

User Guide

GENERAL

Search Clients

- Perform Basic Search
- Perform Advanced Search
- Perform functions once client is found
- Search Jurisdictional Registry

Document History

[illegible]

Table of contents

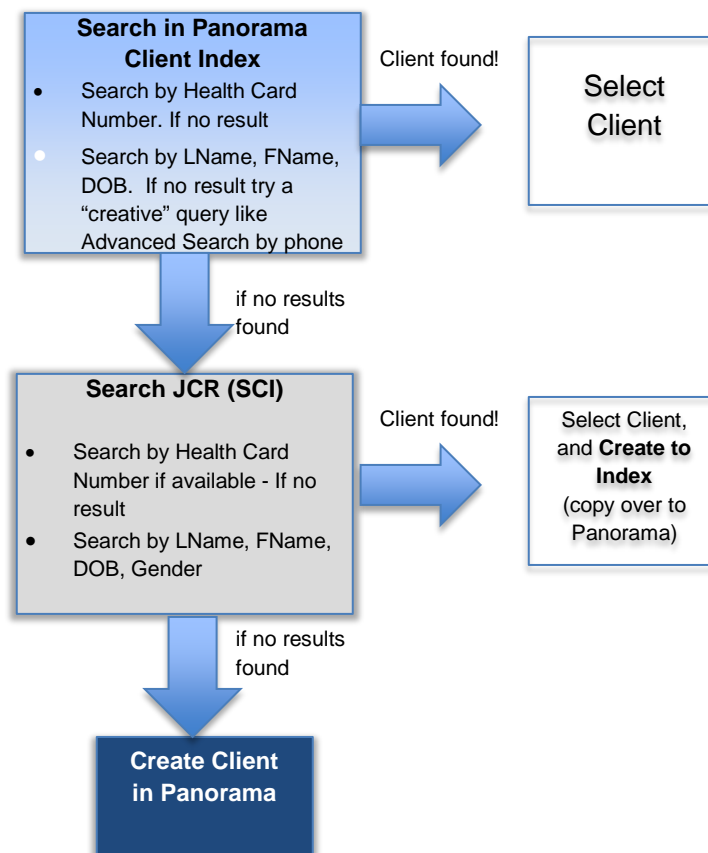
A. Introduction	4
B. Steps for searching a client	7
1.0 Steps to perform a basic search	7
2.0 Steps to perform an advanced search.....	12
3.0 Steps to take once search results are populated	15
4.0 Search Jurisdictional Registry (SCI).....	20

NOTE: For details on creating and managing Client information, see the Maintain Client User Guide.

A. Introduction

The SEARCH CLIENTS screen allows a User to search for an existing Client in the Panorama Client Index as well as a Jurisdictional (Provincial) Client Registry (JCR). This guide lists the steps to perform a basic client search, an advanced search, and to search the Jurisdictional Client Registry (the Shared Client Index or SCI in order to find and create the Client within Panorama).

A thorough search should be done before creating a new client in Panorama. This will reduce the number of duplicate clients in the system and ensure health information is recorded on the correct record. Common names and nicknames can make this challenging. The following process shows the steps to perform a thorough search.



- The BASIC SEARCH CRITERIA section contains items to support the need to find a specific client.
- The ADVANCED SEARCH CRITERIA section contains additional identification items to support the need to pinpoint specific clients (e.g. telephone number) or create a group of clients (e.g. by a Date of Birth range for a specific School).
- The SEARCH JURISDICTIONAL REGISTRY (SEARCH JCR) section contains items to support searching the Shared Client Index (SCI). If the client is found, the user may copy the demographic data over to Panorama.

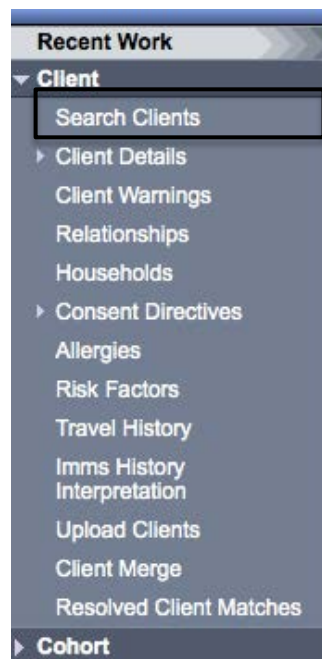
ASSUMPTIONS: The user has successfully logged into Panorama. The user has the appropriate security permissions to perform the assigned tasks.

PRE-REQUISITES: User is in the IMMUNIZATIONS module (tab).


RELATED USER GUIDES: Maintain Client.

MENU ACCESS:



From the IMMUNIZATIONS tab, select CLIENTS > SEARCH CLIENTS from left hand navigation to access SEARCH CLIENTS screen.



NOTE: The SEARCH CLIENTS screen lets you access clients in the Panorama Client Index and is of core service to all functional areas. Search Client allows a User to search for an existing Client in either the System Client Index or a Jurisdictional Client Registry.

TIP: To expand sections on Panorama click the  Show hyperlink on the section header (e.g. Client Preview header).

