Client Summary

Purpose	Create a concise client dashboard that brings important data points, report fields, and graphs into one view.
Who should do this	CAREWare administrators and authorized users who design or manage Client Summaries.
Use this guide when you need to	Create a Client Summary, add report-field controls and labels, or add a quantitative lab graph.
Main warning	Only one Client Summary can be active for a provider at a time. Assigning another summary replaces the active one.

Quick path
Administrative Options > Custom Features > Client Summary Designer

Important
CAREWare can contain several Client Summaries, but only one can be active for a provider at a time.

Before you begin

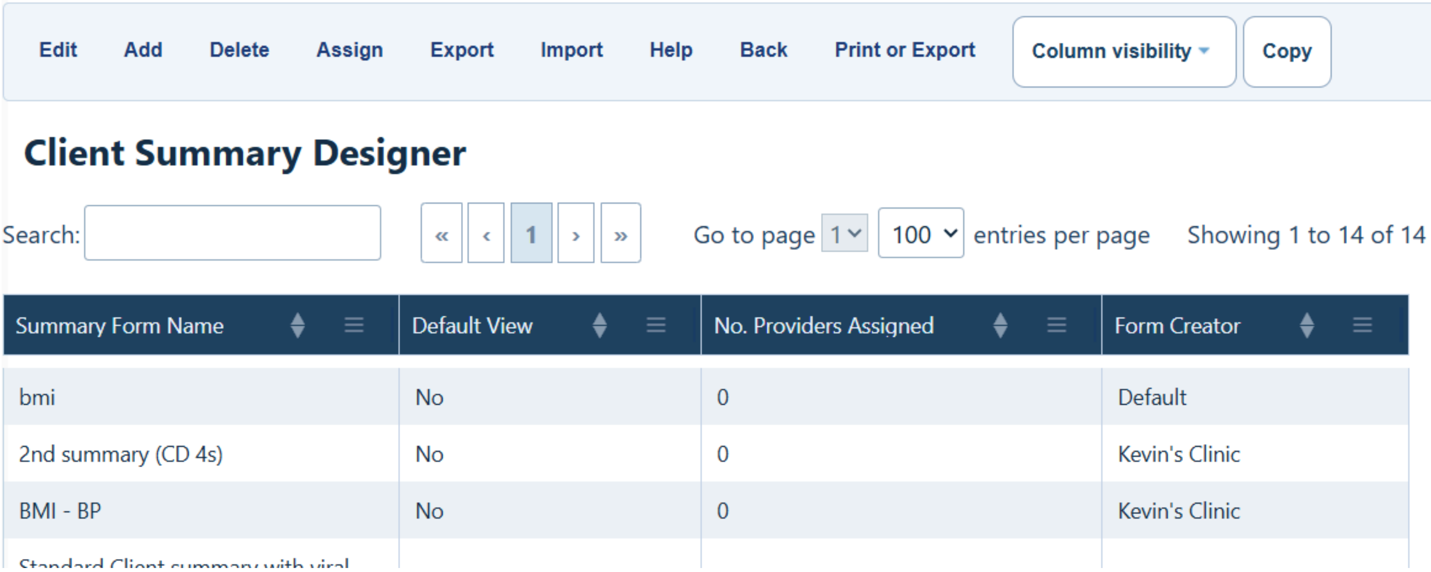
- Confirm that the appropriate permissions are granted in Central Administration, the provider domain, and the user account.
- Grant View Client Summaries so users can view the summary in client records.
- Grant Manage Client Summaries so authorized users can create or edit summaries.

Open Client Summary Designer

Step 1. Click Administrative Options.

Step 2. Click Custom Features.

Step 3. Click Client Summary Designer.



Client Summary Designer buttons

Button	What it does
Edit	Opens the selected summary in Design View.
Add	Creates a new Client Summary.
Delete	Deletes the selected Client Summary.
Assign	Activates the selected summary for a provider and deactivates the previously assigned summary.
Export	Exports a Client Summary design as a file that can be imported into CAREWare.
Import	Imports a Client Summary design from a CAREWare JSON file.
Help	Opens the Knowledge Base article for the Client Summary Designer.
Back	Returns to Custom Feature Setup.
Print or Export	Opens the print screen for the list of summaries.
Column Visibility	Hide or show columns in the view.

