

 <b>Saskatchewan Health Authority</b>	<b>Title: Client Record Search and Registration</b> <b>Role performing Activity: Authorized Panorama User</b>	
<h1>WORK STANDARD</h1>	<b>Location:</b>	<b>Department/Unit:</b>
	<b>Document Owner:</b>	<b>Date Prepared:</b>
	<b>Last Revision:</b>	<b>Date Approved:</b>
	<b>Related Policies/Documentation:</b> <b>Panorama Policy:</b> <ul style="list-style-type: none"> <li>• Client Registration;</li> <li>• Confidentiality of Client Information</li> <li>• Informing Clients about Panorama</li> </ul> <b>Panorama Bulletins:</b> <ul style="list-style-type: none"> <li>• Bulletin 36 – Supported Health Card Number Types</li> <li>• Bulletin 41 – Client Creation</li> </ul> <b>Panorama User Guides:</b> <ul style="list-style-type: none"> <li>• Panorama User Guide – Client Search and Registration Quick Reference</li> </ul> Client Consent for Collection and Use, and Disclosure of Information in Panorama	

## Work Standard Summary:

This will support the process of searching for a client appropriately in Panorama. If the client is not in Panorama, registration needs to occur accordingly to avoid creating a second record in panorama and also to ensure the information can be accessed my ehealth viewer and mysask health record.

<b>Essential Tasks:</b>	
1.	<p>If it is the client’s first time presenting for immunization service, inform them that they will be registered in the electronic provincial immunization registry called Panorama.</p> <ul style="list-style-type: none"> <li>• If they require further information on Panorama direct them to the Panorama Privacy Information at: <a href="https://www.saskatchewan.ca/residents/health/accessing-health-care-services/immunization-services#immunization-forms-and-fact-sheets">https://www.saskatchewan.ca/residents/health/accessing-health-care-services/immunization-services#immunization-forms-and-fact-sheets</a>.</li> </ul> <p style="text-align: center;">   </p> <p>Information about the collection, privacy and use of your personal health information</p>

2.

To search for a client in Panorama

- Click on the Immunization on the module bar of the Panorama Dashboard



The Public Health Solution for Disease Surveillance and Management supports the identification, management and control of infectious diseases and outbreaks that pose a threat to the public's health.

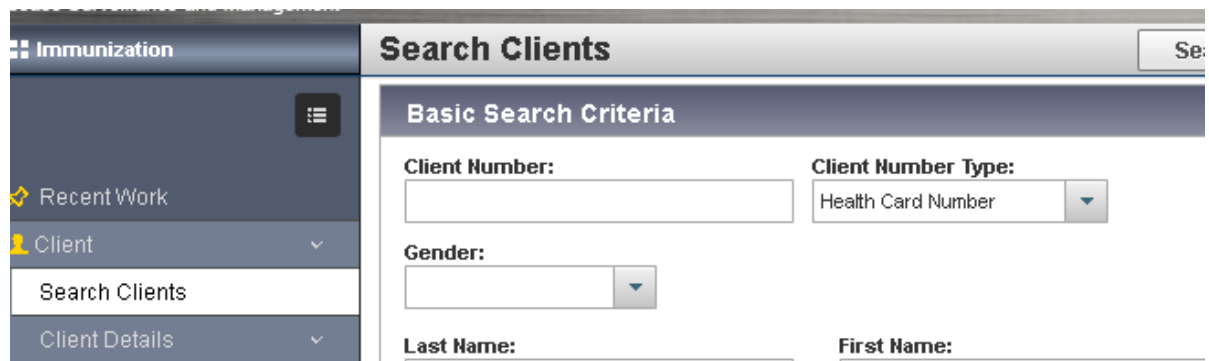
Specify your Service Delivery Location (SDL).

\* **Service Delivery Location:** Regina East Public Health Office

**SDL Time Zone:** CST



- This will bring you to the "Search Client" page in Panorama
- The module will state: **Basic search criteria**
- The Left hand navigation (LHN) will have "Search clients" highlighted.



3.