Search Clients

Basic Search Criteria

[Hide Basic Search Criteria](#)

[Search Jurisdictional Registry](#)

☐ Phonetic Matches
☐ Exclude Indeterminate Clients
☒ Include Inactive Clients

Wildcard characters % (multiple letters) and _ (single letters) can be used on any text field - except on Client Number and on First and Last Name when matching phonetically. Wildcard-only searches will be treated as blank searches.

Client Number:

(Client ID, Health Card Number, Additional IDs)

Client Number Type:

Last Name:


First Name:

Middle Name:

Gender:

Date of Birth or Age

[Hide Date of Birth or Age](#)

☒ Not Applicable
☐ Date of Birth / / 

yyyy

mm

dd

☐ Age

Year(s)

Units

Range ±

Year(s)

Units

Jurisdictional Organization:

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization]

Find 

Search

Retrieve

Clear

Advanced Search

Client Preview

Show Client Preview

Client Index: Search Results

Show Search Results

B. Steps for searching a client

1.0 Steps to perform a basic search

Pre-requisites: The user has successfully logged into Panorama. User is in the **Immunization module** (tab).

1. Select Clients > Search Clients from left hand navigation. Search Clients screen displays.

In the Search Clients screen, the Basic Search Criteria section is used to perform a general search. There are many options to enter search criteria in the Basic Search Criteria section, as described in the following steps.

Search Clients

[Search Jurisdictional Registry](#)

Basic Search Criteria [Hide Basic Search Criteria](#)

Wildcard characters % (multiple letters) and _ (single letters) can be used on any text field - except on Client Number and on First and Last Name when matching phonetically. Wildcard-only searches will be treated as blank searches.

☐ Phonetic Matches
☐ Exclude Indeterminate Clients
☒ Include Inactive Clients
☐ Display Results on Single Page

Client Number: (Client ID, Health Card Number, Additional IDs)

Client Number Type:

Last Name: **First Name:** **Middle Name:**

Gender:

Date of Birth or Age [Hide Date of Birth or Age](#)

☒ Not Applicable
☐ Date of Birth / /
☐ Age
☐ Date of Birth From / / To / /

Jurisdictional Organization: ☐ Exact Match
To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization] [Find](#)

Search [Retrieve](#) [Clear](#) [Advanced Search](#)

2. If you have the **health card number**, use this information to start your search. Enter this number in the **Client Number** field. Enter **Client Number Type:** Health Card Number. The Client Number field may also be used for searching by Panorama ID or Alternate ID.

NOTE: Due to the nightly update from SCI, most Client Records **should** have a Saskatchewan Health Card Number, if one is available for them. Public Health users should always try and obtain the HSN from Clients at point of service and record it in Panorama, if it is missing.

NOTE: You must enter at least one search criteria. If you are searching by HSN – you must select “Saskatchewan” Health Card Number “Type” and enter the number in order to save it.

NOTE: Perform an exhaustive (creative!) search in both Panorama and the Jurisdictional Registry before creating a new client.

TIP: At any time while searching on the Search Clients screen, the User may clear the search criteria, using the Clear button. The System will set all search criteria to a blank or default value, whatever is applicable to the field.

TIP: Wildcard characters (%) can be used for matching none, one or multiple characters and (_) for matching a single character on any text field except Client Number and First and Last Name when matching phonetically. Examples: Jo%n matches John, Joan, Jon, Johnson, Johan, Joann, etc. Jo%n matches John, Joan, etc. – for searching Panorama only. SCI applies it's own "probabilistic" search and it is best to provide last name, first name, and DOB and Gender where possible.

Then click SEARCH.

The search results are displayed on the bottom of the page. If the search results exist, **Contains Data** displays on the header and results section.

- If the client is the correct one, check the box beside the client and select **Set in Context**, or to Preview the client record, select **Preview**. See Section 3 in this user guide for further information.

If the correct client does not display in the Search Results section, clear any search criteria that did not display a result and try again.

- Enter the Last Name, First Name of the client.. You may want to use a wildcard to replace part of any last or first name, to broaden your search results or to accommodate a variety of spellings and nicknames (e.g. Tam% would find both Tamara or Tammy and Tammy Jo).
- In the Date of Birth or Age sub-section, optionally select the Date of Birth radio button or the Age radio button.

- Click SEARCH.

TIP: At any time while searching in the Search Clients screen, the User may indicate to retrieve the last search criteria, using the RETRIEVE button. If a search for Client has occurred during the User's current web session, the System will populate the search criteria with the values used in the last search so you can review and adjust if necessary.

NOTE: PHONETIC MATCHES: A phonetic search looks for names that are similar to that entered in the name field (first, middle, last). For example:
When you search for "Stephen", "Steven" is a valid match. When you search for "Dawn", "Don" is a valid match. When selected, wildcard characters are not allowed.

The search results are displayed on the bottom of the page. If the search results exist, **Contains Data** displays on the header and results section.

Search Clients

Basic Search Criteria ✓ Contains Data Hide Basic Search Criteria

[Search Jurisdictional Registry](#)

Wildcard characters % (multiple letters) and _ (single letters) can be used on any text field - except on Client Number and on First and Last Name when matching phonetically. Wildcard-only searches will be treated as blank searches.

