

Client Search and Registration – IOM WS	Name of Activity: 1. Client Search 2. Client Registration (if not found in search)		
	Role Performing Activity: Public Health Services Staff		
Panorama – IOM WORK STANDARD	Location:		Department:
	Document Owner:		
	Date Prepared: May 2018	Last Revision: July 25, 2022	Date Approved:

NOTE: If a client has ever received immunization in SK, they will have a Panorama record

Essential Tasks:	
1.	<p>Search client using at least 2 basic search criteria;</p> <p>a. Search using only provincial health card number (HSN)</p> <ul style="list-style-type: none"> ➤ LHN > Search > Search Client <ul style="list-style-type: none"> ○ Enter HSN under Client number ○ Select Health Card Number from drop down list under Client Number Type ○ Click on “Search” Button at top of page ○ If found, set in context and update demographics <p>b. If no result is found, Search using name with wildcard (%) and/or gender (i.e. John% smith%)</p> <p>Note: Wild card may be used when unsure of correct spelling of the name</p> <ul style="list-style-type: none"> ➤ LHN > Search > Search Client <ul style="list-style-type: none"> ○ Enter Last Name “%” ○ Enter First Name “%” ○ Click on “Search” Button at top of page
2.	<p>If no result is found in step 1 a or b, and you suspect the client should be there, utilize the Advanced Search function using the most appropriate search criteria (i.e. phone number, address, etc) Note: the Client Number Type field must be blank when searching by client name or other search criteria</p> <ul style="list-style-type: none"> ➤ LHN > Search > Search Client <ul style="list-style-type: none"> ○ scroll down on page ○ Click on Advanced Search Criteria ○ Enter known data ○ Click on “Search” Button at top of page

<p>3.</p>	<p>If no result is found in steps 1 or 2, go to the Search Jurisdictional Registry</p> <p>Note: Wild card may NOT be used in a Jurisdictional Registry Search</p> <ul style="list-style-type: none"> ➤ Click on “Search Jurisdictional Registry” Button at top of page ➤ Enter Last Name name (no wildcards) ➤ Enter First Name (no wildcards) ➤ If known enter HSN, gender, or DOB ➤ Click on “Search” Button
	<ul style="list-style-type: none"> ➤ If the client is found: <ul style="list-style-type: none"> ○ Select radio button beside the client's name ○ Click on “Create to Index” Button <p>Update client info as needed- as per Panorama policy ‘ “Documenting Geography for CD</p> <ul style="list-style-type: none"> ➤ Investigations in Panorama from BCCDC 2019 04 04 ” ’ at each encounter. (If phone number is 000000, it must be changed to a valid format to save. 306 999-9999) ➤ Ensure all address’ are entered including city/community for <i>address at time of infection field drop-down</i> – rules of residency. ➤ Click on “Save” Button

4. If client is not found in step 3, the client must be registered manually **(this method will be needed very rarely (new to SK) – clients created this way are not linked to other health systems (EID) and will not be visible on the Viewer)**

- Click on “Client Quick Entry” Button
- Enter Last Name
- Enter First Name
- Enter Date of Birth
- Select Gender from drop down list, (gender identity optional)
- Select Health Card Province from drop down list
- Enter Health Card Number
- Select Health Region Organization -JOrg (former health region or first nations community)
- Enter Contact Information
 - Telephone Number(s)
 - Address (if more than one address – must select a ‘preferred’)
 - When changing/correcting an existing address, end date the address and re-enter new – never update an existing address as it may be linked to an investigation.
 - Ensure a ‘physical’ address is included (i.e. First Nation Community) for investigation and not only the mailing address (Box #)
- Enter Relationship for non-indexed client relationship -- Custodial parent/guardian for clients less than 16 yrs of age

Immigration information may be entered if needed for immunization assessment

- Click on “Save” Button at top of page