



## Client Records: Search Client Record

**Before creating a client record, always search for the client in PHIMS** (e.g. if the client has received the first dose of COVID-19 vaccine, they may already exist in PHIMS)

Best practice start by entering the client's 9 digit **Manitoba Health Number (PHIN)**

Enter the 9 digit **Health Card Number** in the **Client Number** field, select **Health Card Number** from the **Client Number Type** drop list

The screenshot shows the 'Search Clients' interface. The 'Client Number' field contains '555888111'. The 'Client Number Type' dropdown menu is open, showing 'Health Card Number' selected. The 'Search' button is circled in green. Other fields include 'Last Name', 'Middle Name', 'Gender', and a 'Select' section with checkboxes for 'Inc' and 'Us'.

**OR** by **Client ID** when available

The screenshot shows the 'Search Clients' interface. The 'Client Number' field contains '7711003'. The 'Client Number Type' dropdown menu is open, showing 'Client ID' selected. The 'Search' button is circled in green. Other fields include 'Last Name', 'Middle Name', 'Gender', and a 'Select' section with checkboxes for 'In' and 'U'.

Click **Search**

If the **'No records were found matching the search criteria'** message displays, modify the search.



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Ensure to remove the previously entered search criteria prior to searching, click **Reset**



Search using the **Additional ID** client number type. This searches by the following identifiers, example:

- Manitoba Health Family Registration Number (6 digits) – found on the Manitoba Health Card
- Health Card Number from other provinces
- Medical Record Number
- Citizen/Immigration Identification Number
- RCMP Regiment Number
- Veterans Health Identification Number
- Treaty Number

Enter the number in the Client Number field and select Additional ID from the Client Number Type drop list, (the number can have letters within it), click **Search**

If the **'No records were found matching the search criteria'** a message displays, modify the search.



# Client Records: Search Client Record

Search: (there are multiple ways to search for a client in PHIMS)

- **Last Name & First Name** (also invert the First Name for Last Name, or combine both First and Last name, e.g. Karen Smith, Karen Smith. The client’s name might have been created incorrectly)
- **First Name & Date of Birth**
- **First Name & Date of Birth Range (Effective From: To)**
- **Telephone number**
- **First Name & Age**
- **First Name & Gender**
- **Pseudonym** (e.g. Bill and not William or client might be using alias e.g. Rabbit)
- **Maiden Name & First Name**
- **Maiden Name & First Name & Date of Birth**

If the “**Too many search results found. Please refine the search criteria and try again**” message will displays.



If the exact spelling of the client’s name is unknown, use *wildcards* or *placeholders* to search.

**Wildcard** search, use the percentage sign (%) to improve search results. Entering a % at the beginning, end or a partial name it the name field will look for results that begin with the letters before or after the %.

(e.g. Smi% will return names such as: Smith, Smitherman, Smiel, etc)

**Note: Using a percentage sign % in a blank name field is not permitted, as it will negatively impact system performance**

Try searching different variations using the wildcard:

A screenshot of the "Search Clients" web interface. The "Search" button is circled in green. The "Basic Search Criteria" section has several fields: "Last Name:" with "Smith%" entered (circled in red), "First Name:" with "K%" entered (circled in red), "Middle Name:" (empty), "Gender:" (dropdown), "Date of Birth:" with "1999/01/01" entered (circled in purple), and "Effective From:" and "To:" (empty). On the right, there are checkboxes for "Select a" with options "Inc", "Inc", and "Us".

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Client was created with First Name combined with Last Name. (e.g. Karen Smith, Karen Smith)

**Search Clients** [Search]

**Basic Search Criteria**

Client Number:  Client Number Type:

Last Name:  First Name:

Middle Name:

Gender:

Choose one:

Date of Birth:

Effective From:  To:

Select a

- Inc
- Inc
- Us

Placeholders can also be used if the exact spelling is not known (e.g. Kar\_n for Karyn or Karen)

**Search Clients** [Search]

**Basic Search Criteria**

Client Number:  Client Number Type:

Last Name:  First Name:

Middle Name:

Gender:

Choose one:

Date of Birth:

Effective From:  To:

Select a

- Inc
- Inc
- Us

## Search by Telephone Number

Age:  Year(s)

None of the above

Telephone Number:

Country:  Number:  x

Health Region Organization:     Exact Match



## Client Records: Search Client Record

When a client's record displays in the **Search Results** factory table, select the radio button associated to the client and click **Preview**. The client's demographics will display.

