



Saskatchewan Health Authority

Title: Regina Area: Reviewing and Updating Client Demographics in Panorama

Role performing Activity: All

WORK STANDARD

Location:

Department/Unit:

Document Owner:

Date Prepared:

Last Revision:

Date Approved:

Related Policies/Documentation:

Panorama Policies

- Gender Identity
- Immigration information, November 1, 2016
- Management of Records for Children who are adopted
- Updating Personal Information
- Updating JOrg for clients Moving within the province
- Updating the JOrg for clients moving out of the province
- Updating the JOrg for clients lost to follow up

Panorama Bulletins

- Bulletin 002: Indicate which Public Health Office has a Client's paper records
- Bulletin 0051: Refugee Registration,
- Bulletin 52 - JOrg Assignment of Clients;
- Bulletin 53 - Inactivation of Clients;
- Bulletin 62 – PO Box # Does Not

Work Standards:

- Regina Area: Client Record Search and Registration

Work Standard Summary:

Work Standard Summary: Review and update client information at time of registration and at every subsequent encounter.

Essential Tasks:


1. **Access Client's Personal Information Screen**

- LHN >Client Details >Update client

2. **Name**

- Ensure the legal first and middle names are in proper fields **according to HCN card.**

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

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


3. **Date of birth:**


- Correct based on the Health Card only.

Date of Birth:  **Estimated** **Age:**
 years months days

4. **Gender**

- Biological gender.
- If client identifies as other than biological sex then also complete Gender Identity field and choose from drop-down menu.


Gender: 

Gender Identity: 

Other Identity:

Health Card Province: Saskatchewan, Canada Personal Health Number

*** Health Region Organization:** Regina North PH, Regina, Saskatchewan

Preferred Communication Method: 

Inactivate **Inactive Reason:** **Date of Death:**

Other (Specify)

Transgender Female to Male

Transgender Male to Female

Undifferentiated

In Saskatchewan an individual cannot change their biological sex on their health card until they are 18 years of age

5. **Health card number and type**

- Ensure that **health card type (province) & number are both entered**, otherwise HCN# will not save. Therefore in future, searches you will not find client using HCN# search.

Female [dropdown] [dropdown] [input]
Health Card Province: [dropdown] **Health Card Number:** 460143875
 [input] [magnifying glass icon]
 Newfoundland and Labrador, Canada Personal Health Number
 Northwest Territories, Canada Personal Health Number
 Nova Scotia, Canada Personal Health Number
 Nunavut, Canada Personal Health Number
 Ontario, Canada Personal Health Number
 Prince Edward Island, Canada Personal Health Number (PHN) Identifier
 Quebec, Canada Personal Health Number
 Royal Canadian Mounted Police Number
 Saskatchewan Health Card

6. **Health Region Organization – (First Nations Jurisdiction-FNJ or Regional Health Authority - RHA only)**

- **RHA or FNJ community ONLY**
- **Physical address must match** the client’s former **RHA or FNJ**
- **NEVER** a public health office or clinic name

* **Health Region Organization:**
 Regina Qu'Appelle RHA, Regina, Saskatchewan

Examples of appropriate Health Region Organizations:

Former Regional Health Authorities	First Nation Jurisdictions
Regina Qu’Appelle RHA, Regina, Saskatchewan	Pasqua Health Centre, Zehner, Saskatchewan
Sun Country RHA, Weyburn, Saskatchewan	Yellow Quill Health Centre Muskoday First Nation, Saskatchewan
Sunrise RHA, Yorkton, Saskatchewan	Standing Buffalo Health Station, Balcarres, Saskatchewan
Five Hills RHA, Moose Jaw, Saskatchewan	Carry the Kettle Health Centre, Carry the Kettle, Saskatchewan
Saskatoon RHA, Saskatoon Saskatchewan	Day Star Health Centre, Punnichy, Saskatchewan

7. **Expand Toggle bars for Address and Telephone Number** to review and update as necessary.

