



Shared health  
**Soins communs**  
Manitoba

# Public Health Information Management System (PHIMS)

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## Module 9: How to Print an Individual Client Record

# Printing an Individual Client Record

## Step 1:

Log into PHIMS and click the "Immunization" tab at the top of the page.

The screenshot displays the PHIMS Panorama Dev3 interface. At the top left, the logo for PANORAMA (Public Health Solution for Disease Surveillance and Management) is visible. The main header area includes the text "Panorama Dev3" and "Generic WRHA20 - ALL: MB\_NON\_PH\_PROVIDER". On the right side of the header, there are notification counts for "Threshold Notifications: 0" and "Jurisdiction Notifications: 0", along with navigation links for "Help", "Contact Us", "My Account", and "Logout". The "IMMUNIZATION" tab is highlighted with a red circle. Below the header, a message states: "The Public Health Solution for Disease Surveillance and Management supports the identification, management and control of infectious diseases and outbreaks that pose a threat to the public's health." A form section for "Specify your Service Delivery Location (SDL)" shows "Service Delivery Location" set to "Winnipeg Health SDL" and "SDL Time Zone" set to "CDT". There are four main functional tiles: "Personal WorkLoads" (View all your assigned work tasks), "Reporting" (Specify and view client specific and aggregate reports), "Document Management" (Add, update, delete and search for electronically attached documents), and "Notifications" (Create and view jurisdiction and threshold notifications, with links for "View Jurisdiction Notifications" and "View Threshold Notifications"). A "Need Help?" section provides contact information for the Help Desk. On the right side, there is a calendar for August 2015 with the 25th highlighted, and an "External Reference Links" section with a message: "NoRefLinkMsgKey No Reference Link has been added".

# Printing an Individual Client Record

## Step 2:

Click "Search Clients" from the left hand navigation bar.

The screenshot shows the PANORAMA Public Health Solution for Disease Surveillance and Management interface. The version number 3.2.3 is displayed in the top right. The left navigation bar includes options like Immunization, Recent Work, Client, Search Clients (circled in red), Client Details, Client Warnings, Client Relationships, Client Households, Consent Directives, Allergies, Risk Factors, Travel History, Imms History Interpretation, Upload Clients, Client Merge, Resolved Client Matches, and Cohort. The main content area is titled 'Search Clients' and contains a 'Basic Search Criteria' form. The form includes fields for Client Number, Client Number Type, Last Name, First Name, Middle Name, Gender, Date of Birth, Date of Birth Range, Age, Telephone Number, and Health Region Organization. There are also checkboxes for 'Include Inactive Clients', 'Include Indeterminate Clients', and 'Use Phonetic Matches'.

**PANORAMA**  
Public Health Solution for  
Disease Surveillance and Management

3.2.3

Immunization

**Search Clients** Search Retrieve Reset

**Basic Search Criteria**

Client Number: [ ] Client Number Type: [ ]

Last Name: [ ] First Name: [ ] Middle Name: [ ]

Gender: [ ]

Choose one:

Date of Birth: [ ]

Date of Birth Range: [ ] Effective From: [ ] To: [ ]

Age: [ ] Year(s) [ ]

None of the above

Telephone Number:

Country: [ ] Number: [ ] x [ ]

Health Region Organization: [ ] Exact Match [ ]

Select all that apply:

Include Inactive Clients

Include Indeterminate Clients

Use Phonetic Matches

# Printing an Individual Client Record

## Step 3:

Enter the client's PHIN number in the "Client Number" field.

**PANORAMA**  
Public Health Solution for  
Disease Surveillance and Management

3.2.3

Immunization

**Search Clients** Search Retrieve Reset

**Basic Search Criteria**

**Client Number:**  **Client Number Type:**

**Last Name:**  **First Name:**  **Middle Name:**

**Gender:**

**Choose one:**

**Date of Birth:**

**Date of Birth Range:**  **Effective From:**  **To:**

**Age:**   **Year(s)**

**None of the above**

**Telephone Number:** **Country:**  **Number:**  x

**Health Region Organization:**     **Exact Match**

**Select all that apply:**

**Include Inactive Clients**

**Include Indeterminate Clients**

**Use Phonetic Matches**

Recent Work

Client

Search Clients

Client Details

Client Warnings

Client Relationships

Client Households

Consent Directives

Allergies

Risk Factors

Travel History

Imms History Interpretation

Upload Clients

Client Merge

Resolved Client Matches

Cohort

# Printing an Individual Client Record

## Step 4:

Select "Health Card Number" from the Client Number Type drop down menu.

