

Panorama Immunization Module Policies

TOPIC:	Client Registration		
APPROVED BY:	Saskatchewan Ministry of Health	DATE APPROVED:	January 24, 2015

POLICY:

All clients eligible to receive immunization services from Public Health must be registered in Panorama.

PURPOSE:

To create a Public Health client record ready for the entry of immunization services and historical immunization records that is readily accessible to those with Panorama access.

PROCEDURE:

Search Client: A manual search will be performed to find the Client in the Panorama Index using at least two different search methods within the Search Clients function.

Search Jurisdictional Registry: After two or more unsuccessful attempts to search the Panorama Index for the Client, users will be able to extend their search to the Panorama Search Jurisdictional Registry.

- If a record exists in the “Jurisdictional Registry” (SCI) for the client, import the Client information from the “Jurisdictional Registry” into a record in Panorama.
- If a record for the client does not exist, proceed with a new Client registration.

Registration should occur within 7 business days or less following notification/presentation to Public Health.

Steps in Process:

1. Using the Basic Search Criteria section in the Search Clients screen, enter the Client’s Saskatchewan Health Card Number or alternate health card number such as an Alberta Health Card Number.
2. If no result is found using Step 1, perform a second search using the Client’s last name, first name, and/or gender.
Note: When searching by name the wild card sign (%) may be used to assist in the search where the correct spelling of the name may be in question.
3. If you still don’t find the Client using Step 2 and you suspect the Client should be there, utilize the **Advanced Search** function employing the most appropriate search criteria (e.g. address, phone number, etc.).
4. If no result found using the basic/advanced search (Steps 1 to 3), go to the Search Jurisdictional Registry and use the Client last name, first name, gender, and/or Saskatchewan Health Card Number if known.
 - a. If Client found in the “Jurisdictional Registry”, User selects the desired Client record for import into Panorama, and uses the **Create to Index** button.
 - b. If Client not found in the “Jurisdictional Registry”, the User must register the Client manually.
5. To manually register a Client use the **Client Quick Entry** button.
Note: Provincial documentation standard: For readability and communication, search for and create the client record using initial capitalization of the names, e.g. John Doe.
Note: Provincial documentation standard: Enter double last names with a dash without spaces (Smith-Jones).
6. Client Quick Entry - Minimum fields for registration include:

- a. Last Name
- b. First Name
- c. Date of Birth
- d. Gender
- e. Health Card Number or other provincial/territorial health card number if available
- f. Telephone Number
- g. Address
- h. Non-Indexed Client Relationship for Custodial Parent/Guardian for Clients less than 16 years of age
- i. When creating a Client record if you are aware that a client has immigrated to Canada¹ you may add this information to the *Immigration Information* screen. See the *Immigration Information* policy.

Note: The Health Region assigned to the Client will default to the User's assigned Health Region. The Client's Health Region may be changed to a different jurisdiction if required.

REFERENCES & RESOURCES:

- Policies:
 - Documentation of Consent -*
<https://www.ehealthsask.ca/services/panorama/Pages/Immunizations.aspx>
 - Immigration Information -*
<https://www.ehealthsask.ca/services/panorama/Pages/Immunizations.aspx>
- Panorama User Guides:
 - Search Client and Put in Context -*
<https://www.ehealthsask.ca/services/panorama/Pages/Access-Training-Resources.aspx>
 - Maintain Client –*
<https://www.ehealthsask.ca/services/panorama/Pages/Access-Training-Resources.aspx>
- Training Portal :
 - Manage your Client –*
<https://www.ehealthsask.ca/services/panorama/Pages/Access-Training-Resources.aspx>

¹ Note: Immigrants and others without a Saskatchewan Health Card Number will be registered with a Client ID (which is a unique number).