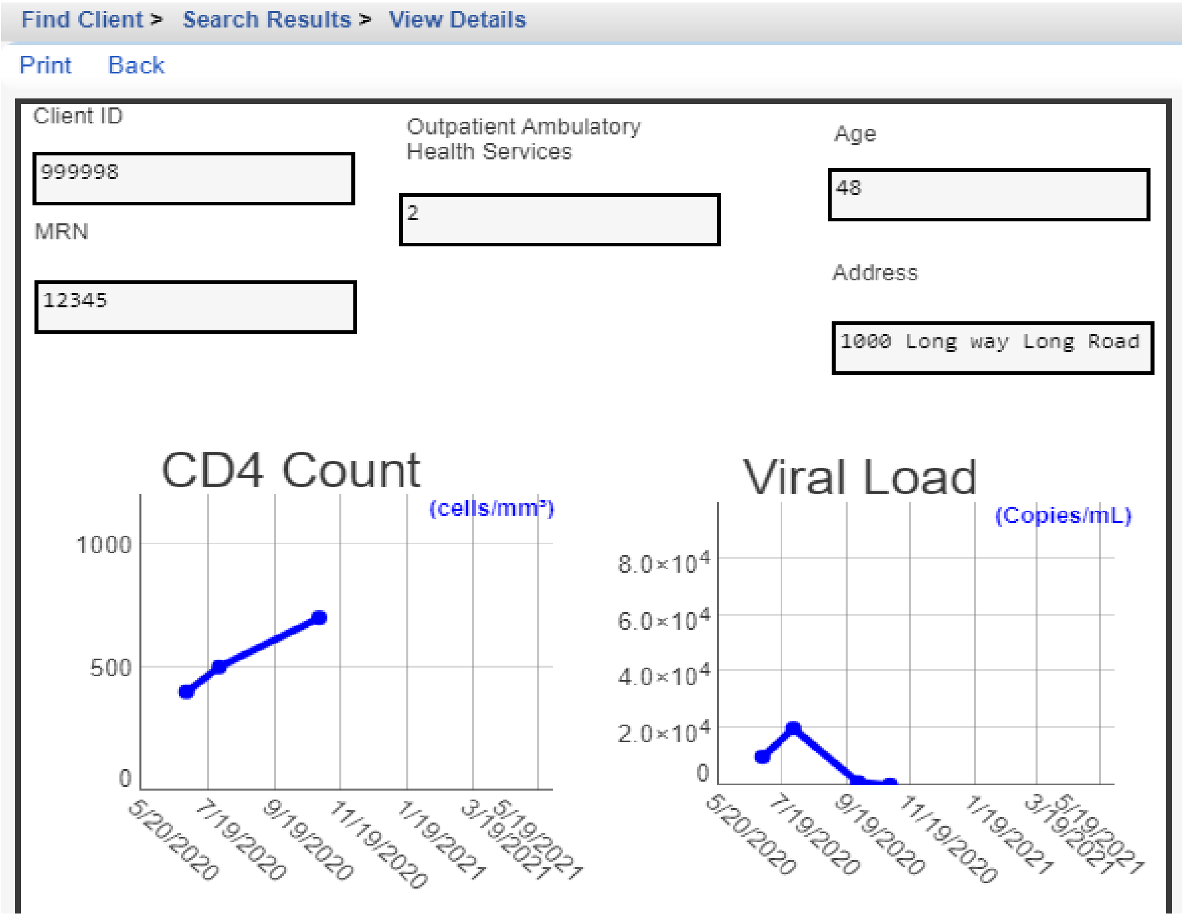
The Client Summary is a quick reference to important data points; it can focus users on completing important data entry while making the data easier to interpret.These data points can be presented using custom report fields and graphs in an interface similar to the Form Designer. CAREWare presents the Client Summary to users when they first open a client record.