☐ Phonetic Matches
☐ Exclude Indeterminate Clients
☒ Include Inactive Clients

Also, the CLIENT INDEX: SEARCH RESULTS header, CONTAINS DATA, displays a check mark and lists clients matching the search criteria.

Client Preview Show Client Preview

Client Index: Search Results ✓ Contains Data Hide Search Results

1 result found. Click on Client ID to see full client information. Click on radio button to select.

Row Actions: [Preview](#) [Set in Context](#) [Imms Client Profile](#) [Update](#) [Generate Map](#) [Create Client](#) [New Search](#)

Client ID	Health Card Number	Last Name	First Name	Gender	Date Of Birth	Determinate/Indeterminate	Active
<input type="checkbox"/> 608		Gray	Amy	Female	2010 Oct 01	Determinate	Active

Total: 1 Page 1 of 1 Jump to page:

Other (optional) search criteria are listed in the following steps.

7. Select the PHONETIC MATCHES check box to search for names that sound alike.

Basic Search Criteria Hide Basic Search Criteria

[Search Jurisdictional Registry](#)

Check the Phonetic Matches checkbox to include Phonetic search results.

Wildcard characters % (multiple letters) and _ (single letters) can be used on any text field - except on Client Number and on First and Last Name when matching phonetically. Wildcard-only searches will be treated as blank searches.

☐ Phonetic Matches
☐ Exclude Indeterminate Clients
☒ Include Inactive Clients

8. Select the EXCLUDE INDETERMINATE CLIENTS check box to exclude indeterminate clients from the search criteria. Indeterminate clients are those clients that have been marked as not having enough information to sufficiently identify the client (e.g. the client's name is a First Name or initial only, and no health card number, address or telephone number is available).

Basic Search Criteria Hide Basic Search Criteria

[Search Jurisdictional Registry](#)

Check the Exclude Indeterminate Clients checkbox to exclude them in the search results.

Wildcard characters % (multiple letters) and _ (single letters) can be used on any text field - except on Client Number and on First and Last Name when matching phonetically. Wildcard-only searches will be treated as blank searches.

☐ Phonetic Matches
☐ Exclude Indeterminate Clients
☒ Include Inactive Clients

- Basic Search Criteria

Hide Basic Search Criteria

[Search Jurisdictional Registry](#)

Wildcard characters % (multiple letters) and _ (single letters) can be used on any text field - except on Client Number and on First and Last Name when matching phonetically. Wildcard-only searches will be treated as blank searches.

Uncheck the Include Inactive Clients checkbox to exclude them from search results.

☐ Phonetic Matches

☐ Exclude Indeterminate Clients

☒ Include Inactive Clients

- Date of Birth or Age

Hide Date of Birth or Age

☒ Not Applicable
 ☐ Date of Birth

/ /

yyyy mm dd


☐ Age

Year(s)

Units

Range ± Year(s)

Units

- Jurisdictional Organization:**
To specify an Organization, first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.
- Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization]
- Click on the Find Button to specify an Organization.
- Find 

Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization]

Find

Close X

TypeSearch

Start typing the name of the Organization. Matches will begin to appear below.
Select the match with the keyboard or mouse.

Organization Name:

Show Info

Select

- Page 10 of 24

13. Click SEARCH.

The search results are displayed on the bottom of the page. If the search results exist, **Contains Data** displays on the header and results section.

14. If the client is the correct one, check the box beside the client and select **Set in Context**, or to Preview the client record, select **Preview**. See Section 3 in this document for further information.

If the correct client does not display in the Search Results section, clear any search criteria that did not display a result and try an Advanced Search (see next section).



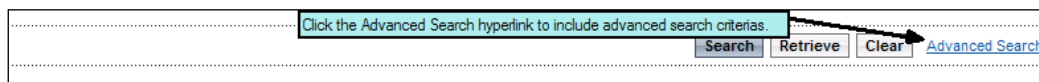
TIP: Searching a client through a phone number or address, or by School can be done through the ADVANCED SEARCH CRITERIA section.

NOTE: Saskatchewan policy does not permit recording Website/ Chatroom data at this time.

2.0 Steps to perform an advanced search

PRE-REQUISITES: The user has successfully logged into Panorama. User is in the IMMUNIZATION module (tab).

