

Update Client Data

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Overview

Changing the basic demographic information for a client.

Applicable Staff

ID Directors and Supervisors will have read/write access to the form. No other users may view or edit this form for any client.

Usage

The **Update Client Data** form allows changing previously entered demographic information that was collected in the **Pre-Admission** or **Admission** forms. Any data that is changed in the Update Client Data form will be updated throughout Avatar when submitted.

NOTE: This is the **ONLY** way to change a client name after the admission process is complete. Please do not return to the Admission form and attempt to make changes.

The form is client-based and can be accessed through the Home View, from within a client chart, or by following the menu path Avatar PM/Client Management/Client Information/Update Client Data. Information displayed is collected from the Pre-Admit or Admission forms that have been previously completed.

Client Update Section

Changing the Client Name will add the original name to the first available Alias entry in the Alias subsection. Update as much information as required, including name, sex, birthday and address information, ethnicity/language/religion data, contact info, smoking status/assessment date. etc.

The screenshot shows a web application interface for updating client data. The top navigation bar includes 'Chart', 'Update Client Data', and a plus icon. The left sidebar has a section titled 'Update Client Data' with sub-items 'Client Update' (highlighted) and 'Alias'. Below this is a 'Submit' button and a set of icons for document management. The main content area is titled 'Client Update' and contains the following fields:

- Client Name:** Text input field containing 'DOE,JOHN'.
- Sex:** Radio buttons for 'Female' and 'Male' (selected).
- Date Of Birth:** Date picker showing '05/05/1955'.
- Maiden Name:** Text input field.
- Marital Status:** Dropdown menu.
- Social Security Number:** Text input field containing '111-11-1111'.
- Facility Chart Number:** Text input field containing '11111'.
- Primary Language:** Dropdown menu showing 'English'.
- Client Race:** Dropdown menu showing 'White/Caucasian'.
- Ethnic Origin:** Dropdown menu showing 'Not Of Hispanic Origin'.
- Religion:** Dropdown menu showing 'Greek Orthodox'.
- Address - Street:** Text input field containing '123 Street Boulevard'.
- Apartment or Unit:** Text input field.
- Client Declined To Provide Information On The Following:** Checkboxes for 'Ethnic Origin', 'Race', and 'Language'.
- Place Of Birth:** Text input field.
- Country Of Origin:** Dropdown menu.
- Education:** Dropdown menu.
- Employment Status:** Dropdown menu.
- Occupation:** Dropdown menu.
- Smoker:** Dropdown menu.
- Smoking Status Assessment Date:** Date picker with 'T' and 'Y' buttons.
- Zip Code:** Text input field containing '90210'.
- City:** Text input field.
- State:** Dropdown menu.
- County:** Dropdown menu.
- Home Phone:** Text input field.
- Work Phone:** Text input field.
- Cell Phone:** Text input field.
- Email Address:** Text input field.
- Communication Preference:** Radio buttons for 'Email', 'Regular Mail', 'Home Phone', 'Work Phone', 'Cell Phone', and 'Do Not Contact'.

Alias Section

Enter any known alias information as appropriate. Pregnancy and due date information can be entered if required. The **Name Qualifier** section is used to specify if release of the client's name is allowed. The **Protection Indicator** field is used to specify if the client's information can be shared with others or should be kept private. If Yes is selected, enter the date which protection should occur.

The screenshot shows the 'Update Client Data' form. On the left is a sidebar with 'Update Client Data', 'Client Update', 'Alias', a 'Submit' button, and 'Online Documentation'. The main form area has a '▼ Alias' section with 10 input fields. Below this is the 'Expected Due Date' section with a date picker and 'T'/'Y' buttons. The 'Lactating Status' section has 'Yes' and 'No' radio buttons. The 'Name Qualifier' section has 'Keep Private' and 'Unspecified' radio buttons. The 'Protection Indicator' section has 'Yes' and 'No' radio buttons. The 'Mother's Maiden Name' section has a text input field. The 'Protection Indicator Effective Date' section has a date picker and 'T'/'Y' buttons. The 'Pregnancy Status' section has a dropdown menu. Two yellow callout boxes provide instructions: 'Are there restrictions on disclosing the client's name?' pointing to the Name Qualifier, and 'May the client's information be shared with others? If Yes, enter Date protection should begin.' pointing to the Protection Indicator.

Click the blue **Submit** button when complete to enter the form into the record. When done, the client's demographic information is updated throughout Avatar.

Tips & FAQ

Alias information can be used to increase search terms related to a client. Examples include alternate spellings, nicknames, preferred forms of names (Bob for Robert), etc.

Technical Information

Menu Location (Avatar PM/Client Management/Client Information/Update Client Data)

SQL Table(s)

RAD Envelope (if applicable)

Related Forms and Reports: Pre-Admission, Admission, Client Demographics, Client Data Bar

Posted by: **John Cookson** - Thu, May 19, 2016 at 4:10 PM. This article has been viewed 1732 times.

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