

NEXTSTEP

Client Details Panel

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About

The **Client Details Panel** displays a common set of fields, including the **Standardized Demographic drop-down fields**, for the selected client. As the user selects a client, the Navigation Menu will display that client's name. The **Quick Navigation** menu allows for ease of navigating between pages in NextStep while working on a patient/client record and completing documentation quickly.



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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. Click the **View** button to display the selected client's Face Sheet in a popup window. Click the **Edit** button to edit the Face Sheet.
4. Click the  button to hide and shrink the **Navigation Menu**. Shrinking the Navigation menu give you more area to work
5. When the Navigation menu is shrunk, click  to show and hide the **Client Details Panel**.
6. The Client Details panel displays the following list of items for the selected client: Name, DOB, Case No, Gender Identity, Preferred Pronouns, Race, Ethnicity, Language, and Smoking Status.
7. To edit, for your login, the items that appear on the list in the **Client Details Panel**, click the cog button



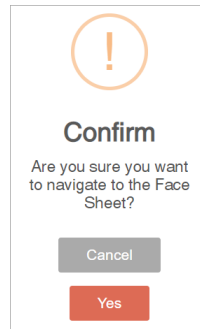
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You can then edit which fields appear. Click **Save** to save your changes or **Cancel** to cancel your changes.

8. When you select a new client, the following options appear.

- **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 **Quick Navigation Panel** will display a default set of items from the **Main Menu**, and lets you easily switch to different sections of the selected client's chart. To add items to, and remove them from, the Quick Navigation Panel, hold down the Control Key and click on an item in your Main Menu. **Note** this currently only works on a Windows computer.



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.

