



Saskatchewan Health Authority

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

**Role performing Activity: All**

# WORK STANDARD

**Location:** Clinical Integration – Public Health Intranet Site

**Department/Unit:** Clinical Integration – Public Health

**Document Owner:** Clinical Integration Unit – Public Health

**Date Prepared:** September 18, 2020

**Last Revision:** September 15, 2022

**Date Approved:** September 25, 2020

**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;

**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

**Personal Information**

Indeterminate

Last Name: Bird \* First Name: Eddie Middle Name: Suffix:

Date of Birth: 2011/05/24  Estimated Age: 11 years 3 months 0 days

Gender: Male Gender Identity: Other Identity:

Health Card Province: Saskatchewan, Canada Personal Health Number: 123456789 Health Card Number:

Health Region Organization: Add

Update Delete

Health Region Organization	Effective From	Effective To
Regina Qu'Appelle RHA	2022 Aug 16	

2. **Name**

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

Last Name: Green \* First Name: Raine Middle Name: Ann

Last Name: Green \* First Name: Raine Ann Middle Name:

3. **Date of birth:**

- Correct based on the Health Card only.

Date of Birth: 2019/05/26  Estimated Age: 1 years 3 months 23 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: Male Gender Identity: Other Identity:

Health Card Province: Saskatchewan, Canada Personal Health Number: 89 Health Card Number:

Health Region Organization: Update Delete

Health Region Organization: Regina Qu'Appelle RHA Effective From: 2022 Aug 16 Effective To:

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

**Health Card Province:**  **Health Card 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
- 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

Update Delete

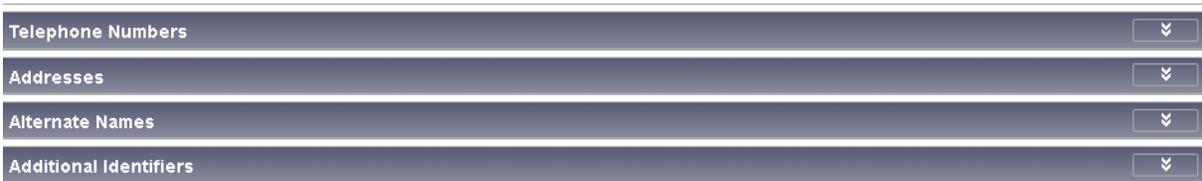
<input type="checkbox"/>	Health Region Organization	Effective From	Effective To
<input type="radio"/>	Saskatoon RHA	2014 Oct 06	

Total: 1

**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.

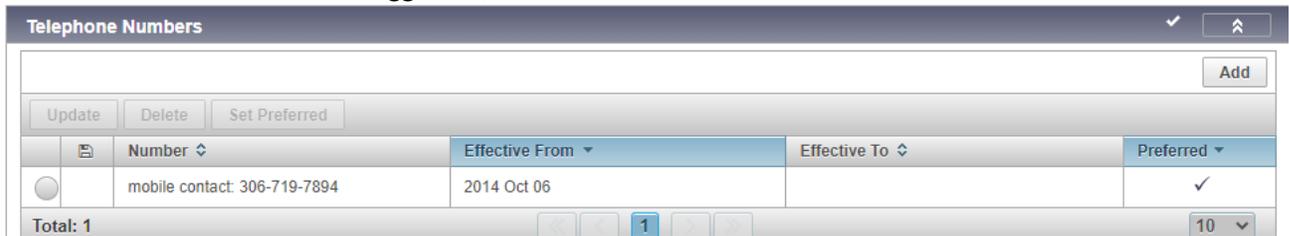


Common principals with entering addresses and phone numbers:

- **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**

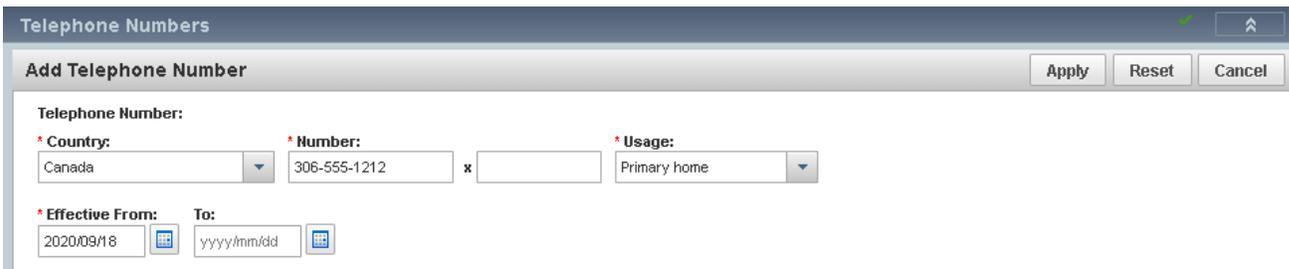
If there is a **check mark** in the toggle bar, **data is entered**.



