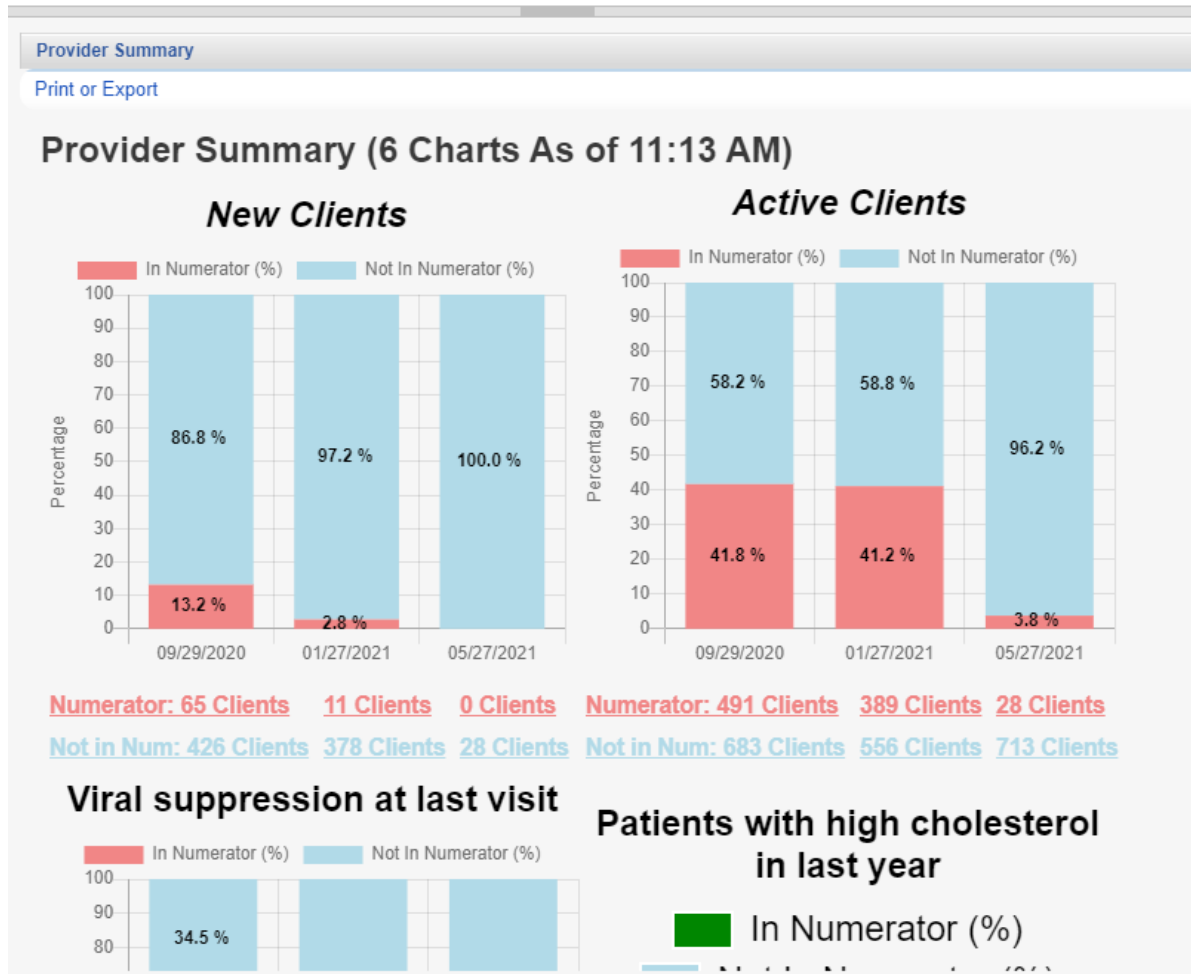The Provider Summary is a quick reference to important data points for providers. These data points are presented using graphs that display performance measure results. This visual reference can help users focus on completing the data entry key for the provider while making the data easier to interpret.


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 here.

