Complete Biopsychosocial Information

Complete biopsychosocial collection of client data is essential during the intake process prior to the actual beginning of counseling. It is not possible to properly counsel a client without having a significant understand of who the client is. This information will be accessible throughout your counseling experience with the client. This information will give you a summary of all facets of who the client is.

When you click on *View Complete Biopsychosocial Information*, you will see a summary of every field from every link that has been completed. This allows you or another therapist that you are working with, to see a summary of everything related to a client.

To summarize, here are the areas that are covered under the biopsychosocial heading:

- **Basic Client Information** – Name, gender, and email address.
- **Personal Information** – Address and phone numbers.
- **Presentation/Exit Details** – Two short narratives detailing the reasons for client's entry into and exit from therapy.
- **Relationships** – Listing all significant relationships with significant others including marriage, divorce, separation, etc.
- **Children** – Listing of all children.
- **Therapy History** – Client's previous therapy history.
- **Legal Issues** – A historical listing of a client's legal history.
- **Medical History** – A listing of a client's historical medical issues.
- **Family Mental Health** – A record of significant family-related mental or psychological issues.
- **Religious/Spiritual Issues** – Significant religious or spiritual events in the client's life.
- **Occupational Information** – A record of the client's work history.
- **Client Insurance Information** – Information related to the client's insurance coverage. This included the name and phone number of their primary care physician.

Detailed Information about the Biopsychosocial Intake Information

The following are the areas in which you can record information about a client's biopsychosocial information. Explanation is given where needed.

In order to access a client's biopsychosocial information you must have a client loaded (see *Load Client* feature on the *QuikClient Menu*). Once a client is loaded, you will find the biopsychosocial information listed as the first item on the client's summary. Click on the link that says *View Complete Biopsychosocial Information*..

Basic Client Information

The following information appears under the *Basic Client Information* link.

Office ID

This field is not used by the system and may be used by the client's office for whatever purpose deemed appropriate. It may also be left blank.

First and Last Name

This is a required field. Include both the first and the last name of the client.

Date of Birth

This field is optional but highly recommended.

Gender

This is a required field.

Account Status

This is a required field. It is automatically set to *active*. If this field is changed to *inactive*, you will no longer be able to access the client's account information. Only choose to *inactivate* a client's account when you are sure that you no longer want access to the information.

Email

This is not a required field. It is, however, strongly recommended that you include an email address for the client, if possible.

Personal Information

This link allows you to input address information for the client including two phone numbers.

Presentation/Exit Details

This link allows you to enter two separate short (250 character) statements on the client's record. The first statement should summarize why the client has entered therapy. The second statement should be recorded when the client leaves therapy. This allows you to see why the client left, should they return again.

Relationships

Relationship events are any official events that transpired throughout a person's life related to involvement with a significant other. They may include: marriage, separation, divorce, or death of a spouse. Make sure to include all relationship events so that you have a clear picture of a person's relationship history. Both fields below are required.

Each time you enter a relationship the screen will refresh so that you can see the entries already in the database. From the top portion of the screen you may also delete or edit entries that have already been placed in the database. Use on screen instructions to perform those tasks.

Relationship Event Field

This should include complete involvement with significant others. This will give you a clear picture of relationship stability throughout the client's adult life.

Year Field

This is the year that the relationship event transpired. The summary that will be presented on the summary page will list events by this field so make sure that the year is input accurately. This field may not be blank.

Children

This option should be used to record all children that the client has.

Each time you enter a child's name the screen will refresh so that you can see the entries already in the database. From the top portion of the screen you may also delete or edit entries that have already been placed in the database. Use on screen instructions to perform those tasks.

Add a Child Name

This field should contain the first name of each child that the client has.

Year

This is the year of the child's birth. This field is mandatory and all names will appear in this order on the summary.

Therapy History

This option should list every single therapy incident that the client has engaged in. This is very important information for any therapist. You should also list all incidents wherein the client was hospitalized for psychiatric reasons.

Each time you enter a therapy event the screen will refresh so that you can see the entries already in the database. From the top portion of the screen you may also delete or edit entries that have already been placed in the database. Use on screen instructions to perform those tasks.

