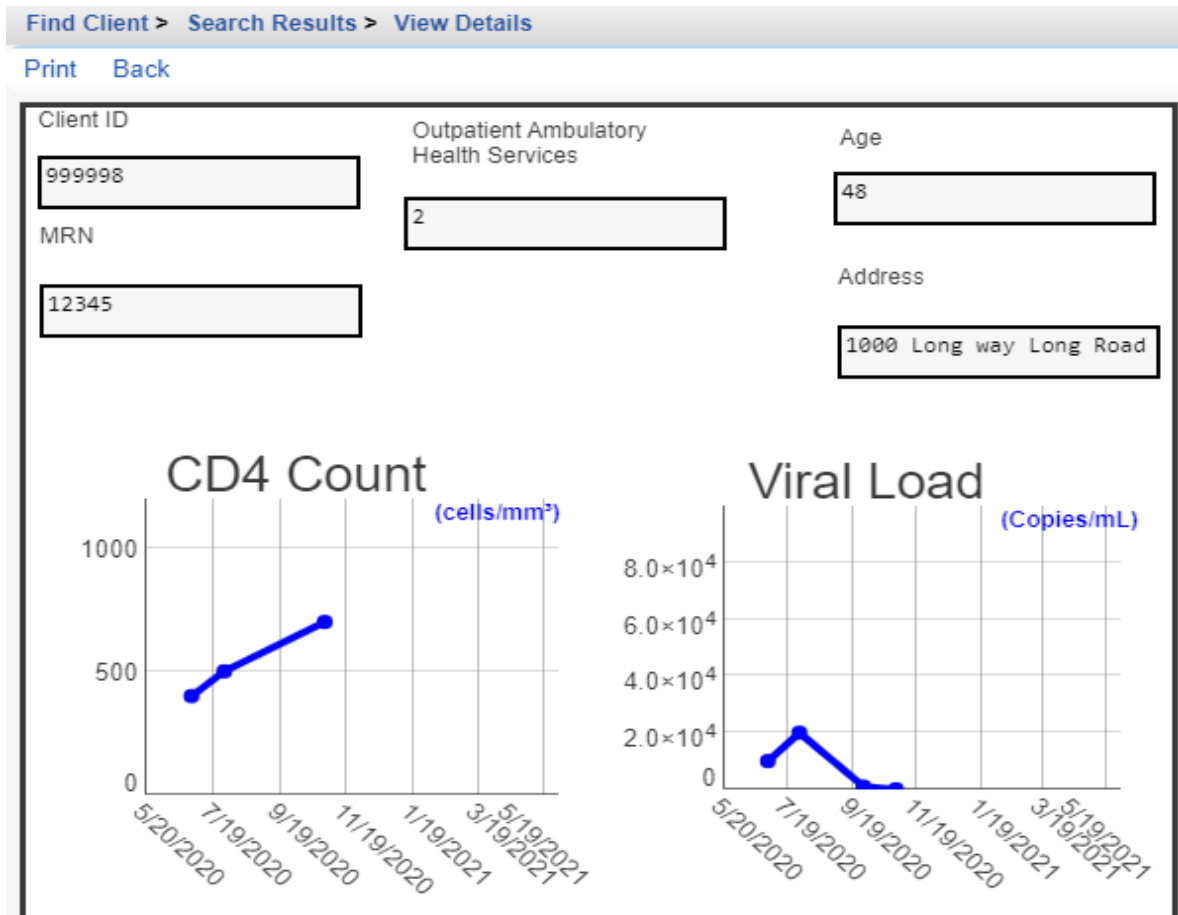


The Client Summary is a quick reference to important data points; it can focus users on completing important data entry while making the data easier to interpret. These data points can be presented using custom report fields and graphs in an interface similar to the [Form Designer](#). CAREWare presents 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*.

Administrative Options > Custom Feature Setup > Client Summary Designer

Edit Add Delete Assign Export Import Back Print or Export

Client Summary Designer

Search:

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.

