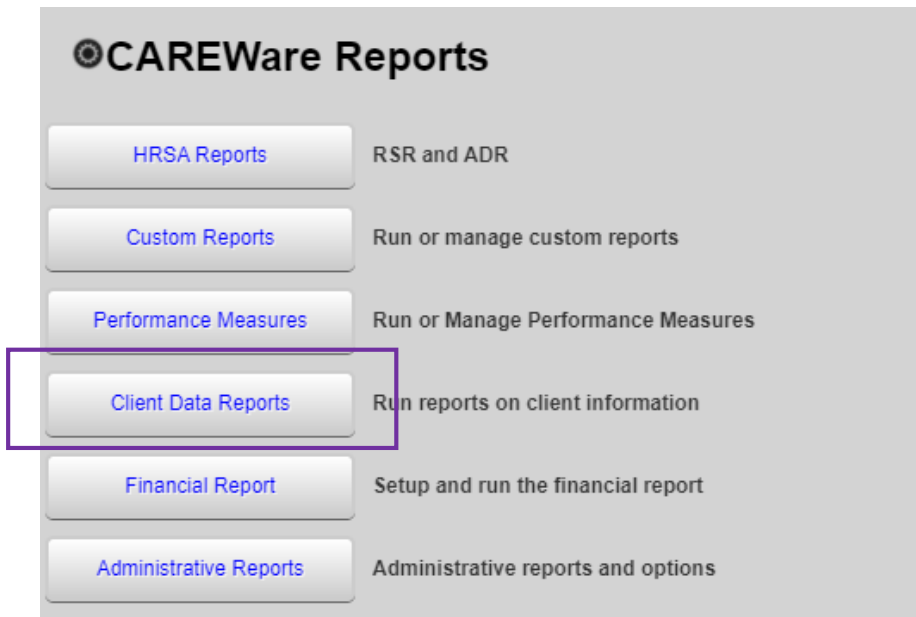
At this time, I do not have super-quick at a glance way to see if there are any missing case notes

Reports Used: Part B- All Services List for Case Notes" and "Multiple Client Case Notes" (Instructions on running this report are below)

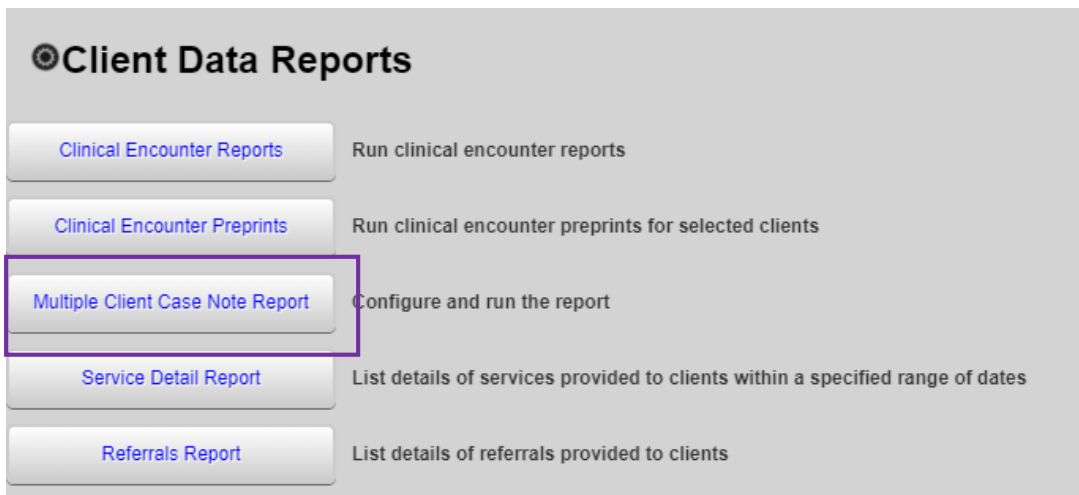
Go to Reports



Click Client Data Reports



Click Multiple Client Case Note Report





Click Select clients

CAREWare Reports > Client Data Reports > Select options for Multiple Client Case Notes Report


Select Clients Run PDF Cancel

### Select options for Multiple Client Case Notes Report

From:  

Through:  

Selected Clients:

Sort By:  

Make sure all clients are selected (there will be multiple pages of clients) and click Save.

CAREWare Reports > Client Data Reports > Select options for Multiple Client Case Notes Report >

Save Cancel Print or Export

### Select Clients

Search:


Selected	First Name	Last Name	Client ID	URN
<input checked="" type="checkbox"/>	Chevy	Silverado	45454	CESL0607741U
<input checked="" type="checkbox"/>	Peace	Client		PACI1010822U
<input checked="" type="checkbox"/>	LX	Lexus	1256	L9LX0101805U
<input checked="" type="checkbox"/>	klient	fake	6516320	KIFK0801752U
<input checked="" type="checkbox"/>	Kristen	Client		KICI0706802U
<input checked="" type="checkbox"/>	Freedom	Client	929292	FECI1111922U
<input checked="" type="checkbox"/>	Mini	Van	795dl	MNVN0108801U


Select the date span you would like to use and the “Sort By” Method. We find Last Name, First Name to be the most useful. Then click Run or PDF

CAREWare Reports > Client Data Reports > Select options for Multiple Client Case Notes Report


Select Clients Run PDF Cancel

### Select options for Multiple Client Case Notes Report

From: 4/7/2021 

Through: 4/21/2021 

Selected Clients: 15

Sort By: Last Name, First Name 

We then compare the case notes services list and the multiple case notes report. We find things go much quicker if we sort the Case Notes Services list first by service date then by client name so that the list is in the same order as they multiple cases notes report.