COUNTY OF SANTA CLARA
Behavioral Health Services

UPDATE CLIENT DATA

REV. 10/07/22

REVISIONS

Date	Slides	Revisions
10/07/2022	ALL	Made minor edits to help clarify instructions

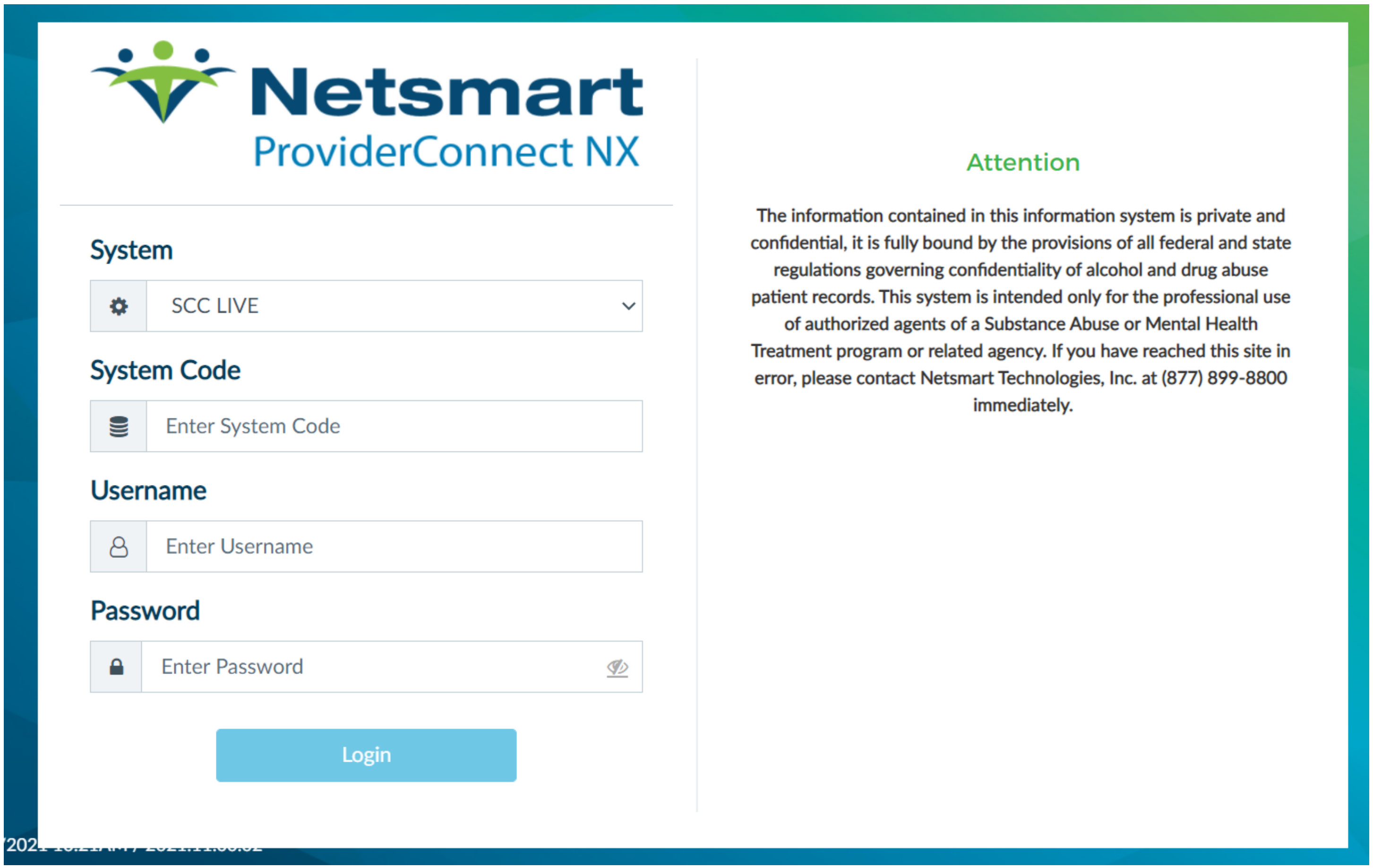
UPDATE CLIENT DATA

Purpose of Form:

The Update Client Data form allows the user to update a client's demographic information throughout the course of treatment. The information initially entered at admission may change during treatment and this form allows you to make updates, as necessary. The demographic information entered in this form can be pulled into other forms, such as Financial Eligibility, to save time, reduce the number of clicks, and make the workflow more efficient.

