Saskatchewan Health Authority	Title: Regina Area: Reviewing and Updating Client Demographics in Panorama Role performing Activity: All	
	Location: Clinical Integration	Department/Unit:
	Document Owner: Clinical Integration Unit – Public Health	<b>Date Prepared:</b> September 18, 2020
	Last Revision:	Date Approved:
	September 15, 2022	September 25, 2020
WORK STANDARD	Related Policies/Documentation: Panorama Policies Gender Identity Immigration information, Management of Records to Updating Personal Inform Updating JOrg for clients Updating the JOrg for clie Updating the JOrg for clie	November 1, 2016 for Children who are adopted ation Moving within the province nts moving out of the province nts lost to follow up
	<ul> <li>Panorama Bulletins</li> <li>Bulletin 002: Indicate whi paper records</li> <li>Bulletin 0051: Refugee Ref</li> <li>Bulletin 52 - JOrg Assignm</li> <li>Bulletin 53 - Inactivation of Work Standards:</li> </ul>	ch Public Health Office has a Client's gistration, nent of Clients; of Clients;
	Regina Area: Client Recor	rd 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
	Last Name: *First Name: Middle Name: Suffix:
	Date of Birth: Age:
	years months days
	Gender:     Gender Identity:     Other Identity:       Male
	Health Card Province:     Health Card Number:       Saskatchewan, Canada Personal Health Number     123456789
	Health Region Organization:
	Add Update Delete
	E     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 UCN card
	• Ensure the legal first and middle names are in proper fields according to HCN card.
	Last Name: * First Name: Middle Name:
	Green Raine Ann
	Last Name:
	Green Raine Ann
	•••
3.	Date of birth:
	Correct based on the Health Card only.
	ů rov
	Date of Birth:
	2019/05/26 Estimated
	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:
	Male 💌
	Health Card Province:
	Health Region Organization:
	Other (Specify)
	Transgender Female to Male
	Transgender Male to Female
	Health Region Organization Undifferentiated
	Regina Qu'Appelle RHA 2022 Aug 16
1	
	In Saskatchewan an individual cannot change their biological sex on their health card until
	they are 18 years of age

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Female	-		•	
Health C	Card Province:		Health Card Number:	
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1	م			
Newfo	oundland and Labrador, Car	ada Personal Health Number		
North	west Territories, Canada Pe	rsonal Health Number		
Nova	Scotia, Canada Personal He	ealth Number		
Nuna	avut, Canada Personal Health	n Number		
Ontar	rio, Canada Personal Health	Number		
Prince	e Edward Island, Canada Pe	rsonal Health Number (PHN)	Identifier	
Queb	ec, Canada Personal Health	Number		
- Royal	l canadian mounted police n	umber		
Saska	atchewan Health Card		-	
<ul> <li>Ph</li> <li>NI</li> <li>Update</li> </ul>	e Delete	<b>match</b> the client's fo office or clinic name	rmer <b>RHA or FNJ</b>	
<ul> <li>Pri</li> <li>NI</li> <li>Update</li> <li>B</li> </ul>	e Delete Health Region Organi	match the client's fo office or clinic name zation ≎	rmer RHA or FNJ Effective From 💌	Effective
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7.	Expand Toggle bars for Address a	and Telephone Number to revie	w and update as necessary.	
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	Addresses			×
	Alternate Names			*
	Additional Identifiers			<b>×</b>
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8.	<b>Telephone numbers</b>	gle bar, <b>data is entered</b> .		
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	Update Delete Set Preferred			
	🖺 Number 🗘	Effective From 🔻	Effective To \$	Preferred *
	mobile contact: 306-719-7894	2014 Oct 06		$\checkmark$
	Total: 1		·	10 🗸
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	• Enter data into all fields t date.	hat are starred. The effective f	rom date will prepopulate w	ith today's
	Telephone Numbers			× 🔝
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	<ul> <li>Click "Apply"</li> </ul>			