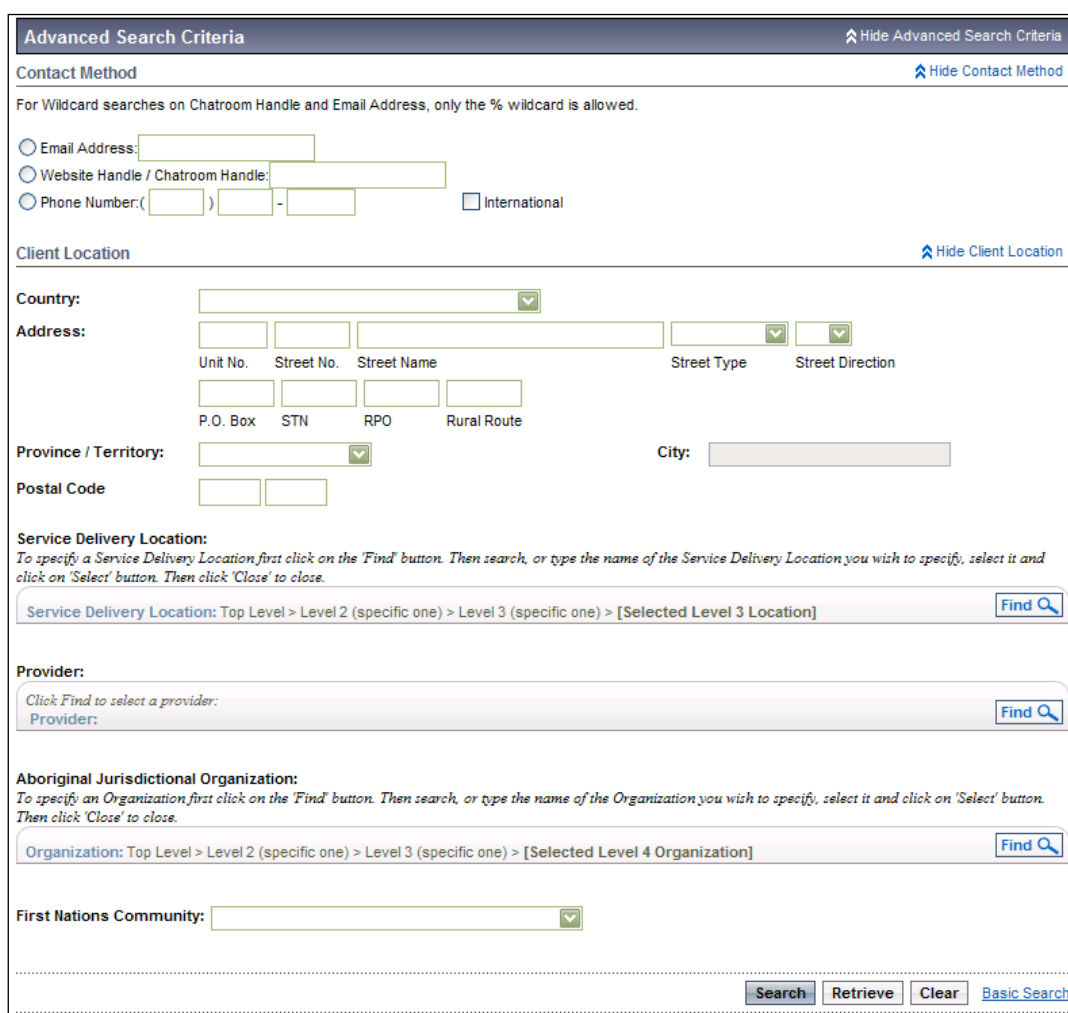
1. From the SEARCH CLIENTS screen, click the Advanced Search hyperlink.



Click the Advanced Search hyperlink to include advanced search criteria.

Search Retrieve Clear [Advanced Search](#)

2. The ADVANCED SEARCH CRITERIA section displays.



Advanced Search Criteria [Hide Advanced Search Criteria](#)

Contact Method [Hide Contact Method](#)

For Wildcard searches on Chatroom Handle and Email Address, only the % wildcard is allowed.

☐ Email Address:

☐ Website Handle / Chatroom Handle:

☐ Phone Number: () - ☐ International

Client Location [Hide Client Location](#)

Country:

Address:

Unit No. Street No. Street Name Street Type Street Direction

P.O. Box STN RPO Rural Route

Province / Territory: **City:**

Postal Code

Service Delivery Location:

To specify a Service Delivery Location first click on the 'Find' button. Then search, or type the name of the Service Delivery Location you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Service Delivery Location: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 3 Location] [Find](#)

Provider:

Click Find to select a provider:

Provider: [Find](#)

Aboriginal Jurisdictional Organization:

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization] [Find](#)

First Nations Community:

Search Retrieve Clear [Basic Search](#)

3. In the ADVANCED SEARCH CRITERIA section, enter the search criteria as needed. Remember the more details you select mean you are forcing an exact match - the Client will not be found if ANY of the search criteria selected does not match.

4. In the CONTACT METHOD sub-section, optionally enter EMAIL ADDRESS or PHONE NUMBWE if known. The wildcard % may be used.

Contact Method [Hide Contact Method](#)

For Wildcard searches on Chatroom Handle and Email Address, only the % wildcard is allowed.

☐ Email Address:

☐ Website Handle / Chatroom Handle:

☐ Phone Number: () - ☐ International

5. In the CLIENT LOCATION sub-section, enter client location details if known – e.g. search by street address or postal code.

Client Location [Hide Client Location](#)

Country:

Address:

Unit No. Street No. Street Name Street Type Street Direction

P.O. Box STN RPO Rural Route

Province / Territory: City:

Postal Code

6. To select SERVICE DELIVERY LOCATION, click FIND.

Service Delivery Location:
To specify a Service Delivery Location first click on the 'Find' button. Then search, or type the name of the Service Delivery Location you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Service Delivery Location: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 3 Location] [Find](#)

The section for finding a SERVICE DELIVERY LOCATION displays.