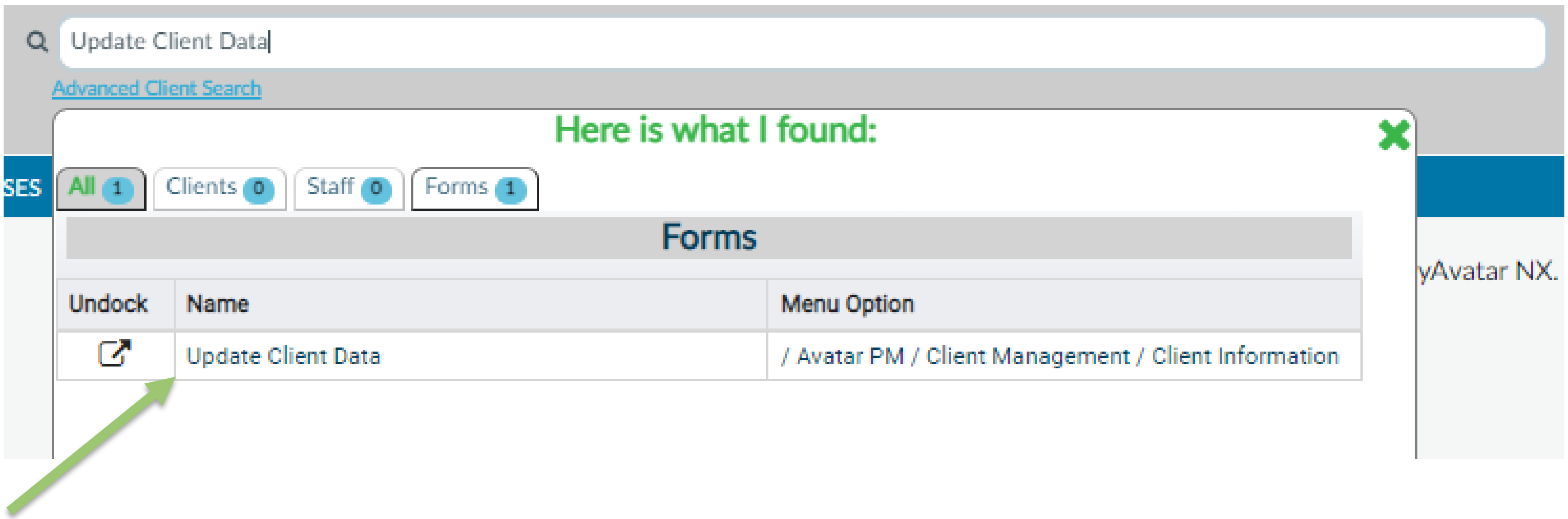
SIGN ONTO PROVIDERCONNECTNX

Enter the System Code, Username, and Password that were provided to you.

