



Update Client Data

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Update Client Data

In this lesson you will learn to use the Update Client Data feature, which is primarily designed for updating a client's demographic information.

Lesson Objectives

- Learn to keep a client's electronic health record up to date
- Learn the guidelines for modifying a client name
- Discover the rules for Social Security Numbers and Alternate Social Security Numbers

LESSON SCENARIO

Amanda Lincoln is an administrator at a BHRS clinic. One of the clients at her clinic achieved her goal of getting a job. Amanda is happy to be able to update the client's data to show her new occupation. Amanda also adds the client's work phone.

The screenshot shows a web browser window titled "AVPMCONV (LIVE) - CELERYSEED, CYNTHIA C (000930069)/Update Client Data". The browser's address bar and menu bar are visible. The page content is a form for updating client data. The form is divided into two columns. The left column contains fields for Client Name, Client Last Name, Client First Name, Client's Middle Initial, Suffix, Prefix, Sex, Date Of Birth, Social Security Number, and Alternate Social Security Number. The right column contains fields for Facility Chart Number, Client's Address - Street, Client's Address - Street 2, Client's Address - Zipcode, Client's Address - City, Client's Address - County, Client's Address - State, Client's Home Phone, Client's Work Phone, Primary Language (Access Only), Client Race (Access Only), and Ethnic Origin (Access Only). The form is currently displaying the following data:

Field	Value
Client Name	CELERYSEED, CYNTHIA C
Client Last Name	CELERYSEED
Client First Name	CYNTHIA
Client's Middle Initial	C
Suffix	<input type="radio"/> Sr <input type="radio"/> Jr <input type="radio"/> III <input type="radio"/> IV <input type="radio"/> V <input type="radio"/> VI
Prefix	
Sex	<input checked="" type="radio"/> Female <input type="radio"/> Male <input type="radio"/> Unknown
Date Of Birth	01/01/1964
Social Security Number	999-99-9999
Alternate Social Security Number	
Facility Chart Number	
Client's Address - Street	123 MAPLE ROAD
Client's Address - Street 2	
Client's Address - Zipcode	94403
Client's Address - City	SAN MATEO
Client's Address - County	SAN MATEO
Client's Address - State	CALIFORNIA
Client's Home Phone	650-555-1212
Client's Work Phone	650-555-5555
Primary Language (Access Only)	
Client Race (Access Only)	
Ethnic Origin (Access Only)	

UNDERSTANDING UPDATE CLIENT DATA

Update Client Data is primarily for updating a client's demographic information. Other updates are accomplished by going directly into the appropriate window and making changes. Changes made in this window are copied to other relevant windows. Staff members should proactively make changes to information as they become aware of changes in a client's information.

WHO CAN PERFORM THIS FUNCTION?

Both administrators and clinicians have the ability to use this function.

MENU PATH

Avatar PM → Client Management → Client Information → Update Client Data

UPDATE CLIENT DATA TAB PAGE 1

You use this page to change name, address, and phone, as well as social security numbers and occupation information.

A — Client Name, Client Last Name, Client First Name, Client's Middle Initial, Suffix, Prefix

B — Social Security Number

C — Alternate Social Security Number

D — Client's Address - Street, Client's Address - Street 2

Field	Description
<p>A) Client Name Client Last Name Client First Name Client's Middle Initial Suffix Prefix</p>	<p><i>Do not</i> make changes to the Client Name field.</p> <p>If you need to change the client name, use the Client Last Name, Client First Name, Client's Middle Initial, Suffix, and Prefix fields. Changes made in these fields will be reflected in the Client Name field.</p>
<p>B) Social Security Number</p>	<ul style="list-style-type: none"> • If the client has a valid social security number, and the client is not a foster care child, the social security number goes in this field. Use the format shown here: <p style="text-align: center;">XXX-XX-XXXX</p> • If the client does not have a social security number, enter all zeros. Use the format shown here: <p style="text-align: center;">000-00-0000</p> • If the client is undocumented. Enter 8 zeros followed by a 2. Use the format shown here: <p style="text-align: center;">000-00-0002</p> • If the client is a foster care child, enter a pseudo social security number for the child in this field. A pseudo social security number is eight numeric digits followed by a P as shown here: <p style="text-align: center;">XXX-XX-XXXXP</p> <p>If the foster care child also has a valid social security number, it goes in the Alternate Social Security Number.</p> <p>If the child leaves foster care and has a valid social security number, move the pseudo social security number to the Alternate Social Security Number field and place the valid social security number in the Social Security Number field.</p>
<p>C) Alternate Social Security Number</p>	<p>If the client is a foster care child who has a valid social security number and a pseudo social security number. See the previous row in this table for a discussion of how to use the Social Security Number and Alternate Social Security Number fields with a foster care child.</p> <p>NOTE: Because Alternate Social Security Numbers will be the same for many clients, and because the system checks for duplicate social security numbers, you will receive a message indicating that the social security number has already been filed for other clients. Just click OK. It is not necessary to take any further steps.</p>

