



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

- It is important to search by several differing criteria before creating a new client record. **NOTE:** When attempting a new search for the same client, click **Reset** to remove the previously entered search criteria, to start a fresh search. Please review: [Search Client \(Guide\)](#)

### **Points to remember:**

When creating a client, enter the **minimum 5 client identifiers** to be completed in Client Demographic: **ITEMS WITH A \* ARE REQUIRED**

- **Last Name\***
- **First Name\***
- **Date of Birth\***
- **Gender\***
- 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
- Select applicable telephone type indicated as the 'usage type'
- Select 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 Card Number (PHIN), the immunizations recorded in PHIMS will not be migrated to eChart
- Assigned Manitoba Health Family Registration Number that are 6 characters alphanumeric, letter characters (e.g. ABC) must be capitalized.

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