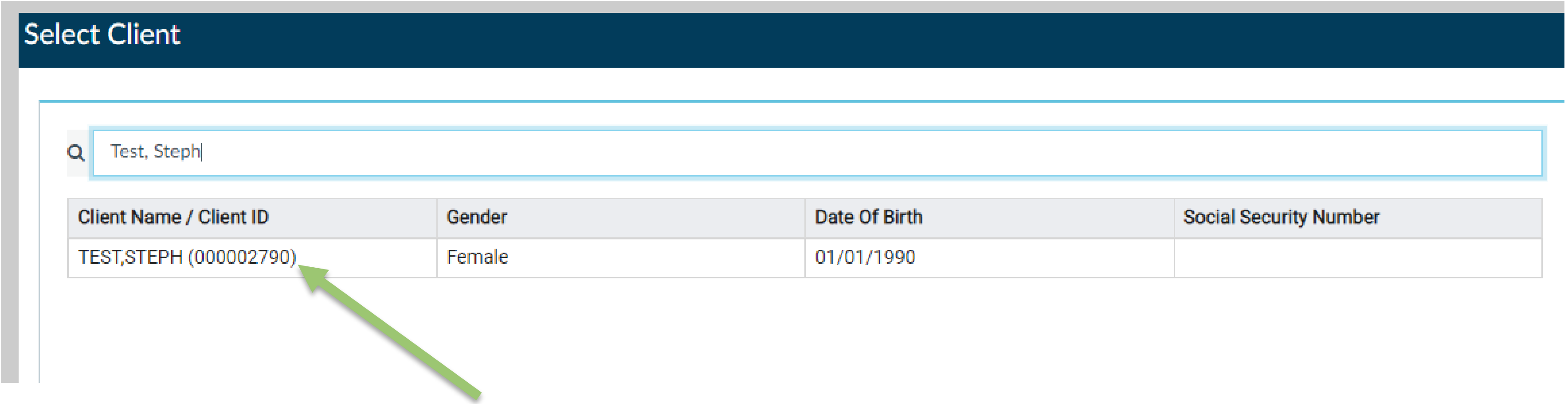


HOW TO ACCESS

After login click on Search**,** type and select **Update Client Data**



After selecting the Update Client Data form, enter Client’s name in the Search bar, and select client.



Select your corresponding **PROGRAM**

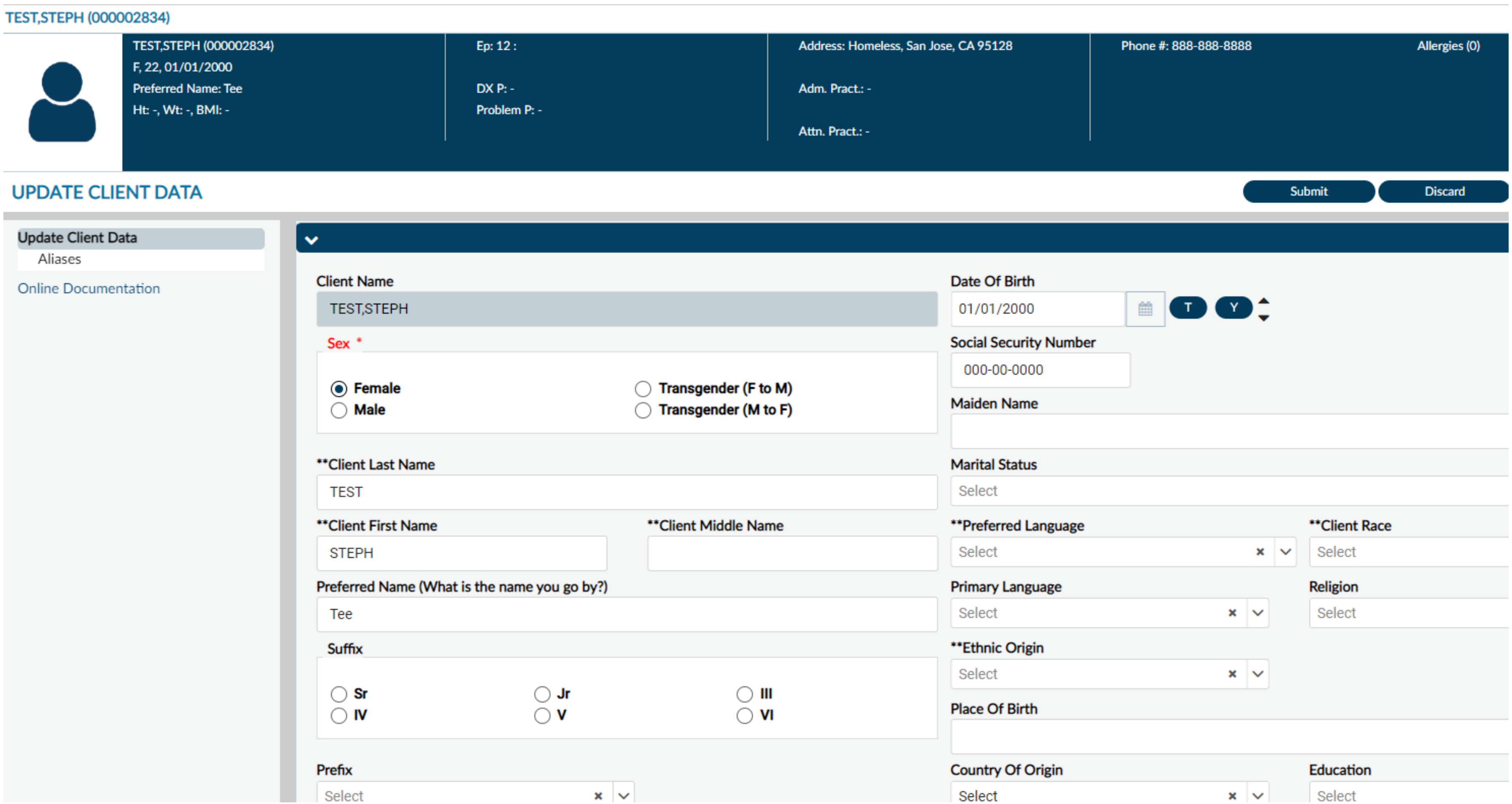
✓ Selected Client : TEST,STEPH (000002790)

