

 Saskatchewan Health Authority	Title: Regina Area: Client Record Search and Registration Role performing Activity: All Panorama Users	
<h1>WORK STANDARD</h1>	Location: Clinical Integration – Public Health Intranet site	Department/Unit: Clinical Integration– Public Health
	Document Owner: Clinical Integration– Public Health	Date Prepared: September 22, 2020
	Last Revision: November 11, 2022	Date Approved: September 25, 2020
	Related Policies/Documentation: Panorama Policy: <ul style="list-style-type: none"> • Client Registration • Confidentiality of Client Information • Informing Clients about Panorama Panorama Bulletins: <ul style="list-style-type: none"> • Bulletin 36 – Supported Health Card Number Types • Bulletin 41 – Client Creation Panorama User Guides: <ul style="list-style-type: none"> • Panorama User Guide – Client Search and Registration Quick Reference 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 in eHealth viewer and mysask health record.

Essential Tasks:	
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. If they require further information on Panorama direct them to the Panorama Privacy Information at: https://www.saskatchewan.ca/residents/health/accessing-health-care-services/immunization-services</p> <div style="text-align: center;">  </div> <p>Information about the collection, privacy and use of your personal health information</p>

2.

To search for a client in Panorama

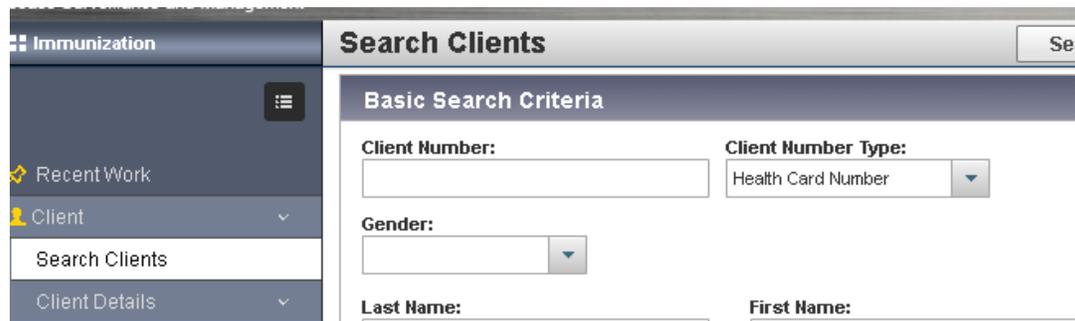
- Click on the Immunization tab on the module bar of the Panorama Dashboard



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.

A screenshot of a dialog box titled "Specify your Service Delivery Location (SDL)". It contains a label "* Service Delivery Location:" followed by a dropdown menu showing "Regina East Public Health Office" and a "Select" button. Below this, it says "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 (HCN)

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

Search Clients Search Search JCR

Basic Search Criteria

Client Number: Client Number Type:

Last Name: First Name: Middle Name:

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					
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Client ID	Health Card Number	Last Name	First Name	Middle Name	Gen		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	81038	326542145	Donn	Bertha	ann	Fem		

Total: 1

- 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 3rd search** method.

5.

Third Search Method: Jurisdictional Search with Health Card Number (HCN)

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

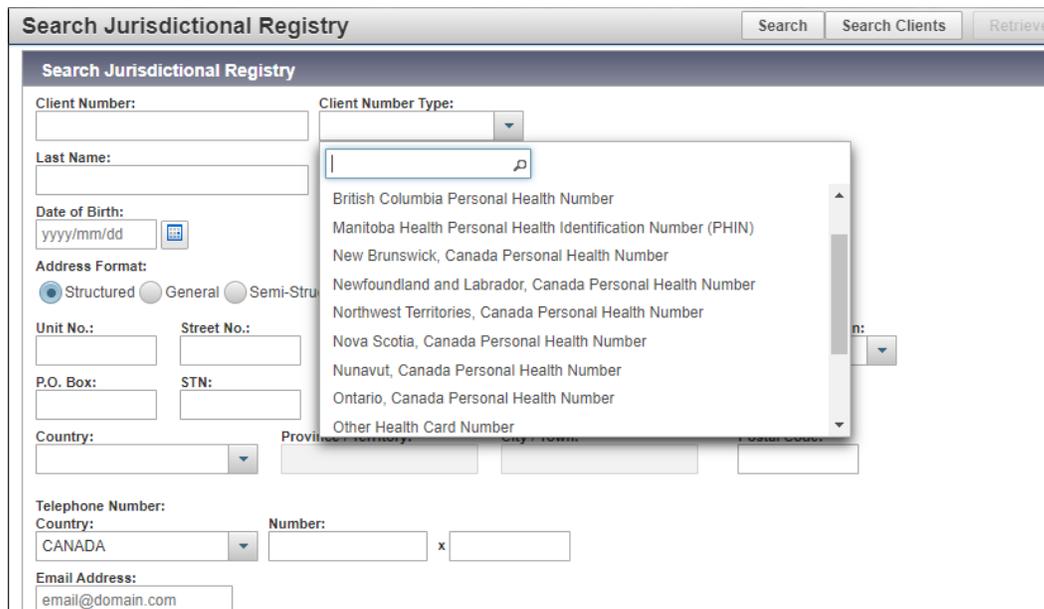
Note: You will no longer be in the Panorama database, but rather the Jurisdictional Registry.



- **Client Number** - enter HCN.
- **Client Number Type** select “Saskatchewan, Canada Personal Health Number” (or the appropriate option i.e. Manitoba, British Columbia). A client can be in the JR with a HCN from another province.

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

- Click > **Search**.



Search Jurisdictional Registry

Search Jurisdictional Registry

Client Number:

Client Number Type:

Last Name:

Date of Birth:

Address Format: Structured General Semi-Stru

Unit No.: Street No.:

P.O. Box: STN:

Country:

Province/Territory:

City/Town:

Postal Code:

Telephone Number:

Country:

Number: x

Email Address:

If the client is found ensure 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

Create to Index Update

Health Card Number	Last Name	First Name	Gender	Date of Birth
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**

Jurisdictional Registry Search Results					
Create to Index		Update			
Health Card Number	Last Name	First Name	Gender	Date	
800000003	RUBY	ADULTMALE	Male	1944	
Total: 1					

- 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 4th (and final) search method.

6.

Fourth Search Method: Jurisdictional Search by Name

- Click > Reset
- **IMPORTANT: DO NOT use wildcards** when name searching the JR.
 - **Last Name** - enter last name. 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. If client has more than one given name, or if first name is hyphenated, enter only the first segment.

Search Jurisdictional Registry	
Client Number: <input type="text"/>	Client Number Type: <input type="text"/>
Last Name: <input type="text" value="Training"/>	First Name: <input type="text" value="Patient"/>
Date of Birth: <input type="text" value="yyyy/mm/dd"/> <input type="button" value="Calendar"/>	Gender: <input type="text"/>
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.

Create Client

- 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**)
- **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 E-health viewer or mysaskhealth record.