Service Delivery Location:
To specify a Service Delivery Location first click on the 'Find' button. Then search, or type the name of the Service Delivery Location you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Service Delivery Location: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 3 Location] [Find](#)

Type Search [Close X](#)

Start typing the name of the Service Delivery Location. Matches will begin to appear below.
Select the match with the keyboard or mouse.

SDL Name: [Show Info](#)

[Select](#)

7. Use TYPE tab or SEARCH tab for specifying a SDL. In the Type tab, enter the complete name or the first few characters of the SDL Name. The type-ahead functionality displays the SDL names starting with the characters that you enter. Select the appropriate SDL.
8. Click SELECT to select the SDL NAME. Or click the CLOSE button to collapse the section without making a selection.

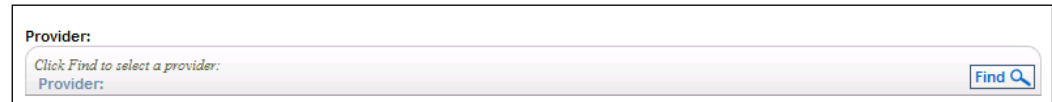
The section closes and the SDL field is populated with your selection.

NOTE: Once an SDL is selected, click on SHOW INFO button to see more information for the SDL of interest. Only Clients who have the selected SDL will display in the Search Results.

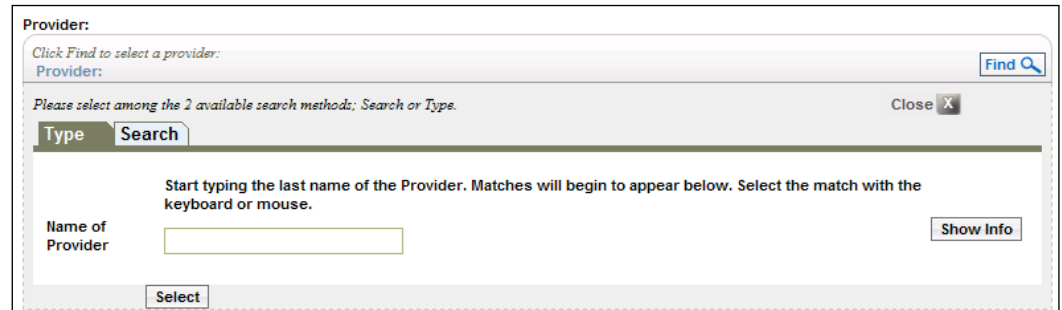
NOTE: Once a PROVIDER is selected, click on SHOW INFO button to see more information for the Provider of interest. A client may have a Provider on record. This information is stored in the Health Services section of the Client Details section.

NOTE: Once an ORGANIZATION is selected, click on SHOW INFO button to see more information for the Organization of interest.

9. Click FIND to select a PROVIDER.



The section for finding a Provider displays.



10. Use the **Type** tab or **Search** tab to specify a Provider. In the Type tab, enter the last name or the first few characters of the Name of Provider.

Provider names starting with the characters that you entered are displayed.

11. Select the PROVIDER from the drop-down list.
12. Click the SELECT button to select the Provider or click the CLOSE button to collapse the section without making a selection.
13. If your Client is not found, search the **Jurisdictional Client Registry (SCI)**.

Client records that are displayed in Advanced search results may be saved as a Cohort. See the Mass Immunization and Reminder Recall User Guides for more details.

Cohort and Mass Immunization functionality are planned for implementation post Go Live.

3.0 Steps to take once search results are populated

PRE-REQUISITES: The user has successfully logged into Panorama. User is in the IMMUNIZATION module (tab). Search criteria has been entered and Search results are populated by the application in the CLIENT INDEX: SEARCH RESULTS section.

1. In the CLIENT INDEX: SEARCH RESULTS section, select the radio button corresponding to client record desired.
2. Select the radio button corresponding to the desired client record to perform any of the following tasks.

NOTE: Unless the radio button next to the client record is selected, Row Action buttons will not be activated.

Client Preview Show Client Preview

Client Index: Search Results Contains Data Hide Search Results

8 results found. Click on Client ID to see full client information. Click on radio button to select.

Select All Client Quick Entry Create Client New Search

Row Actions: Preview Set in Context Imms Client Profile Update Generate Map Create Cohort

	Client ID	Health Card Number	Last Name	First Name	Gender	Date Of Birth	Determine/Indeterminate	Active
<input type="checkbox"/>	348		test	f			Determinate	Active
<input type="checkbox"/>	345		TestClient-JS	John	Male	2013 Oct 01	Determinate	Active
<input type="checkbox"/>	346		TestClient-JS2	Jeremy	Male	2009 Apr 04	Determinate	Active
<input checked="" type="checkbox"/>	6		Tester	Baby Girl	Female	2014 Jun 04	Determinate	Active
<input type="checkbox"/>	7		Tester	Cousin	Male	2010 Feb 04	Determinate	Active
<input type="checkbox"/>	1	101010101	Tester	eHS	Female	2012 Jul 27	Determinate	Active
<input type="checkbox"/>	347		TestIndeterminate	NoGender		2002 Aug 14	Determinate	Active
<input type="checkbox"/>	4		TestPPD	Test	Male	1989 Jan 01	Determinate	Active

Total: 8 Page 1 of 1 Jump to page:

TIP: Use CLIENT PREVIEW to quickly see client details to confirm if this is the right client record needed. This avoids accessing their full record.