To add a phone number click on **“Add”**



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



- Click **“Apply”**

8.

Telephone Numbers

Update Delete Set Preferred Add

	Number	Effective From	Effective To	Preferred
<input type="radio"/>	Primary home: 306-555-1212	2020 Sep 18		

- 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.

Telephone Numbers

Update Delete Set Preferred Add

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

Total: 2

- 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

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

9. **Addresses**

	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

- 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.**

**Add Address** [Apply] [Reset] [Print] [Close]

Address Format:  
 Structured  General  Semi-Structured

\* Address Type:  
 Primary home

Unit No.: [ ] Street No.: 2111 Street Name: Hamilton Street Type: Street Street Direction: [ ]

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

Country: Canada Province / Territory: Saskatchewan City / Town: Regina Postal Code: S4X-3N2

Other Address Details: [ ] Latitude: [ ] Longitude: [ ]

(100 characters remaining.)

\* Effective From: 2022/09/15 To: yyyy/mm/dd

[Apply] [Reset]

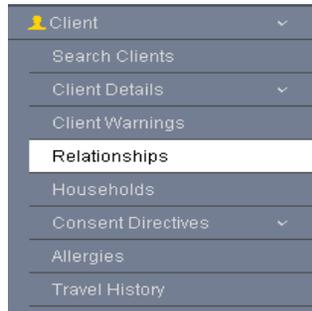
- Enter Unit and Street # in the appropriate fields. If it is a PO box number, use the appropriate fields.

**Click – “Apply”**  
**Click – “Save”**

10.

## Relationships

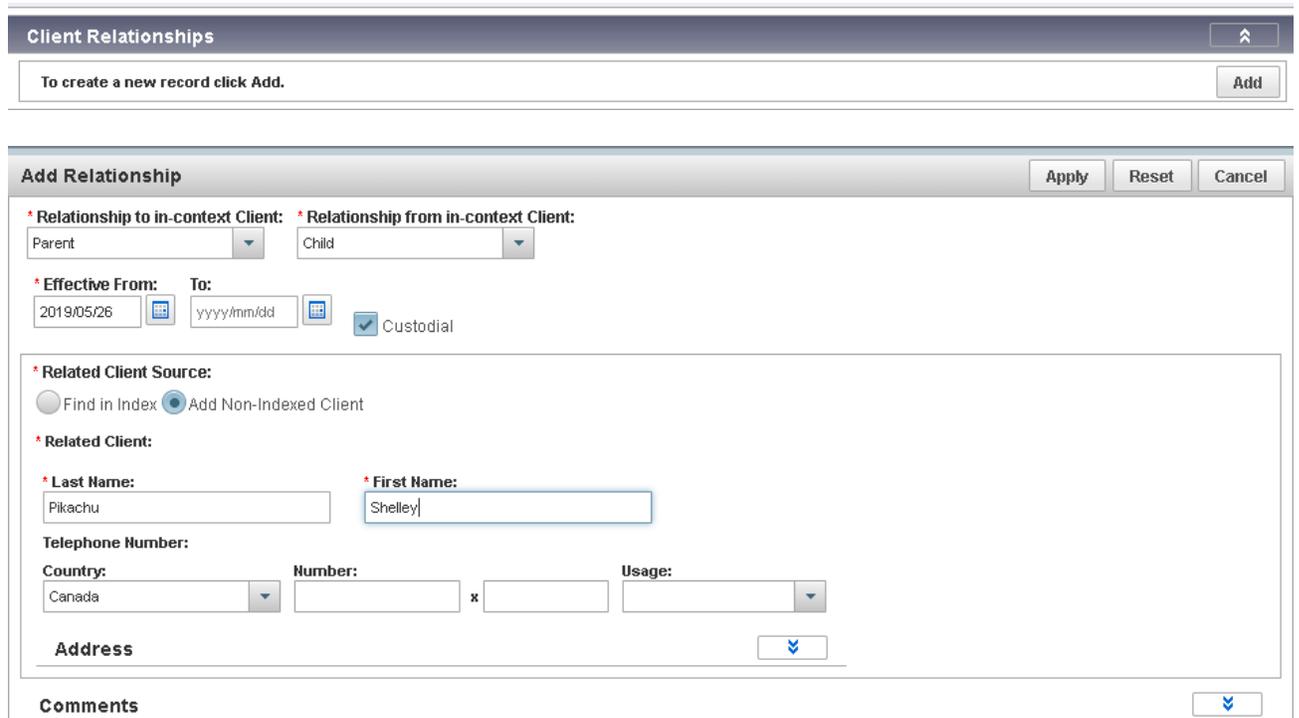
**All clients under the age of 16 years must have a relationship (legal guardian). Preferably, all legal guardians are listed.**



