# Panorama Quick Tip

Client Search and Registration

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The following diagram outlines the process that must be taken to search for a Client in Panorama. This quick tip prevents duplicate Client records from being created, and ensures the correct Client is placed in context for charting.

> 📄 *Steps to complete the process in Panorama can be found on the next page. For more detailed steps on creating or placing a Client into context, or for policies related to the steps below, please see the Panorama Gateway.*

> 📄 *In the diagram below, user entered text is enclosed within angle brackets "<>".*
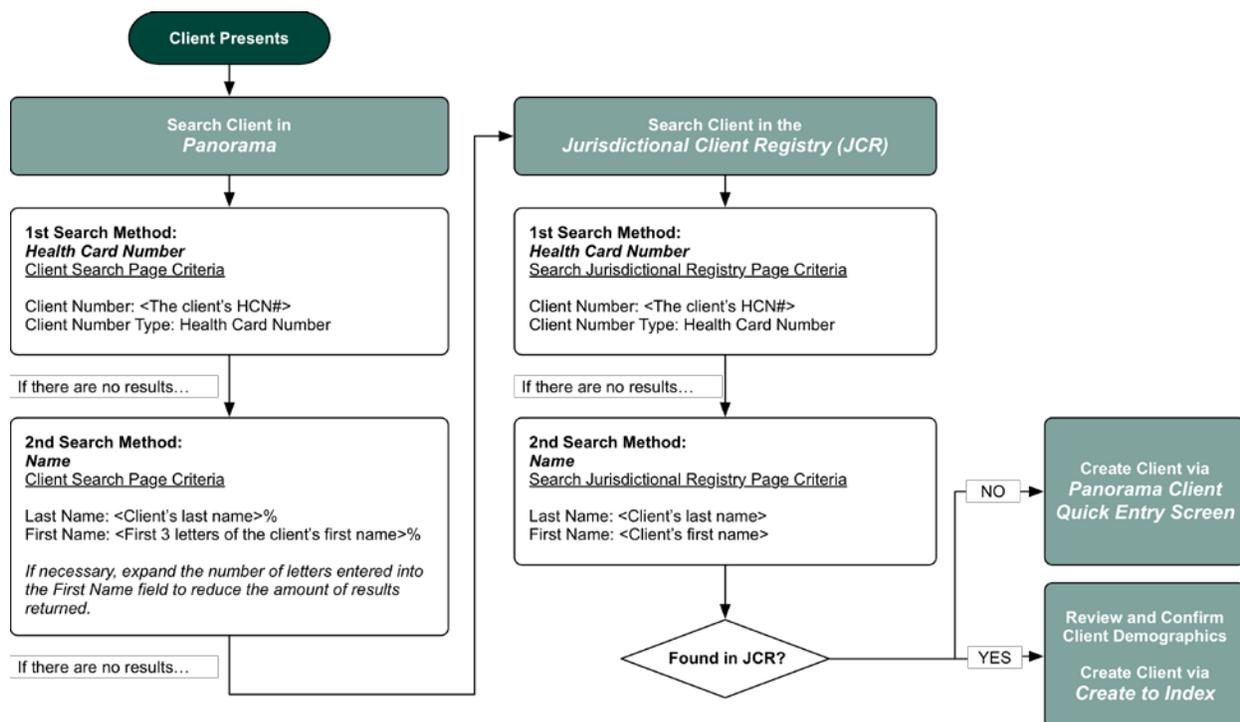
Client Search: Steps

Pre-Requisite: This guide assumes you are logged into Panorama and the Immunization module from the top navigation has been selected.

Search Client in Panorama

Panorama's Client Index must be searched first to see if the Client already exists. If the Client is found in Panorama, the Client can simply be placed into context for charting.

1. From the Left Hand Navigation, select Client > Search Clients.

First Search Method: Health Card Number

2. Enter the Client's HCN into the **Client Number** field.

3. Select "Health Card Number" from the **Client Number Type** field.

4. Click the **Search** button.
   If the Client is found, place the Client into context.
   If the Client is not found, continue to Second Search Method below.

Second Search Method: Name

5. Click the **Clear** button to clear your previous search.

6. Enter the Client's last name into the **Last Name** field, followed by the "%" character.

   a. Example: For "Johnson, Robert", enter "Johnson%".

b. If the Client has more than one last name, or if the last name is split with a hyphen, enter only the first segment.

   i. Example: For "Johnson-James", enter "Johnson%".

7. Enter the first three letters of the Client's first name into the **First Name** field, followed by the "%" character.

   a. Example: For "Johnson, Robert", enter "Rob%".

8. Click the **Search** button.
   <u>If the Client is found</u>, place the Client into context.
   <u>If the Client is not found</u>, continue to Search Client in the Jurisdictional Client Registry below, or repeat Steps 6 through 8 above adjusting as required to limit the number of results returned by Panorama.

📄 Panorama may return matches based on a phonetic match, Last Name/First Name inversion match and/or matches to Alternate Names. It's best practice to check all pages of your search results before continuing to a different search method.