The screenshot displays the PANORAMA Public Health Solution for Disease Surveillance and Management interface. The top navigation bar shows the version number 3.2.3 and user profile icons. The main content area is titled "Search Clients" and features a "Basic Search Criteria" section. A dropdown menu for "Client Number Type" is open, with "Health Card Number" highlighted by a red circle. Other search criteria include "Client Number", "Last Name", "Middle Name", "Gender", "Date of Birth", "Date of Birth Range", "Age", and "Telephone Number". On the right, there are checkboxes for "Include Inactive Clients", "Include Indeterminate Clients", and "Use Phonetic Matches". The left sidebar contains navigation options such as "Recent Work", "Client", "Search Clients", "Client Details", "Client Warnings", "Client Relationships", "Client Households", "Consent Directives", "Allergies", "Risk Factors", "Travel History", "Imms History Interpretation", and "Upload Clients".

# Printing an Individual Client Record

## Step 5:

Click "Search" located at the top of the page.

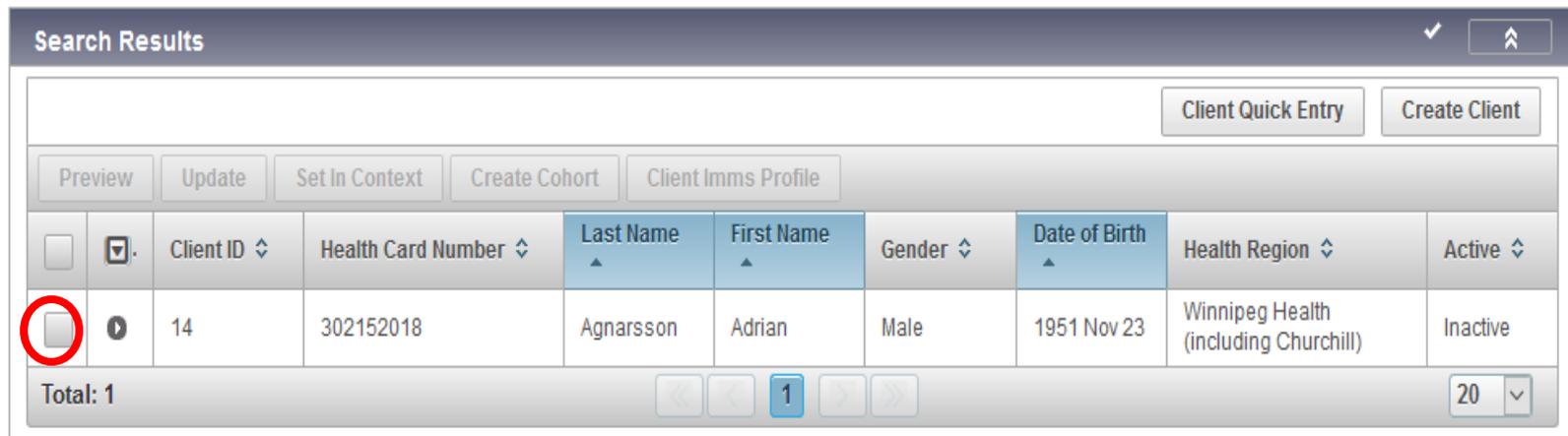
The screenshot shows the 'Search Clients' interface. At the top right, there are buttons for 'Search', 'Retrieve', 'Reset', a printer icon, and a help icon. The 'Search' button is circled in red. Below the buttons is the 'Basic Search Criteria' section, which includes the following fields and options:

- Client Number:** Text input field containing '848484484'.
- Client Number Type:** Dropdown menu with 'Health Card Number' selected.
- Last Name:** Text input field.
- First Name:** Text input field.
- Middle Name:** Text input field.
- Gender:** Dropdown menu.
- Select all that apply:**
  - Include Inactive Clients
  - Include Indeterminate Clients
  - Use Phonetic Matches

# Printing an Individual Client Record

## Step 6:

Click on the radio button beside the correct client listed in the search results table.