Telephone Numbers

Addresses

Alternate Names

Additional Identifiers

Common principals with entering addresses and phone numbers:

- **NEVER DELETE** existing or previous addresses/phone numbers even if there is an error.
- When adding a new address or phone number, add an **EFFECTIVE TO DATE** as the date you changed it.
- Ensure all entries have a postal code.

8. **Telephone numbers**

If there is a **green check mark** in the toggle bar, **data is entered**.

Telephone Numbers

Update Delete Set Preferred Add

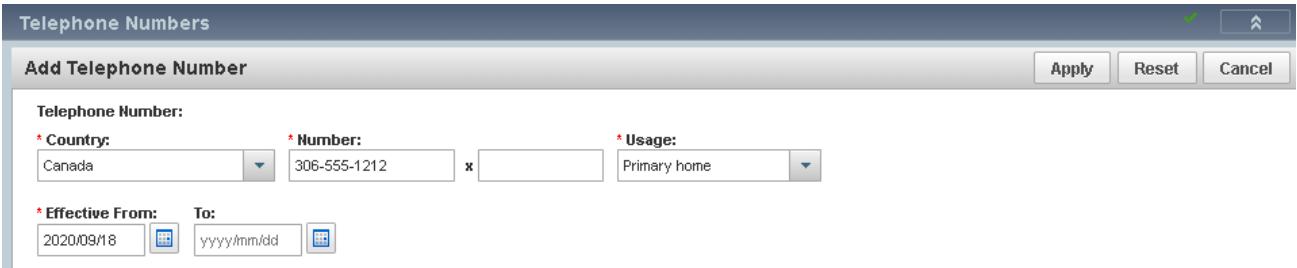
	Number	Effective From	Effective To	Preferred
<input type="radio"/>	mobile contact: 306-586-7648	2018 Sep 18		✓
<input type="radio"/>	Primary home: 306-530-4757	2018 Nov 08		

Total: 2 1 10

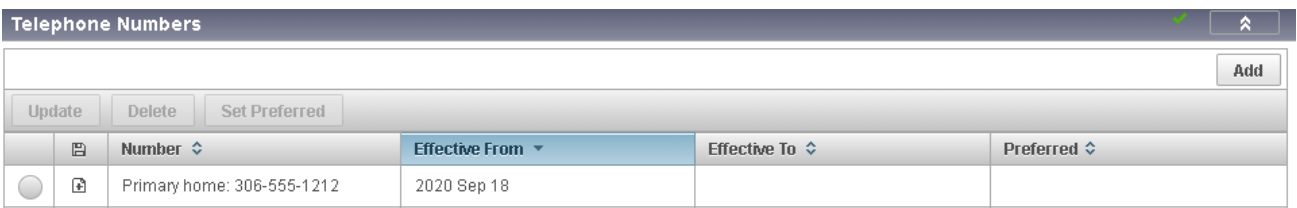
9. If you need to add a number click on **Add**



- Enter data into **all fields that are starred**. The effective from date will prepopulate with today's date.



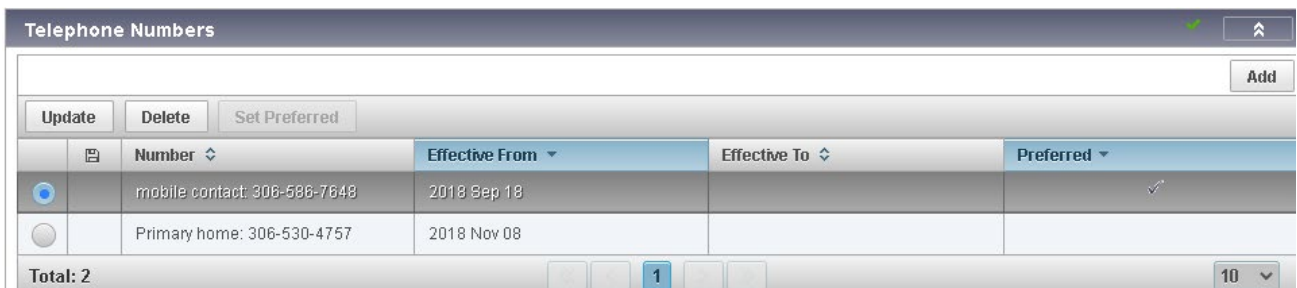
- Click **Apply**



- The **file document box**, shows that new information has been **added but not saved**.
- **Scroll to the top** of the page and click on **Save**.