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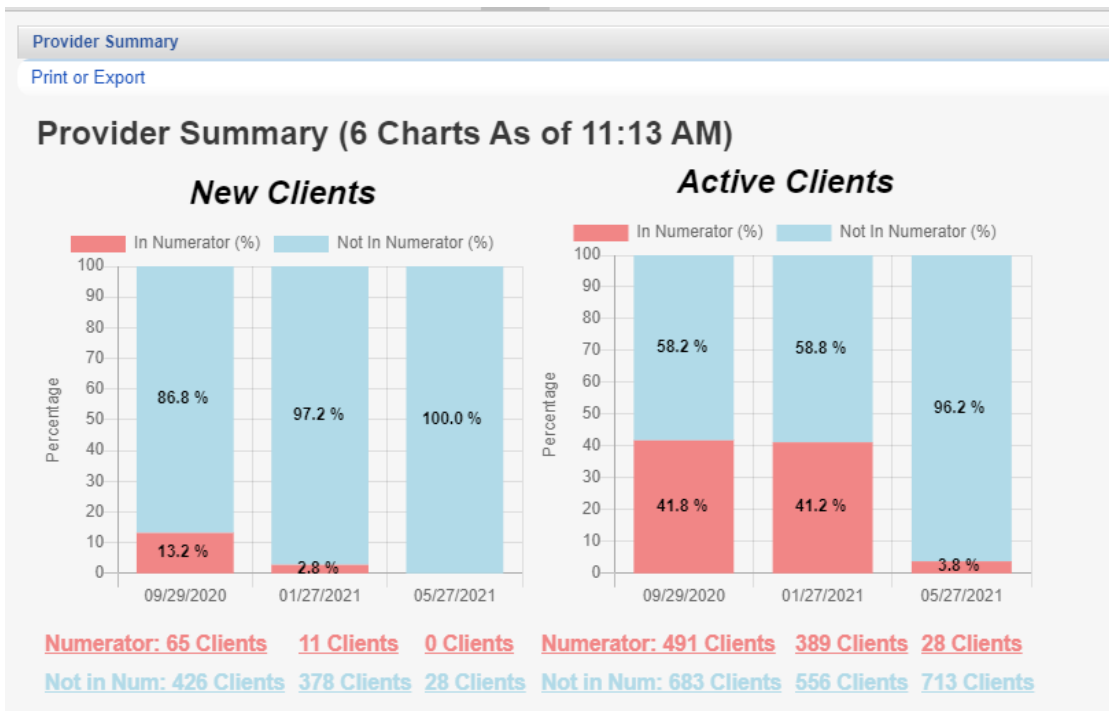
The graphs display the results of these performance measures with the Numerator and Denominator client count for each of three four month periods. This is similar to the Performance Measure Aggregate Report; however, here user's can click the Numerator or Not in Num (Not in Numerator) Clients to get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

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*.