### First Search: Health Card Number

- **Client Number:** Enter the HCN
- **Client Number Type:** Health Card

Training Instance 3.0 POSERT, POSERT M/D

#### Search Clients

Search Search Jurisdictional Registry Retrieve

##### Basic Search Criteria

**Client Number:**  **Client Number Type:**

**Gender:**

**Last Name:**  **First Name:**  **Middle Name:**

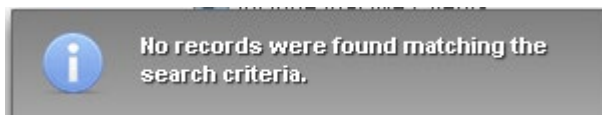
Select all th  
 Include  
 Include  
 Use P

**ALERT:** Ontario HCN's are not supported by panorama; leave blank and search/create by name.

- **Click > Search**
- **If the client is found** ensure the **correct client with DOB, HCN, and gender.**
- Select radio button next to client then click **>Update** to view and update demographics as per Panorama policy. Or click **Client Imms Profile** to view record.

Preview	Update	Set In Context	Create Cohort	Client Imms Profile	Client ID	Health Card Number	Last Name	First Name	Gender	Date of Birth	Health Re
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	82597	456543212	Warthog	John	Male	1975 Dec 03	Regina Q

- If the client is **not found**, you will receive the following note:



- Continue with the **second** search method.

4.

### Second Search: Name

Click **Reset** button to clear the previous search.



- **Last Name** – enter first three letters followed by wildcard “%” character.
  - For example, “Robert Johnson” enter “Joh%”. If client has more than one last name, or if hyphenated, enter only **one** segment. For “Robert Johnson-James” enter “Joh%” or “%Jam%”.
- **First Name** - enter first three letters of first name, followed by the wildcard “%”
  - For example, if “Robert” enter “Rob%”.
- **Clear out** the Client number type – “Health Card Number”

**Client Number:**

**Client Number Type:**

**Gender:**

**Last Name:**

**First Name:**

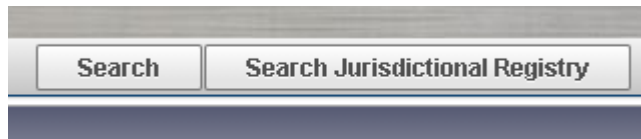
- **Click > Search**
- **If the client is found** ensure the **correct client with DOB, HCN, and gender**.
- Select radio button next to client then click or **>Update** to view and update demographics **as per Panorama policy** or **> Client Imms Profile** to view record
- If the client is **not** found, continue to **the 3<sup>rd</sup> search** method.

5.

### Third Search Method: Jurisdictional Search with Health Card Number

- Click on **Jurisdictional Search** from the top of the page.

**Note:** You will no longer be in the Panorama database, but rather the Jurisdictional Registry.



- **Client Number** enter HCN.
- **Client Number Type** select "Saskatchewan, Canada Personal Health Number" (or the appropriate option i.e. Manitoba, British Columbia).

**Search Jurisdictional Registry**

**Client Number:**

**Last Name:**

**Date of Birth:**

**Address Format:**  
 Structured  General  Semi-Struct

**Unit No.:**  **Street No.:**  **St:**

**P.O. Box:**  **STN:**  **RP:**

**Client Number Type:**

- Alberta, Canada Unique Lifetime Identifier (ULI)
- British Columbia Personal Health Number
- Manitoba Health Personal Health Identification Number (PHIN)
- New Brunswick, Canada Personal Health Number
- Newfoundland and Labrador, Canada Personal Health Number
- Northwest Territories, Canada Personal Health Number
- Nova Scotia, Canada Personal Health Number
- Nunavut, Canada Personal Health Number

**ALERT:** Searching the JCR with HCN and gender creates an error message (reason is unknown). Search registry with HCN only.

- Click > **Search**.

