

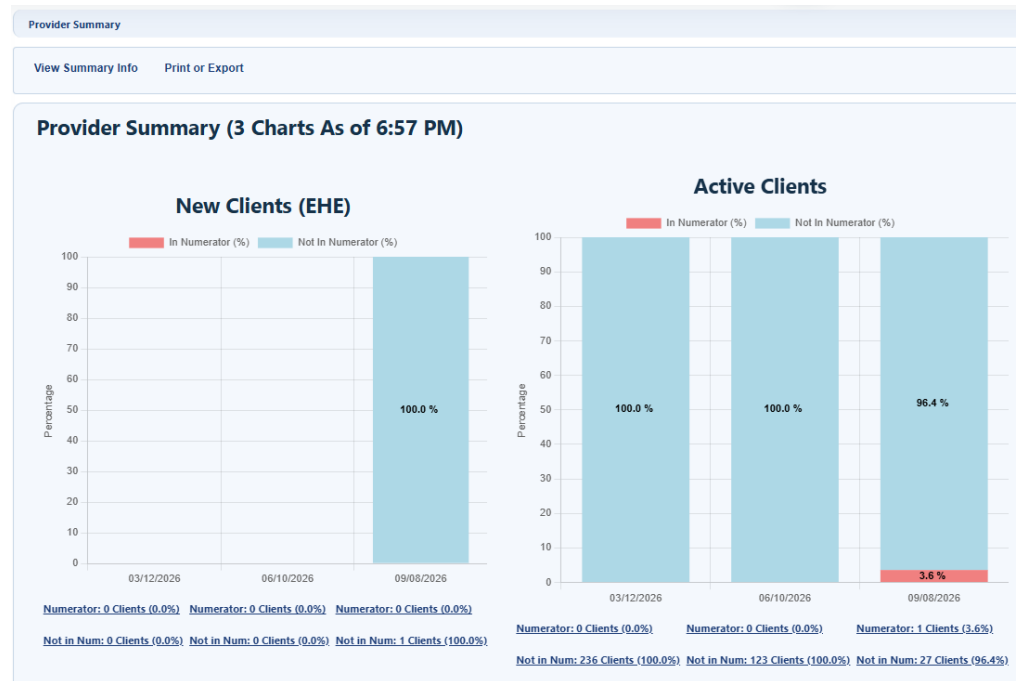
Provider Summary

Purpose	Set up, update, and assign Provider Summaries.
Who should do this	Central Administration users who manage Custom Features.
Use this guide when you need to	Configure charts, recalculate results, or create and assign a summary.
Main warning	Only one Provider Summary can be assigned to a provider at a time.

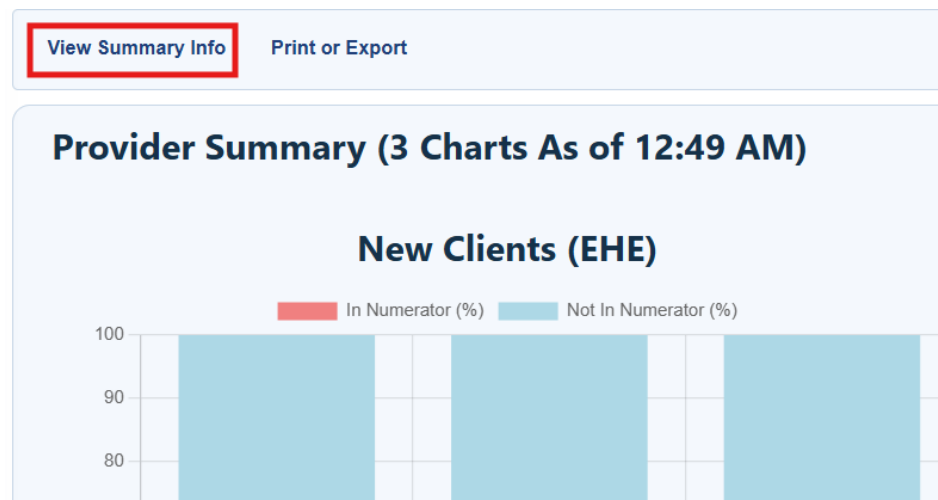
Quick path Central Administration > Administrative Options > Custom Features > Provider Summary

About Provider Summary

Provider Summary provides a real-time quick view of performance measure status. The default summary uses bar graphs for two client groups: new clients and active clients. Each bar shows the percentage of clients who met the measure. The number under a bar is a link to the client list for that result. The numerator is the number of clients who met the measure. The denominator is the number of clients in the group. The Provider Summary can be customized for each provider domain in CAREWare.



View Summary Info provides details of the measures in the provider Summary, including when the measures were last run.



Performance Measure Info

New Clients (EHE)

ChartType: Bar

numeratorDesc: Newly enrolled Clients

denominatorDesc: All clients with at least one visit in the past 4 months

Last Ran One: 03/14/2026

Numerator One Total: 0

Denominator One Total: 0

Not In Numerator One Percent: 0

In Numerator One Percent: 100

Last Ran Two: 06/12/2026

Numerator Two Total: 0

Denominator Two Total: 0

Not In Numerator Two Percent: 0

In Numerator Two Percent: 100

Last Ran Three: 09/10/2026

Numerator Three Total: 0

Denominator Three Total: 1

Not In Numerator Three Percent: 0

Configure Provider Summary Charts

- Step 1. Log in to Central Administration.
- Step 2. Select Administrative Options.
- Step 3. Select Custom Features.

Step 4. Select **Provider Summary**.

Custom Feature Setup

Manage Form Designs

Client Summary Designer
Create, design, and assign Client Summary Screens

Provider Summary
Create, configure, and assign Provider Summary (PS) screens

Step 5. Select a **Summary Name** to highlight it.