The screenshot shows a web interface for search results. At the top, there is a header 'Search Results' with a checkmark and an upward arrow icon. Below the header, there are two buttons: 'Client Quick Entry' and 'Create Client'. A row of action buttons includes 'Preview', 'Update', 'Set In Context', 'Create Cohort', and 'Client Imms Profile'. The main table has columns for Client ID, Health Card Number, Last Name, First Name, Gender, Date of Birth, Health Region, and Active. The first row of data is for a client with ID 14, Health Card Number 302152018, Last Name Agnarsson, First Name Adrian, Gender Male, Date of Birth 1951 Nov 23, Health Region Winnipeg Health (including Churchill), and Active Inactive. A red circle highlights the radio button in the first column of this row. At the bottom, there is a 'Total: 1' label, navigation arrows, a page number '1' in a blue box, and a dropdown menu showing '20'.

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Client ID ▾	Health Card Number ▾	Last Name ▲	First Name ▲	Gender ▾	Date of Birth ▲	Health Region ▾	Active ▾
<input type="checkbox"/>	<input checked="" type="checkbox"/>	14	302152018	Agnarsson	Adrian	Male	1951 Nov 23	Winnipeg Health (including Churchill)	Inactive

# Printing an Individual Client Record

## Step 7:

Take note of the Client ID #: . Click "Set in Context" to open the client record.

The screenshot shows a search results window titled "Search Results". At the top, there are buttons for "Preview", "Set In Context", and "Client Imms Profile". Below these is a table with columns: Client ID, Health Card Number, Last Name, First Name, Gender, Date of Birth, Health Region, and Active. The first row of data shows Client ID 993, Health Card Number 225894742, Last Name Adalardi-P-20191223, First Name Adele-1, Gender Female, Date of Birth 2015 Jun 22, Health Region Prairie Mountain Health, and Active status. The "Set In Context" button and the Client ID "993" are circled in red. At the bottom, there is a "Total: 1" label, a page number "1" in a blue box, and a dropdown menu set to "20".

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Client ID ↕	Health Card Number ↕	Last Name ▲	First Name ▲	Gender ↕	Date of Birth ▲	Health Region ↕	Active ↕
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	993	225894742	Adalardi-P-20191223	Adele-1	Female	2015 Jun 22	Prairie Mountain Health	Active