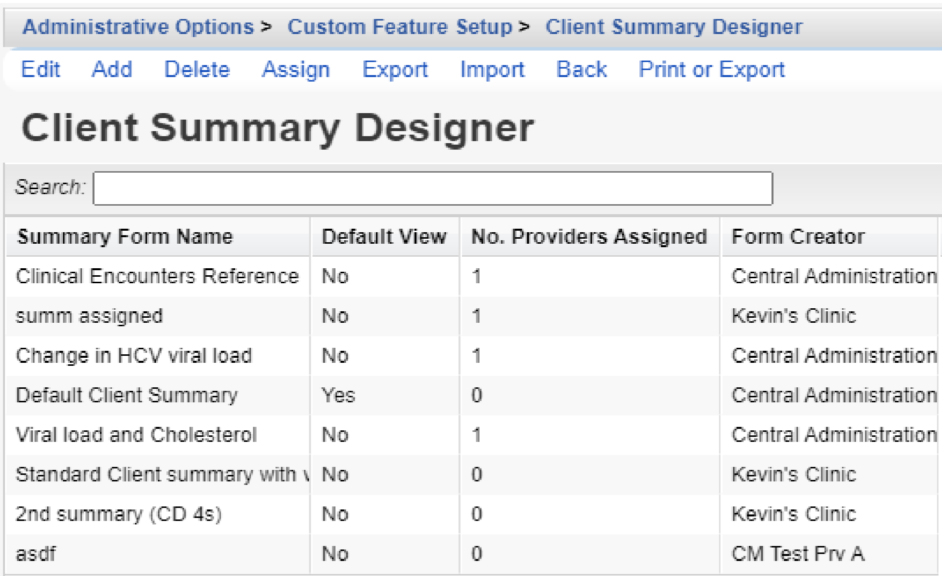


Note: Users can create several Client Summaries in CAREWare. Only one can be active for a provider at a time.

To create, edit, and view Client Summaries, permissions need to be granted in CAREWare for Central Administration, the provider, and the user. To grant permissions for users, follow the instructions here. Grant the permissions View Client Summaries to allow users to view the summary. Grant the permission Edit Client Summaries to allow users to create new summaries or make changes to a summaries design.

Follow these instructions to create a Client Summary:

1. Click *Administrative Options*.
2. Click *Custom Features*.
3. Click *Client Summary Designer*.

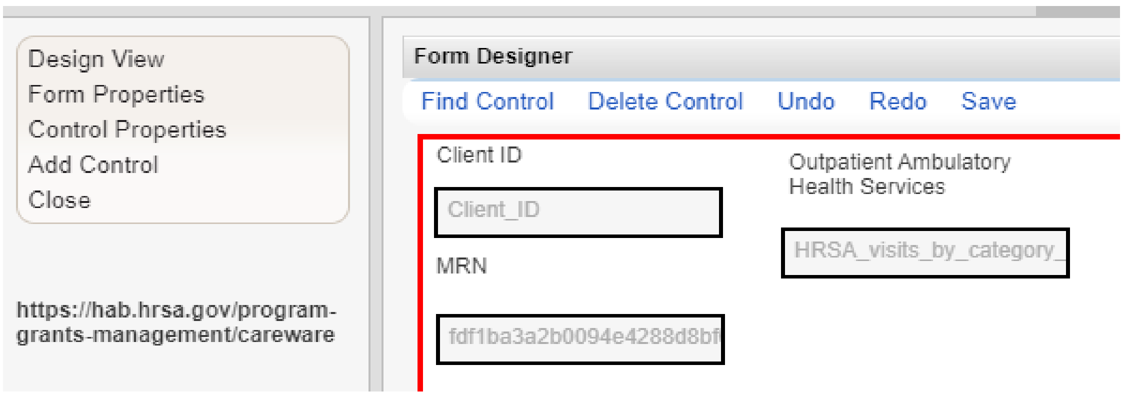


Summary Form Name	Default View	No. Providers Assigned	Form Creator
Clinical Encounters Reference	No	1	Central Administration
summ assigned	No	1	Kevin's Clinic
Change in HCV viral load	No	1	Central Administration
Default Client Summary	Yes	0	Central Administration
Viral load and Cholesterol	No	1	Central Administration
Standard Client summary with v	No	0	Kevin's Clinic
2nd summary (CD 4s)	No	0	Kevin's Clinic
asdf	No	0	CM Test Prv A