If the phone number is no longer active, enter an effective to date with today's date.

- Click on the **radio button**, next to the number that you want to inactivate.
- Click on the **update button**. We do not delete.



- Enter **today's date**.

Telephone Numbers

Update Telephone Number

Apply Reset Cancel

Telephone Number:

* Country: Canada * Number: 306-586-7648 * Usage: mobile contact

* Effective From: 2018/09/18 To: 2020/09/18

- Click **Apply** – You will see the pencil, showing that you have edited but not yet saved your changes.

Update Delete Set Preferred				
	Number	Effective From	Effective To	Preferred
<input type="radio"/>	Primary home: 306-530-4757	2018 Nov 08		
<input type="radio"/>	mobile contact: 306-586-7648	2018 Sep 18	2020 Sep 18	

Total: 2 1 10

- Scroll to **the top of the page** and hit save
- Ensure the **preferred number is set**.

10. **Addresses**

Addresses								
Add								
Update Delete View Map Set Preferred								
	Address Type	Address	Address Detail	Effective From	Effective To	Preferred	Active Household Members	Valid
<input type="radio"/>	Primary home	2111 hamilton Street , Regina, Saskatchewan, S4X2N2, Canada		2018 Nov 30		✓	1	
<input type="radio"/>	Postal address	PO Box 456 , White City, Saskatchewan, S4W2R2, Canada		2018 Nov 28			1	
Total: 2				1				10

- The process for adding, updating with effective to dates and setting preferences for phone numbers, is the same for addresses.
- There are a few differences.
 - ✓ For follow up purposes and statistics, we need a **physical address and a mailing address** as appropriate.
 - ✓ **The Regional Health Organization must match the physical address.**
 - ✓ **All addresses must have a postal code saved in Panorama.**

Address Format:

Structured General Semi-Structured

*** Address Type:**

Primary home

Unit No.: Street No.: Street Name: Street Type: Street Direction:

P.O. Box: STN: RPO: Rural Route:

Country: Province / Territory: City / Town: Postal Code:

Other Address Details: **Latitude:** **Longitude:**
(System-generated)

(100 characters remaining.)

*** Effective From:** **To:**

11.

- Enter all Unit and Street # in the appropriate fields however **do not use the PO Box # field, as it does not display on Update Client screen.**

Address Format:

Structured General Semi-Structured

*** Address Type:**

Postal address

Unit No.:

Street No.:

Street Name:

Street Type:

Street Direction:

P.O. Box:

STH:

RPO:

Rural Route:

Country:

Province / Territory:

City / Town:

Postal Code:

Other Address Details:

Latitude:

Longitude:

(System-generated)

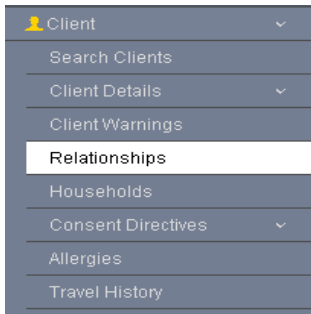
(100 characters remaining.)

*** Effective From:**

To:

12. Relationships

All clients under the age of 16 years must have a relationship (legal guardian). Preferably legal guardians are listed.