6. Click the Provider Name.

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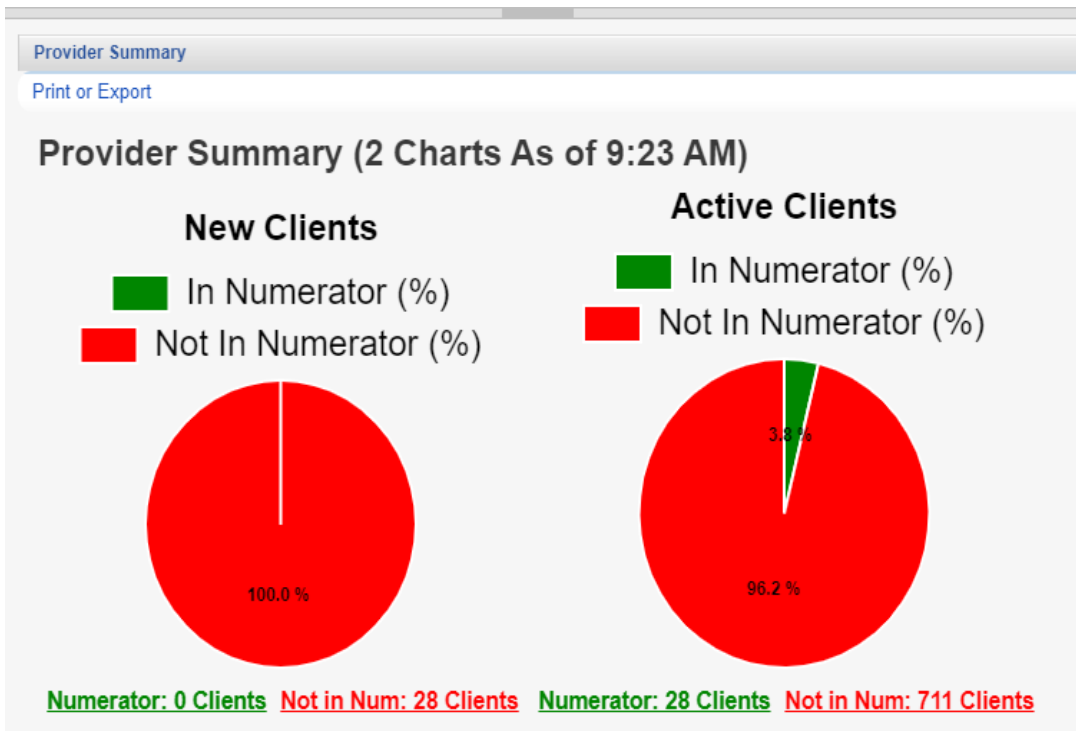
The Default Summary is automatically assigned to all providers. Administrators can assign unique provider summaries to individual providers. Once a new summary has been assigned to a provider, the Default Summary is no longer assigned. Providers can only have one Provider Summary assigned at a time.

Follow these instructions to create a new Provider Summary:

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

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.
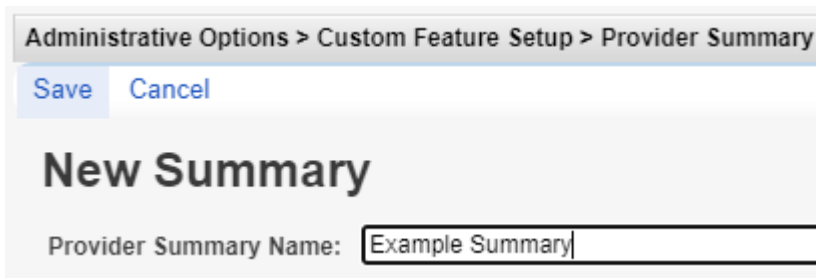**Back** – Goes back to Custom Feature Setup.
Print or Export – Prints or exports the list of summaries.

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*.
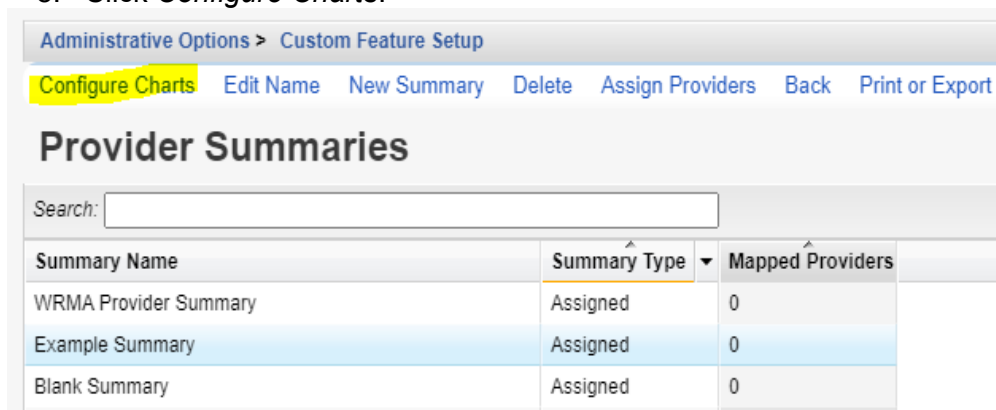5. Enter the *Provider Summary Name*.

