

 Saskatchewan Health Authority	Work Standard #: CV-19 WS0071	
	Title:	Panorama Quick Entry Tool for COVID-19 Documentation – Searching for a Client Record
	Role Performing Activity:	COVID-19 Vaccine Booking Office & Vaccine Clinics
<h1>WORK STANDARD</h1>	Location: Saskatchewan Health Authority	Department/Unit: All Vaccine Clinics/Booking Areas
	Document Owner: Digital Health	Date Prepared: March 5, 2021
	Last Revision: March 11, 2021	Date Approved: March 9, 2021
	Related Policies/Documentation	

Work Standard Summary: This work standard outlines the steps (**Non-Panorama Users**) on how to accurately search for a client in the Panorama Quick Entry Tool being used for recording COVID-19 immunizations.

Essential Tasks:	
1.	<p>Browsers – You must use Google Chrome or Microsoft Edge for this tool. Internet Explorer is unsupported and may result in errors</p> <p style="text-align: center;">It is critical you select the correct client.</p> <p>Duplicate client records cause downstream work, poor data quality and may result in medication errors.</p>
2.	<p>There are 3 types of search criteria that can be used to identify and validate your client:</p> <ul style="list-style-type: none"> • Client’s Health Card Number (HCN). • Last Name and First Name. • Date of Birth and Gender to narrow the results down even more.
3.	<p>Searching by Health Card Number (HCN):</p> <ul style="list-style-type: none"> • Enter the 9 digit SK HCN in the Client Number field and select the Health Card No. option from the drop down list in the Client Number Type field. • Click on the Search button (make sure all other fields are empty or your search may not work) • If you don’t have the SK HCN, but have another provincial health card number for the client - enter the number in the Client Number field and select the Health Card No. option from the drop down list in the Client Number Type field. Click on the  button (make sure all other fields are empty or your search may not work). <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;">  </div>

4. Searching by Client's Name with optional (DOB & Gender):

- If you don't have any identification for the client you can search by First and Last Name.
- Enter the first three letters of the last name with a wild card % and the first three letters of the first name and optionally include the date of birth and gender.
 - E.g. if your client's last name was "Wood" or "Woods" you can enter "Woo%" in Last Name field and "Jil%" in First Name field to find the client. All clients will show in the results whose last name starts with "Woo," and first name that starts with Jil. If you have multiple search results enter the DOB to limit the options. It is important to pick the right client.
 - **Ensure that EVERY first name search is done with a wildcard at the end, as clients have been entered with merged first and middle names.** You may not find your client without the wildcard.

Search Client

Client Number:

Client Number Type:

Last Name:

First Name:

Date of Birth:

Gender:

- If that does not work, search with only LAST name (with or without wildcard) and date of birth, and optionally gender.

It is critical you select the correct client. Duplicate client records may cause medication errors (i.e. missed/duplicate doses or client getting the wrong vaccine type for a second dose).

5. When you are confident you have found the correct client - click in the Client ID field (**84576 in our example**) to display the Client's Immunization Profile.

Matching Clients (2 found)

Client ID	Health Card Number	Last Name	First Name	Date of Birth	Gender	Health Region	Additional ID
84576	989333555	Wood	Jill	1970-Mar-01	Female	Saskatoon RHA	
84579		Wood	Jill	1980-Apr-03	Female	Saskatoon RHA	