Step 6. Select **Configure Charts**.

Configure Charts

Edit Name

New Summary

Delete

Assign Providers

Back

Print or Export

Column visibility

Provider Summaries

Search:

<<

<

1

>

>>

Go to page

1

100

 entries per page Showing 1 to 10 of 75

Summary Name	Summary Type	Mapped Providers
Default Summary	Default	75

Provider Summary Menu Options

Button	What it does
Configure Charts	Choose the measures and chart settings shown in a summary.
Edit Name	Edit the name of the summary.
New Summary	Create a Provider Summary.
Delete	Delete the selected Provider Summary.
Assign Providers	Assign the summary to one or more provider domains.
Back	Return to the Custom Feature Setup menu.
Print or Export	Print or export the list of provider summaries.
Column Visibility	Hide or show columns in the list of provider summaries.

Step 7. Select a chart description to highlight it.

EditAdd Pie ChartAdd Bar GraphDelete

Default Summary Chart Config

Search:

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Description	Type
New Clients (EHE)	Bar Graph
Active Clients	Bar Graph
Viral Load Suppression	Bar Graph

Step 8. Select Edit.

EditAdd Pie ChartAdd Bar GraphDeleteMove UpMove DownBackPrint or ExportColumn visibility

Default Summary Chart Configuration

Search:

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Go to page

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100

 entries per page Showing 1 to 3 of 3

Description	Type
New Clients (EHE)	Bar Graph
Active Clients	Bar Graph
Viral Load Suppression	Bar Graph

Chart Configuration Menu Options

Button	What it does
Edit	Edit a chart or graph included in the Provider Summary.
Add Pie Chart	Add a pie chart to the Provider Summary.
Add Bar Graph	Add a Bar Graph to the Provider Summary.
Delete	Remove the selected chart or graph from the Provider Summary.
Move Up	Move the selected graph or chart up in the Provider Summary. Changes the order of the charts and graphs.
Move Down	Move the selected graph or chart down in the Provider Summary. Changes the order of the charts and graphs.
Back	Return to the list of Provider Summaries.
Print or Export	Print or export the list of graphs and charts in the Provider Summary.
Column Visibility	Hide or show columns in the list of charts and graphs.

Step 9. Change the settings as needed.

Save

Cancel

Default Summary Chart Configuration

Performance Measures: EHE01 - Newly enrolled clients

Days Between Measurements: 90

Titles: New Clients (EHE)

Title Properties

Title Text Color: Green

Title Font Size: 24

Title Italics: ☐

Bar Graph Properties

Bar Height:

Bar Width:

Numerator Color: LightCoral

Numerator Text Color: Black

Numerator Font Size: 24

Numerator Italics: ☒

Not In Numerator Color: LightBlue

Not In Numerator Text Color: Black

Not In Numerator Font Size: 24

Not In Numerator Italics: ☐

Step 10. Select **Save**.

Save

Cancel

Default Summary Chart Configuration

Performance Measure: EHE01 - Newly enrolled clients

Days Between Measurements: 90

Recalculate a Provider Summary

Timing note Recalculation time depends on the number of clients and records, the number of measures, and whether another summary is already running. You can keep working in CAREWare while it runs. Results will not appear until the process finishes.

- Step 1.** Under Provider Summaries, select a **Summary Name**.
- Step 2.** Select **Assign Providers**.
- Step 3.** Use the search field to find the provider.
- Step 4.** Select the **Provider Name** to highlight it.
- Step 5.** Select **Recalculate**.

RecalculateBackPrint or ExportColumn visibility▼Copy

Assign Providers for Summary: Default Summary

Search:

<<<1>>>

Go to page 1▼100▼ entries per page

Mapped	Provider Name	Last Evaluated	Result
Yes	AZ HIV Community Services	09/10/2026 01:04 PM	Newly e clients 1 PCT: 0 with visi months 14 PCT: HIV virus

Create and Assign a Provider Summary

- Step 1.** Under Provider Summaries, select **New Summary**.

Configure ChartsEdit NameNew SummaryDeleteAssign ProvidersBackPrint or Export

Provider Summaries

Search:

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Go to page 1▼100▼ entries per page

Summary Name	Summary Type	Mapped Providers
Default Summary	Default	75

- Step 2.** Enter a **Provider Summary Name**.
- Step 3.** Select **Save**.

SaveCancel

Provider Summary

Provider Summary Name:

JPROG2026-09-106

Step 4. Select **Add Pie Chart** or **Add Bar Graph**.

Important This choice controls how the measure results appear. To change the chart type later, remove the measure and add it again using the other chart type.

Step 5. Select a **Performance Measure**.

Step 6. Enter a **Title**.

Step 7. Complete the other properties as needed.

Step 8. Select **Save**.

Step 9. Select **Back**.

Step 10. Select the **Summary Name** to highlight it.

Step 11. Select **Assign Providers**.

Step 12. Select a **Provider Name**.

Step 13. Select **Save**.

Assignment warning A provider can have only one assigned summary. Assigning the new summary removes the Default Summary from that provider.

How to Confirm It Worked

- The chart list shows the measures and chart types you saved.
- The Assign Providers screen shows Yes for the assigned provider.
- After recalculation, Last Evaluated shows a new date and time.

Troubleshooting and Common Questions

Why is the As of Date old?

The summary has not been recalculated recently. Open Assign Providers, select the provider, and select Recalculate.

Why do I see three bars and three dates?

The measure is set to run more than once as an Aggregate Report. Number of Measurements controls the number of dates. Days Between Measurements controls the space between dates.

Why did the Default Summary disappear?

Only one summary can be assigned to a provider. Assigning a different summary removes the Default Summary from that provider.

Related References

Document	Use it for
Performance Measures	Understand how performance measures work in CAREWare.