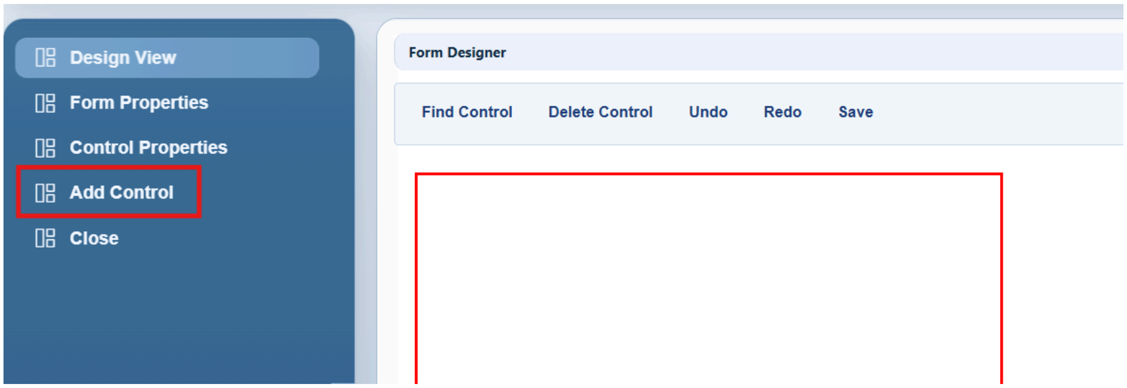
Create a Client Summary

Step 1. Click Add.

Step 2. Enter a name for the Client Summary.

Step 3. Click Add.

Step 4. Click Add Control.



Design View controls

Control	What it does
Design View	Returns to the summary design page.
Form Properties	Edits the design name and description.
Control Properties	Edits properties for the selected control.
Add Control	Lists controls that can be added from Custom Report Fields.
Close	Closes the form.
Find Control	Searches controls currently added to the form.
Delete Control	Deletes the selected control.
Undo / Redo	Reverts the last action or restores an action that was undone.
Save	Saves the form.

Add a demographic report field

Step 1. Click Add Demographic Report Field.

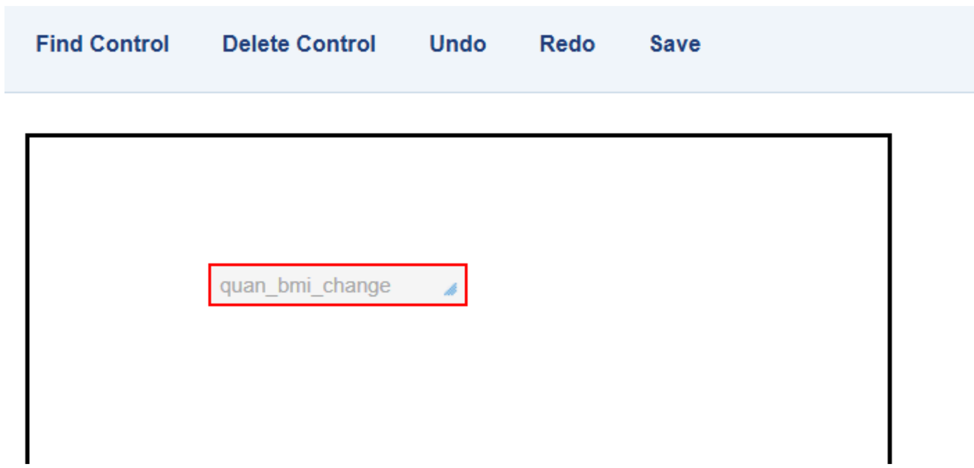
Step 2. Type the field name in the Search box.

Step 3. Select the Field Name.

Step 4. Click Add.

Step 5. Click Back.

Step 6. Drag the field to the desired location.



Add a label

Labels identify controls on the Client Summary. Add the label after placing the report field.

