



BHRS Client Relationships

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BHRS Client Relationships

In this lesson you will learn to document people who are important in the life of a client, such as a family member, friend, or parole officer. You will include contact information for these people and specify whether a release is on file for them.

Lesson Objectives

- Understand how to access and use the BHRS Client Relationships window
- Learn to indicate the level of release the client desires for each contact
- Specify whether the person is a legal guardian, emergency contact, or next of kin

LESSON SCENARIO

Cynthia Celeryseed mentions in a therapy session that her father recently got a new cell phone number. She also mentions a neighbor who she respects and trusts. Her therapist wants to update the list of people Cynthia has a relationship with so the information is current. Her therapist also specifies if a release is on file so other staff can quickly see if BHRS is authorized by the client to release information to the individuals in the list.

The screenshot displays the 'BHRS Client Relationships' software interface. At the top, the window title is 'AVPMCONV (LIVE) - CELERYSEED,CYNTHIA C (000930069)/BHRS Client Relationships'. Below the title bar is a menu bar with 'File', 'Edit', 'Favorites', 'Avatar PM', 'Avatar CWS', and 'Avatar MSO'. A toolbar contains various navigation icons. The main content area is titled 'CELERYSEED,CYNTHIA C (000930069)' and features two tabs: 'Entry Date' and 'Relationships'. Under the 'Relationships' tab, there is a section titled 'List of All Client Relationships' containing a table with the following data:

Type of Relationship	Last Name / Agency Name	First Name	Cell Phone	Work Phone	Release Start Date	Release End Date	Emer
Daughter	CELERYSEED	CAROL	650-555-5...	650-444-4444	01/01/2010	01/01/2011	Yes
Father	CELERYSEED	CARL	650-111-1...		01/01/2010	01/01/2011	Yes
Social Worker	LOPEZ	CARLA		650-753-7575			
Friend	WILLIAMS	WENDY	650-654-6...		05/03/2010	05/03/2011	No

Below the table are three buttons: 'Add New Item', 'Edit Selected Item' (which is highlighted with a mouse cursor), and 'Delete Selected Item'. The 'Edit Selected Item' form contains the following fields:

- Type of Relationship:** A dropdown menu with 'Father' selected.
- Last Name / Agency Name:** A text input field containing 'CELERYSEED'.
- First Name:** A text input field containing 'CARL'.
- Other Relationship:** An empty text input field.
- Address - Street:** A text input field containing '147 STONEY LANE'.
- Address - Street 2:** An empty text input field.
- City:** A text input field containing 'SAN MATEO'.
- State:** A dropdown menu with 'CALIFORNIA' selected.
- Zip Code:** A text input field containing '94403'.

At the bottom of the interface, there is an 'Option' section with a 'Complete' button. The status bar at the very bottom shows 'BHRS Client Relationships' and 'Chart Review'.

UNDERSTANDING BHRS CLIENT RELATIONSHIPS

Maintaining accurate client relationships and contact information is critical. This window allows BHRS to document important people (e.g. friend, teacher, parole officer, primary care physician) and family members in the life of clients.

For information on how to add, edit, or delete a person from this multiple entry table, see Lesson 6 in the *Introduction to Avatar* manual.



IMPORTANT

Everyone who uses Avatar has permission to view Client Relationships data; therefore, if someone gives you information in confidence (like an emergency cell phone number), do not enter it in Client Relationships.

WHO CAN PERFORM THIS FUNCTION?

Both administrators and clinicians can update BHRS Client Relationships.

MENU PATH

Avatar PM → Client Management → Client Information → BHRS Client Relationships

ENTRY DATE TAB

Use this tab to log the date you entered or updated the client's relationship information.

The screenshot shows the 'Entry Date' tab selected. The window title is 'AVPMTEST (SAMPLE) - APPLE, ADAM (000000390)/BHRS Client Relationships'. The client information is: 'APPLE, ADAM (000000390) Client's Home Phone: 650-286-8466; Date Of Birth: 01/01/1984; Sex: Male'. The 'Entry Date' field contains '08/20/2009' with 'T' and 'Y' buttons.

RELATIONSHIPS TAB PAGE 1

Use this page to begin entering a relationship, including the type of relationship and address information.

The screenshot shows the 'Relationships' tab selected. The window title is 'AVPMTEST (SAMPLE) - APPLE, ADAM (000000390)/BHRS Client Relationships'. The client information is: 'APPLE, ADAM (000000390) Client's Home Phone: 650-286-8466; Date Of Birth: 01/01/1984; Sex: Male'. Below the client info is a table titled 'List of All Client Relationships'.