Add a Therapy Event

Add all therapy events that a client has engaged in throughout their entire adult life. This puts their need for care in perspective. It also gives the therapist a good idea of potential for relapse (see the information related to the *ASAM Narrative*). All previous counseling (whether individual or group), self-help groups such as AA or NA, and all hospitalizations should be included.

Year

This is the year of the beginning of the therapy event. You should enter the year that the client started the therapy event. This field is mandatory and all therapy events on the summary will appear in this order.

Legal Issues

This is listing of every legal event that has transpired in a client's adult life. Arrests, jail time or prison time, and legal action against the client should be recorded. This is important to understand the behaviors of a client within social norms.

Each time you enter a legal issue the screen will refresh so that you can see the entries already in the database. From the top portion of the screen you may also delete or edit entries that have already been placed in the database. Use on screen instructions to perform those tasks.

Add Legal Event

Enter every legal event that transpired in a client's adult life.

Year

This is the year that the legal event occurred. This field is mandatory and all legal events on the summary will appear in this order.

Medical History

This option allows you to record all medical events for the client's adult life. This should include chronic conditions (e.g., diabetes), hospitalizations and surgeries.

Each time you enter a medical issue the screen will refresh so that you can see the entries already in the database. From the top portion of the screen you may also delete or edit entries that have already been placed in the database. Use on screen instructions to perform those tasks.

Add a Medical Event

Add all medical events under this heading.

Year

This is the year that the medical event occurred. This field is mandatory and all medical events on the summary will appear in this order.

Family Mental Health

Sometimes it is important to understand the mental health issues that prevailed in the home-of-origin of the client.. This might prove important for mental health issues such as psychiatric hospitalizations, psychosis, major depression, or substance abuse.

Each time you enter a family mental health issue the screen will refresh so that you can see the entries already in the database. From the top portion of the screen you may also delete or edit entries that have already been placed in the database. Use on screen instructions to perform those tasks. If it is too difficult to put a year on this event, it is advisable that the therapist use a zero (0).

Add a Family Mental Health Event

Add all apparently significant mental health issues from the home-of-origin of the client.

Year

This is the year that the family mental health event occurred. This field is mandatory and all family mental health events on the summary will appear in this order. If it is too difficult to put a year on this event, it is advisable that the therapist use a zero (0).

Religious/Spiritual Issues

Sometimes the religious or spiritual understandings of a client have some bearing on their treatment.

Each time you enter a religious or spiritual issue the screen will refresh so that you can see the entries already in the database. From the top portion of the screen you may also delete or edit entries that have already been placed in the database. Use on screen instructions to perform those tasks. If it is too difficult to put a year on this event, it is advisable that the therapist use a zero (0).

Add a Religious or Spiritual Event

Record all apparently significant religious or spiritual events of the client.

Year

This is the year that the religious or spiritual event occurred. This field is mandatory and all religious or spiritual events on the summary will appear in this order. If it is too difficult to put a year on this event, it is advisable that the therapist use a zero (0).

Occupational Information

Under this heading the therapist should enter every work experience that the client has had during their adult life.

Each time you enter an occupation the screen will refresh so that you can see the entries already in the database. From the top portion of the screen you may also delete or edit entries that have already been placed in the database. Use on screen instructions to perform those tasks.

Add Occupational Event

List all of a client's occupations. This will give you a history of a person's work behaviors. It will also give you some indication of a client's stability over their adult life.

Year

This is the year of the occupational event. You should enter the year that the client started working in the occupational event. This field is mandatory and all occupational events on the summary will appear in this order.

Client Insurance

This option allows you to add important insurance information for the client. Even if you do not take third party payments, you may wish to use some of these fields. None of these fields are mandatory. For example, maybe you only wish to record the *Primary Care Physician Name* and *Phone Number* so that you can contact the client's *PCP*, in case of emergency.

If you do collect third party payments, not all of these fields may apply for every client. Use fields in what ever manner makes the most sense to you.

Insurance Carrier Name

This is the name of the insurance company (e.g., Blue Cross).

Cardholder Name and Cardholder ID

This is the name of the client and the client’s ID number on the insurance card.

Group Name and Group Number

Optionally enter the group information for the client's insurance.

Network ID

Optionally add the Network ID for the client's insurance information.

Plan ID

Optionally enter the *Plan ID* for the client's insurance information.

Primary Care Physician Name and PCP Phone

Record the name and phone information for the client's primary care physician.