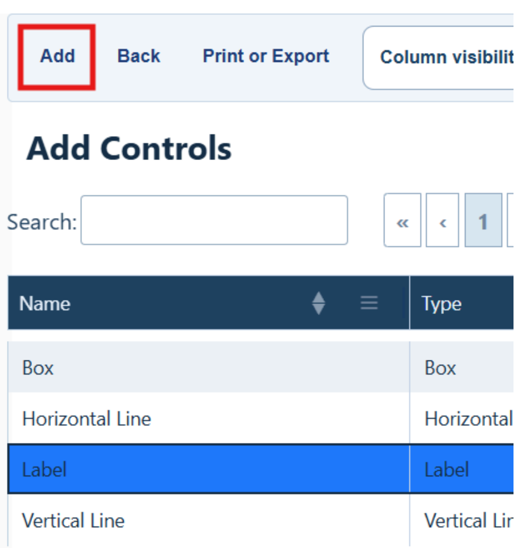
Step 1. Click a blank area of the page to select the page.

Step 2. Click Add Control.

Step 3. Click Add Doodad.

Step 4. Click Label.

Step 5. Click Add.



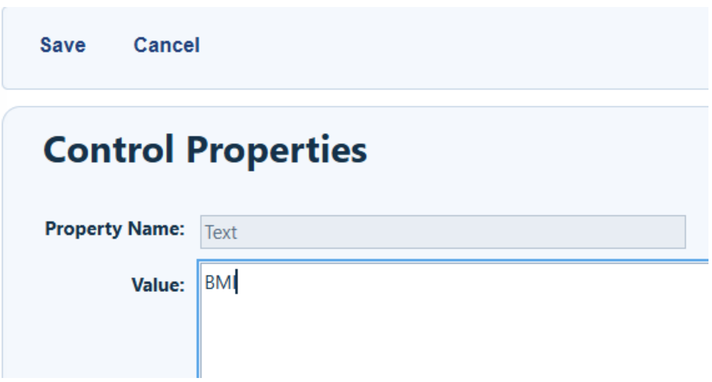
Step 6. Drag the label to the desired location.

Edit the label text

Step 1. Click Control Properties.

Step 2. Click Text.

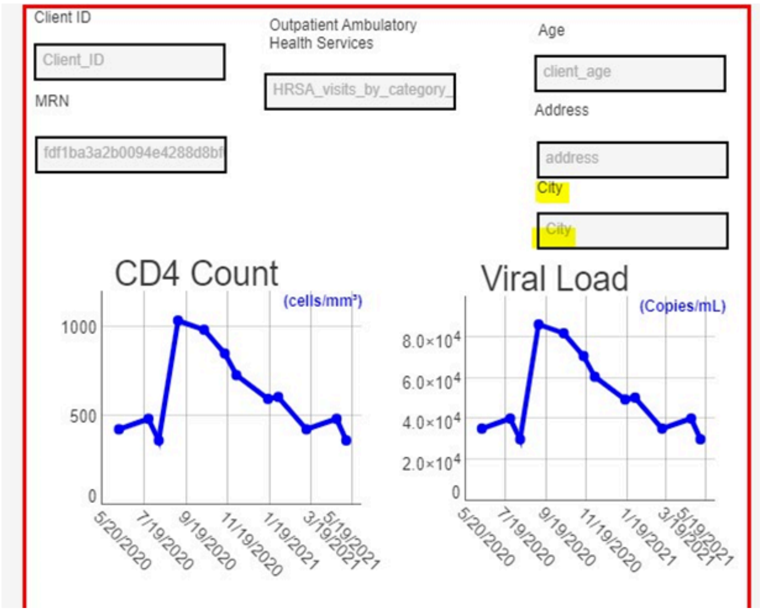
Step 3. Enter the label text in the Value box.



Step 4. Click Save.

