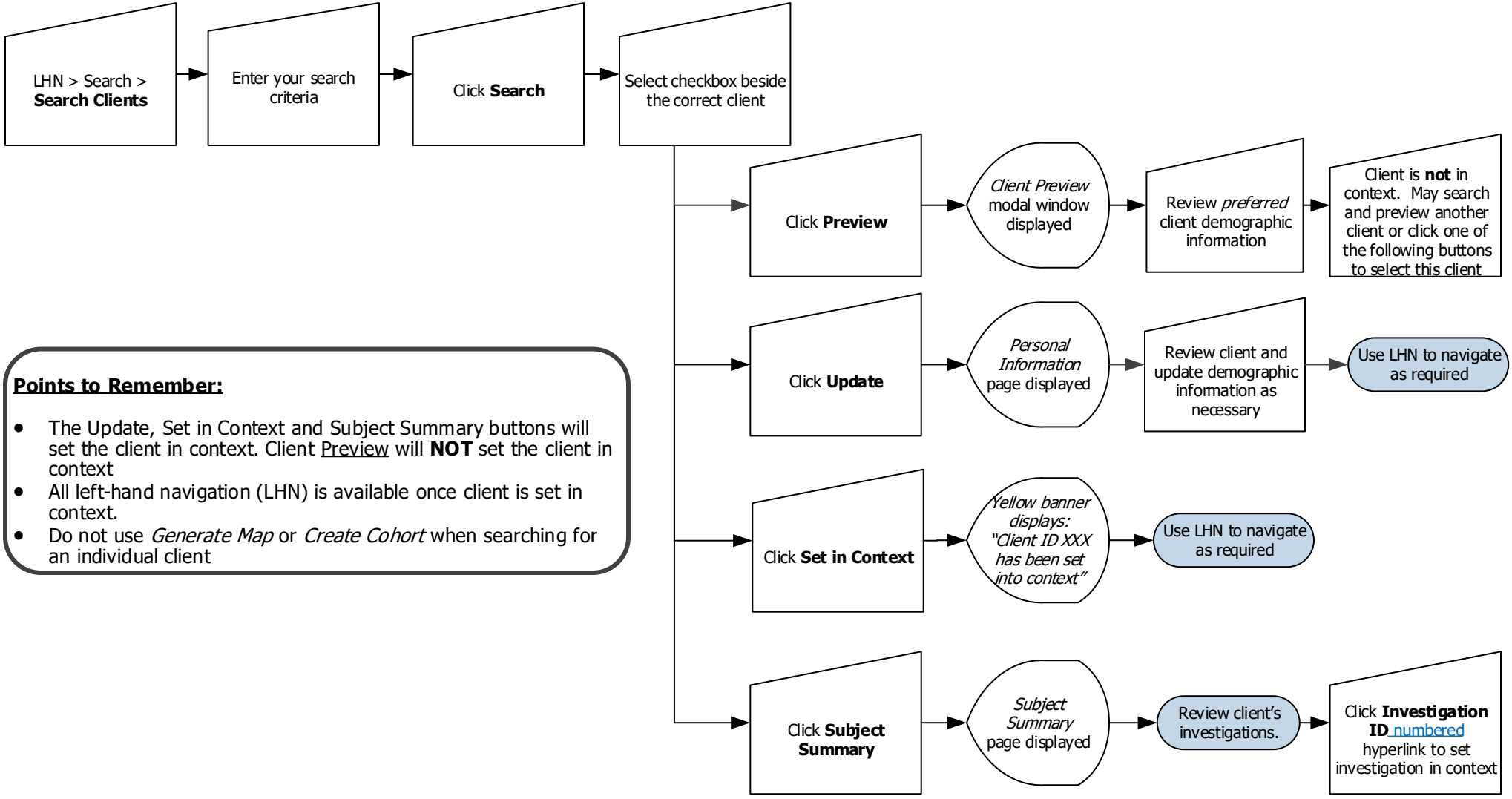
Best Practices for Searching Clients

- Users should always search for a client with the PHIN if it is known. Client Number Type is required, select the applicable number type from the drop-down list.
  - The client number type for PHIN is *Health Card Number*
  - The client number type for MHSC (registration number) is *Alternate ID*
- Best practice is to search for the client at least 3 times before assuming that there isn't a file for the client. If the client does not appear in the Search Results factory table, check the PHIN (or other search parameters entered) to ensure they were entered correctly.
- If the exact spelling of the client's name is unknown, users may use wildcards or placeholders to search.
- Wildcard Searches: Enter the percentage sign wildcard (%) at the end of a partial name in the name field will search for results that begin with the letters before the %. For instance, "Smi%" will return names such as: Smith, Smitherman, Smiel, etc.
- Placeholders: Use an underscore (_) if the exact spelling is not known. For example, search "Kar_n" to find Karyn or Karen.
- Using a wildcard percentage sign in a blank name field is not permitted.
