Basic Panorama Steps for CLIENT REGISTRATIONS	Client Search Clients	() <u> </u>
To begin; log into Panorama, select role, set user	Search Clients Search Jurisdictional Registry Client Details Basic Search Criteria Client Warnings	<b>☆</b> Hide Basic Search Criteria
1. <u>Search client in the Panorama index</u> ;	Relationships 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. Travel History	Phonetic Matches Exclude Indeterminate Clients Include Inactive Clients Display Results on Single Page
a) using the HSN —	Upload Citentia       Client Number:       555234111         Client Merge       Client Number Type:       Health Card Number, Additional IDs)         Client Number Type:       Health Card Number       First Name:         Cohort       Smith       First Name:       J%	Middle Name:
addition information (i.e. DOB),or using a wildcard (%)/phonetic	mmunizations     Gender:     Male       Notes     Document Management     Date of Birth or Age       Communication     Date of Birth or Age	tide Date of Birth or Age
NOTE: If a client had a record in SIMS, then they WILL be in Panorama	Cempia/es <ul> <li>Not Applicable</li> <li>Date of Birth</li> <li>Yyyy</li> <li>Md</li> <li>Range ±</li> <li>Year(s)</li> <li>Units</li> <li>Date of Birth From</li> <li>Yyyy</li> <li>To</li> <li>Yyyy</li> <li>To</li> <li>Yyyy</li> <li>Yyyy</li> <li>Yyyy</li> <li>Year(s)</li> <li< td=""><td>r(s) <b>v</b> 3 / dd</td></li<></ul>	r(s) <b>v</b> 3 / dd
<ol> <li>If not found in Panorama; <u>Search</u> <u>Jurisdictional Registry</u> (SCI database)</li> </ol>	Jurisdictional Organization: To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organiza Then click 'Close' to close. Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4	Exact Match ation you wish to specify, select it and click on 'Select' button. Organization]
a) c/o (click on) Search Jurisdictional Registry	Search Jurisdictional Registry	Search Retrieve Clear Advanced Search
b) Try searching HSN alone, name alone, etc	Search Clients Search Criteria	▲ Uida Search Criteria
•		R Hue Search Chtena
<ul> <li>c) If any type of client number is present, any other data is ignored in the search.</li> </ul>	Wildcard characters % (multiple letters) and _ (single letters) can be used on any text field - except on Clien matching phonetically. Wildcard-only searches will be treated as blank searches.  Client Number: 555234111	K number and on First and Last Name when
<ul> <li>c) If any type of client number is present, any other data is ignored in the search.</li> <li>Note; Jurisdictional Registry does not recognize the wildcard (%), so must be removed.</li> </ul>	Wildcard characters % (multiple letters) and _ (single letters) can be used on any text field - except on Client matching phonetically. Wildcard-only searches will be treated as blank searches.         Client Number:       565234111         Client Number Type:       Image: Smith Signature         Last Name:       Smith Smith Signature         Date of Birth       / _ / _ / _ / _	Male
<ul> <li>c) If any type of client number is present, any other data is ignored in the search.</li> <li>Note; Jurisdictional Registry does not recognize the wildcard (%), so must be removed.</li> </ul>	Wildcard characters % (multiple letters) and _ (single letters) can be used on any text field - except on Clien matching phonetically. Wildcard-only searches will be treated as blank searches.         Client Number:       555234111         Client Number Type:       Image: Client Number Type:         Last Name:       Smith         Pate of Birth       / _ / _ /	Male Street Direction
<ul> <li>c) If any type of client number is present, any other data is ignored in the search.</li> <li>Note; Jurisdictional Registry does not recognize the wildcard (%), so must be removed.</li> </ul>	Wildcard characters % (multiple letters) and _ (single letters) can be used on any text field - except on Clien matching phonetically. Wildcard-only searches will be treated as blank searches.         Client Number:       565234111         Client Number Type:       Image: Smith         Last Name:       Smith         Date of Birth       / _ / _ / _ / Gender:         YYYY       mm         Values:       Image: Street No. Street Name         Unit No.       Street No. Street Name         P.O. Box       STN         Province / Territory:       Image: City:	Male Street Direction
<ul> <li>c) If any type of client number is present, any other data is ignored in the search.</li> <li>Note; Jurisdictional Registry does not recognize the wildcard (%), so must be removed.</li> <li>1 Created Jan 27 2015</li> </ul>	Wildcard characters % (multiple letters) and _ (single letters) can be used on any text field - except on Clien matching phonetically. Wildcard-only searches will be treated as blank searches.         Client Number:       555234111         Client Number Type:       Image: Smith         Last Name:       Smith         Date of Birth       / / / / Image: Street Name         Yyyyy       mm         Country:       Canada         Unit No.       Street No.         Province / Territory:       Image: City:         Postal Code       Image: City:         Phone Number:       Image: City:	Male Street Direction

Search Retrieve Clear

## **Basic Panorama Steps for CLIENT REGISTRATIONS**

## Jurisdictional registry – Option 1 - Found Client

- a) c/o (click on) radio button next to the correct client.
- b) c/o Create to Index. This will copy the client's personal information into Panorama. (\*if a 'red dot' error page loads instead, see step f).
- *c)* The Panorama *Create Client* page will load with the demographics intact.
- d) Scroll down and review / correct (Health Region, address, phone #, etc)
- e) For clients < 16, a non-indexed relationship must be entered. (Usually mother).

Juris	dictional Registry	y: Search Results		✓ Contains Data			\$Hi	de Search Result
24 re:	suits found.						Click on radio	button to select
Row	Actions: Create	to Index Update						New Search
	<u>Jurisdictional</u> IΩ	Health Card Number	Last Name	First Name	Gender 🔻	Date Of Birth	Address	
0	· 00 <sup>.</sup> -	1 15	SMITH	JI II	F	19 Jul	CA.SK.Regina, SK S4V.	CA
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0	50 it	6*** B	SMITH	ME E VET	м	197 Mar	118 . CA S4R4 'CA	SK. , SK

f) \*The red dot error page does not always mean a record was not created in Panorama. Before manually creating a client in Panorama, try these two steps; 1. c/o page reload to see if it takes you to the 'create client' page, and if not, 2. Return to the panorama search client screen and see if the client now appears in Panorama. Remember to use the wildcard after both first and last name and try search both with and without the HSN. It seems, duplicate records are being created by assuming the red dot error = it did not work, so best to check. If not in Panorama, then proceed with manual client registration as described below.

## Jurisdictional registry – Option 2- Client Not Found

1.	Return to Panorama Search Clients page	Search Jurisdictional Registry	· E
2.	Search Client again, then c/o <i>Client Quick Entry</i> and complete at least the minimum required fields;	Search Creation	Search Retrieve Clear Advanced Search be when
a.	Last Name	mato Client Preview	Show Client Preview
b.	First Name	Client Index: Search Results	Alide Search Results
С.	Date of Birth	O results found.	The search criteria entered did not match any results.
<i>d</i> .	Gender		Client Quick Entry Create Client New Search
е.	Health Card Number or other provincial/territorial health	Row Actions:	

- 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 Canada<sup>1</sup> you may add this information to the <u>Immigration Information</u> 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.

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