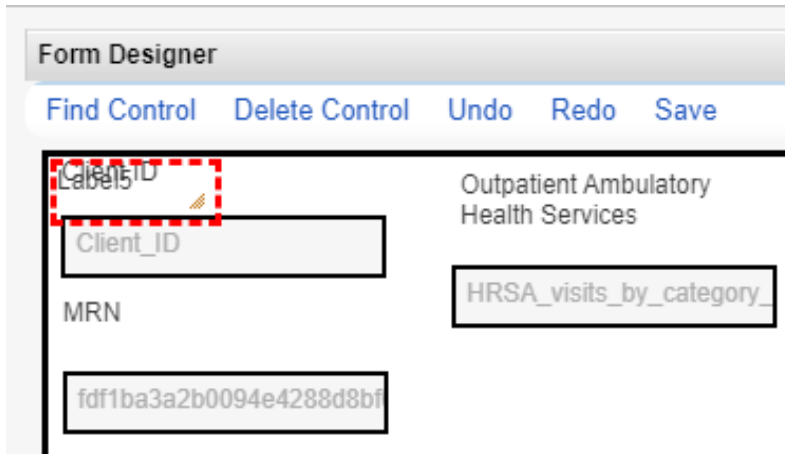
The screenshot shows the 'Form Designer' window. At the top, there is a menu bar with 'Find Control', 'Delete Control', 'Undo', 'Redo', and 'Save'. Below the menu bar is a control palette with a red border around the 'City' control. The main area of the window shows a form layout with several controls: 'Outpatient Ambulatory Health Services', 'HRSA_visits_by_category_', 'Age', 'client_age', 'Address', 'address', and 'City'. The 'City' control in the form layout is highlighted with a red border.

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

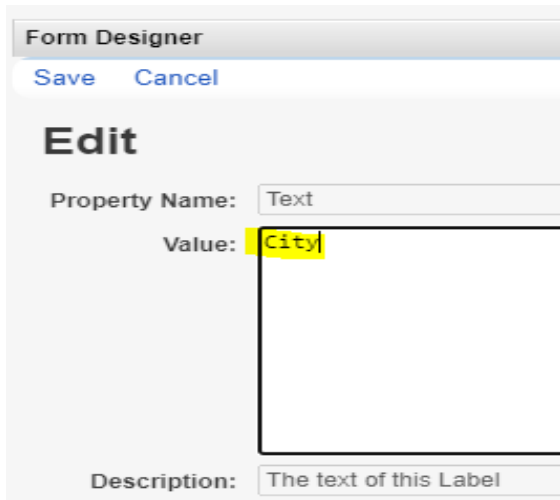
The screenshot shows the 'Add Controls' dialog box. At the top, there is a menu bar with 'Add', 'Back', and 'Print or Export'. Below the menu bar is the title 'Add Controls' and a search field. Below the search field is a table with the following data:

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.