- A maximum of 50 search results will display in the factory table. The message "*More than 50 results found. Too many results returned. Please refine your search*." will display in the search results section and no results will show in the table if more than 50 results are available for the search parameters that were entered. Refine your search parameters and search again.
- Newborns, immigrants and individuals who have recently moved to Manitoba may not be found in PHIMS. Clients will be created automatically through the interface with the Manitoba Health Insurance Registry. Newborn infants will be created shortly after discharge from birth hospital and users should hold data entry until the infant's record is available in PHIMS. Newcomers to Manitoba will be created when their Manitoba health coverage takes effect. Clients who move away from Manitoba will have inactive PHIMS records and out of province clients who have never lived in Manitoba will not have records in PHIMS. Contact your peer supporter if you believe your client should be manually created in PHIMS.

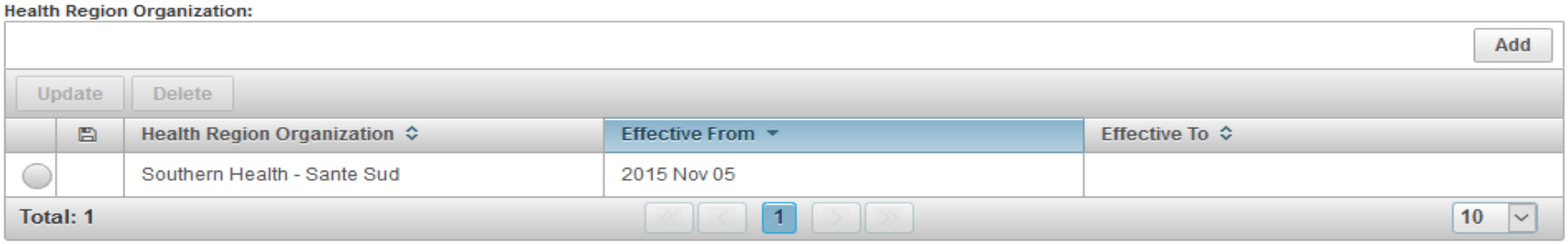
Investigations: *Search Client - Add / Update Client Demographics*

QRC 7.19a



Points to Remember:

- The Update, Set in Context and Subject Summary buttons will set the client in context. Client Preview will **NOT** set the client in context
- All left-hand navigation (LHN) is available once client is set in context.
- Do not use *Generate Map* or *Create Cohort* when searching for an individual client



