Client Record Management

Managing Client Accounts

The *MARETweb Project* is a client-based system. There is little that can be done in the system without a client loaded. Many of the functions are not even visible until a client is loaded. This is a client management and a client assessment system. Thus, it is critical that the user understands exactly how to manage client records.

All of the functions and procedures described in this manual require the user to login before performing procedures.

Creating a New Client Account

In order to create a new client account, follow these instructions:

- Click on the *New Client* option (from the *QuikClient Menu*).
- First, last name and gender are not optional.
- Click on *Save Client Information* when you are finished.

Loading a Client Record

In order to load a client record, you must do the following:

- Click on the *Load Client* option (from the *QuikClient Menu*).
- Click in the selection box and enter a few letters from the client's **last name** and then click on *Find Client*.
- After you click on *Find Client* a list of all clients fitting the criteria that you entered will appear. (If no clients appear that means that there was no match for your criteria.)
- From the top list of clients, select the client that you wish to load by clicking on their name. (You must click on the client's name even if there is only one client in the box).
- After you click on the client's name, click on the *Load Client* button and the client's information will load into memory.

Editing a Client's Personal Information

There is a substantial amount of biopsychosocial information that can be entered for a client's record. All of that information can be edited. Biopsychosocial data will be discussed in the next section.

Deleting/Hiding a Client Account

In the *MARETweb Project*, you may not actually delete a client and all of their information. Client records are retained in case you change your mind or need previous client information in the future (especially for medical or legal purposes).

Even though you cannot technically delete a client, you can hide a client from visibility so that they do not appear on the client load list. The way to hide a client's record is as follows:

- Load the client as instructed above.
- Click on the *View Complete Biopsychosocial Information* link.
- Click on the *Basic Client Information* link on the top menu.
- Click on *Inactive* for the *Account Status*.
- Click on *Update Client Information*.

Client Biopsychosocial Information

What is Biopsychosocial Information?

Biopsychosocial information is any information that relates to the client's physical issues (bio), psychological issues (psycho) or social issues. While a counselor or therapist may be most interested in the psychological and the mental issues of a client, it is not reasonable to assume that those psychological or mental issues many not be influenced by physical or social issues in the client's life.

The *MARETweb Project* allows the user to accumulate a significant amount of biopsychosocial information. It is highly recommended that the user gather as much of this information as possible so that he or she will have a thorough understanding of all of the client's issues.

Accessing the Biopsychosocial Information in the MARETweb Project

Once you load a client, all information related to the client will appear beneath the *QuikClient Menu* in summary form. This will include a complete listing of all assessments that have been administered, session notes, and everything else associated with the client.

At the very top of that summary, the user will find a link that says *View Complete Biopsychosocial Information*. When the user clicks on that link, all of the recorded biopsychosocial information will be shown in summary form. Only those areas that contain information will be visible. The biopsychosocial information is able to be edited and expanded at any time. It is also set up in a printable format. That printable format is found under the *Print Preview* link directly next to the *Biopsychosocial* link.

Biopsychosocial Information in the *MARETweb Project*

The *MARETweb Project* allows you to catalog 12 different areas of biological, psychological and social information related to a client. This information will give you a comprehensive understanding of all of the factors that have brought the client to counseling. Each of these areas will be discussed in detail in the document titled *Viewing Complete Biopsychosocial Information*. The twelve areas covered by the biopsychosocial information are:

- **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.