The Provider Summary is a quick reference to important data points for providers. These data points are presented using graphs that display performance measure results. This visual reference can help users focus on completing the data entry key for the provider while making the data easier to interpret.



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

To create, edit, and view Provider Summaries, permissions need to be granted in CAREWare for Central Administration, the provider, and the user. To grant permissions for users, follow the instructions <u>here</u>.

In Central Administration, users need the permission Configure Provider Summaries to add/edit Provider Summaries. User's need the permission Run Performance Measure Reports to view the Provider Summary.

In each provider the permission Run Performance Measure Reports needs to be granted to the providers and the users to view the Provider Summary.

The Default Summary is assigned to all providers by default and includes the performance measures EHE01 – Newly enrolled clients and EHE02 – Clients with visit in last 4 months listed as New Clients and Active Clients in the description.



The graphs display the results of these performance measures with the Numerator and Denominator client count for each of three four month periods. This is similar to the Performance Measure Aggregate Report; however, here user's can click the Numerator or Not in Num (Not in Numerator) Clients to get a client list.

Provider Summary		
Go To Client Back	Print or Export	
undefined		
Search:		
Client	Provider	Viewed
Arellano_Fake, Kelvin	Steve's Test Agency	
Blanchard_Fake, Tristen	Steve's Test Agency	
Collins_Fake, Alisa	Steve's Test Agency	
Cowan_Fake, Trent	Steve's Test Agency	
Hopkins_Fake, Jackson	Steve's Test Agency	
Martin_Fake, Jan	Steve's Test Agency	
Miller_Fake, Denzel	Steve's Test Agency	
Schmidt_Fake, Sonny	Steve's Test Agency	
Sosa_Fake, Niko	Steve's Test Agency	
talthaneil, tinurina	Default	
talthaneil, tinurina	Kevin's Clinic	
Wilcox_Fake, Frederick	Steve's Test Agency	

The Client List can be used for quick navigation to make corrections in the results by completing data entry. Users can click a client and then Go to Client to open that client's record to complete data entry. *Print or Export* can be used to distribute the Client List to other staff. In this example, there are multiple providers listed showing the provider(s) the client is active for and where data corrections would have to be made to improve the results.

In order for Provider Summaries to display data for multiple providers, <u>Data Sharing</u> settings need to be enabled and the Performance Measures need to have the subfilter Cross-Provider set to Yes.

The Default Summaries are set as the Type Bar Graph by default; however, that can be changed to the Type Pie Chart.

Follow these instructions to change the Type of graph for Provider Summaries:

- 1. Click Administrative Options.
- 2. Click Custom Features.
- 3. Click Provider Summary.
- 4. Click *Default Summary*.
- 5. Click Configure Charts.
- 6. Click New Clients.
- 7. Click Delete.
- 8. Click Active Clients.
- 9. Click Delete.
- 10. Click Add Pie Chart.
- 11. Select the *Performance Measure EHE01 Newly enrolled clients*.
- 12. Enter New Clients in the Title.
- 13. Click Save.
- 14. Click Add Pie Chart.
- 15. Select the Performance Measure EHE02 Clients with visit in last 4 months.
- 16. Enter New Clients in the Title.
- 17. Click Save.

Once the Type of chart is changed, the new results are displayed the next time the Provider Summary is recalculated. If Provider Summary is clicked now, the Bar Graph Type is still displayed. CAREWare recalculates Provider Summaries for all providers at 2 AM local time each day. To see the results of changes made to Provider Summaries or to get current results after data entry, the Provider Summary needs to be manually recalculated for that provider. Follow these instructions to manually recalculate the Provider Summary:

- 1. Click Administrative Options.
- 2. Click Custom Features.
- 3. Click *Provider Summary*.
- 4. Click Default Summary.
- 5. Click Assign Providers.

Administrative Options > Custom Feature Setup > Provider Summary

Configure Charts Edit Name New Summary Delete Assign Providers Back Print or Export

## **Provider Summaries**

Search:	]	
Summary Name	Summary Type	Mapped Providers
New Webinar Provider Summary	Assigned	1
Default Summary	Default	58
assigned 2	Assigned	2
WRMA Provider Summary	Assigned	0
Test Summary	Assigned	0
Test Summary 2	Assigned	0
Standard	Assigned	1
Blank Summary	Assigned	0
assigned one	Assigned	0
Percent of Clients with High Cholesterol	Assigned	1

## 6. Click the Provider Name.

Administrative Recalculate	Options > Custom Featu Back Print or Export	ure Setup > Provide	r Summary > Assigr	Providers for Summary: Default Summary
Assign	Providers for	or Summa	ry: Defaul	t Summary
Search:				
Mapped	ProviderName	Last Evaluated	Result	
	Aatest1			
Yes	AIDS R Us	5/27/2021 11:35 AM	Newly enrolled clien	
Yes	Bill's Mediocre Dom	4/7/2021 2:16 PM	Newly enrolled clien	
Yes	Btest1	4/30/2021 5:01 PM	Newly enrolled clien	
	California Domain	6/9/2020 8:42 AM	Newly enrolled clien	
Yes	Central Administrati	5/28/2021 9:09 AM	Recalculating	
Yes	CM Test Prv A	11/2/2020 11:50 AM	Newly enrolled clien	
Yes Yes Yes	Btest1 California Domain Central Administrati CM Test Prv A	4/30/2021 5:01 PM 6/9/2020 8:42 AM 5/28/2021 9:09 AM 11/2/2020 11:50 AM	Newly enrolled clien Newly enrolled clien Recalculating Newly enrolled clien	

- 8. Click Back.
- 9. Click Back.
- 10. Click *Provider Summary*.