Select Episode

Name: STEPH TEST
ID: 2790
Sex: Female
Date of Birth: 01/01/1990

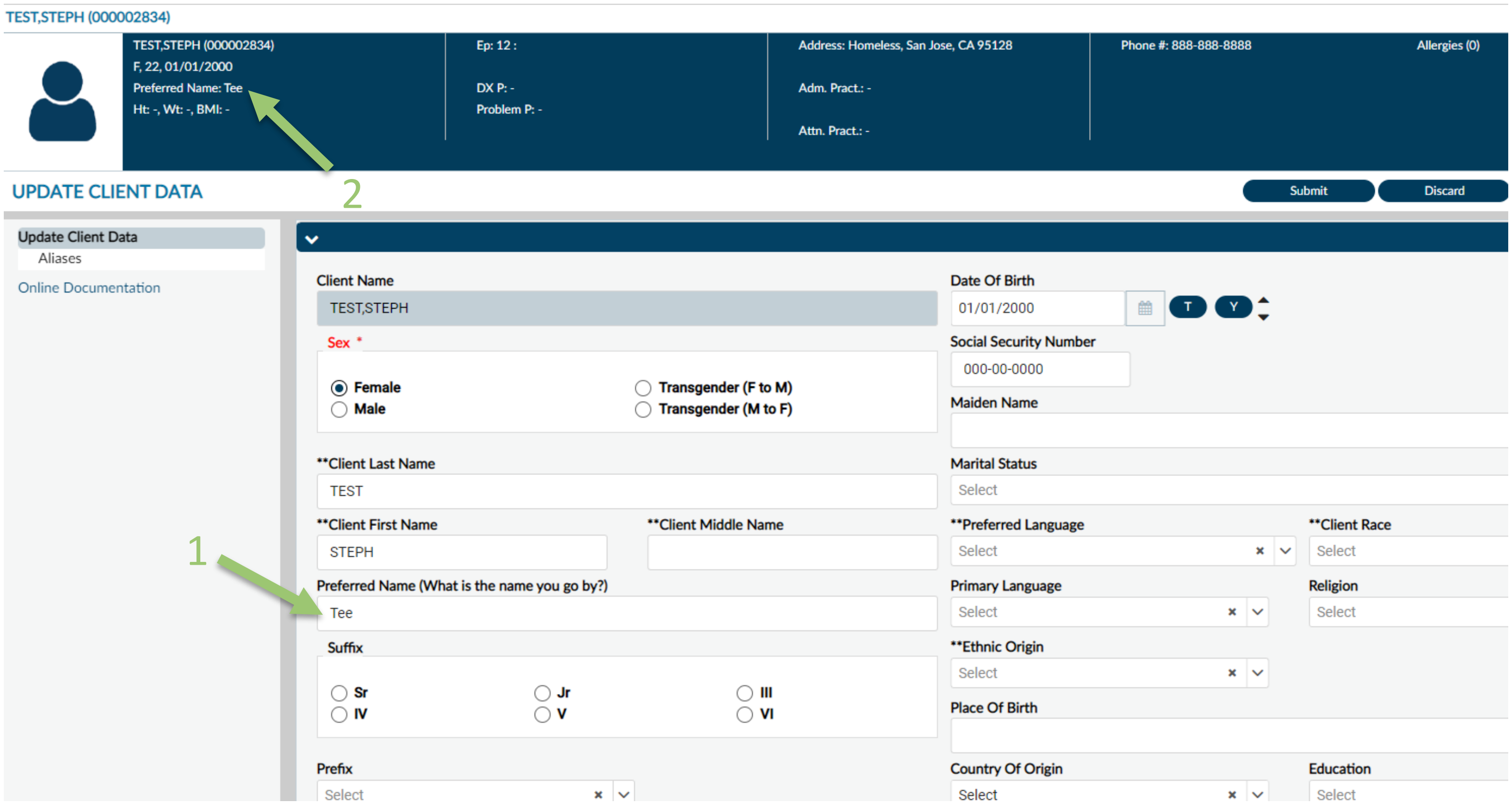
Episode	Program	Start	End
1	DTN SMH OP -Wellness	12/08/2021	