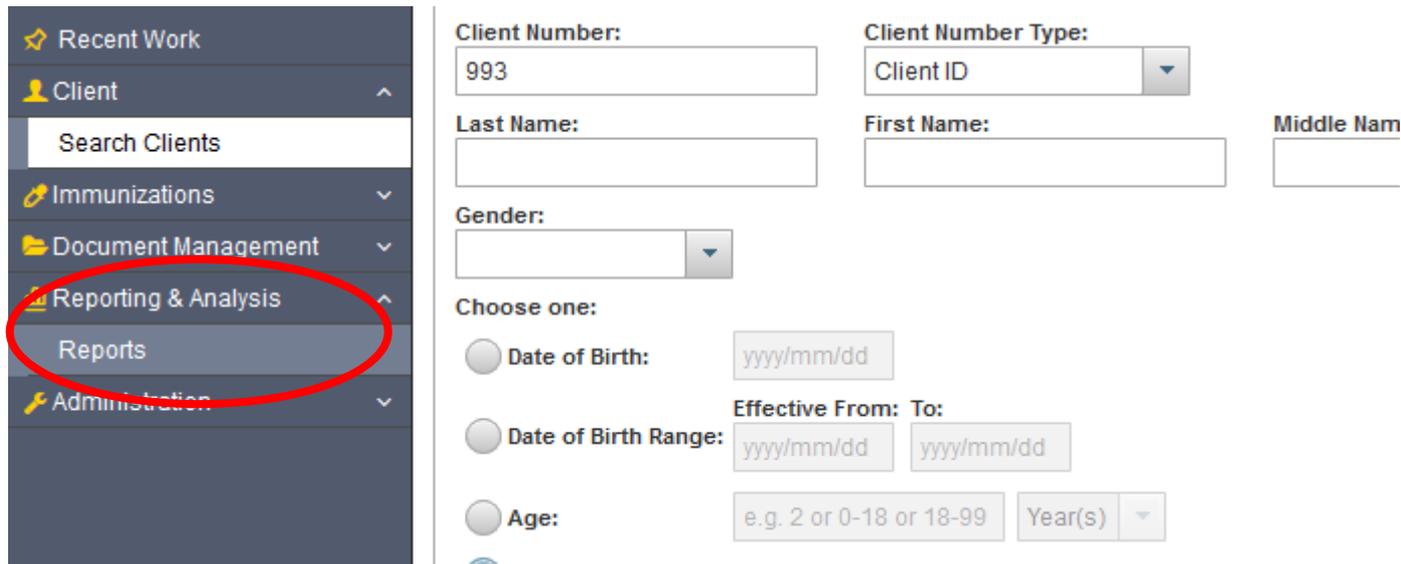
Pop up box will appear



# Printing an Individual Client Record

## Step 8:

Expand “Reporting & Analysis” on the left hand navigation bar and click on “Reports”



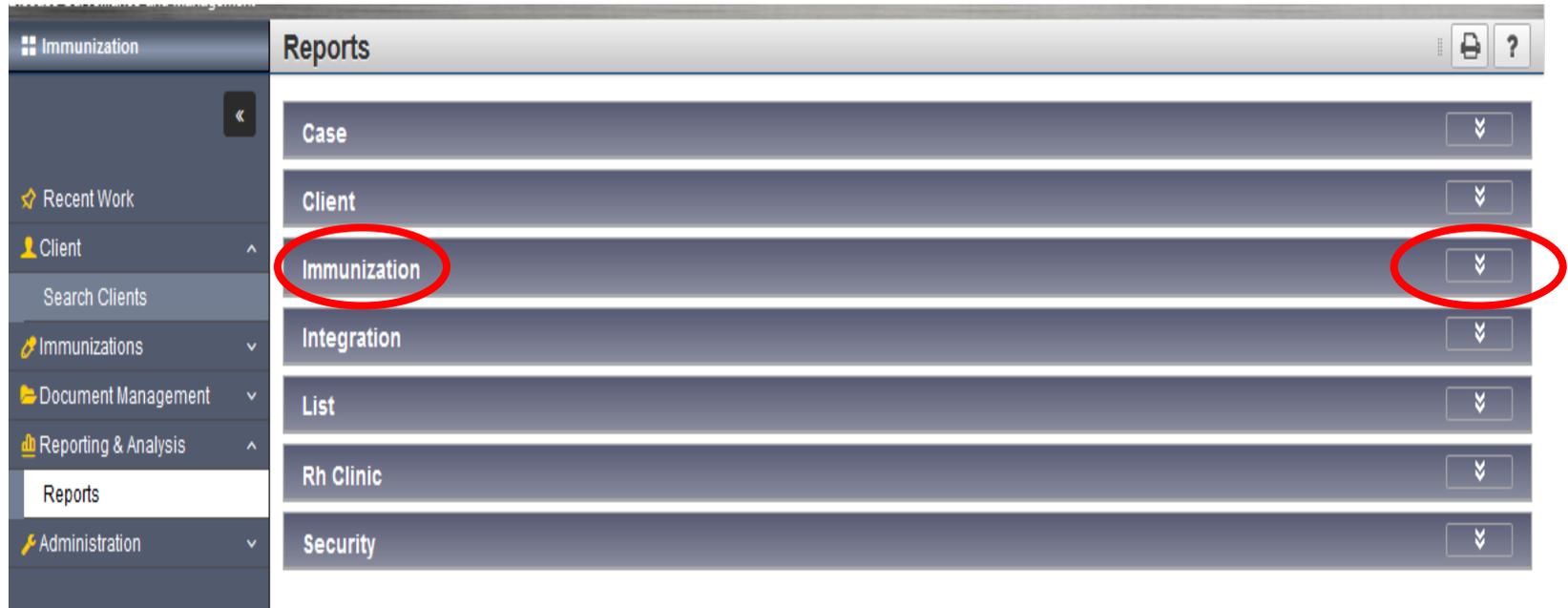
The screenshot displays a web application interface. On the left is a dark navigation bar with the following items: 'Recent Work', 'Client', 'Search Clients', 'Immunizations', 'Document Management', 'Reporting & Analysis' (circled in red), and 'Administration'. The 'Reports' sub-item under 'Reporting & Analysis' is highlighted. On the right is a search form with the following fields:

