

Basic Panorama Steps for CLIENT REGISTRATIONS

To begin; log into Panorama, select role, set user defaults

1. [Search client](#) in the Panorama index;
 - a) using the HSN
 - b) If not found, [Search](#) with **NAME** or addition information (i.e. DOB), or using a wildcard (%)/phonetic

NOTE: If a client had a record in SIMS, then they WILL be in Panorama

2. If not found in Panorama; [Search Jurisdictional Registry](#) (SCI database)

- a) c/o (click on) [Search Jurisdictional Registry](#)
- b) Try searching HSN alone, name alone, etc
- c) If any type of client number is present, any other data is ignored in the search.

Note; Jurisdictional Registry does not recognize the wildcard (%), so must be removed.

Search Jurisdictional Registry

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Jurisdictional registry – Option 1 - Found Client

- c/o (click on) radio button next to the correct client.
- 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).*
- The Panorama *Create Client* page will load with the demographics intact.
- Scroll down and review / correct (Health Region, address, phone #, etc)
- For clients < 16, a non-indexed relationship must be entered. (Usually mother).
- *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 ID	Health Card Number	Last Name	First Name	Gender	Date Of Birth	Address
00	1 38	SMITH	J I	F	19 Jul	CA, SK, Regina, SK S4V, CA
7 454	4	SMITH	J A	M	19 Oct	131 LANE, CA, SK, Moose Jaw, SK CA
2 16 3	76 3	SMITH	C C V	F	18 Apr	S4N2 I CA, CA, SK, Regina, SK
7 J	7 13	Smith	Li	M	19 Jul	RR S0J, CA, SK, SK
50 1	5 5	SMITH	M I E V F	M	19 Mar	118 S4R, CA, CA, SK, SK

Jurisdictional registry – Option 2- Client Not Found

- Return to Panorama *Search Clients* page
- Search Client again, then c/o *Client Quick Entry* and complete at least the minimum required fields;
 - Last Name*
 - First Name*
 - Date of Birth*
 - Gender*
 - Health Card Number or other provincial/territorial health card number if available*
 - Telephone Number*
 - Address*
 - Non-Indexed Client Relationship for Custodial Parent/Guardian for Clients less than 16 years of age*
 - When creating a Client record if you are aware that a client has immigrated to Canada¹ you may add this information to the *Immigration Information* 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.

Search Jurisdictional Registry

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