All fields will be auto-populated based on information inputted in the Admission form.



PREFERRED NAME

Use the Preferred Name (1) field to record what a client prefers to be called. The preferred name displays in the Client Header (2) and in the Client Information widget.



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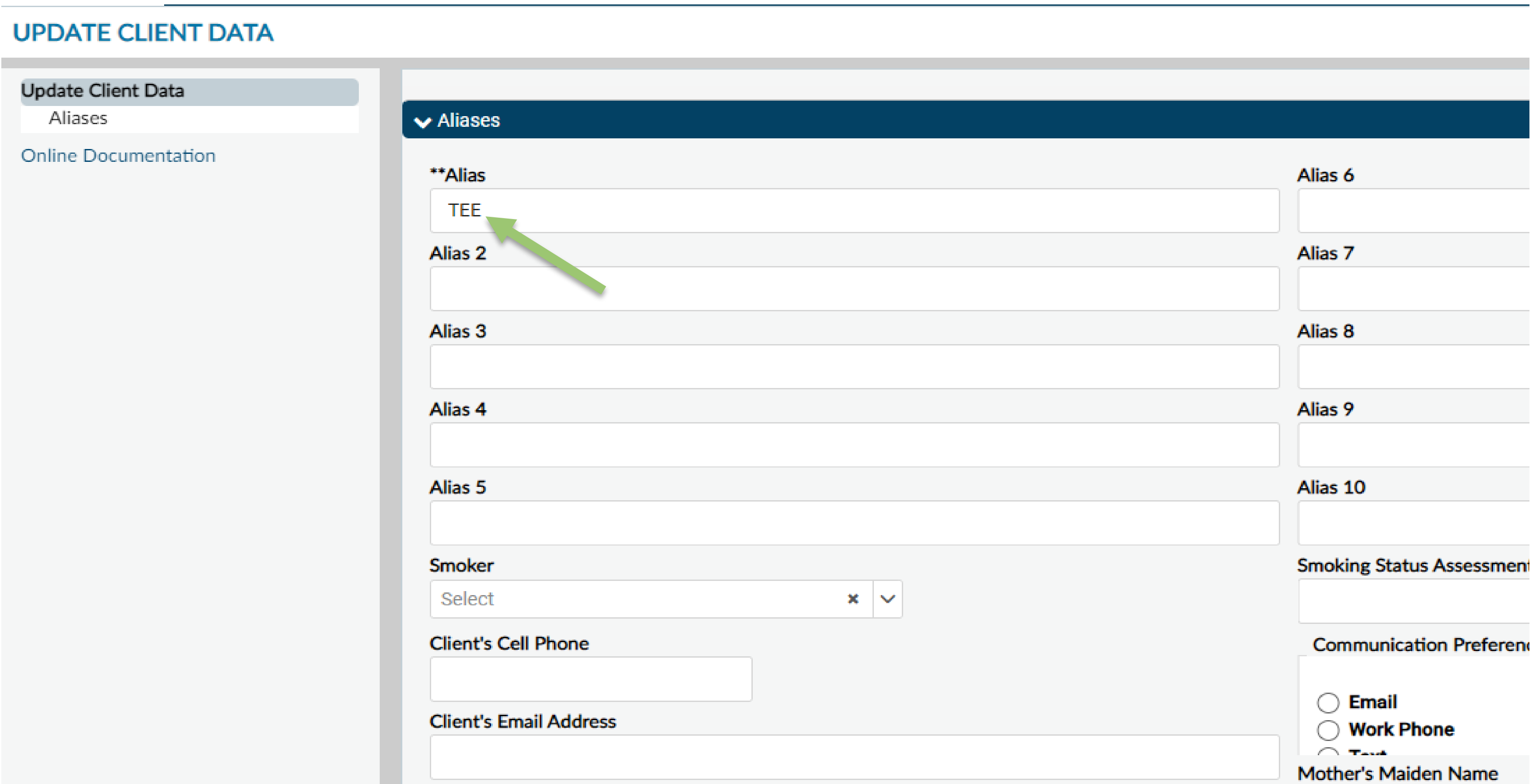
ALIAS

When entering preferred name, enter the preferred name in the Alias field too. Once an alias has been recorded, you can search for client utilizing the alias.



