

Points to Remember

- Lab Inbox messages must be matched to a PHIMS client for the message to be completed.
- PHIMS matches client information in the Received Report to client information already in PHIMS. PHIMS will identify a match when there is an **exact match** on last name, first name, date of birth, gender and PHIN.
- Clients will be Unmatched if there is a discrepancy in the identifiers or if the client is not in PHIMS.
- Common discrepancies in the client identifiers:
 - Middle name included in First Name field
 - Misspelled Last or First name
 - Incorrect date of birth
- It is acceptable to match a client with these discrepancies when other identifiers do match.
- **Consult local process before creating a client.**
- Once a Lab Inbox message is matched, it will move to the Matched Inbox. Users who selected only the "New-Unmatched Client" Electronic Report Status check box will no longer see the message upon return to the Electronic Lab Report Inbox. To see the report in the Lab Inbox after it is matched, select the "New-Matched Client" Electronic Report Status checkbox.
- A Lab Inbox message that came through as "New-Unmatched Client" because of discrepancies in the identifiers will not have include the address information that is current and active in PHIMS. The "Client Official Registry Addr:" or "Client MHSU Addr:" line will not show on the Received Report because the client was initially Unmatched, and the match was manual.

Tips for Searching

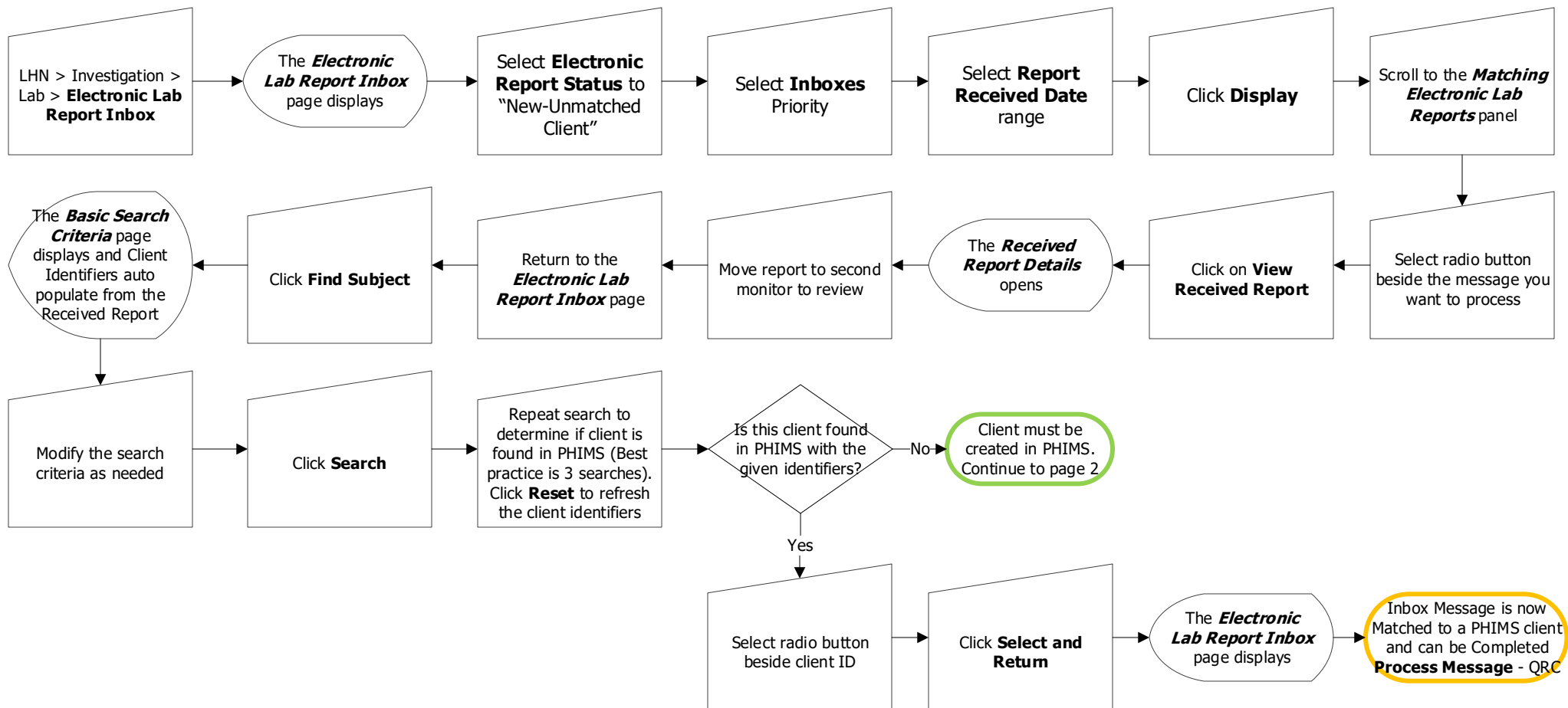
- Client identifiers auto populate from the Received Report.
- When the Client Number is specified as a Health Card Number or Alternate ID, this will populate in the Client Number Type field. If it is not specified, select a client number type before searching because Client Number Type is required when Client Number is provided.
- Inactive clients are not automatically included in the search. Click the Include Inactive Clients checkbox at the top right corner of the search page to include Inactive clients in your search.
- To identify if the last or first name was misspelled, use a wildcard (%) search in the name field.
- To ignore the date of birth, select the radio button beside "None of the Above"
- Click **Retrieve** to reset your last search criteria
- Click **Reset** to refresh all the client identifiers as provided on the Received Report
- You have to click Search, even if there are no results, to access the Create Client button.



Laboratory Inbox: Match New-Unmatched Client Process

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Laboratory Inbox: Create New-Unmatched Client

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