

## Panorama Immunization Module Policies

TOPIC:	<b>Updating Personal Information</b>		
APPROVED BY:	<b>Saskatchewan Ministry of Health</b>	DATE APPROVED:	<b>January 17, 2015</b>

### **POLICY:**

Confirmation of a client's personal information is required for each client encounter.

### **PURPOSE:**

Accurate recording of a client's personal information in Panorama is vital for appropriate client follow-up, client safety, and regional report functionality.

### **PROCEDURE:**

At each client encounter the Panorama user will review personal information with the client/guardian and will update the client record accordingly.

Minimal data to be reviewed includes:

- Name
- Date of Birth
- Gender
- Health Card Number (HSN)
- Phone Number
- Address
- Relationship – for those less than 16 years of age

Updating information:

- **Effective From** is the date you are adding the new information.
- Access and complete the mandatory fields using the **Create Non-Indexed Client** button in the Maintain Client Relationships screen.
- If a client provides an immunization record from a country outside Canada document the immigration information in Client Details using the *Immigration Information* screen.

### **REFERENCES & RESOURCES:**

- *Policies:*
  - Client Registration –*  
<https://www.ehealthsask.ca/services/panorama/Pages/Access-Training-Resources.aspx>
  - Immigration Information -*  
<https://www.ehealthsask.ca/services/panorama/Pages/Immunizations.aspx>
- *Panorama User Guides:*
  - Maintain Client -*  
<https://www.ehealthsask.ca/services/panorama/Pages/Access-Training-Resources.aspx>
  - Relationships and Households -*  
<https://www.ehealthsask.ca/services/panorama/Pages/Immunizations.aspx>