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$\bigcirc$		Postal address	PO Box 456 , White City, Saskatchewan, S4W2R2, Canada		2018 Nov 28			1	
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10.	Relationships			
	All clients under the age of 16 years must have a relationship (legal guardian). Prefe guardians are listed.	rably, a	all legal	I
	Client  Search Clients  Client Datails  From the Left Hand Navigation >Client >Relationship			
	Client Warnings			
	Relationships			
	Households Consent Directives			
	Allergies			
	Travel History			
	Click >Add			
	Client Relationships			*
	To create a new record click Add.			Add
	Add Relationship	Apply	Reset	Cancel
	* Relationship to in-context Client: * Relationship from in-context Client:			
	Parent Child T			
	Custodial			
	* Related Client Source:			
	Find in Index      Add Non-Indexed Client			
	* Kelated Client:			
	Pikachu Shelley			
	Telephone Number:			
	Canada V Number: Usage:			
	Address			
	Comments			*
	<ul> <li>Pick applicable "Relationship to in-context client" from drop-down options</li> <li>Pick applicable "Relationship from in-context client" from drop-down option</li> <li>Click &gt;Add Non-Indexed client only</li> <li>Only add a guardian phone number or address if it is different from the child information.</li> <li>Ensure to add all legal guardians.</li> </ul>	s <b>I's dem</b>	ograph	ic

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12.	Service Delivery Location (SDL)	
	<ul> <li>The SDL is where the Child Health Record is located.</li> </ul>	
	<ul> <li>LHN &gt;Client Details &gt;Health Services</li> </ul>	
	<ul> <li>Enter SDL by clicking on "Add" button</li> </ul>	
	Service Delivery Locations	
	To create a new record click Add.	
	<ul> <li>Type in field, starting with city/town location and pick the</li> </ul>	
	Panorama option- The record can be located at a	
	public health office ONLY	
	Add Service Delivery Leasting	
	Add service belivery Location	4
	* Service Delivery Location:	
	* Effective From: To:	
	yyyy/mm/dd	
	Apply Reset	
	<ul> <li>The effective from date will populate with today's date</li> </ul>	_
	$\circ$ 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.	
	<ul> <li>Update the old SDL with an effective to date (Do not delete)</li> </ul>	
	<ul> <li>Click &gt;Save</li> </ul>	
L		

13.	Immigration information					
	• Add when an immigrant or refugee pro	esents for service.				
	• LHN >Client Details >Immigration In	nformation				
	Refugee Information:					
	<ul> <li>Arrival Date: Day, month, year,</li> </ul>	if possible				
	<ul> <li>Immigration status at time of ar</li> </ul>	rival: Convention Refugee				
	<ul> <li>Country emigrated from</li> <li>Country of hitth (ontional)</li> </ul>					
	<ul> <li>Country of birth (optional)</li> </ul>					
	<ul> <li>Click &gt;Save</li> <li>Immigration Information:</li> <li>Arrival Date: Year</li> </ul>					
	<ul> <li>Country emigrated from</li> </ul>					
	$\circ$ Country of birth (optional)					
	<ul> <li>Click &gt;Save</li> </ul>					
	Immigration Information					
	Citizen:	Date Citizenship Received:				
	Ves No	yyyy/mm/dd				
	Immigration File No:	Date Immigration Form Received: yyyy/mm/dd				
	Arrival Date:	Arrival Year:				
	yyyy/mm/dd					
	Immigration Status at Time of Arrival:					
	·					
	Country Emigrated From:	Country Last Resided:				
	-	*				
	Country Born in:	Province Born in:				
	<b>•</b>					
	Mother's Birth Country:	Father's Birth Country:				
14.	Inactivation					
	$\circ$ When a client indicates that they ha	ve moved out of province or they are lost to follow-up (PHNs				
	only).					
	<ul> <li>Follow appropriate bulletins or polic</li> </ul>	y l				
	• Bulletin 53 - Inactivation of Clients					
	<ul> <li>Updating the Health Region Organiz</li> </ul>	ation for clients moving out of the province				
	<ul> <li>Updating the Health Region Organiz</li> </ul>	ation for clients lost to follow up.				