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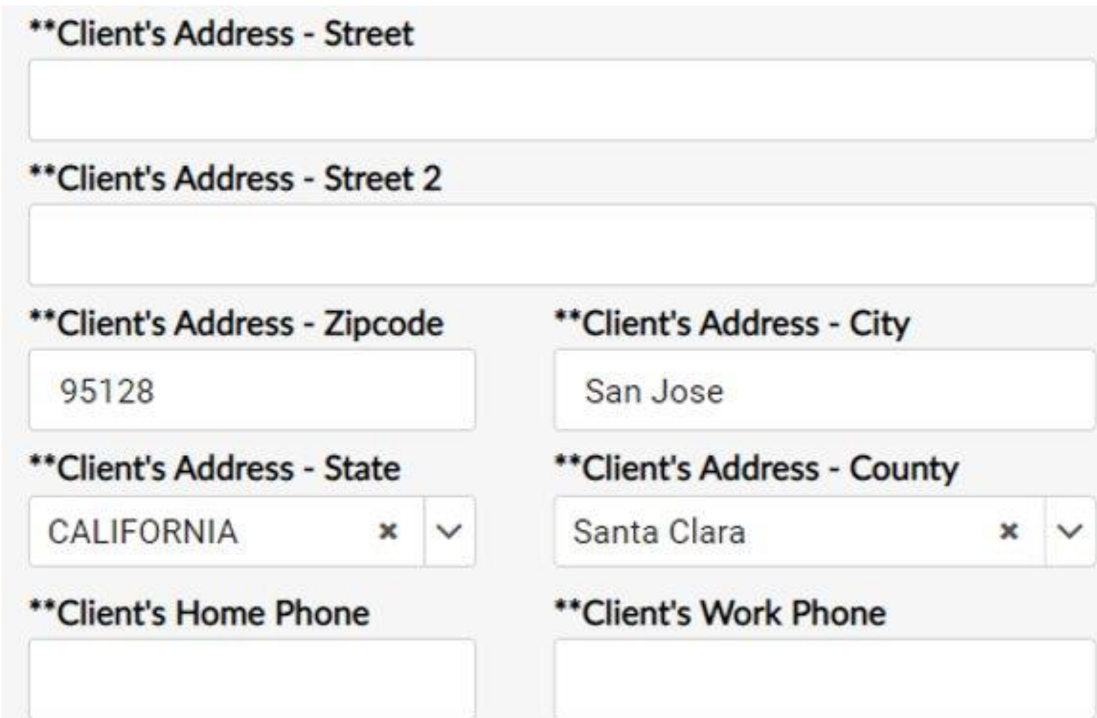
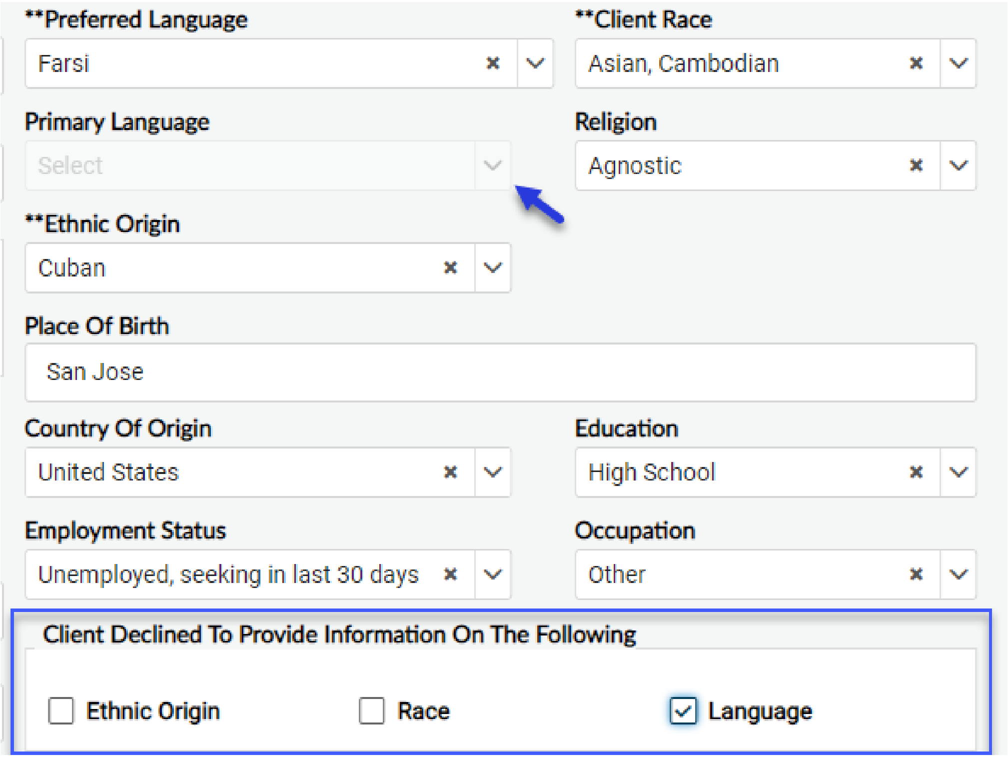
CLIENT'S ADDRESS