Scroll to the ***Health Region Organization*** section

Search and select client
Click **Update**

OR

<u>If client is in context</u>

LHN > Subject > Client Details > ***Client Demographics***

Client Demographics - Personal Information page displayed

Select radio button beside the ***Health Region Organization*** to be updated

Click ***Update*** and enter the ***Effective To*** Date

Click **Apply**

Click **Add**

Start typing the name of the ***Health Region Organization*** to be added

Select the appropriate ***Health Region Organization*** from the drop-down list

The ***Effective From*** date is defaulted to the current date

Click **Apply**

Click **Save**

Scroll to the ***Ethnicity Information*** section & expand the chevron

Search and select client

Click **Update**

OR

If client is in context

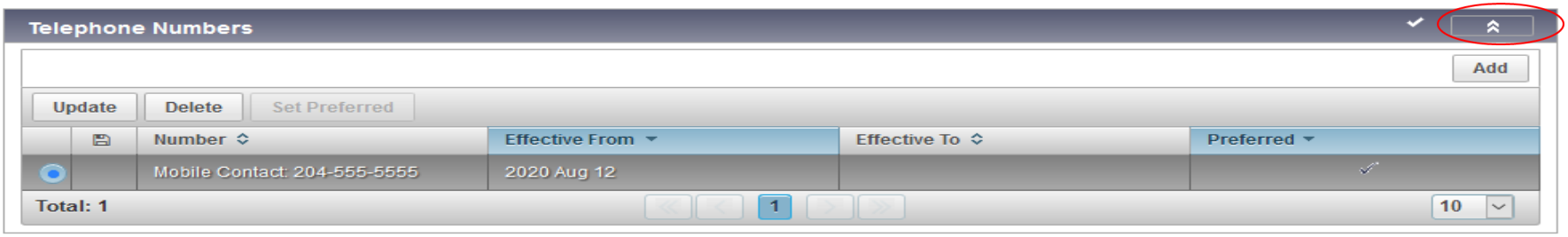
LHN > Subject > Client Details > **Client Demographics**

Client Demographics - Personal Information page displayed

Does your client's ***Racial/Ethnic Identity*** display in the drop-down list?

Yes → Select the appropriate ***Racial/Ethnic Identity*** → Click **Save**

No → Select ***Other*** from the drop-down list → Enter information in the ***Other Racial/Ethnic Identity*** box → Click **Save**



Scroll to the ***Telephone number*** panel & expand <<chevron>>

Search and select client
Click **Update**

OR
If client is in context

LHN > Subject > Client Details > **Client Demographics**

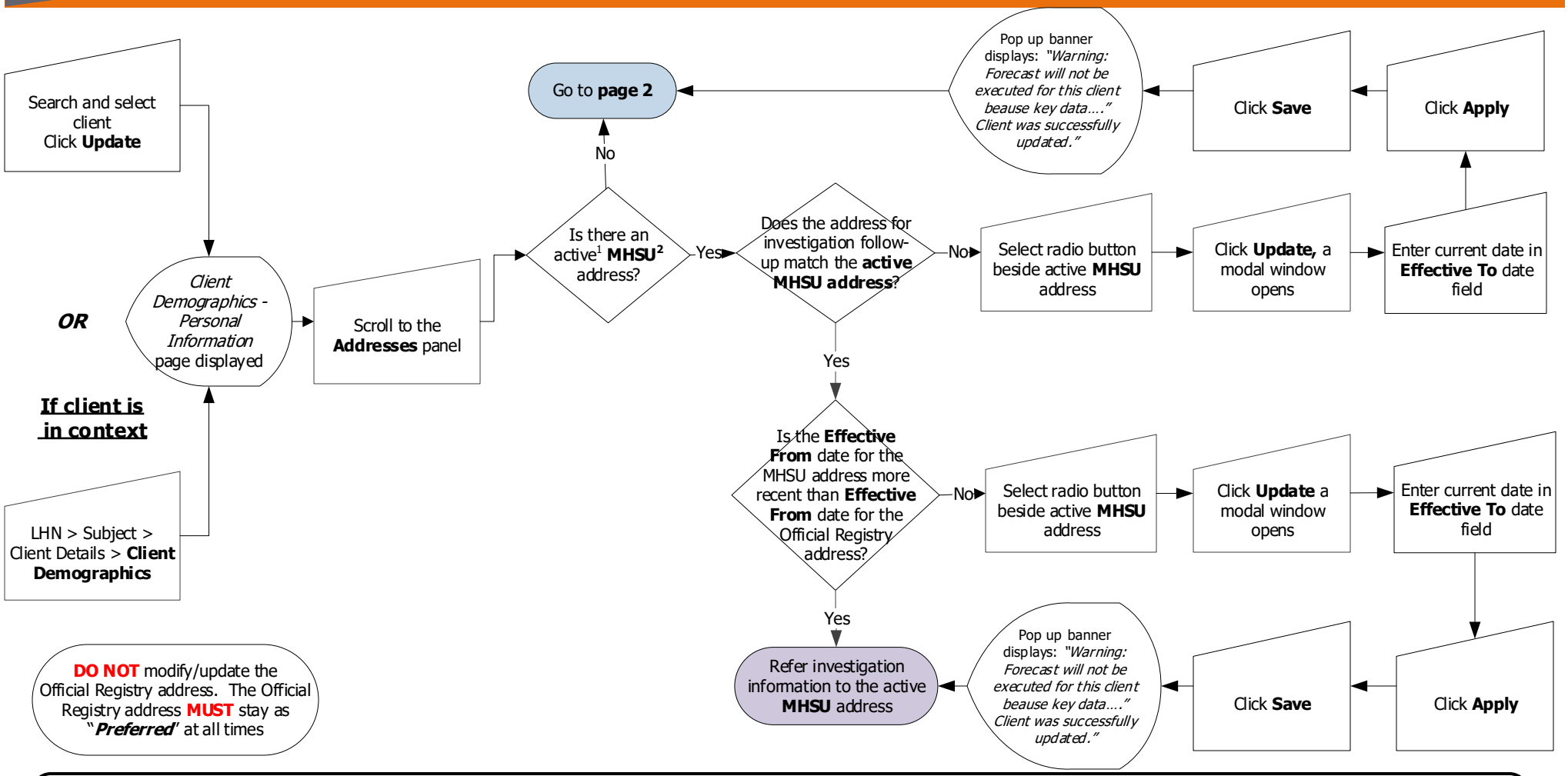
Client Demographics - Personal Information page displayed