Search Client in the Jurisdictional Client Registry (JCR)

If an existing record is not found in Panorama, the Jurisdictional Client Registry (JCR) can be searched to import the Client's record into Panorama's index.

1. From the Search Clients screen, click the **Search Jurisdictional Registry** hyperlink near the top.

Search Jurisdictional Registry

Search Clients

Search Criteria   ⌃ 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: yyyy / mm / dd 📅   Gender:

First Search Method: Health Card Number

2. Enter the Client's HCN into the **Client Number** field.

3. Select "Saskatchewan, Canada Personal Health Number" from the **Client Number Type** field (or the appropriate option for the Client's HCN).

4. Click the **Search** button.
   If the Client is found, continue to Found in JCR? Create to Index below.
   If the Client is not found, continue to the steps below.

Second Search Method: Name

5. Click the **Clear** button to clear your previous search.

6. Enter the Client's last name into the **Last Name** field.
   Note: **Do not use the wildcard, or the "%" character.**

   a. If the Client has more than one last name, or if the last name is split with a hyphen, enter only the first segment.

7. Enter the Client's first name into the **First Name** field.
   Note: **Do not use the wildcard, or the "%" character.**

   b. If the Client has more than one given name, or if the first name is split with a hyphen, enter only the first segment.

8. Click the **Search** button.
   If the desired Client is found, continue to Found in JCR? Create to Index below.
   If the desired Client is not found, continue to Not found in JCR? Client Quick Entry below, or repeat Steps 6 through 8 above adjusting as required to limit the number of results returned by the Jurisdictional Registry.

🗏 Panorama may return matches based on a phonetic match, Last Name/First Name inversion match and/or matches to Alternate Names. It's best practice to check all pages of your search results before continuing to a different search method.

Found in JCR? Create to Index

When the Client is found in the JCR, a data quality validation is required before it is imported into Panorama.

1. Select the desired Client, and click the **Create to Index** button.

   a. Note: If the Create to Index button is not active, or greyed out, the Client already exists in Panorama. Go back and Search for the Client in Panorama again.

   b. If the client demographics do not match, contact the eHealth Service Desk.

2. To clean the Client record before saving, review each factory table (examples below) and ensure a Preferred Flag is set (if data exists). To set data as preferred within a row, select the desired row and click the **Set Preferred** button.

| | | | | Add | Clear |

Row Actions: Update | Delete | **Set Preferred**

	Number Type ▼	Number	Effective From ▼	Effective To ▼	Preferred
○	Primary home	(604) 820-0050	-	-	

    a. This includes ensuring a Preferred flag is set on the following tables:

        i. Alternate Names,

        ii. Telephone Numbers,

        iii. Addresses,

        iv. Email Addresses, and

        v. Online Names.

3. Click the **Save** button to add the Client to Panorama's index.

Not found in JCR? Client Quick Entry

If the Client cannot be found in Panorama, and the Client cannot be found in the JCR, a new Client record can be created in Panorama through the Client Quick Entry screen.

1. From the Left Hand Navigation, select Client > Search Clients.

2. Enter the Client's demographics into the Search Clients screen.

    a. This includes, at a minimum:

        i. The Client's HCN,

        ii. Last Name,

        iii. First Name,

        iv. Gender,

> v. Date of Birth, and
>
> vi. Jurisdictional Organization (RHA or FN Community).

b. If you do not enter the Client's HCN, this Client will not be linked to the Jurisdictional Client Registry, and this Client's Immunization Profile will not display in the eHealth Viewer. When seeing this Client in the future (or any Client) please ensure the HCN is stored on the Personal Information screen and available from the Client Header. Add the HCN if it is missing.

3. Click the **Search** button.

4. Click the **Client Quick Entry** button.

5. Review and update the Client's demographics on the Client Quick Entry screen as required.

   a. At a minimum, the following must be entered:

      i. Telephone Number,

      ii. Address, and

      iii. Non-Indexed Client Relationship (for Custodial Parent/Guardian for Clients less than 16 years of age).

6. Once complete, click the **Save** button.
   The Client is saved and placed into context.

   a. If you are aware that the Client has immigrated to Canada, or if the Client is a refugee, the appropriate information must be added to Panorama. This includes any Additional IDs the Client may have (such as the Canadian Immigration Number) and details on the Client's Immigration record. Details steps can be found on the Panorama Gateway.

Best Practices

▤ Remember to only have one window of Panorama open at a time. Your user account cannot be logged into multiple windows or tabs.

▤ The wildcard (%) is a helpful character that can be used in any text field to substitute any other set of characters. For Example: entering "Jo%" into a Last Name field on a search screen, will return Joe, John, Joseph, or any other combination of Last Name's that begin with the characters entered before the wildcard.

o The wildcard (%) should not be used when searching the JCR.

▤ Please confirm the HCN is on the Client's record and add the HCN it if it is not.

Contact

If you have any questions or concerns, please contact the eHealth Service Desk at 1-888-316-7446 or by email at servicedesk@ehealthsask.ca.