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| <b>Panorama – IOM<br/>WORK STANDARD</b> | <b>Name of Activity:</b> IOM Searches |                                   |                       |
|   | <b>Role performing Activity:</b>      |                                   |                       |
|   | <b>Location:</b>                      | <b>Department:</b>                |                       |
|   | <b>Document Owner:</b>                |                                   |                       |
|   | <b>Date Prepared:</b><br>May 14, 2018 | <b>Last Revision:</b><br>Feb 2022 | <b>Date Approved:</b> |

**Assumptions:**

| <b>Essential Tasks:</b> |   |
|-------------------------|---|
| <b>1.</b>               | <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"> <li>➤ <b>LHN &gt; Search &gt; Search Client</b> <ul style="list-style-type: none"> <li>○ Enter HSN under Client number</li> <li>○ Select Health Card Number from drop down list under Client Number Type</li> <li>○ Click on “Search” Button at top of page</li> <li>○ If client is found, click on ‘radio button’ beside client and click on ‘set in context’ to open client record (demographics) or ‘subject summary’.</li> </ul> </li> </ul> <p>b. If no result is found, Search using name with wildcard (%) and/or gender (i.e. John% smith%)</p> <p><b>Note: Wild card may be used when unsure of correct spelling of the name</b></p> <ul style="list-style-type: none"> <li>➤ <b>LHN &gt; Search &gt; Search Client</b> <ul style="list-style-type: none"> <li>○ Enter Last Name “%”</li> <li>○ Enter First Name “%”</li> <li>○ Click on “Search” Button at top of page</li> </ul> </li> </ul> |
|                         | <p>If no result is found in step 1 a or b, and you suspect the client should be there, utilize the <b>Advanced Search</b> function using the most appropriate search criteria (i.e. phone number, address, etc)</p> <ul style="list-style-type: none"> <li>➤ <b>LHN &gt; Search &gt; Search Client</b> <ul style="list-style-type: none"> <li>○ scroll down on page</li> <li>○ Click on <b>Advanced Search Criteria</b></li> <li>○ Enter known data</li> <li>○ Click on “Search” Button at top of page</li> </ul> </li> </ul>   |

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|------------------|--|
|                  | <p>If no result is found in steps 1 or 2, go to the Search Jurisdictional Registry</p> <p><b>Note: Wild card may NOT be used in a Jurisdictional Registry Search</b></p> <ul style="list-style-type: none"> <li>➤ Click on “Search Jurisdictional Registry” Button at top of page</li> <li>➤ Enter Last Name name (no wildcards)</li> <li>➤ Enter First Name (no wildcards)</li> <li>➤ If known enter HSN, gender, or DOB</li> </ul> |
|                  | <ul style="list-style-type: none"> <li>➤ Click on “Search” Button If the client is found: <ul style="list-style-type: none"> <li>○ Select radio button beside the client's name</li> <li>○ Click on “Create to Index” Button</li> </ul> </li> <li>➤ Update client info as needed</li> <li>➤ Click on “Save” Button</li> </ul>  |
| <p><b>2.</b></p> | <p><b>OTHER SEARCHES AVAILABLE</b> (See Panorama IOM User Guide for details)</p> <ul style="list-style-type: none"> <li>➤ Investigations</li> <li>➤ Lab</li> <li>➤ Exposures</li> <li>➤ Interventions</li> </ul>   |