A vertical navigation menu with the following items: Client (with a person icon), Search Clients, Client Details, Client Warnings, Relationships (highlighted with a white background), Households, Consent Directives, Allergies, and Travel History.

From the Left Hand Navigation >Client >Relationship

- Click >Add



The screenshot shows the 'Add Relationship' form. At the top, there is a header 'Client Relationships' with an 'Add' button. Below it, a message says 'To create a new record click Add.' with another 'Add' button. The main form area is titled 'Add Relationship' and includes buttons for 'Apply', 'Reset', and 'Cancel'. The form contains several fields: 'Relationship to in-context Client' (set to 'Parent'), 'Relationship from in-context Client' (set to 'Child'), 'Effective From' (2019/05/26) and 'To' (yyyy/mm/dd) date pickers, a 'Custodial' checkbox (checked), 'Related Client Source' (radio buttons for 'Find in Index' and 'Add Non-Indexed Client', with 'Add Non-Indexed Client' selected), 'Related Client' section with 'Last Name' (Pikachu) and 'First Name' (Shelley) text boxes, 'Telephone Number' section with 'Country' (Canada), 'Number' (with an 'x' separator), and 'Usage' dropdown, and an 'Address' section with a dropdown arrow. At the bottom, there is a 'Comments' section 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 to add all legal guardians.

## 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    To: 2020/09/18     Custodial

\* Related Client:

\* Last Name: Pikachu    \* First Name: Shelley

- Click **>Apply**
- Click **>Save**

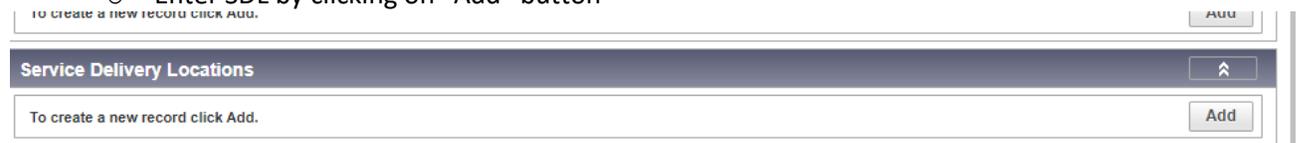
Update		View		Delete		Preview Related Client		Set in Context	
		Related Client Name ▲	Deceased ⇅	Indexed ⇅	Relationship to in-context Client ⇅	Effective From ▼	Effective To ⇅	Custodial ⇅	
<input type="radio"/>	<input checked="" type="radio"/>	Pikachu, James			Parent	2019 May 26		<input checked="" type="checkbox"/>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

Total: 2 1 / 10

12.

### 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 a new SDL by clicking on “Add” and enter the public health office where the record will be going.
  - Update the old SDL with an effective to date (Do not delete)
  - Click >Save

13.

### Immigration information

- Add when an immigrant or refugee presents for service.
- **LHN >Client Details >Immigration Information**
- Refugee Information:
  - 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:
  - Arrival Date: Year
  - Country emigrated from
  - Country of birth (optional)
  - Click >Save

#### Immigration Information

Citizen:

Yes  No

Date Citizenship Received:

yyyy/mm/dd 

Immigration File No:

Date Immigration Form Received:

yyyy/mm/dd 

Arrival Date:

yyyy/mm/dd 

Arrival Year:

Immigration Status at Time of Arrival:

▼

Country Emigrated From:

▼

Country Last Resided:

▼

Country Born in:

▼

Province Born in:

Mother's Birth Country:

Father's Birth Country:

14.

### Inactivation

- 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.