Edit – Opens a summary in Design View.
Add – Creates a new Client Summary.
Delete – Deletes the selected Client Summary.
Assign – Activates a Client Summary for a provider. This deactivates the prior summary assigned.
Export – Exports a Client Summary design as a file, which can be imported into CAREWare.
Import – Imports a Client Summary design. Must be a JSON file from CAREWare.
Back – Goes back to Custom Feature Setup.
Print or Export – Opens the print screen to print the list of summaries.

Summary Form Name – Name of Client Summary.
Default View – If Yes, this is the default Client Summary that came with CAREWare. Providers are automatically assigned with this Client Summary until another summary is assigned to the provider.
No. Providers Assigned – Number of Providers assigned to the Client Summary.
Form Creator – Provider the Client Summary was created in. Editing can only be completed in the Form Creator provider or Central Administration.

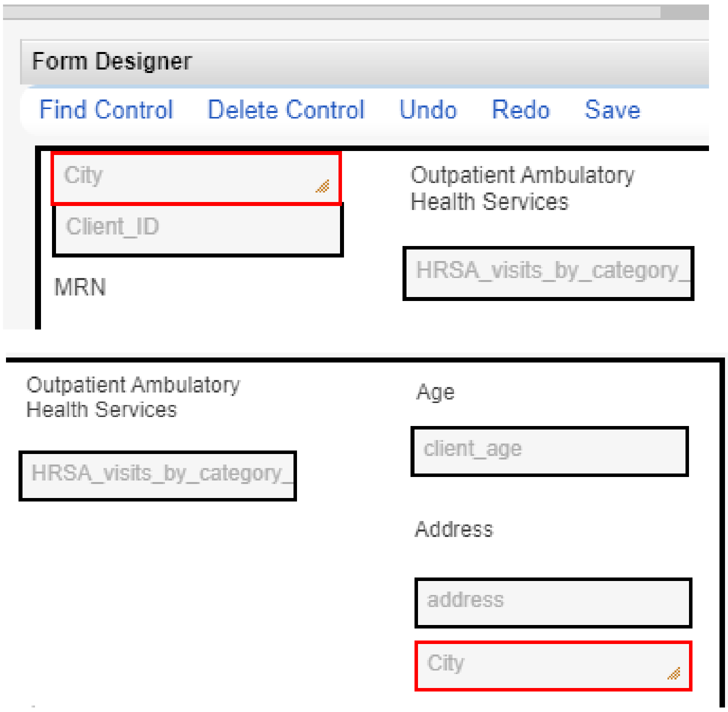
4. Click *Add*.
5. Enter a *Name*.
6. Click *Add*.
7. Click *Add Control*.



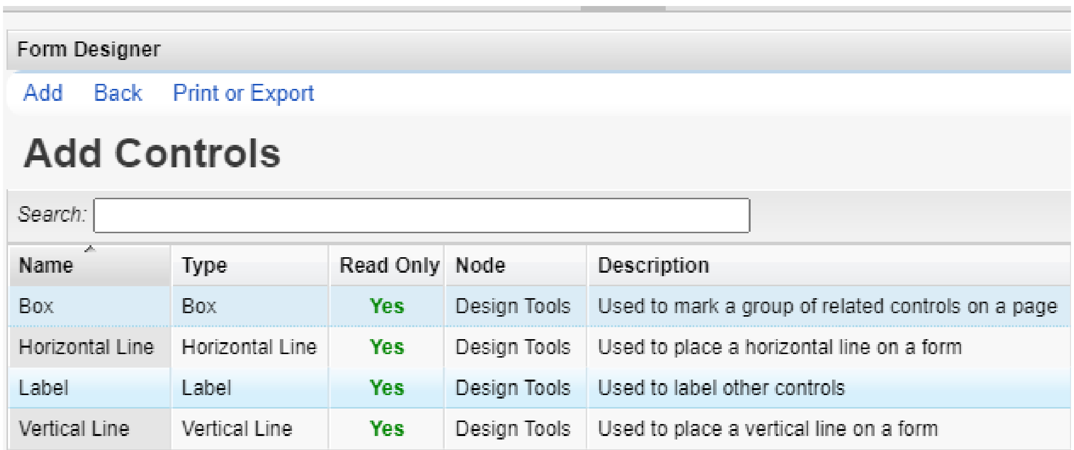
Design View – Navigates back to the design page.
Form Properties – Design Name and Description for the Client Summary can be edited here.
Control Properties – Properties for the selected control.

