

# Managing Client Records: Creating a Client Record

Page 1

QRC 1.0



**IMPORTANT – DO NOT create a new client record, until doing a thorough search for an existing client record!**

Please review <https://phimsmb.ca/document/69/1-0-managing-client-records/1153/1-1-searching-for-a-client-record.pdf>

- 1) If the client does not appear in the factory table when searching, check the spelling to make sure the name was entered correctly.
- 2) It is important to search by several differing criteria before creating a new client record. For example, by name; by date of birth and gender; by partial name with wild cards. You can also search by a phone number. **NOTE:** If you are attempting a new search for the same client, ensure to remove the previously entered search criteria, to start a fresh search.
- 3) Wildcard Searches: Percentage sign wildcard (%) can be used to improve search results. Entering a '%' at the end of a partial name in the name field will look for results that begin with the letters before the '%.' For instance, Smi% will return names such as: Smith, Smitherman, Smiel, etc. You can also add a '%' to the front of a name.
- 4) Placeholders can also be used if the exact spelling is not known. (For example Kar\_n for Karyn or Karen)
- 5) If for any of the name searches, you get the message, 'Too many results refine your search', add additional search criteria

Search Clients

Basic Search Criteria

Client Number:  Client Number Type:

Last Name:  First Name:

Middle Name:

Gender:

Choose one:

Date of Birth:

Effective From:  To:

**Search for the client at least 3 different ways before creating a new client record, to avoid duplicate records.**

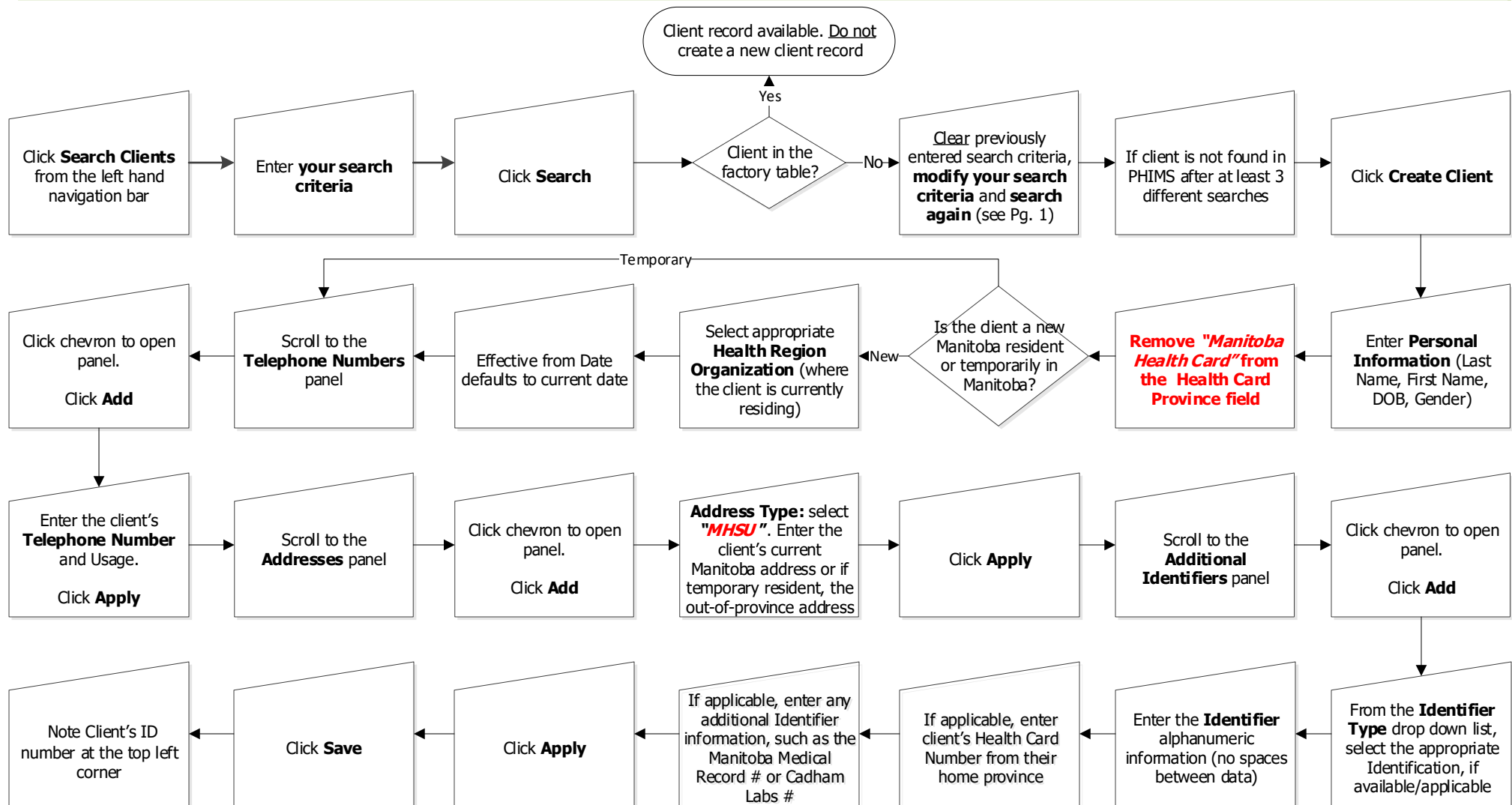
## Points to remember:

- When creating a client, enter the **minimum 5 client identifiers** to be completed in Client Demographics > i) Last Name ii) First Name iii) Date of Birth iv) Gender v) additional demographics e.g. address, phone number, additional ID's such as Medical Record number, etc. Additional identifiers should be entered with no spaces between the alphanumeric data. The Identifier Type "Citizen/Immigration Identification Number" can be selected for passport or immigration number.
- 'Effective from' date is the date the client is created in PHIMS
- Select MHSU as the address type and the applicable telephone type indicated as the usage type. Email address type is primary home
- When creating a client with a health card number from another province, record the health card number in Additional Identifiers (**NOT Health Card Number Field**); if the client obtains a MB Health number in future, the previous provincial ID would remain on the record.
- When a client is created in PHIMS without a MB Health number, the immunizations recorded in PHIMS will not be migrated to eChart as interface requires a PHIN

# Managing Client Records: Creating a Client Record

Page 2

QRC 1.0



#### Release Notes/Updates

Date	Owner	Reason for change	Change Description
2021-05-27	Clinical Informatics Specialist	Updated points to remember	Pg. 1 Updated points to remember Pg. 2 Added details 'clear previously entered search criteria' and 'no spaces between data' to the applicable boxes in workflow
2021-12-07	Clinical Informaticist	Updated Search Tips	Pg. 1 Added screen shot for search client