- Client Number:** Text input containing '993'
- Client Number Type:** Dropdown menu with 'Client ID' selected
- Last Name:** Text input
- First Name:** Text input
- Middle Name:** Text input
- Gender:** Dropdown menu
- Choose one:** Radio button selection for:
  - Date of Birth:** Text input with placeholder 'yyyy/mm/dd'
  - Date of Birth Range:** Two text inputs with placeholder 'yyyy/mm/dd' and 'Effective From: To:' label above them
  - Age:** Text input with placeholder 'e.g. 2 or 0-18 or 18-99' and a 'Year(s)' dropdown menu

# Printing an Individual Client Record

## Step 9:

Expand the Immunization panel



# Printing an Individual Client Record

**Step 10:** Click on the “MB6800-Immunization Record” *hyperlink*

The screenshot shows a software interface for 'Immunization' reports. It features a dark header bar with the title 'Immunization' and an upward arrow icon. Below this is a section titled 'Operational Reports' with another upward arrow icon. Underneath are two buttons: 'View Report Status' and 'View Report History'. A table follows with a header row 'Report Title ▲'. The table contains two rows: 'MB6799-Archive Immunization Record' and 'MB6800-Immunization Record'. The second row is highlighted in light blue and its text is circled in red. At the bottom, there is a 'Surveillance Reports' section with an upward arrow icon.

Report Title ▲
<a href="#">MB6799-Archive Immunization Record</a>
<a href="#">MB6800-Immunization Record</a>

# Printing an Individual Client Record

## Step 11:

Enter **Client's ID**, choose Client's preferred language and click **Generate Report Now** in the top nav bar

The screenshot shows the 'Set Report Filters' interface for an immunization record report. The report title is 'MB6800-Immunization Record'. Under 'Report Output', 'PDF' is selected. The 'Client ID' field is empty and circled in red. The 'Language' dropdown menu is open, showing 'Client's preferred language' as the selected option, which is also circled in red. Other options in the dropdown are 'English' and 'French'. In the top navigation bar, the 'Generate Report Now' button is circled in red.

**Set Report Filters** Return Generate Report Now Schedule Report Reset

**Report Filters**

**Report:** MB6800-Immunization Record

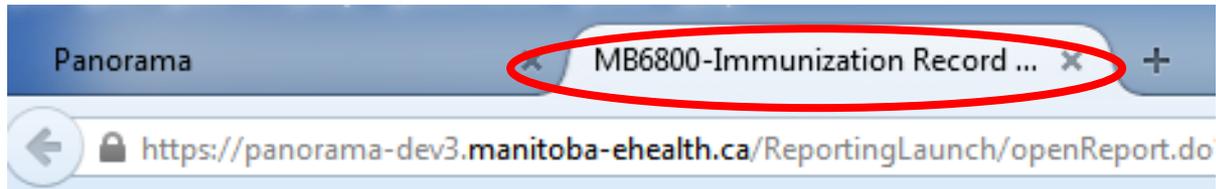
**\* Report Output:**  
 PDF  Excel (Data Only)

