Client Summary Screen

Updated on February 2018

Home > Client Management (Search Client) > Summary

Business Purpose:

The Client Management – Summary page displays a basic profile of clients **Personal Information**, **Family**, **Bed/Room**, **Current Program** and **Referrals** in separate tabs.

The Personal Information includes the Client No., First Name, Last Name, Alias, Health and Safety alert (includes message, who entered it, and date entered), Active (Yes or No), Gender and Date of Birth.

The **Family** tab displays members of family information when applicable.

The **Bed/Room** tab displays the **Assigned Room** and the **Assigned Bed** (for non-families).

The **Current Program** tab displays any active bed program admissions and active service program intakes for the client.

The **Referrals** tab shows any current active referrals and their status for the client.

How to:

1. The clickable fields on this Summary screen are the: a) **Program Names**, once clicked, the user will be taken to the program's client listing screen. b) **Client IDs** in the **Family** tab, once clicked, it displays the family member's information.

2. If applicable, you may click on the New Health and Safety link and a window will display and allows you to enter and save appropriate messages.