

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-based form titled "Update Client Data". The form is organized into several sections:

- Client Update Section:**
 - Client Name:** Text field containing "DOE,JOHN".
 - Sex:** Radio buttons for "Female" and "Male" (selected).
 - Date Of Birth:** Date picker showing "05/05/1955".
 - Maiden Name:** Empty text field.
 - Marital Status:** Empty dropdown menu.
 - Social Security Number:** Text field containing "111-11-1111".
 - Facility Chart Number:** Text 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".
 - Client Declined To Provide Information On The Following:** Checkboxes for "Ethnic Origin", "Race", and "Language" (all unchecked).
 - Place Of Birth:** Empty text field.
 - Country Of Origin:** Empty dropdown menu.
 - Education:** Empty dropdown menu.
 - Employment Status:** Empty dropdown menu.
 - Occupation:** Empty dropdown menu.
 - Smoker:** Empty dropdown menu.
 - Smoking Status Assessment Date:** Date picker showing "T Y".
- Address Section:**
 - Address - Street:** Text field containing "123 Street Boulevard".
 - Apartment or Unit:** Empty text field.
 - Zip Code:** Text field containing "90210".
 - City:** Empty text field.
 - State:** Empty dropdown menu.
 - County:** Empty dropdown menu.
 - Home Phone:** Empty text field.
 - Work Phone:** Empty text field.
 - Cell Phone:** Empty text field.
 - Email Address:** Empty text field.
- Communication Preference Section:**
 - Radio buttons for "Email", "Regular Mail", "Home Phone", "Work Phone", "Cell Phone", and "Do Not Contact".
 - Radio button for "Text" is also present.
- Navigation and Tools:**
 - Buttons for "Submit", "Home", "Print", "Refresh", "Save", and "Cancel".
 - Section titled "Online Documentation".

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.

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 2212 times.

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