Type of Relationship	Last Name	First Name	Cell Phone	Relationship Start Date	Relationship End Date	Emergency Contact?	Next of Kin
Father	APPLE	ARTHUR	650-456-5934	Birth		Yes	No
Sibling	APPLE	AMY	650-594-9582	Birth		No	No
Sibling	APPLE	ANNIE	650-450-3963	BIRTH		Yes	
Friend	PEPPER	PALULA	650-394-2949				

Buttons: Add New Item, Edit Selected Item, Delete Selected Item

Type of Relationship
Father (dropdown)
Other Relationship:

Last Name: APPLE
First Name: ARTHUR

Address - Street: 2130 EL CAMINO REAL
Address - Street 2:

City: SAN MATEO
State: CALIFORNIA (dropdown)
Zip Code: 94401

Option: Complete

Bottom bar: BHRS Client Relationships | Chart Review

RELATIONSHIPS TAB PAGE 2

Use this page to enter phone numbers, release availability and to specify whether the individual is a legal guardian, emergency contact, or next of kin.

The screenshot shows a web browser window titled "AVPMTST (SAMPLE) - APPLE, ADAM (000000390)/BHRS Client Relationships". The browser's address bar shows "Page 2 of 2". The page header displays the patient's name and ID, along with contact information: "APPLE, ADAM (000000390) Client's Home Phone: 650-286-8466, Date Of Birth: 01/01/1984, Sex: Male".

The main content area is divided into two tabs: "Entry Date" and "Relationships". The "Relationships" tab is active. It contains several input fields and radio buttons:

- Home Phone:** An empty text input field.
- Cell Phone:** A text input field containing "650-456-5934".
- Work Phone:** An empty text input field.
- Email Address:** A text input field containing "a.apple@yahoo.com".
- Best Number/Time to Contact:** An empty text input field.
- Release Available?:** A dropdown menu with "No" selected.
- Relationship Start Date:** A text input field containing "Birth".
- Relationship End Date:** An empty text input field.
- Notes:** A large empty text area.
- Legal Guardian?:** Radio buttons for "Yes", "No" (selected), and "Unknown".
- Emergency Contact?:** Radio buttons for "Yes" (selected) and "No".
- Next of Kin?:** Radio buttons for "Yes" and "No" (selected).

At the bottom of the form, there is an "Option" section with a "Complete" button. The footer of the browser window shows two tabs: "BHRS Client Relationships" and "Chart Review".



Exercise 1

Add an Important Person in a Client's Life Using BHRS Client Relationships

In this exercise you will add a sister to the client's list of relationships.

Before You Begin: *Select a sample client that you have been using for practice. In this example, client Adam Apple is used.*


1. Choose Avatar PM→Client Management→Client Information→BHRS Client Relationships from the Menu Frame.
2. In the Entry Date field, if necessary, click the T button to enter today's date.
3. Go to the Relationships tab.
4. Click the Add New Item button to generate a new row in the table.

ENTER THE RELATIONSHIP DETAILS


5. In Type of Relationship field, select Sibling from the dropdown list.
6. In Address – Street field, type **132 MAIN ST**.
7. In Last Name field, type **APPLE**.
8. In First Name field, type **AMY**.
9. In City field, type **SAN MATEO**.
10. In Zip Code field, type **94401**.
11. Click the Forward icon to go to page 2.
12. In Home Phone field, type **650-555-9484**.
13. In Legal Guardian field, select No.
14. In Emergency Contact field, select Yes.
15. In Next of Kin field, select Yes.
16. In Notes field, type **Amy and client were close friends growing up**.
17. Click the Submit icon to save your entry.

You realize you forgot to enter a cell phone number for Amy Apple.

EDIT A CLIENT RELATIONSHIPS ENTRY

18. Choose Avatar PM→Client Management→Client Information→BHRS Client Relationships from the Menu Frame.
19. Go to Relationships tab.
20. In List of All Client Relationships table, click once on Amy Apple's entry.
21. Click Edit Selected Item button.
22. Amy Apple's information populates in the fields below the table.
23. Click the Forward  icon on the Option toolbar to go to page 2.

24. In Cell Phone field, type **415-555-3920**.

25. Click the Submit  icon on the Option toolbar to save your changes.

