

## Panorama Immunization Module Policies

TOPIC:	<b>Pseudonym Option (Client Privacy Request)</b>		
APPROVED BY:	<b>Saskatchewan Ministry of Health</b>	DATE APPROVED:	<b>January 20, 2015</b>

### POLICY:

Pseudonyms may be initiated on client request and will be documented as an indeterminate client record using a standard convention to ensure client anonymity.

### PURPOSE:

To ensure that Panorama users are consistent in the recording of a pseudonym for a client requesting additional privacy measures to protect their anonymity. A standard convention will ensure clinicians can identify and access the complete client record when there is a need to know to provide safe clinical care.

### PROCEDURE:

Panorama users review the current version of *Protecting the Privacy of Your Immunization Record* (PHNP 63) with the client and when appropriate discuss the additional privacy options available to clients in Panorama. The options include blocking the display of information (consent blocks) and the use of pseudonyms.

The Panorama user indicates to the client that blocking the display of information is the preferred approach for managing a client's request for additional privacy but that a pseudonym can be used if the client indicates that identifying their true personal identity could be a barrier to receiving services.

If the client requests the use of a pseudonym the Panorama user will need to determine if there is already a *determinate* client record in Panorama and decide in consultation with the client if the information in that record should all be moved to the new *indeterminate* client record.<sup>1</sup>

Assign a pseudonym (e.g. PNSHHE197012) using this standard convention:

- PN – always used for the first two letters – to indicate pseudonym
- SH = first two letters of the client's first name – e.g. **Sh**egirl
- HE = first two letters of the client's last name – e.g. **He**rlastname
- 1970 = Birth year (YYYY)
- 12 = Birth month (MM)

An indeterminate client record with a pseudonym is created according to the following steps:

- In the Search Client screen perform a Basic Search (at least one search is mandatory in Panorama before the Create option is available).
- In the Create Client screen:
  - Check the **Indeterminate Client** box.
  - Do **not** enter any information in the **Last Name** field.
  - Enter the pseudonym (using the standard convention) in the mandatory **First Name** field.

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<sup>1</sup> The clinical risk associated with a client having more than one client record in Panorama includes challenges with supporting clinical decision making and delivering service.

- Complete the **Gender** field.
- Do **not** enter any information in the **Health Card Number** field.
- An estimated age or date of birth can be added if client agrees.
- Current address and telephone details should be recorded accurately.
- Save the indeterminate client and complete the documentation of services as required.

To access the record for a client with a pseudonym, the user can *Search Clients* using the pseudonym or using a wild card (PN%).

## **REFERENCES & RESOURCES:**

- *Protecting the Privacy of Your Immunization Record* fact sheet, Saskatchewan Ministry of Health, November 2014 –  
<https://www.ehealthsask.ca/services/panorama/Privacy%20and%20Immunization%20Records/PHNP%2063%20-%20Privacy%20Imm%20Records%20Nov%202014.pdf>
- *Privacy and Security in Panorama* –  
<https://www.ehealthsask.ca/services/panorama/Pages/Immunizations.aspx>
- *Privacy Workshop Recording* –  
<https://vimeo.com/album/4045016/video/184041341>
- *Policies:*
  - Consent Blocking - Privacy* –  
<https://www.ehealthsask.ca/services/panorama/Pages/Access-Training-Resources.aspx>
  - Client Registration* –  
<https://www.ehealthsask.ca/services/panorama/Pages/Access-Training-Resources.aspx>
- *Privacy and Immunization Records*
  - Panorama JSAP Bullet Point Summary* –  
<https://www.ehealthsask.ca/services/panorama/Pages/Immunizations.aspx>
  - Panorama Immunization Management System Joint Service and User Access Policy* – <https://www.ehealthsask.ca/services/panorama/Pages/Immunizations.aspx>