Search Results							
<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Client ID	Health Card Number	Last Name	First Name	Gender	Date of Birth		
5933	987987987	June	May	Female	1998 Jan 13		

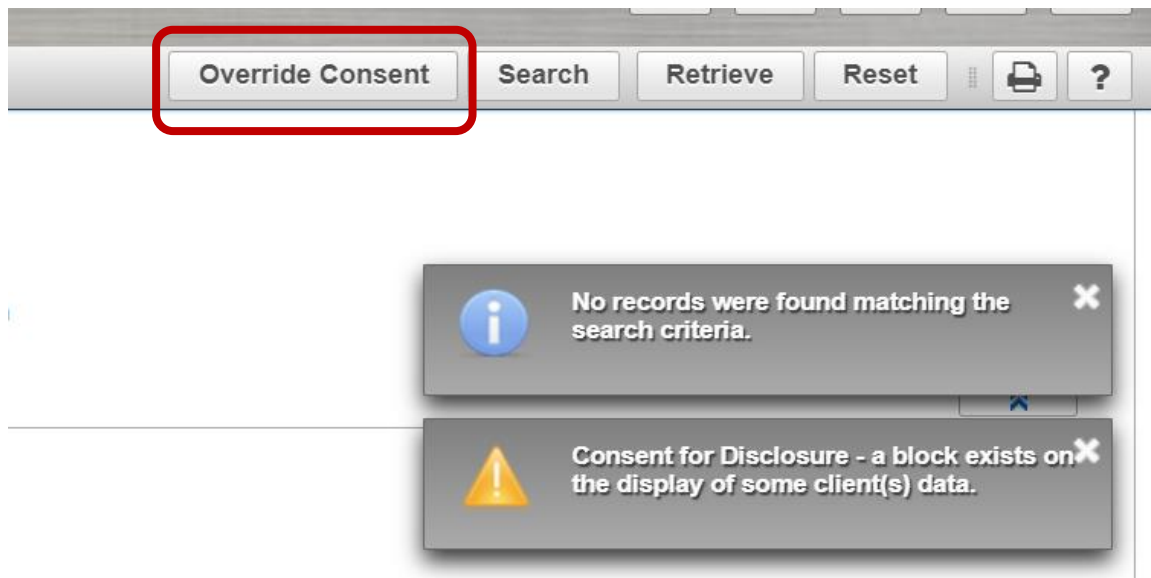
The **Client Profile** modal opens

Client Profile	
Client Information	
<b>Client ID:</b>	5933
<b>Client Name:</b>	June, May
<b>Preferred Alternate Name:</b>	Smith, Karen
<b>Health Card Number:</b>	987987987 - Manitoba Health Card
<b>Date of Birth:</b>	1998 Jan 13
<b>Age:</b>	24 years
<b>Gender:</b>	Female
<b>Gender Identity:</b>	
<b>Other Identity:</b>	
<b>Preferred Address:</b>	111 Shore Bay, Winnipeg, Manitoba, R1G0B6, Canada
<b>Preferred Telephone Number:</b>	Primary Home: 204-360-1212
<b>Health Region:</b>	Winnipeg Health (including Churchill)



## Client Records: Search Client Record

If a message displays '*Consent for Disclosure – a block exists on the display of some client(s) data*'. Click **Override Consent** to proceed.



Select **Override Reason** from the drop list, enter **Description**, click **Confirm**

**Search Clients**

**Override Consent**

\* **Override Reason:**  
Other (specify)

\* **Description:**  
Covid-19 Immunization administered

Confirm

**DO NOT** delete a Consent for Disclosure

Best practice is to search for the client at least 3 times before assuming that there isn't a file.