- Preview client details
- Set Client In Context
- View Immunization Client Profile
- Update Client Information
- Generate Map (this functionality may not be available)
- Create Cohort (this functionality will be discussed in the Reminder Recall user guide)
- Client Quick Entry
- Create Client
- New Search

3. TO PREVIEW CLIENT DETAILS: Select client and click PREVIEW. This populates the Client Preview section of the Basic Search screen with some additional client details to help confirm if you've found the correct Client.

Client Preview

Contains Data

Hide Client Preview

Client Id:

345

Additional ID Type

Additional Id

Health Card Number:

-

Last Name:

TestClient-JS

First Name:

John

Middle Name:

-

Gender:

Male

Date of Birth:

2013 Oct 01

Age:

10month(s) 13day(s)

Preferred Alternate Name:

-

Health Authority:

Saskatoon RHA

Preferred Address:

112- Sask Street
Saskatchewan Canada S7N0W0

Preferred Phone Number:

(306) 555-4332

4. TO SET CLIENT IN CONTEXT: Select client and click SET IN CONTEXT.

Client Index: Search Results

Contains Data

Hide Search Results

8 results found.

Click on Client ID to see full client information. Click on radio button to select.

Select All

Client Quick Entry

Create Client

New Search

Row Actions:

Preview

Set in Context

Imms Client Profile

Update

Generate Map

Create Cohort

	Client ID	Health Card Number	Last Name	First Name	Gender	Date Of Birth	Determinate/Indeterminate	Active
<input type="checkbox"/>	348		test	f			Determinate	Active
<input checked="" type="checkbox"/>	345		TestClient-JS	John	Male	2013 Oct 01	Determinate	Active

Search Clients

?

Client ID 345 has been set into UI Context.

Search Jurisdictional Registry

Basic Search Criteria

Contains Data

Hide Basic Search Criteria

The SEARCH CLIENTS screen re-displays. Message “Client ID xxx has been set into UI Context.”, where xxx is the system-generated client ID corresponding to the client, displays in the Header.

5. TO VIEW IMMUNIZATION CLIENT PROFILE: Select client and click IMMS CLIENT PROFILE.

Client Index: Search Results

Contains Data

Hide Search Results

8 results found.

Click on Client ID to see full client information. Click on radio button to select.

Select All

Client Quick Entry

Create Client

New Search

Row Actions:

Preview

Set in Context

Imms Client Profile

Update


Generate Map

Create Cohort

	Client ID	Health Card Number	Last Name	First Name	Gender	Date Of Birth	Determinate/Indeterminate	Active
<input type="checkbox"/>	348		test	f			Determinate	Active
<input checked="" type="checkbox"/>	345		TestClient-JS	John	Male	2013 Oct 01	Determinate	Active

This automatically puts the client into context and displays the CLIENT IMMUNIZATION PROFILE screen. (See the Client Immunization Profile User Guide for more details.)

Client Immunization Profile

 [Warnings](#)

ACTIVE

Client ID:
345

Name(First,Middle,Last)/Gender:
John TestClient-JS / Male

Health Card No:
-

Date of Birth / Age:
2013 Oct 1 / 10 mos 13 days

Phone Number:
(306)-555-4332(Primary home)

Jurisdiction Info:
Sample Jurisdictional Organization,Saskatoon RHA

Additional ID Type / Additional ID:
Provincial health service provider identifier / -

Client Immunization Profile

✓ Contains Data

⌵ Hide Client Immunization Profile

Immunizing Agent						
DTaP-IPV-Hib	2014 Feb 04					
MMR-Var	OX 2014 Aug 04					

O - The status for this immunization has been overridden.

X - Some or part of the vaccine did not meet local schedule.

Antigen Count

✓ Contains Data

⌵ Show Antigen Count

Immunization Forecast (by Agent)

⌵ Show Immunization Forecast (by Agent)

Deferrals

⌵ Show Deferrals

Invalid/Uncounted Immunizations

✓ Contains Data

⌵ Show Invalid/Uncounted Immunizations

Special Considerations

⌵ Show Special Considerations

Reminder/Recall Count

⌵ Show Reminder/Recall Count

TB Skin Tests and Follow Ups

⌵ Show TB Skin Tests and Follow Ups

NOTE: The row actions relate to the “found” clients in the results list. The buttons on the right side (Client Quick Entry, Create Client, and New Search) are used when the client is NOT Found.

6. TO UPDATE CLIENT INFORMATION: Select the client and click UPDATE.

Client Index: Search Results ✓ Contains Data ⬆ Hide Search Results

8 results found. Click on Client ID to see full client information. Click on radio button to select.

Select All Client Quick Entry Create Client New Search

Row Actions: Preview Set in Context Imms Client Profile
Update Generate Map Create Cohort

	Client ID	Health Card Number	Last Name	First Name	Gender	Date Of Birth	Determine/Indeterminate	Active
<input type="checkbox"/>	348		test	f			Determine	Active
<input checked="" type="checkbox"/>	345		TestClient-JS	John	Male	2013 Oct 01	Determine	Active

PERSONAL INFORMATION screen displays. Client is set into context. User can edit client data on this screen and click Save.