The Result changes to Recalculating. Once the Result changes back to the name of the Performance Measure, the Provider Summary has been updated with the new results.

Now the Provider Summary is displayed as a Pie Chart with just a single result rather than the aggregate result of with three date spans.



The Default Summary is automatically assigned to all providers. Administrators can assign unique provider summaries to individual providers. Once a new summary has been assigned to a provider, the Default Summary is no longer assigned. Providers can only have one Provider Summary assigned at a time.

Follow these instructions to create a new Provider Summary:

- 1. Click Administrative Options.
- 2. Click Custom Features.
- 3. Click *Provider Summary*.

Administrative Options > Custom Feature Setup > Provider Summary					
Configure Charts Edit Name New Summary De	lete Assign Provi	iders Back Print or Export			
Provider Summaries					
Search:		]			
Summary Name	Summary Type	Mapped Providers			
New Webinar Provider Summary	Assigned	1			
Default Summary	Default	58			
assigned 2	Assigned	2			
WRMA Provider Summary	Assigned	0			
Test Summary	Assigned	0			
Test Summary 2	Assigned	0			
Standard	Assigned	1			
Blank Summary	Assigned	0			
assigned one	Assigned	0			
Percent of Clients with High Cholesterol	Assigned	1			

Configure Charts – Open to edit settings for the selected summary .
Edit Name – Open to change the Summary Name.
New Summary – Creates a new summary.
Delete – Deletes the selected summary from the list.
Assign Providers – Open to assign a provider to the selected summary.
Back – Goes back to Custom Feature Setup.
Print or Export – Prints or exports the list of summaries.

Summary Name – The name of the summary.

**Summary Type** – Default was automatically assigned. Assigned means a user assigned the provider to the summary.

**Mapped Providers** – Number of providers assigned to the summary.

4. Click New Summary.

5. Enter the Provider Summary Name. Administrative Options > Custom Feature Setup > Provider Summary Save Cancel **New Summary** Provider Summary Name: Example Summary 6. Click Save. 7. Click the Summary Name. 8. Click Configure Charts. Administrative Options > Custom Feature Setup Configure Charts Edit Name New Summary Delete Assign Providers Back Print or Export **Provider Summaries** Search: Summary Type - Mapped Providers Summary Name 0 WRMA Provider Summary Assigned Example Summary Assigned 0 Blank Summary Assigned 0

9. Click either Add Pie Chart or Add Bar Graph. (In this case, Add Bar Graph was selected.)

Administrative Options > Cust	om Feature Setup	Example S	ummary Chart	Configura	tion
Edit Add Pie Chart Add Ba	ar Graph Delete	Move Up	Move Down	Back	Print or Export
Example Summ	ary Chart	Config	guration	1	
Search:					
Description	Туре				
Add Pie Chart – Adds a Pie Ch Add Bar Graph – Adds a Bar G Delete – Deletes the selected cl Move Up – Moves a chart up th Move Down – Moves a chart do Back – Goes back to Provider S Print or Export – Prints or expo 10. Select a <i>Performance Ma</i> 11. Select the <i>Days Between</i> results) 12. Enter a <i>Title</i> . 13. Click Save. Administrative Options > Custom Save Cancel Edit	art. Fraph. hart from the list. e list, changing th own the list, chan Summaries. orts the list of cha easure. (list is fro n Measurements	he order pre iging the ord arts. om <i>Perform</i> . (number o	esented in res der presented ance Measure f days betwee	sults. I in result es in <i>Rep</i> en each o	ts. ports.) of the three
Performance Measure:	Core01 - HAB: HIV	/ viral load sur	pression		
Days Between Measurements:	90		•		
Title:	Viral Load				
	Title Properties				
Title Text Color:	Black				
Title Font Size:	24				
Title Italics:					
	Bar Graph Prop	erties			
14. Click <i>Back.</i> 15. Click the <i>Summary Nam</i>	e.				

16. Click Assign Providers.17. Select the Provider.

Administrative (	Options > Custom	Feature Setup > Assig	n Providers for	Summary: Example Summary	
Save Recald	ulate Back P	Print or Export			
Assign Providers for Summary: Example Summary					
Search: kevin					
Select	ProviderNam	e Last Evaluated	Result		
	Kevin's Clinic				

- 18. Click Save.
- 19. Click the Summary Name.
- 20. Click Assign Providers.
- 21. Click the Provider.
- 22. Click Recalculate.
- 23. Click Back.
- 24. Click Back.

Click the Provider Summary currently connected to that provider or Switch Providers, selecting the provider assigned to the new summary, to view the results.



Provider Summaries can have several charts added. Users can scroll down to view the results. The *Print or Export* button on this Provider Summary screen prints or exports the chart(s).