Add Control – Produces the list of options for controls based on [Custom Report Fields.]
Close – Closes the form.
Find Control – Creates a searchable list of controls currently added to the form so users can locate them.
Delete Control – Deletes the selected control.
Undo – Reverts back prior to the last action.
Redo – Recreates an action that was undone.
Save – Saves the form.

8. Click *Add Demographic Report Field*.
9. Type the name of the field in the *Search* field.
10. Select the *Field Name*.
11. Click *Add*.
12. Click *Back*.
13. Drag the field to the desired location.

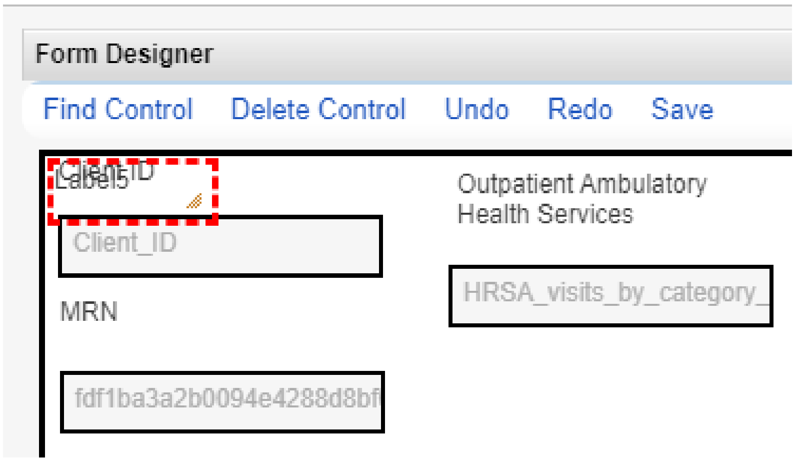


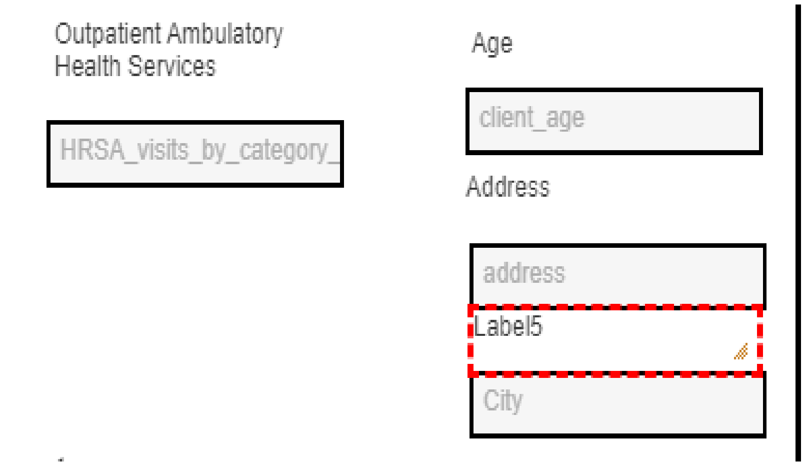
14. Click a blank space in the page to highlight the page.
15. Click *Add Control.*
16. Click *Add Doodad*.
17. Click *Label*.



