

Changing a Client's Name in Carelogic

Step 1: Go to Clients ECR home page then Client > General Information > Demographics

The screenshot shows the Carelogic interface for a client named 'Dummy, Test (1297088) 1/19/1990'. The 'Client' menu is open, and the 'Demographics' option is highlighted. Red arrows indicate the navigation path: from the 'Client' menu to 'General Information' and then to 'Demographics'.

Step 2: Once in client Demographics find the area listed Name History

Press on SELECT to the left of the client's name.

Name History				
	Name	Begin Date	End Date	Signed By
Select	Dummy, Test	(Not Set)	(Not Set)	

Step 3: Once Pressing SELECT you will now be able to enter the New Name of the client with the correct spelling.

Name History

Title:	
First Name:	Test
Middle Name:	
Last Name:	Dummy
Suffix:	
Begin Date:	
End Date:	

New Name

Title:	Select Title ▼
First Name:	<input type="text"/>
Middle Name:	<input type="text"/>
Last Name:	<input type="text"/>
Suffix:	Select Suffix ▼
Begin Date:	<input type="text"/>
Electronic Signature:	<input type="text"/>



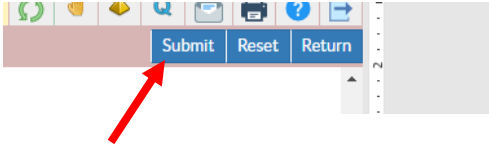
Step 4: Enter the new name spelled correctly

Begin Date: Should be the clients first date of entry

Electronically sign and Press Submit in the top right corner

New Name

Title:	Select Title ▼
First Name:	Testing
Middle Name:	<input type="text"/>
Last Name:	Dummy
Suffix:	Select Suffix ▼
Begin Date:	08/01/2019
Electronic Signature:



Step 5: Click on the client's name at the top to be taken back to the face sheet

You will see the clients name has changed once you return to the face sheet.

Dummy, Testing (1297088) 1/19/1990