Do you want to Add a **Number**?
- Yes → Click **Add** → Enter appropriate **Number** → Select appropriate ***Usage*** from the drop-down list → Click **Apply** → Click **Save**
- No ↓

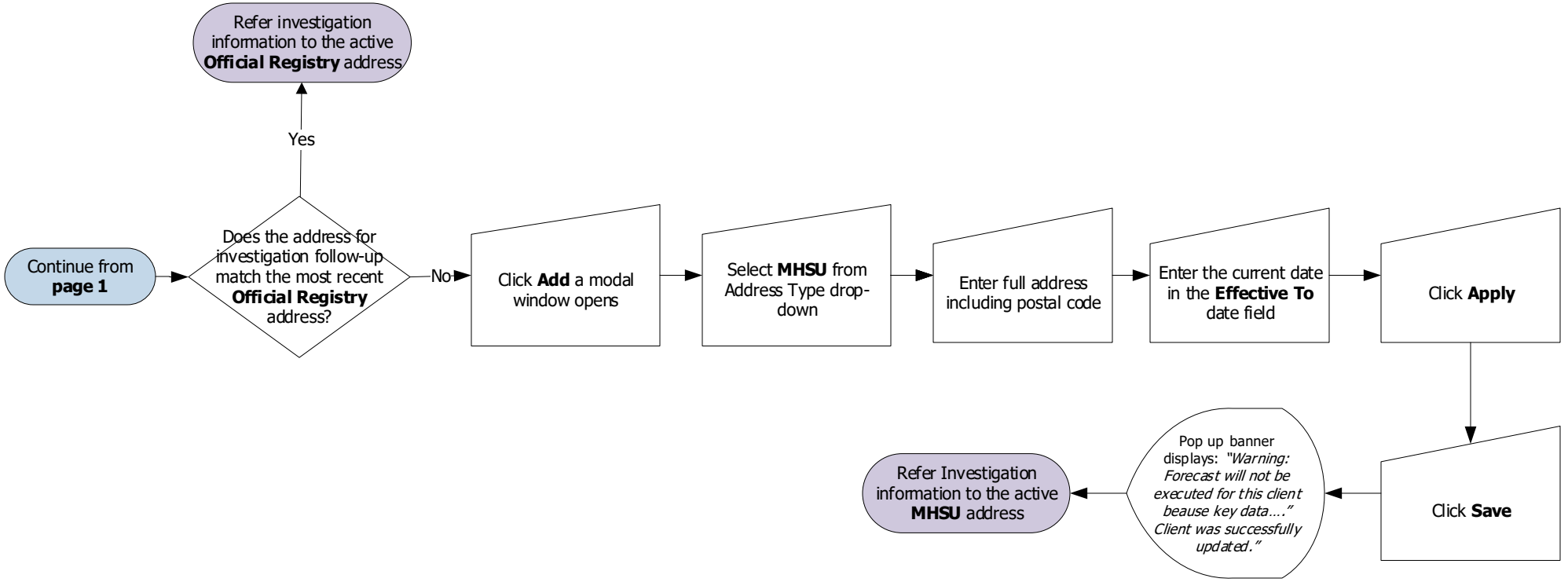
Do you want to Update a **Number**?
- Yes → Select radio button beside the **Number** you would like to update → Click **Update** → Enter appropriate **Number** → Select appropriate ***Usage*** from the drop-down list → Click **Apply** → Click **Save**
- No ↓