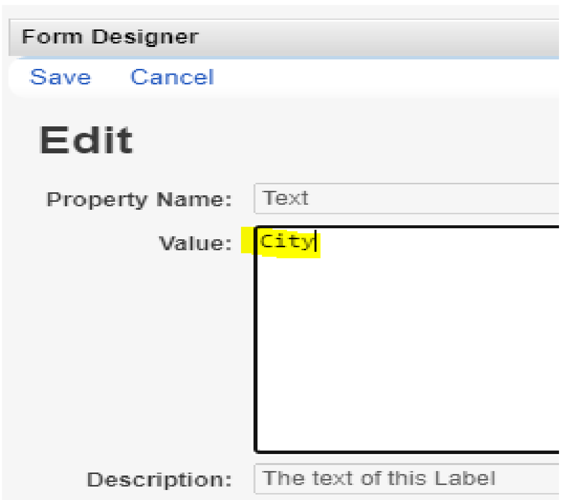
Name	Type	Read Only	Node	Description
Box	Box	Yes	Design Tools	Used to mark a group of related controls on a page
Horizontal Line	Horizontal Line	Yes	Design Tools	Used to place a horizontal line on a form
Label	Label	Yes	Design Tools	Used to label other controls
Vertical Line	Vertical Line	Yes	Design Tools	Used to place a vertical line on a form