Personal Information ? 🖨

Warnings ACTIVE

Client ID: 345 Name(First,Middle,Last)/Gender: John TestClient-JS / Male Health Card No: - Date of Birth / Age: 2013 Oct 1 / 10 mos 13 days

Phone Number: (306)-555-4332(Primary home) Jurisdiction Info: Sample Jurisdictional Organization,Saskatoon RHA Additional ID Type / Additional ID: Provincial health service provider identifier / -

Client ID 345 has been set into UI Context.

Save Reset Save and Sync with Registry Cancel

7. TO CREATE A NEW CLIENT: Click CLIENT QUICK ENTRY, or CREATE CLIENT.

NOTE: The “Client Quick Entry” screen has less fields and fewer data choices than the “Create Client” screen. It is streamlined so that the user can quickly enter pertinent demographic data and then click a button, taking the user to the “Add Immunization” screen.

Client Index: Search Results ✓ Contains Data ⬆ Hide Search Results

8 results found. Click on Client ID to see full client information. Click on radio button to select.

Select All Client Quick Entry Create Client New Search

Row Actions: Preview Set in Context Imms Client Profile
Update Generate Map Create Cohort

	Client ID	Health Card Number	Last Name	First Name	Gender	Date Of Birth	Determine/Indeterminate	Active
<input type="checkbox"/>	348		test	f			Determine	Active
<input checked="" type="checkbox"/>	345		TestClient-JS	John	Male	2013 Oct 01	Determine	Active

CREATE CLIENT or the CLIENT QUICK ENTRY screen displays.

Create Client

Save Clear Save and Sync with Registry Cancel

* Required field

Personal Information

Hide Personal Information

☐ Indeterminate Client Subject ID: -

Last Name: * First Name:

Middle Name: Suffix:

☐ Estimated Click on the estimated checkbox to enable the age fields.

Date of Birth: / / Age: years months days (only required under 1 year) Gender:

yyyy mm dd

Enter required data and click SAVE. Refer MAINTAIN CLIENT USER GUIDE for more details.

8. TO START A NEW SEARCH: Click NEW SEARCH.

Client Index: Search Results

Contains Data Hide Search Results

8 results found. Click on Client ID to see full client information. Click on radio button to select.

Select All Client Quick Entry Create Client **New Search**

Row Actions: Preview Set in Context Imms Client Profile Update Generate Map Create Cohort

	Client ID	Health Card Number	Last Name	First Name	Gender	Date Of Birth	Determinate/Indeterminate	Active
<input type="checkbox"/>	348		test	f			Determinate	Active
<input checked="" type="checkbox"/>	345		TestClient-JS	John	Male	2013 Oct 01	Determinate	Active

SEARCH CLIENTS screen re-displays. The System will clear both the Search Results and the Search Criteria and resumes with Basic Search. Repeat steps in SECTION 1.0 and 2.0 of this guide to search for another client.

Search Clients

Hide Basic Search Criteria

Basic Search Criteria

[Search Jurisdictional Registry](#)

Wildcard characters % (multiple letters) and _ (single letters) can be used on any text field - except on Client Number and on First and Last Name when matching phonetically. Wildcard-only searches will be treated as blank searches.

☐ Phonetic Matches

☐ Exclude Indeterminate Clients

☒ Include Inactive Clients

Client Number:

(Client ID, Health Card Number, Additional IDs)

Client Number Type:

Last Name: First Name: Middle Name:

Gender:

4.0 Search Jurisdictional Registry (SCI)

If the client is not found in Panorama, the user may search the Jurisdictional Registry, which is Saskatchewan's Shared Client Index (SCI). If the client is found and selected, the demographic record can then be copied from the Registry to Panorama. The client's address, phone number, HSN, and other demographic information are copied over to the Panorama client index where they can be managed, and updated, if required.

The records brought over from SCI will be synced on an ongoing basis to reflect any updates made. This is a one-way feed from SCI to Panorama matching on Clients in the Index who have an HSN, or other Provincial Health Card Number recorded.

The steps to search the SCI are as follows:

Pre-requisites: The user has successfully logged into Panorama. User is in the **Immunization module** (tab). User has performed at least one basic and/or advanced search before searching the Jurisdictional Registry to avoid creating duplicate clients in Panorama.

1. Select Clients > Search Clients from left hand navigation. Search Clients screen displays.

Search Clients ? 📄

[Search Jurisdictional Registry](#) ←

Basic Search Criteria ⬆ Hide Basic Search Criteria

Wildcard characters % (multiple letters) and _ (single letters) can be used on any text field - except on Client Number and on First and Last Name when matching phonetically. Wildcard-only searches will be treated as blank searches.

