

Searching for a Client Record

Before creating a client record, always search for the client in PHIMS (e.g. if the client has received the first dose of COVID-19 vaccine, they may already exist in PHIMS)

Best practice start by entering the client's 9 digit **Manitoba Health Number (PHIN)**

Enter the 9 digit **Health Card Number** in the **Client Number** field, select **Health Card Number** from the **Client Number Type** drop-down list

The screenshot shows the 'Search Clients' interface. The 'Client Number' field contains '555888111' and is circled in red. The 'Client Number Type' dropdown menu is open, showing 'Health Card Number' selected and circled in red. Other fields include 'Last Name', 'Middle Name', and 'Gender'. A 'Search' button is highlighted with a green box in the top right corner. On the right side, there are 'Select' checkboxes for 'Inc' and 'Us'.

OR by **Client ID** when available

The screenshot shows the 'Search Clients' interface. The 'Client Number' field contains '7711003' and is circled in red. The 'Client Number Type' dropdown menu is open, showing 'Client ID' selected and circled in red. Other fields include 'Last Name', 'Middle Name', and 'Gender'. A 'Search' button is highlighted with a green box in the top right corner. On the right side, there are 'Select' checkboxes for 'In' and 'U:'.

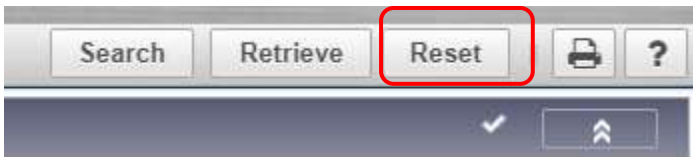
Click **Search**

If the **'No records were found matching the search criteria'** pop-up message displays, modify the search.

Searching for a Client Record



Ensure to remove the previously entered search criteria prior to searching again. Click **Reset**



Search using the **Additional ID** client number type. This allows you to search by the following identifiers that could have been used when creating the client in PHIMS. For example:

- Manitoba Health 6 digit family registration number (found on the Manitoba Health Card)
- Health card numbers from other provinces
- Medical Record Number
- Citizen/Immigration Identification Number
- RCMP Regiment Number
- Veterans Health Identification Number
- Treaty Number

Enter the number in the **Client Number** field and select **Additional ID** from the **Client Number type** drop-down list, (the number can have letters within it), click **Search**

A screenshot of the "Search Clients" web interface. The "Client Number" field contains "123456" and is circled in red. The "Client Number Type" dropdown menu is open, showing options: "Client ID", "Health Card Number", and "Additional ID", with "Additional ID" selected and highlighted in red. The "Search" button in the top right is highlighted with a green box. On the right side, there are checkboxes for "Inc" (checked), "Inc" (checked), and "Us" (unchecked).

If 'no' continue search



Searching for a Client Record

Search: (there are multiple ways to search for a client in PHIMS)

- **Last Name & First Name** (also invert the First Name for Last Name, or combine both First and Last name, e.g. Karen Smith, Karen Smith. The client's name might have been created incorrectly)
- **First Name & Date of Birth**
- **First Name & Date of Birth Range (Effective From: To)**
- **Telephone number**
- **First Name & Age**
- **First Name & Gender**
- **Pseudonym** (e.g. Bill and not William or client might be using alias e.g. Rabbit)
- **Maiden Name & First Name**
- **Maiden Name & First Name & Date of Birth**



If the **"Too many search results found. Please refine the search criteria and try again"** pop-up message will display

If the exact spelling of the client's name is unknown, use *wildcards* or *placeholders* to search.

Wildcard search, use the percentage sign (%) to improve search results. Entering a % at the beginning, end or a partial name in the name field will look for results that begin with the letters before or after the %.

(e.g. Smi% will return names such as: Smith, Smitherman, Smiel, etc)

Note: Using a percentage sign % in a blank name field is not permitted, as it will negatively impact system performance

Try searching different variations using the wildcard:

(see next page)

Searching for a Client Record

Search Clients Search

Basic Search Criteria

Client Number: Client Number Type:

Last Name: **First Name:**

Middle Name:

Gender:

Choose one:
 Date of Birth:

Effective From: To:

Select a
 Inc
 Inc
 Usi

Client was created with **First Name combined with Last Name**. (e.g. Karen Smith, Karen Smith)

Search Clients Search

Basic Search Criteria

Client Number: Client Number Type:

Last Name: **First Name:**

Middle Name:

Gender:

Choose one:
 Date of Birth:

Effective From: To:

Select a
 Inc
 Inc
 Usi

Placeholders can also be used if the exact spelling is not known (e.g. Kar_n for Karyn or Karen)

Searching for a Client Record

Search Clients Search Re

Basic Search Criteria

Client Number: Client Number Type:

Last Name: **First Name:**

Middle Name:

Gender:

Choose one:

Date of Birth:

Effective From: To:

Select a

Inc

Inc

Usi

Search by telephone number

Age: Year(s)

None of the above

Telephone Number:

Country: **Number:** x

Health Region Organization:

When a client's record has an **alternate name**, the record will also appear in the **Search Result**. Select the radio button and preview to view all demographics. Client may use an alternate name.

Basic Search Criteria

Client Number:

Client Number Type:

Last Name:

First Name:

Searching for a Client Record

Search Results

Preview Update Set In Context Create Cohort Client Imms Profile

<input type="checkbox"/>	..	Client ID	Health Card Number	Last Name	First Name	Gender	Date of Birth
<input checked="" type="checkbox"/>	<input type="checkbox"/>	5933	987987987	June	May	Female	1998 Jan 13

Preview screen alternate names show Karen Smith and Karynn Smith.

Search Clients

Client Profile

Alternate Names

Alternate Names Type	Last Name	First Name	Middle Name
Pseudonym	Smith	Karynn	
Pseudonym	Smith	Karen	

Total: 2

If you see a pop up with "**Consent for Disclosure – a block exists on the display of some client(s) data**", click **Override Consent** to proceed

Search Clients Override Consent Search Retrieve Reset

e.g. Organization Display Name Exact Match

School Information

School: e.g. Organization Display Name

School Year: Grade: Class:

Consent for Disclosure - a block exists on the display of some client(s) data.

Select *Override Reason* from the drop-down list, enter **Description**, click **Confirm**

Searching for a Client Record



Search Clients

Override Consent [X]

* **Override Reason:**
Other (specify) [v]

* **Description:**
Covid-19 Immunization administered

Confirm

Best practice is to search for the client at least 3 times before assuming that there isn't a file for the client..