18. Click *Add*.
19. Drag the label to the desired location.





20. Click *Control Properties*.
21. Click *Text*.
22. Enter the text value for the *Label* in the *Value* box.

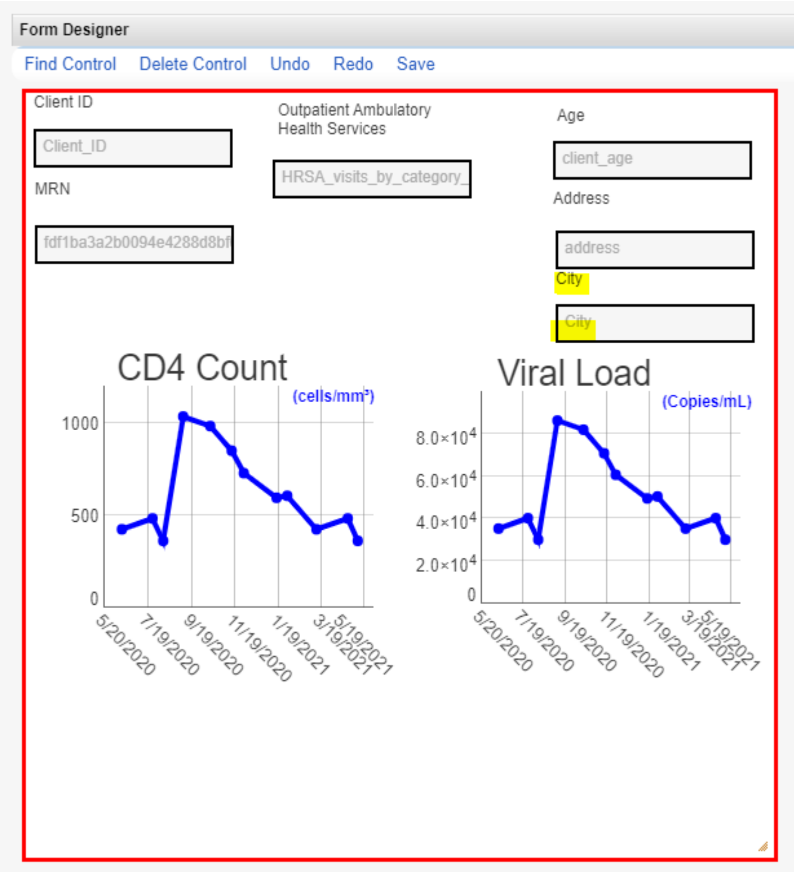


23. Click *Save*.

24. Click *Back*.

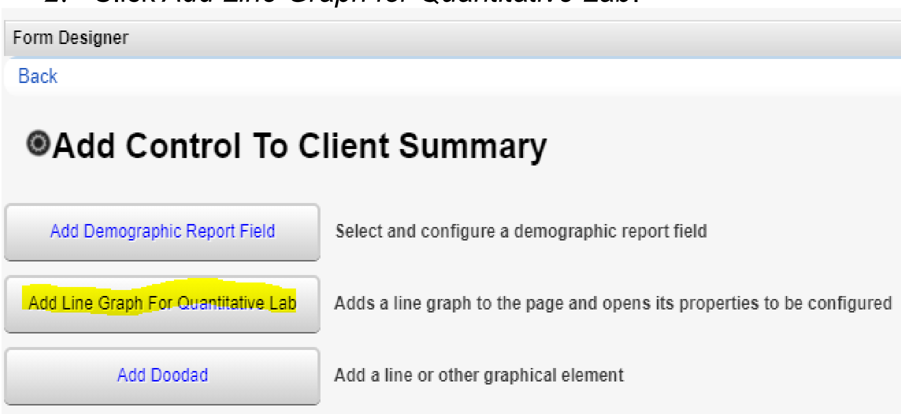
At this point, a control and a label for that control have been added to the Client Summary. In this example the control and label are for the custom report field City.

Graphs can be added to the Client Summary as well for lab data.

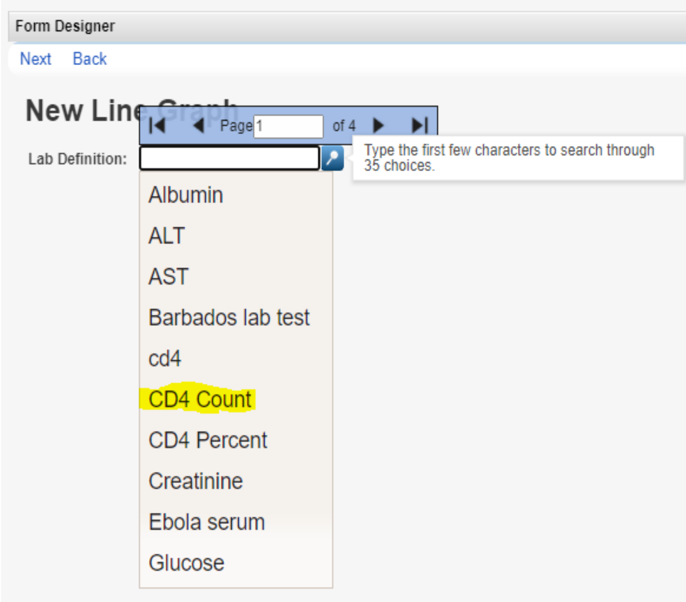


Follow these instructions to add the CD4 Count graph displayed in example above:

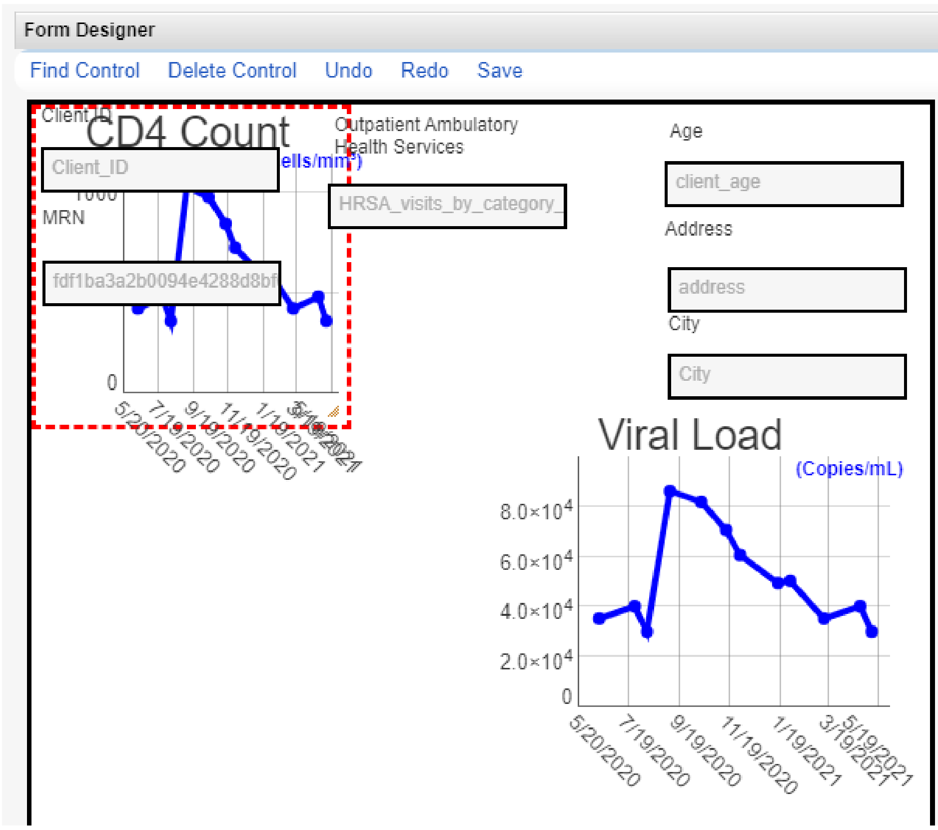
1. Click *Add Control*.
2. Click *Add Line Graph for Quantitative Lab*.