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 Name	Summary Type	Mapped Providers
WRMA Provider Summary	Assigned	0
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.)

Edit – Open to make changes to a chart.
Add Pie Chart – Adds a Pie Chart.
Add Bar Graph – Adds a Bar Graph.
Delete – Deletes the selected chart from the list.
Move Up – Moves a chart up the list, changing the order presented in results.
Move Down – Moves a chart down the list, changing the order presented in results.
Back – Goes back to Provider Summaries.
Print or Export – Prints or exports the list of charts.

 10. Select a *Performance Measure*. (list is from *Performance Measures* in *Reports*.)
 11. Select the *Days Between Measurements*. (number of days between each of the three results)
 12. Enter a *Title*.
 13. Click Save.

 14. Click *Back*.
 15. Click the *Summary Name*.
 16. Click *Assign Providers*.
 17. Select the *Provider*.

Administrative Options > Custom Feature Setup > Assign Providers for Summary: Example Summary

Save   Recalculate   Back   Print or Export

Assign Providers for Summary: Example Summary

Search: kevin

Select	Provider Name	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 Summary

Print or Export

Provider Summary (1 Charts As of 10:10 AM)
Viral Load

Numerator: 9 Clients   7 Clients   6 Clients
Not in Num: 8 Clients   25 Clients   37 Clients
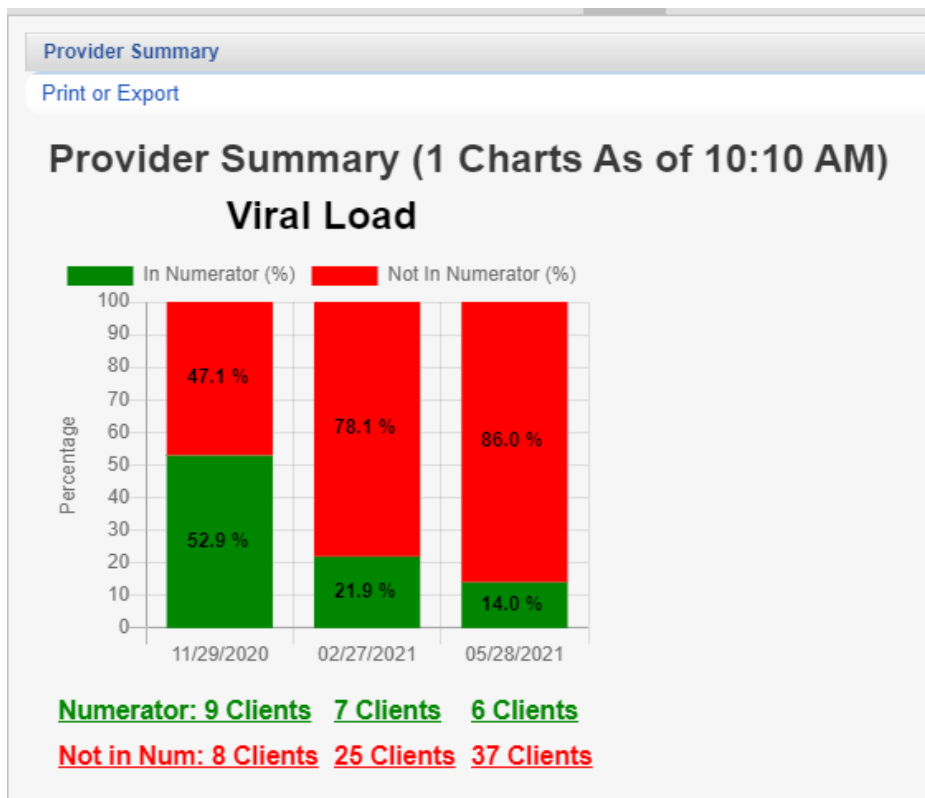
Provider Summaries can have several charts added. Users can scroll down to view the results.
The *Print or Export* button on this Provider Summary screen prints or exports the chart(s).