**Client ID:**

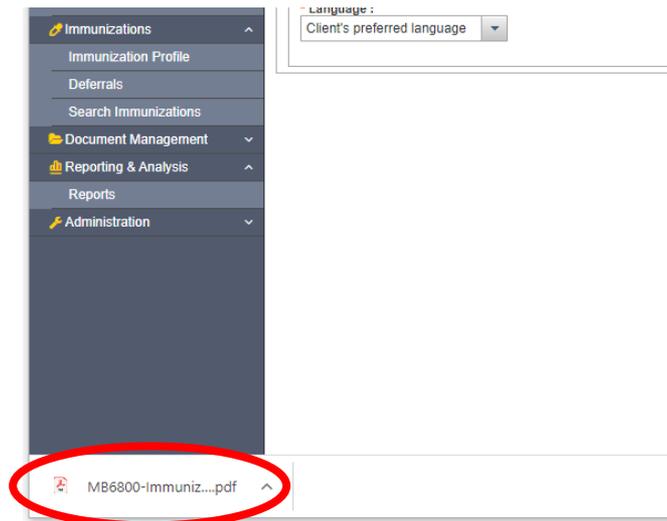
**\* Language:**  
Client's preferred language ▼  
 🔍  
Client's preferred language  
English  
French

# Printing an Individual Client Record

**If you are using Firefox:** A new tab in PHIMS will open and the client's Immunization Record will appear



**If you are using Google Chrome:** A PDF copy of the report will download, open PDF copy to view client's Immunization Record



# Printing an Individual Client Record

The following is an example of a Client Immunization Record

1 of 2
Automatic Zoom



**Date Printed:** 2015-Jul-14

## Immunization Record

This document contains personal health information and is confidential. Personal health information may only be collected, used or disclosed where allowed by the Personal Health Information Act. If you have received this document in error, please immediately destroy it in a secure manner and notify the sender. Any unauthorized use, disclosure, distribution, or copying is strictly prohibited.

**Personal Information**

<b>Last Name:</b> Banner-W-20141110	<b>Personal Health Information Number (PHIN):</b> 259619955
<b>First Name:</b> Betty-1	<b>Date of Birth:</b> 2005-Jan-10 (Female)
<b>Middle Name:</b>	<b>Age:</b> 10 yrs 6 mos at date of printing

**Immunization History**

Vaccine	Abbreviation	Date of Immunization(s)			
Diphtheria, Tetanus, Acellular Pertussis, Inactivated Poliomyelitis	DTaP-IPV	2009 Jun 08			
Diphtheria, Tetanus, Acellular Pertussis, Inactivated Poliomyelitis, Haemophilus influenza type b	DTaP-IPV-Hib	2005 Aug 06	2005 Oct 06	2005 Dec 06	
Hepatitis B	HB	2015 May 09	2015 Jul 02		
Meningococcal Conjugate Type C	Men-C-C	2015 Jul 02			
Measles, Mumps & Rubella	MMR	2006 Jun 08	2009 Jun 08		
Pneumococcal Conjugate 7 valent	Pneu-C-7	2005 Aug 06	2005 Oct 06	2005 Dec 06	2006 Dec 06

**Note:**  
 Rubella = German Measles    Varicella = Chicken Pox    Zoster = Shingles    Pertussis = Whooping Cough  
 Influenza only shows the 4 most recent immunizations.  
 X = All or part of this vaccine is invalid according to Manitoba's Immunization schedule. If you still require the immunization or part of the immunization, it will be listed in the table below.

# Printing an Individual Client Record

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To print the immunization record, click on the “Print Icon”

**The following is an example using Firefox:**



**The following is an example using Google Chrome:**



Note: The immunization record is often 2 pages. Whenever possible it should be printed double sided.

# Printing an Individual Client Record

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Once the Immunization Record has been printed, click on the “x” on the tab. This will bring you back to the client record.

**The following is an example using both Firefox and Google Chrome**



# Printing an Individual Client Record

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## **Points to Remember:**

- Always close the Immunization Record once it has been printed.
- Ensure that the Immunization Record is not downloaded to the computer's hard drive. If it is, delete it from the download folder because the document contains personal health information.
- Format printer to print a two sided document

# Questions

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If you have any questions, contact Digital Health

- Email: [servicedesk@sharedhealthmb.ca](mailto:servicedesk@sharedhealthmb.ca)
- Phone: 204-940-8500 or 1-866-999-9698