Field	Description
D) Client's Address – Street Client's Address - Street 2	Follow these data entry conventions for address information: <ul style="list-style-type: none"> Do not use punctuation or special symbols such as the pound sign (#) for apartment numbers.

UPDATE CLIENT DATA TAB PAGE 2

Use this page to update the client's birth, marital, occupation, and alias information.

AVPMCONV (LIVE) - DILL, DONNA D MS (000930104)/Update Client Data

File Edit Favorites Avatar PM Avatar CW5 Avatar MSO Help

Page 2 of 2

DILL, DONNA D MS (000930104) Date Of Birth: 07/12/1995; Sex: Female

Update Client Data

Place Of Birth: SAN MATEO

Country Of Origin: United States

Maiden Name:

Marital Status: Single / Never Married

Education (Access Only):

Employment Status (Access Only):

Occupation (Access Only): Administrative Support Occu...

Alias: DILL, DEE DEE

Alias 2:

Alias 3:

Alias 4:

Alias 5:

Alias 6:

Alias 7:

Alias 8:

Alias 9:

Alias 10:

Option

Complete

Update Client Data Chart Review



Exercise 1: Update Client Data

In this exercise you will update data for your client.

Before You Begin: Select a client with an episode to use in this exercise.

1. Choose Avatar PM→Client Management→Client Information→Update Client Data from the Menu Frame.
2. Follow these steps to update your client's data:

A Add your client's middle initial here.

AVPMCONV (LIVE) - PARSLEY, PABLO (000930099)/Update Client Data

File Edit Favorites Avatar PM Avatar CWS Avatar MSO Help

Page 1 of 2

PARSLEY, PABLO (000930099) Date Of Birth: 12/04/1964; Sex: Male

Update Client Data

Client Name

PARSLEY, PABLO P

Client Last Name PARSLEY

Client First Name PABLO

Client's Middle Initial P

Suffix

Sr Jr III IV V VI

Prefix

Sex

Female Male Other Unknown

Date Of Birth 12/04/1964

Social Security Number 999-99-9999

Alternate Social Security Number

Client's Address - Street 123 CHERRY BLOSSOM LANE APT 2

Client's Address - Street 2

Client's Address - Zipcode 94403

Client's Address - City SAN MATEO

Client's Address - County SAN MATEO

Client's Address - State CALIFORNIA

Client's Home Phone 650-555-1212

Client's Work Phone 650-777-7777


Primary Language (Access Only)

Client Race (Access Only)

Ethnic Origin (Access Only)

B Add the client's work phone.

A Add your client's middle initial here.

3. Click the Forward  icon on the Option toolbar to move to page 2 of the Update Client Data tab.

4. Follow these steps to complete page 2 of the Update Client Data tab:

A Choose an occupation for your client.

AVPMCONV (LIVE) - PARSLEY, PABLO (000930099)/Update Client Data

File Edit Favorites Avatar PM Avatar CWS Avatar M50 Help

Page 2 of 2

PARSLEY, PABLO (000930099) Date Of Birth: 12/04/1964; Sex: Male

Update Client Data

Place Of Birth: SAN MATEO CA

Country Of Origin: United States

Maiden Name:

Marital Status: Separated

Education (Access Only):

Employment Status (Access Only):

Occupation (Access Only): Executive, Administrative, An...

Alias: PARSLEY, PAULO

Alias 2:

Alias 3:

Alias 4:

Alias 5:

Alias 6:


Alias 7:

Alias 8:

Alias 9:

Alias 10:

B Enter an alias for your client.

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



CONCEPT REVIEW

See appendix for answers.

1. Update Client Data is primarily for updating a client's demographic information.
 - a. True
 - b. False
2. If a client is a foster care child, you enter a pseudo social security number in the Social Security Number field.
 - a. True
 - b. False
3. Changes made in Update Client Data automatically copy to other relevant windows.
 - a. True
 - b. False

APPENDIX—CONCEPT REVIEW ANSWERS

1. a
2. a
3. a