Do you want to Delete a **Number**?
- Yes → Select radio button beside the **Number** you would like to delete → Click **Delete** → Click **Save**
- No ↓

Do you want to set the **Number** as preferred?
- Yes → Select radio button beside the **Number** you would like to set as preferred → Click **Set Preferred** → Click **Save**



Footnotes:
1 Active addresses are addresses that do not have an Effective To date specified
2 There should only be one active MHSU address at a time. Ensure that all MHSU addresses that are no longer applicable have an Effective To date (to mark the address inactive).



Points to Remember:

- Do **NOT** update, delete or change the Official Registry address.
- You **MUST** enter a postal code with an address. Consult www.canadapost.ca to search postal codes. If the address is a landmark (such as a park or bridge), search for an address close to the landmark and use that postal code. If the address is a facility, search for the facility street address (if not noted on the form) and enter it.
- Active addresses are addresses that do not have an *Effective To* date specified.
- There should only be one active MHSU address at a time. Ensure that all MHSU addresses that are no longer applicable have an Effective To date (to mark the address inactive).

Scroll to the ***Alternate Names*** panel & expand <<chevron>>

Search and select client
Click **Update**

OR

If client is in context

LHN > Subject > Client Details > **Client Demographics**

Client Demographics - Personal Information page displayed

Do you want to Add an **Alternate name**?
- Yes → Click **Add** → Enter appropriate **Alternate name** → Click **Apply** → Click **Save**

No

Do you want to Update an **Alternate name?**
- Yes → Select radio button beside the **Alternate name** you would like to update → Click **Update** → Enter appropriate **Alternate name** → Click **Apply** → Click **Save**

No

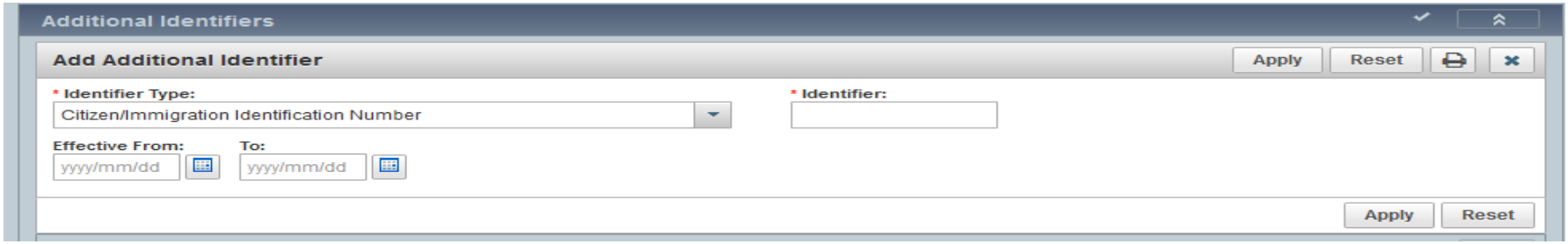
Do you want to Delete an **Alternate name**?
- Yes → Select radio button beside the **Alternate name** you would like to delete → Click **Delete** → Click **Save**

