

 Saskatchewan Health Authority	Title: Panorama Client Record Search	
	Role performing Activity: Non Public Health Immunization providers	
<h1>WORK STANDARD</h1>	Location:	Department/Unit:
	Document Owner:	Date Prepared:
	Last Revision:	Date Approved:
	Related Policies/Documentation:	
Panorama Policy: <ul style="list-style-type: none"> Confidentiality of Client Information Informing Clients about Panorama 		
Panorama Bulletins: <ul style="list-style-type: none"> Bulletin 36 – Supported Health Card Number Types 		
Panorama User Guides: <ul style="list-style-type: none"> Panorama User Guide – Client Search and Registration Quick Reference 		

Work Standard Summary:

To search appropriately for client records to enter the non-provider recorded immunizations into Panorama.

Essential Tasks:																																					
1.	<p>First Search: Health Card Number</p> <ul style="list-style-type: none"> Client Number: Enter the HCN Client Number Type: Health Card  <p>ALERT: Ontario HCN's are not supported by panorama; leave blank and search/create by name.</p> <ul style="list-style-type: none"> Click > Search If the client is found: Select radio button next to client then click > Client Imms Profile to view record and enter immunizations.  <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Preview</th> <th>Update</th> <th>Set In Context</th> <th>Create Cohort</th> <th>Client Imms Profile</th> <th></th> <th></th> <th></th> <th></th> <th></th> </tr> <tr> <th><input checked="" type="checkbox"/></th> <th></th> <th></th> <th></th> <th></th> <th>Client ID</th> <th>Health Card Number</th> <th>Last Name</th> <th>First Name</th> <th>Gender</th> <th>Date of Birth</th> <th>Health Region</th> <th>Active</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td></td> <td></td> <td></td> <td></td> <td>82587</td> <td>456543212</td> <td>Warhog</td> <td>John</td> <td>Male</td> <td>1975 Dec 03</td> <td>Regina Qu'Appelle RHA</td> <td>Active</td> </tr> </tbody> </table> <ul style="list-style-type: none"> If the client is not found, continue with the second search method. 	Preview	Update	Set In Context	Create Cohort	Client Imms Profile						<input checked="" type="checkbox"/>					Client ID	Health Card Number	Last Name	First Name	Gender	Date of Birth	Health Region	Active	<input checked="" type="checkbox"/>					82587	456543212	Warhog	John	Male	1975 Dec 03	Regina Qu'Appelle RHA	Active
Preview	Update	Set In Context	Create Cohort	Client Imms Profile																																	
<input checked="" type="checkbox"/>					Client ID	Health Card Number	Last Name	First Name	Gender	Date of Birth	Health Region	Active																									
<input checked="" type="checkbox"/>					82587	456543212	Warhog	John	Male	1975 Dec 03	Regina Qu'Appelle RHA	Active																									

2.

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%”.

Basic Search Criteria

Client Number: Client Number Type:

Gender:

Last Name: First Name: Middle Name:

Choose one:

Date of Birth or Age Range Not Applicable

Date of Birth:

- **Click > Search**
- **If the client is found:** Select radio button next to client then click > **Client Imms Profile** to view record and enter **Immunizations**.
- **If more than one client** is found check other identifiers including birthdate and sex to ensure the correct client is chosen.

Preview	Update	Set In Context	Create Cohort	Client Imms Profile								
<input checked="" type="checkbox"/>					Client ID	Health Card Number	Last Name	First Name	Gender	Date of Birth	Health Region	Active
<input checked="" type="checkbox"/>					1176	118486238	JOHNSON	ROBERT	Female	2003 Jun 17	Foam Lake PH	Active
Total: 1								1				20

- If the client is **not** found, continue to **step 3**.

3.

Contact the Panorama support staff Office Administrative Assistant to register client in Panorama.