From the Left Hand Navigation >Client >Relationship

- Click >Add

A screenshot of a web application form titled 'Add Relationship'. At the top, there is a dark blue header with the text 'Client Relationships' and an upward arrow icon. Below the header is a message box that says 'To create a new record click Add.' with an 'Add' button. The main form area has a title bar 'Add Relationship' with 'Apply', 'Reset', and 'Cancel' buttons. The form contains several sections: 1. Two dropdown menus for '* Relationship to in-context Client:' (set to 'Parent') and '* Relationship from in-context Client:' (set to 'Child'). 2. Two date pickers for '* Effective From:' (set to '2019/05/26') and '* To:' (set to 'yyyy/mm/dd'). A checkbox labeled 'Custodial' is checked. 3. Radio buttons for '* Related Client Source:' with 'Find in Index' unselected and 'Add Non-Indexed Client' selected. 4. Text input fields for '* Related Client:' with '* Last Name:' (set to 'Pikachu') and '* First Name:' (set to 'Shelley'). 5. A 'Telephone Number:' section with 'Country:' (set to 'Canada'), 'Number:' (with an 'x' separator), and 'Usage:' (with a dropdown arrow). 6. An 'Address' section with a dropdown arrow. 7. A 'Comments' section at the bottom with a dropdown arrow.

- Pick applicable “Relationship to in-context client” from drop-down options
- Pick applicable “Relationship from in-context client” from drop-down options
- Click >Add Non-Indexed client only
- Only add a guardian phone number or address if it is different from the child’s demographic information.
- Ensure all legal guardians are added.

Updating relationships

- Click on the radio button next to the client and select **Update**.

Update			View			Delete			Preview Related Client		Set in Context	
		Related Client Name ^	Deceased ⇅	Indexed ⇅	Relationship to in-context Client ⇅	Effective From ▾	Effective To ⇅	Custodial ⇅				
<input type="radio"/>	<input type="radio"/>	Pikachu, James			Parent	2019 May 26		<input checked="" type="checkbox"/>				
<input checked="" type="radio"/>	<input checked="" type="radio"/>	Pikachu, Shelley			Parent	2019 May 26		<input checked="" type="checkbox"/>				
Total: 2										1		10 ▾

- Add Effective to date for the guardian (Do not delete previous relationships).
- De-select Custodial

Update Relationship Apply Reset Cancel

* Relationship to in-context Client: Parent ▾ * Relationship from in-context Client: Child ▾

* Effective From: 2019/05/26 [calendar] To: 2020/09/18 [calendar] Custodial

* Related Client:

* Last Name: * First Name:

- Click >Apply
- Click >Save

Update			View			Delete			Preview Related Client		Set in Context	
		Related Client Name ^	Deceased ⇅	Indexed ⇅	Relationship to in-context Client ⇅	Effective From ▾	Effective To ⇅	Custodial ⇅				
<input type="radio"/>	<input type="radio"/>	Pikachu, James			Parent	2019 May 26		<input checked="" type="checkbox"/>				
<input type="radio"/>	<input checked="" type="radio"/>	Pikachu, Shelley			Parent	2019 May 26	2020 Sep 18	<input type="checkbox"/>				
Total: 2										1		10 ▾

13. Service Delivery Location (SDL)

- The SDL is where the Child Health Record is located.
- **LHN >Client Details >Health Services**
- Enter SDL by clicking on “Add” button
- Type in field, starting with city/town location and pick the Panorama option- The record can be located at a public health office ONLY
- The effective from date will populate with today’s date
- Click > Save
- Transferring a record to another office
 - Enter new SDL to where it is being sent
 - Update the old SDL with an effective to date (Do not delete)
 - Click >Save

14.	<p>Immigration information</p> <ul style="list-style-type: none"> • Add when an immigrant or refugee presents for service. • LHN >Client Details >Immigration Information • Refugee Information: <ul style="list-style-type: none"> ○ Arrival Date: Day, month, year, if possible ○ Immigration status at time of arrival: Convention Refugee ○ Country emigrated from ○ Country of birth (optional) ○ Click >Save • Immigration Information: <ul style="list-style-type: none"> ○ Arrival Date: Year ○ Country emigrated from ○ Country of birth (optional) ○ Click >Save
15.	<p>Inactivation</p> <ul style="list-style-type: none"> ○ When a client indicates that they have moved out of province or they are lost to follow-up (PHNs only). ○ Follow appropriate bulletins or policy ○ Bulletin 53 - Inactivation of Clients ○ Updating the Health Region Organization for clients moving out of the province ○ Updating the Health Region Organization for clients lost to follow up.