When you enter a California Zip code the City, County, State, auto-populate based on the Zip code.

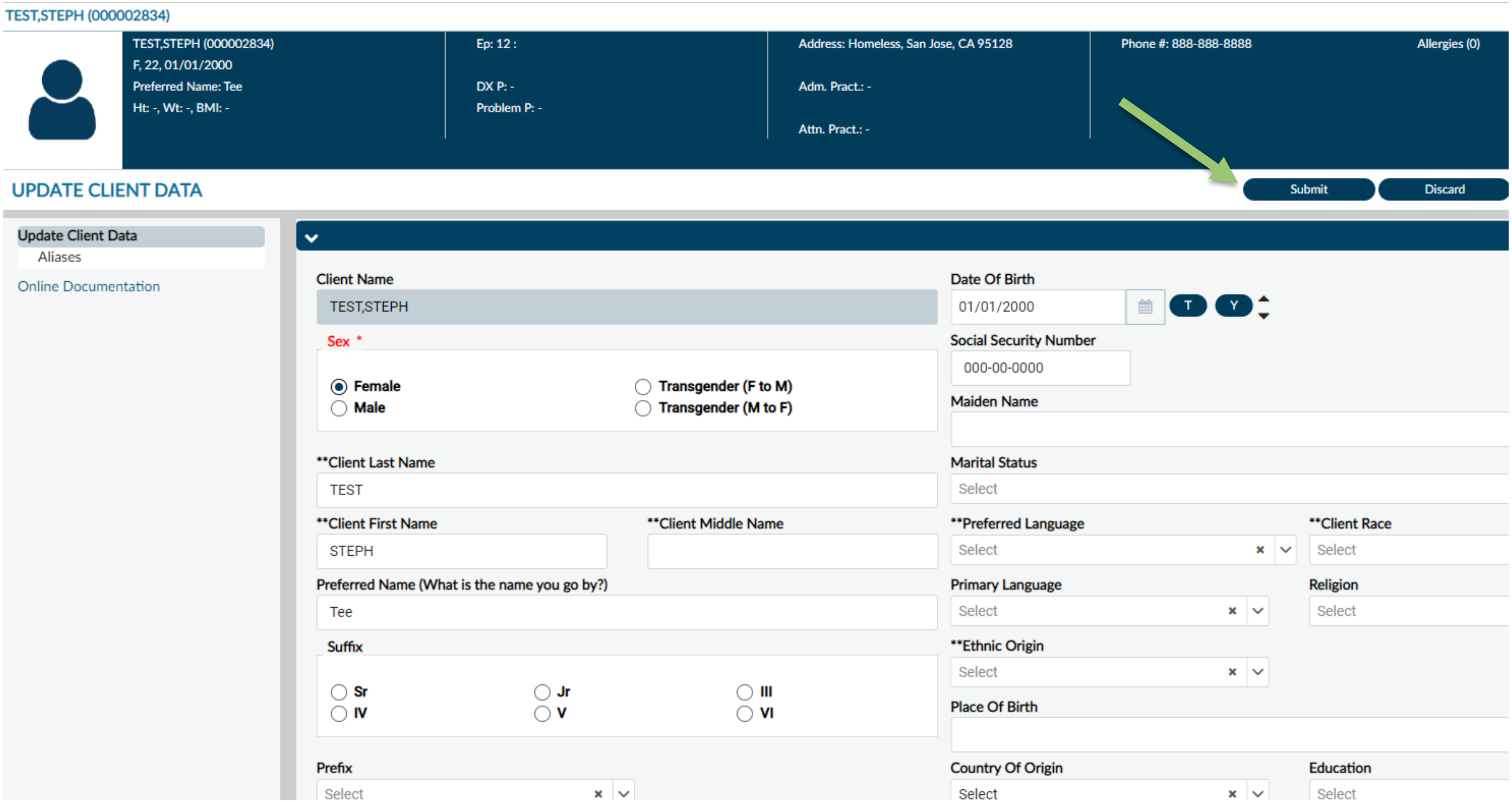


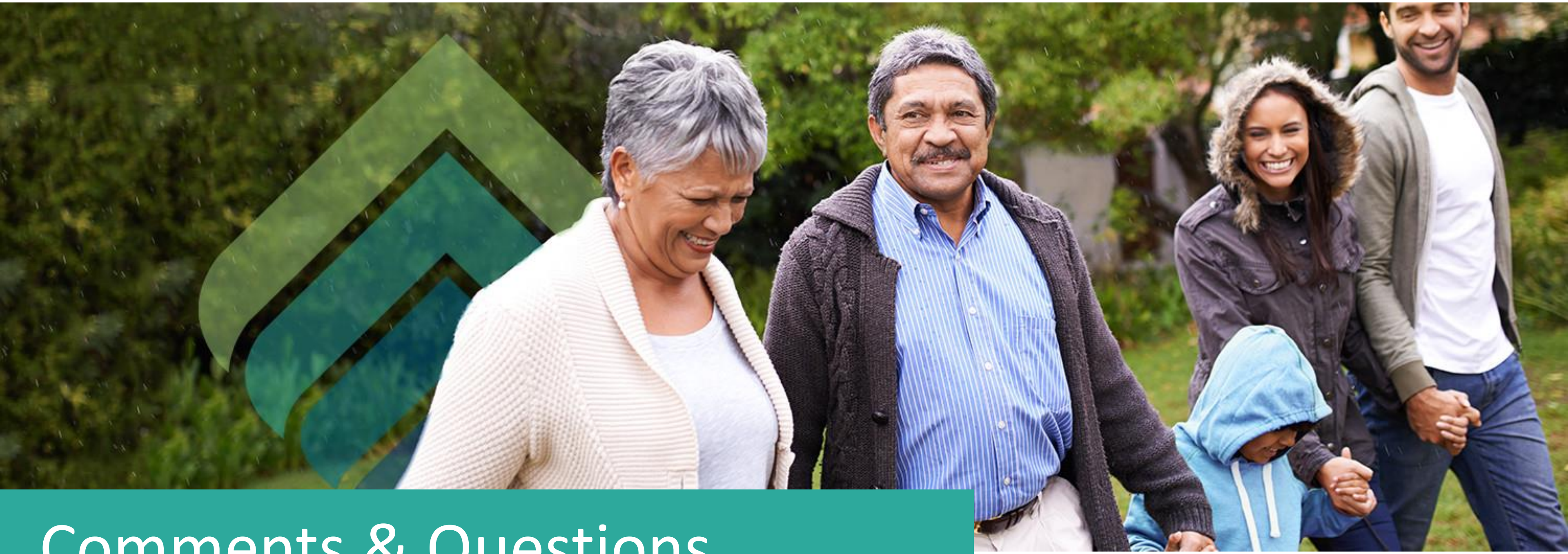
CLIENT DECLINED TO PROVIDE INFORMATION ON THE FOLLOWING

If client declines to answer Ethnic Origin, Race, or Language, check the corresponding box and the field will be disabled.



Input all changes needed to be made to client's information. Once information has been added/corrected, click **Submit**.





Comments & Questions