Client Details Panel

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About

Once you complete the **Standardized Demographic drop-down fields**, the info from those fields is accessible for the active/selected client in the Client Details panel by clicking their name or the right-facing arrow in the Navigation Menu. As the user selects a client, the Navigation Menu will display that client's name. If no client has been selected then a name will not be displayed. Once a client is selected a Client Details panel and Quick Navigation menu display. The Quick Navigation menu allows for ease of navigating between pages in NextStep while working on a patient/client record and completing documentation quickly.

- Client Details Panel
- Quick Navigation Panel

Client Details Panel

In the Navigation Menu, click the active/selected **client's name**. The Client Details panel is displayed to the right of the Navigation Menu. To collapse the Client Details Panel, click the client's name again.

1. Search for and select a client. The client name displays in the Navigation Menu.
2. Click the client name or the right-facing arrow, the Client Details panel and Quick Navigation menu display.

3. The Client Details panel displays the following information entered on the Face Sheet: Name, DOB, Case No, Gender Identity, Preferred Pronouns, Race, Ethnicity, Language, and Smoking Status.
4. To edit information in the Client Details panel, click the **Edit** button.
5. A confirmation window displays, select one of the following.

- **Cancel**: You'll remain on the page you're currently on in NextStep Clinical.
- **Yes**: The Edit Client Information window opens to make the appropriate changes. Once changes are made click the **Update** button. The changes will update on the Client Details panel.
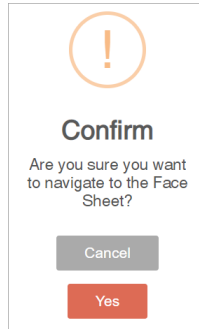
Quick Navigation Panel

The table below displays the options once a button is selected in the Quick Navigation panel. Click the image in the table to display full screen. **Note**: the entries in your Options may be different than what is displayed.

Quick Navigation Panel Selection	Options
Admissions	
Clinical Forms	
Treatment Planning	
Progress Notes	
Reports	

> **Tip:** Once an Option is selected, the window will open to the right of the ClientDetails panel and Quick Navigation menu. Click Main Menu to return or make another selection in the Quick Navigation menu.