**If the client is found the correct client with DOB, HCN, and gender.**

- Select the radio button next to the client name and Click > **Create to Index**
- **Update demographics** as per Panorama policy

**Jurisdictional Registry Search Results**

	Health Card Number	Last Name	First Name	Gender	Date of Birth
<input checked="" type="radio"/>	700073949	MCTESTERSON	TESTY	Male	1975 Jul 05

Total: 1

- Click > **Save**

If the “update” button is active and the “create to index” is inactive/greyed out, the client exists in panorama. **Click > Update**

The screenshot shows a web interface titled "Jurisdictional Registry Search Results". At the top, there are two buttons: "Create to Index" (disabled) and "Update" (active). Below the buttons is a table with the following columns: Health Card Number, Last Name, First Name, Gender, and Date. The table contains one row with the following data: Health Card Number: 8000000003, Last Name: RUBY, First Name: ADULTMALE, Gender: Male, Date: 1944. At the bottom of the table, it says "Total: 1" and there are navigation buttons, including a page number "1".

Health Card Number	Last Name	First Name	Gender	Date
8000000003	RUBY	ADULTMALE	Male	1944

- **Update the demographics** as per Panorama policy
- **Click > Save**

**ALERT:** Ensure the phone number is NOT 000-0000. If it is, delete it before saving.


If the client is **not found**, continue to the 4<sup>th</sup> (and final) search method.

6.

#### Fourth Search Method: Jurisdictional Search by Name

- **Click > Reset**
- **Last Name** - enter last name. **IMPORTANT: DO NOT** use wildcards when searching the JCR.
  - If client has more than one last name, or if hyphenated, enter only the first segment. For example, for “Robert Johnson-James” enter “Johnson”.
- **First Name** - enter first name. **Do not use the wildcard.**
  - If client has more than one given name, or if first name is hyphenated, enter only the first segment.

### Search Jurisdictional Registry

<b>Client Number:</b> <input type="text"/>	<b>Client Number Type:</b> <input type="text" value="▼"/>
<b>Last Name:</b> <input type="text" value="Training"/>	<b>First Name:</b> <input type="text" value="Patient"/>
<b>Date of Birth:</b> <input type="text" value="yyyy/mm/dd"/> 	<b>Gender:</b> <input type="text" value="▼"/>

**Address Format:**

- **Click > Search**

If client found, ensure you have the **correct client with DOB, HCN, and gender.**

- **Click > Create to Index.**
- **Update demographics** as per Panorama policy.
- **Click > Save**

If the “**update**” button is active and the “**create to index**” is inactive/greyed out, the client exists in panorama.

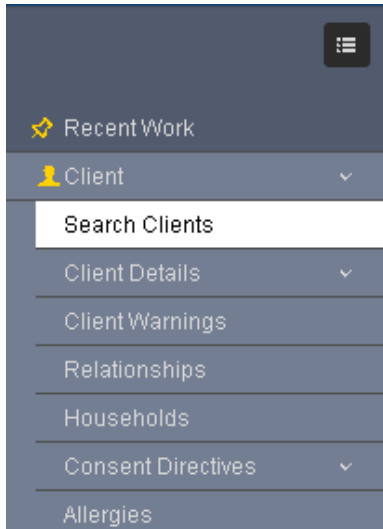
- **Click > Update**
- **Update the demographics**
- **Click > Save**

**ALERT:** Ensure the phone number is NOT 000-0000. If it is, delete it before saving.

**99% of the time,** the client will be found with in the first four search attempts:

7.

If client is **not found after four search attempts** go back to Panorama data base by:  
**LHN click > Client > Search Clients.**



- Enter the following client information. This includes, at a minimum:
  - Health Card Number
  - Last Name
  - First Name
  - Middle name – if appropriate
  - Gender
  - Date of Birth and,
  - Health Region Organization (**RHA or FN Community only and must match physical address**).
- **Click > Search.** The system will display a message that no results were found.
- **Click > Create Client.** The required fields will automatically prepopulate with the client details entered during the search. **Update additional demographics as per Panorama policy Client Registration** (see work standard: **Reviewing and Updating Client Demographics in Panorama with influenza booking**).
- **Click > Save.**

**Please note:** When we add or register a client in Panorama this way there will be no unique identifier number linked with this record to display the record in Ehealth viewer. The record will also not display on mysaskhealth record.