☐ Phonetic Matches
☐ Exclude Indeterminate Clients
☒ Include Inactive Clients
☐ Display Results on Single Page

Client Number:
(Client ID, Health Card Number, Additional IDs)

Client Number Type:

Last Name: **First Name:** **Middle Name:**

Gender:

Date of Birth or Age ⬆ Hide Date of Birth or Age

☒ Not Applicable

☐ Date of Birth / /
yyyy mm dd

☐ Age
Units Year(s) Units

☐ Date of Birth From / / To / /
yyyy mm dd yyyy mm dd

Jurisdictional Organization: ☐ Exact Match

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization] Find 🔍

Search Retrieve Clear Advanced Search

TIP: At any time while searching on the Search Jurisdictional Registry screen, the User may indicate to clear the search criteria, using the CLEAR button. The System will set all search criteria to a blank or default value, whatever is applicable to the field.

At any time while searching on the Search Jurisdictional Registry screen, the User may indicate to retrieve the last search criteria, using the RETRIEVE button. If a search for Client has occurred during the User's current web session, the System will populate the search criteria with the values used in the last search.

2. Select the hyper-link **Search Jurisdictional Registry**.

The Search Jurisdictional Registry screen displays.

Search Jurisdictional Registry

[Search Clients](#) Hide Search Criteria

Wildcard characters % (multiple letters) and _ (single letters) can be used on any text field - except on Client Number and on First and Last Name when matching phonetically. Wildcard-only searches will be treated as blank searches.

Client Number:

Client Number Type:

Last Name: First Name:

Date of Birth: / / Gender:

Country:

Address:

Unit No. Street No. Street Name Street Type Street Direction

P.O. Box STN RPO Rural Route

Province / Territory: City:

Postal Code:

Phone Number: () - ☐ International

Email Address:

Jurisdictional Registry: Search Results Hide Search Results

Row Actions:

Jurisdictional ID	Health Card Number	Last Name	First Name	Gender	Date Of Birth	Address
Total: 0						

Page 1 of 1 Jump to page:

3. If you have the **health card number**, use this information to start your search. Enter this number in the **Client Number** field. Enter the **Client Number Type**.

Search Jurisdictional Registry

[Search Clients](#) Contains Data Hide Search Criteria

Wildcard characters % (multiple letters) and _ (single letters) can be used on any text field - except on Client Number and on First and Last Name when matching phonetically. Wildcard-only searches will be treated as blank searches.

Client Number:

Client Number Type:

4. Then click SEARCH.

TIP: Once you have clicked Search, you can Hide the Search Criteria section to allow the Search Results to move closer to the top of your screen.

If the search results do not display the client, clear the search criteria and try to find the client using name and date-of-birth search (go to step 8).

- The **Create Client** screen displays with the client's demographic contents brought over from the Jurisdictional Registry (SCI).

NOTE: When a client record is brought over from the Registry to the Panorama index, the Health Number is included, but the Province of the Health number is not. It is therefore, very important for the user to add this information to the client record.

NOTE: There is a nightly update from SCI to Panorama, so any client demographic updates will be reflected in Panorama.

NOTE: There may be incorrect names in the SCI, which are then brought over to Panorama. E.g. concatenated first and middle names, or a first name as Baby. Please carefully review this information and adjust as required before saving to Panorama.

- From the **Health Card Number** drop-list, choose the appropriate provincial health card (e.g. Saskatchewan Health Card).
- Add or update any demographic information as required, then click **SAVE**. This client is now in the Panorama Index.

When bringing a client record from the Jurisdictional Registry (SCI) to Panorama, there may be some error messages if data in SCI is not complete. For instance:

X **Unable to get client demographics information from Jurisdictional Client Registry.**

The client may still be created in Panorama, however, this record may be excluded from the daily sync from SCI, until a HSN can be recorded in the Panorama Index for the Client at which time it will be eligible for daily sync to SCI again.

TIP: The results may show results that don't seem to make sense. This may be due to the search algorithm that shows results that match phonetically, first and last name swaps, first initial or first and last names match plus DOB match.

When searching SCI use full last name, first name, and DOB and Gender to refine the search as much as possible. (Where the HSN is not available.)

NOTE: SCI currently does not perform searches based on addresses. Any address or telephone number search criteria will be ignored.

8. If the client does not display in the Search Results section, clear search criteria and try again using adding name and date of birth search criteria.

9. Enter the **Last Name** and the **First Name** of the client, and the **Date of Birth**.
10. Then click SEARCH.

If the search result does not display the client, or displays too many results, adjust the search criteria accordingly and try again (example: add Gender).

Note: Panorama's jurisdictional search screen allows users to enter address data as search criteria; however, SCI currently ignores address data it receives when doing searches.

11. If the correct client is displayed in the results, check the box beside the client and select **Create to Index**.

Jurisdictional ID	Health Card Number	Last Name	First Name	Gender	Date Of Birth	Address
<input checked="" type="radio"/> 80001677	999999889	BOTTLE	WATER	M	1997 Jul 27	1-201 APPT ROAD , AB

The **Create Client** screen displays with the client's demographic contents brought over from the Jurisdictional Registry (SCI).

Follow previous steps 5, 6 and 7 to save the client record to the Panorama Index.

Note: Please be sure to select the Health Card Number (Saskatchewan Health Card) before you save the record.

12. If the client still does not display in the Search Results section, the user may create a client. See the User Guide for **Maintain Client**.