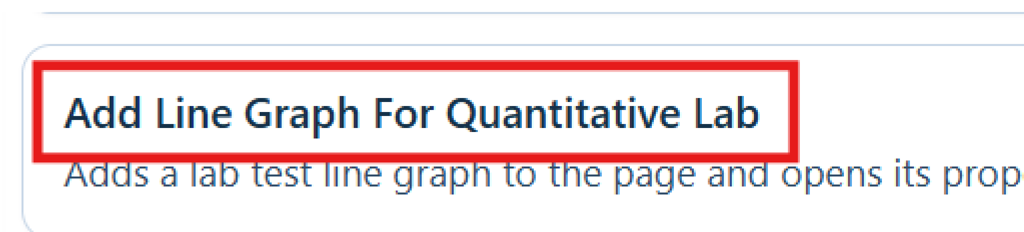
Step 5. Click Back.

Add a quantitative lab graph



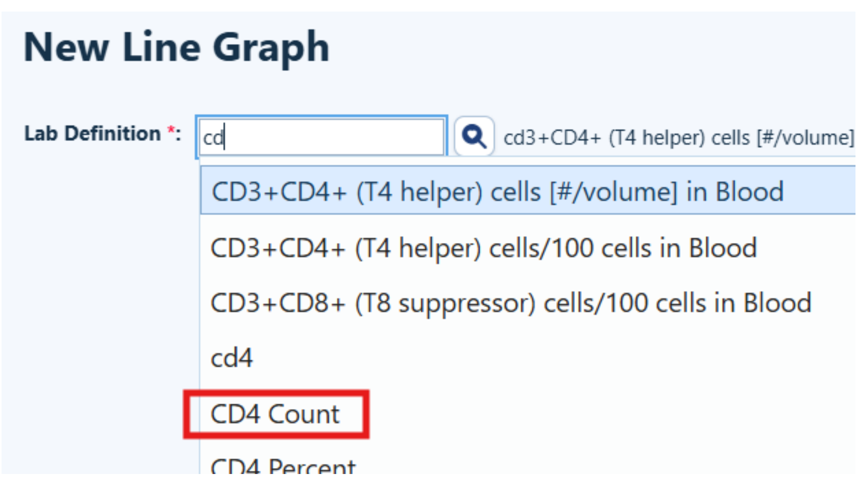
Step 1. Click Add Control.

Step 2. Click Add Line Graph for Quantitative Lab.



Select the lab definition

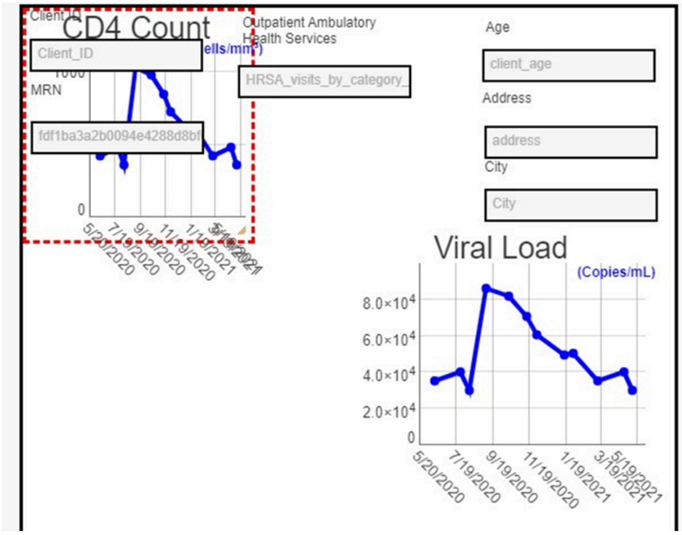
Step 3. Select CD4 Count from the Lab Definition list.



Step 4. Click Next.

Step 5. Click Back.

Step 6. Drag the CD4 Count graph to the desired location.



Step 7. Click Save.

Verification

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 Demographics under Contact Information.

How to confirm it worked

- The intended Client Summary appears in the client record.
- The report fields display values from the expected client record areas.
- The lab graph displays records from the selected lab definition.
- Only the intended summary is active for the provider.

Troubleshooting and common questions

Why is the chart blank? – Confirm that the client has labs entered. Open the client record and click Labs in the left menu.

Can the colors be changed? – Yes. Color options are located under Control Properties.

Related References

Document	Use it for
Form Designer	Overview, planning guidance, key terms, and permissions.