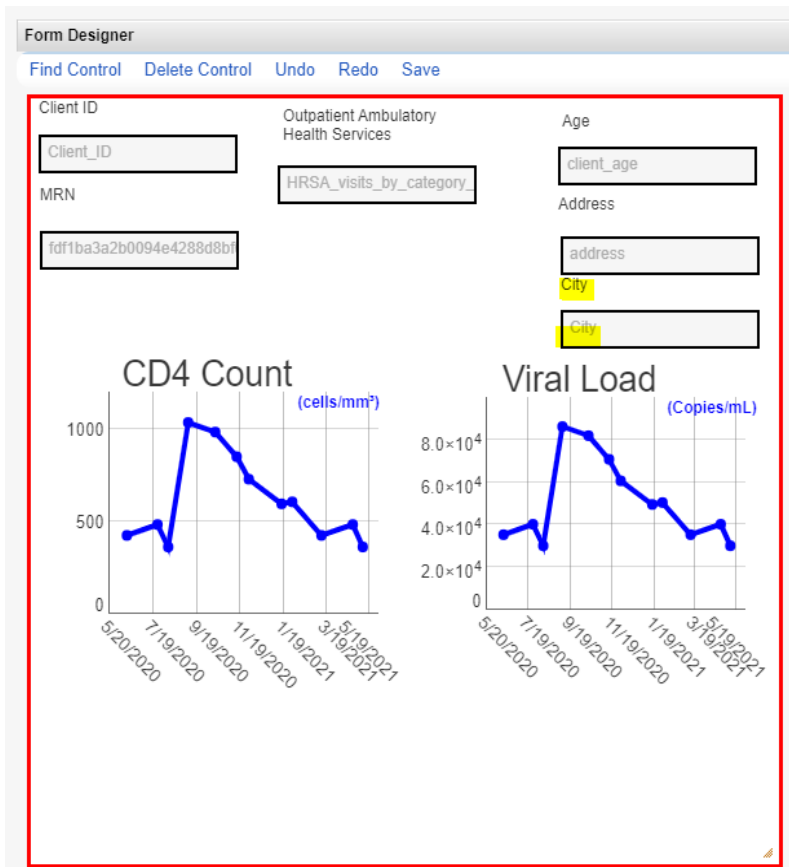


23. Click *Save*.

24. Click *Back*.

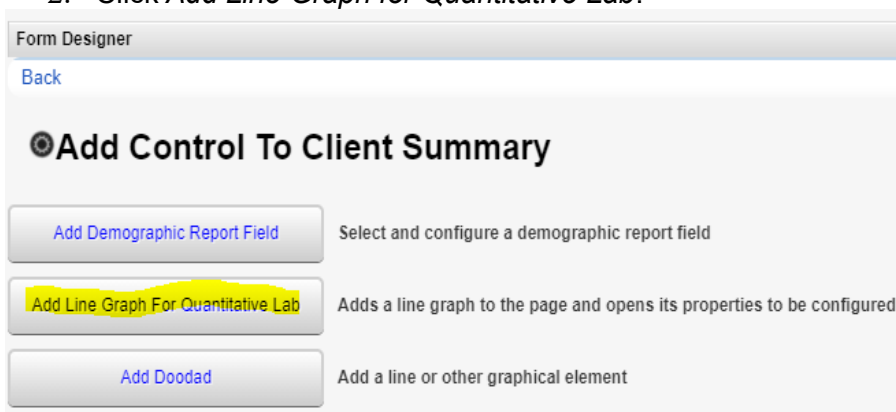
At this point, a control and a label for that control have been added to the Client Summary. In this example the control and label are for the custom report field City.

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

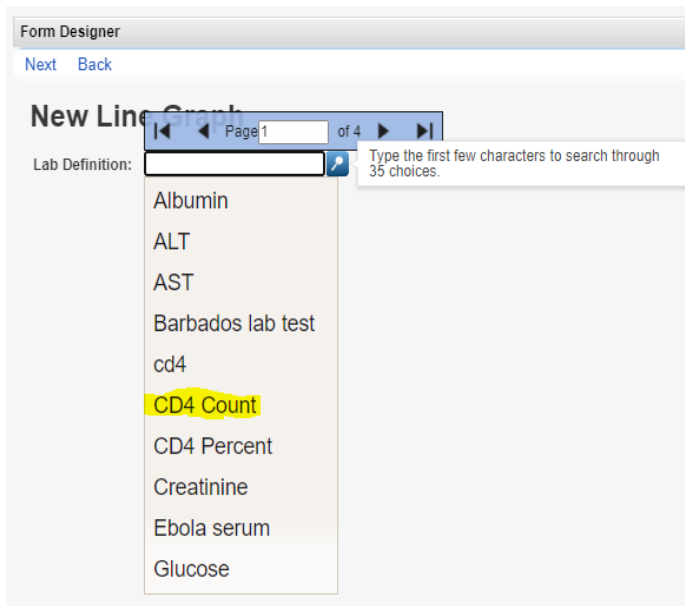


Follow these instructions to add the CD4 Count graph displayed in example above:

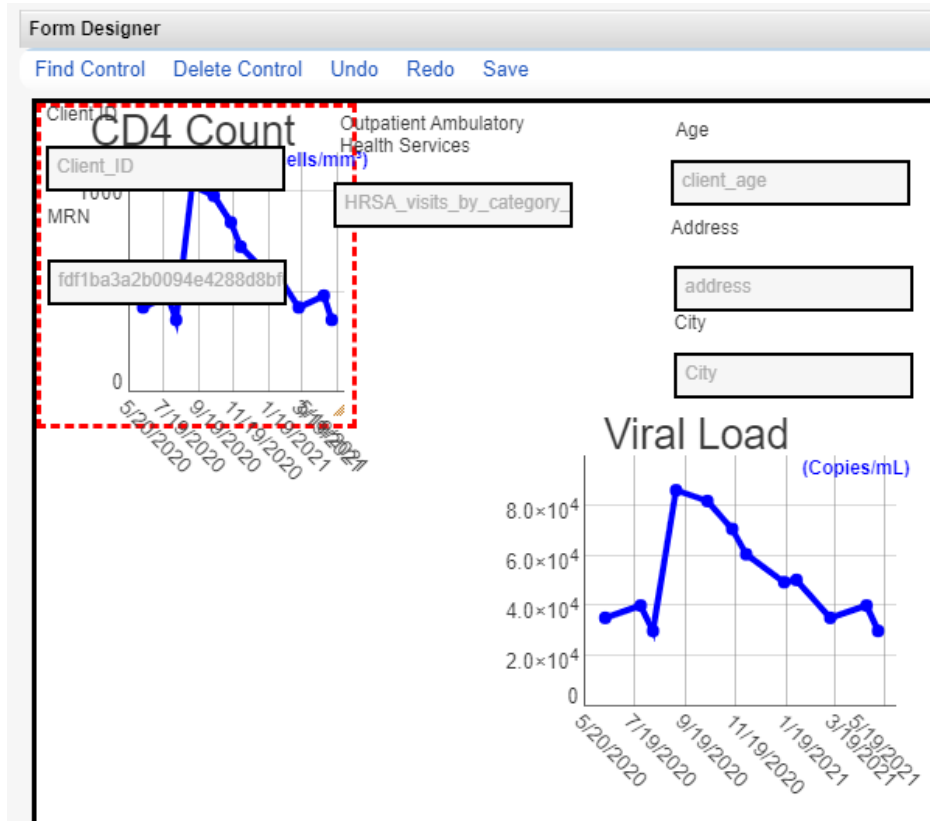
1. Click *Add Control*.
2. Click *Add Line Graph for Quantitative Lab*.



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.



Form Designer

Find Control Delete Control Undo Redo Save

Client ID Client_ID	Outpatient Ambulatory Health Services HRSA_visits_by_category_	Age client_age
MRN fdf1ba3a2b0094e4288d8bf		Address address
		City City

CD4 Count (cells/mm³)

Date	CD4 Count (cells/mm ³)
5/20/2020	450
7/19/2020	500
9/19/2020	1000
11/19/2020	850
1/19/2021	650
3/19/2021	550
5/19/2021	450

Viral Load (Copies/mL)

Date	Viral Load (Copies/mL)
5/20/2020	3.5 × 10 ⁴
7/19/2020	4.0 × 10 ⁴
9/19/2020	8.5 × 10 ⁴
11/19/2020	7.5 × 10 ⁴
1/19/2021	6.0 × 10 ⁴
3/19/2021	5.0 × 10 ⁴
5/19/2021	4.0 × 10 ⁴

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.

Find Client > Search Results > Client Summary

Print Back

Client ID 999998	Outpatient Ambulatory Health Services 2	Age 48
MRN 12345		Address 1000 Long way Long Road
		City Yeppers

CD4 Count (cells/mm³)

Date	CD4 Count (cells/mm ³)
5/20/2020	400
7/19/2020	500
9/19/2020	700

Viral Load (Copies/mL)

Date	Viral Load (Copies/mL)
5/20/2020	1.0 × 10 ⁴
7/19/2020	2.0 × 10 ⁴
9/19/2020	0.5 × 10 ⁴
11/19/2020	0.2 × 10 ⁴