No

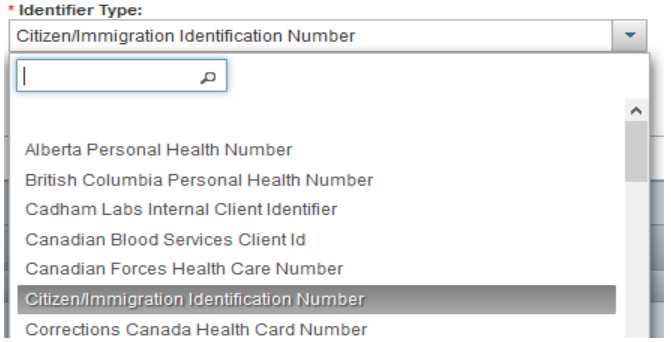
Do you want to set the **Alternate name** as preferred?
- Yes → Select radio button beside the **Alternate name** you would like to set as preferred → Click **Set Preferred** → Click **Save**

Investigations: *Client Demographics Additional Identifiers*

QRC 7.19a



Scroll to the ***Additional Identifiers*** panel



Search and select client
Click **Update**

OR

If client is in context

LHN > Subject > Client Details > **Client Demographics**

Client Demographics - Personal Information page displayed

Click **Add**

Select appropriate ***Identifier Type*** from the drop-down list

Enter the appropriate ***Identifier*** number

Select the appropriate ***Effective From*** date

Click **Apply**

Click **Save**

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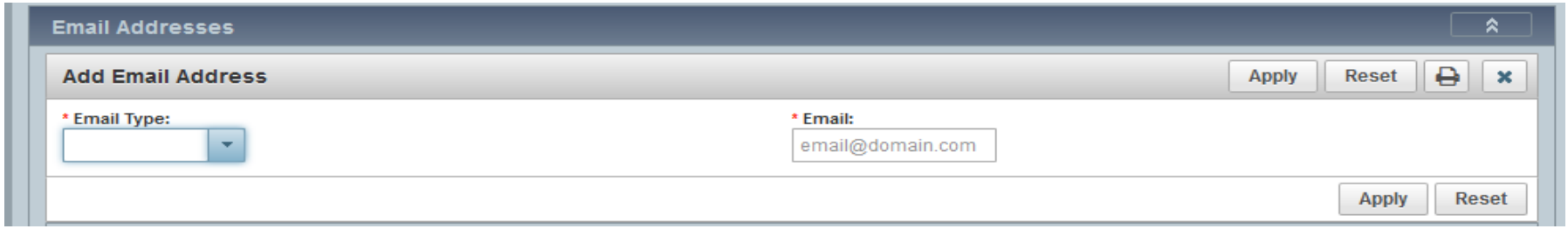


Scroll to the ***Email Addresses*** panel & expand <<chevron>>

Search and select client
Click **Update**

OR

If client is in context

LHN > Subject > Client Details > **Client Demographics**

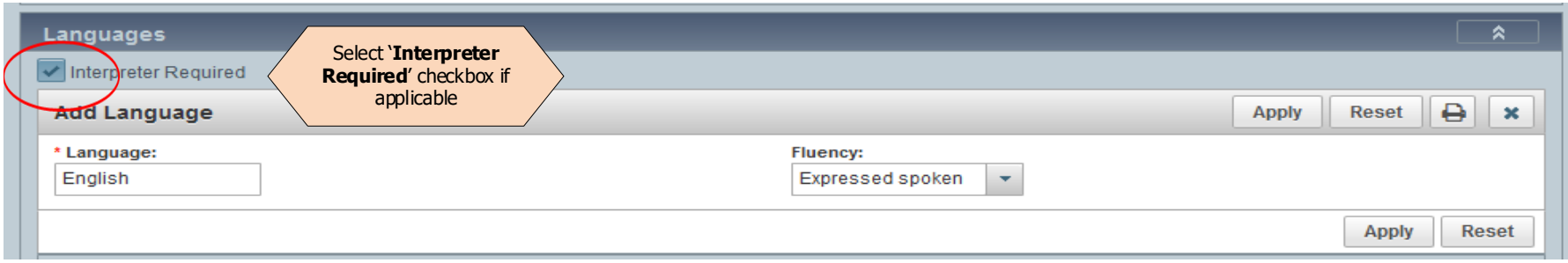
Client Demographics - Personal Information page displayed