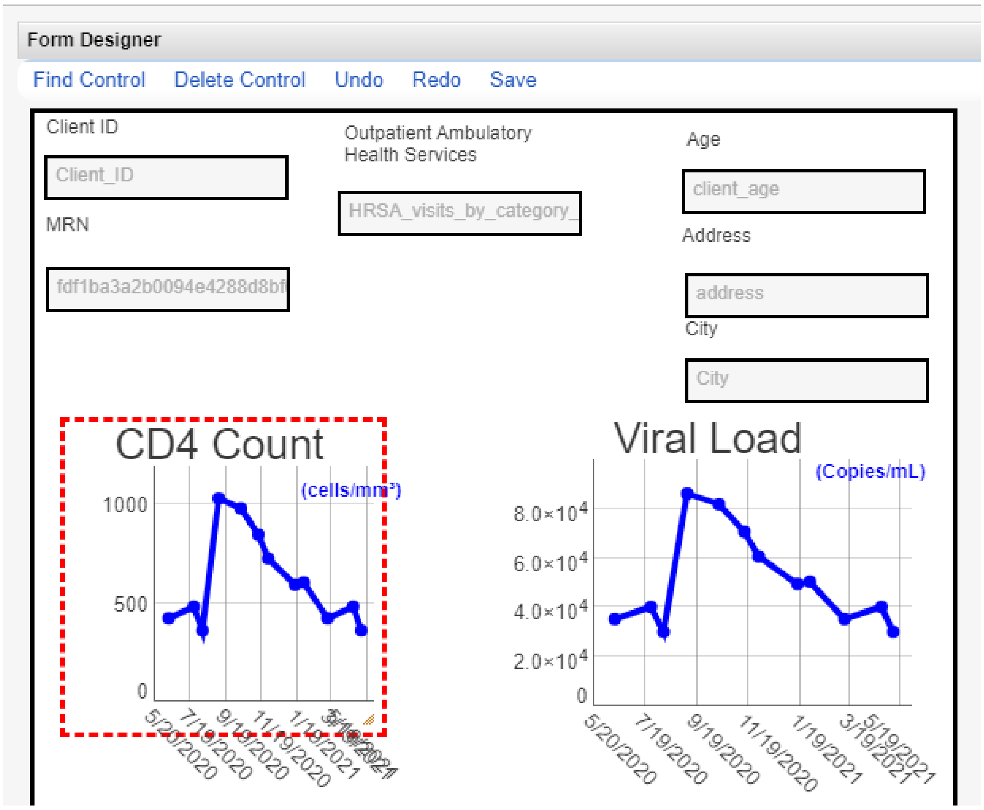


3. Select *CD4 Count* from the *Lab Definition* list.



4. Click *Next*.
5. Click *Back*.
6. Drag the *CD4 Count* graph to the desired location.





7. Click *Save*.

In this example, the CD4 Count graph shows the client's CD4 Count records from Labs. The City field displays the client's City from the Demographics tab under Contact Information.