Do you want to Add an Email Addresses?
- Yes → Click **Add** → Enter appropriate **Email Type** → Select appropriate **Email** address → Click **Apply** → Click **Save**
- No

Do you want to Update an Email Addresses?
- Yes → Select radio button beside the **Email Addresses** you would like to update → Click **Update** → Enter appropriate **Email Type** → Select appropriate **Email** address → Click **Apply** → Click **Save**
- No

Do you want to Delete an Email Addresses?
- Yes → Select radio button beside the **Email Addresses** you would like to delete → Click **Delete** → Click **Save**
- No

Do you want to set the Email Addresses as preferred?
- Yes → Select radio button beside the **Email Addresses** you would like to set as preferred → Click **Set Preferred** → Click **Save**



Scroll to the ***Languages*** panel & expand <<chevron>>

Search and select client
Click **Update**

OR

If client is in context

LHN > Subject > Client Details > **Client Demographics**

Client Demographics - Personal Information page displayed

Do you want to Add a ***Language***?
- Yes → Click **Add** → Select appropriate ***Language*** → Select appropriate ***Fluency*** from the drop-down list → Click **Apply** → Click **Save**

No

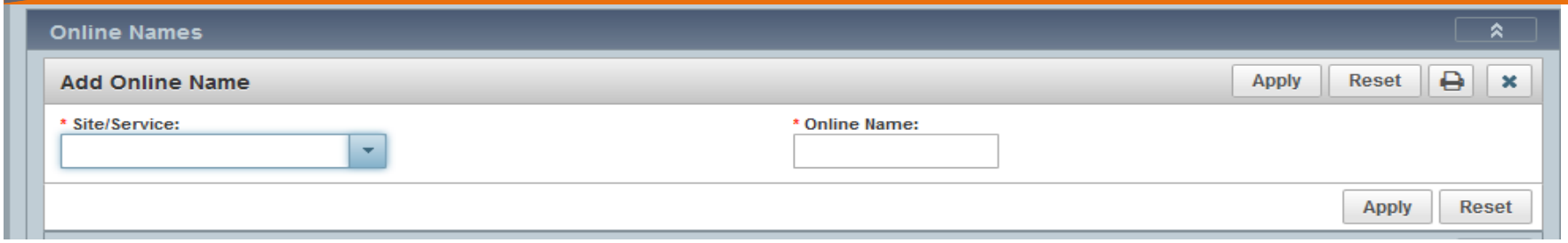
Do you want to Update a ***Language***?
- Yes → Select radio button beside the ***Language*** you would like to update → Click **Update** → Enter appropriate ***Language*** → Select appropriate ***Fluency*** from the drop-down list → Click **Apply** → Click **Save**

No

Do you want to Delete a ***Language***?
- Yes → Select radio button beside the ***Language*** you would like to delete → Click **Delete** → Click **Save**

No

Do you want to set the ***Language*** as preferred?
- Yes → Select radio button beside the ***Language*** you would like to set as preferred → Click **Set Preferred** → Click **Save**



Scroll to the ***Online Names*** panel

Search and select client
Click **Update**

OR

If client is in context

LHN > Subject > Client Details > **Client Demographics**

Client Demographics - Personal Information page displayed

Do you want to Add an ***Online Name***?
- Yes → Click **Add** → Select appropriate ***Site/ Service*** → Select appropriate ***Online Name*** → Click **Apply** → Click **Save**
- No ↓

Do you want to Update an ***Online Name***?
- Yes → Select radio button beside the ***Online Name*** you would like to update → Click **Update** → Select appropriate ***Site/ Service*** → Select appropriate ***Online Name*** → Click **Apply** → Click **Save**
- No ↓

Do you want to Delete an ***Online Name***?
- Yes → Select radio button beside the ***Online Name*** you would like to delete → Click **Delete** → Click **Save**
- No ↓

Do you want to set an ***Online Name*** as preferred?
- Yes → Select radio button beside the ***Online Name*** you would like to set as preferred → Click **Set Preferred** → Click **Save**