

Searching for a Client Record

PHIMS landing page

Ensure the Service Delivery Location (SDL) is correct. An SDL is the physical location where the pharmacy services are delivered (e.g. Taché Pharmacy)

Click **Immunization**

Public Health Solution for Disease Surveillance and Management

IMMUNIZATION INVENTORY

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.

Specify your Service Delivery Location (SDL)

* **Service Delivery Location:** Tache Pharmacy

SDL Time Zone: CST

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.

Notifications
Create and view jurisdiction and threshold notifications.

Need Help ?
Contact information for the [Help Desk](#)

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External Reference Links
LINKS WILL OPEN A NEW WINDOW

No Reference Link has been added

The **Search Clients** page displays

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

Select all that apply:

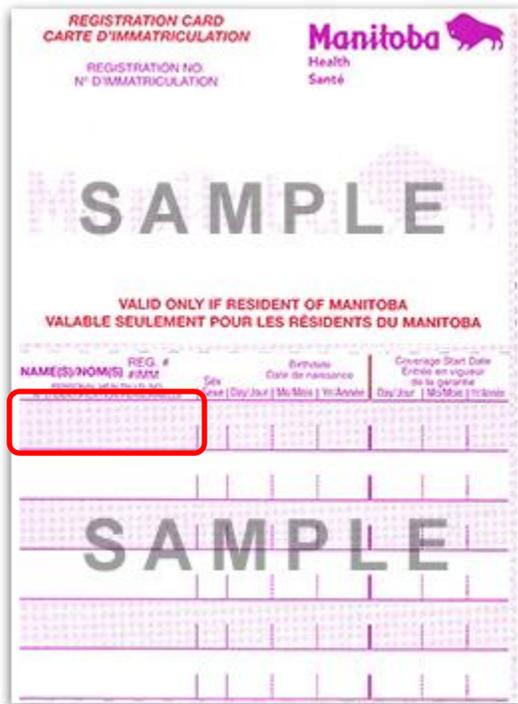
Include Inactive Clients

Include Indeterminate Clients

Use Phonetic Matches

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



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

Search Clients

Basic Search Criteria

Client Number: 555888111

Client Number Type: Health Card Number

Last Name: []

Gender: []

Middle Name: []

Choose one:

Date of Birth: []

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Search

Click **Search**

Searching for a Client Record

Does the name of the client you are searching display in the **Search Results** factory table? If 'yes', select the checkbox to the left in the row associated with the client's name and Select "**Preview**" or "**Client Imms Profile**" and continue.

Search Results									
Preview	Set In Context	Client Imms Profile							
<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"/>	5966	173018388	Agosti	Alan	Male	1947 Oct 19	Southern Health - Sante Sud	Active
Total: 1									

Preview

Client Profile
Client File Status
Active
Client Information
<p>Client ID: 5966</p> <p>Client Name: Agosti, Alan</p> <p>Preferred Alternate Name: -, Bill</p> <p>Health Card Number: 173018388 - Manitoba Health Card</p> <p>Date of Birth: 1947 Oct 19</p> <p>Age: 73 years</p> <p>Gender: Male</p> <p>Gender Identity:</p> <p>Other Identity:</p> <p>Preferred Address: 25 Legal Bay, Ste. Anne, Manitoba, R0A2A6, Canada</p> <p>Preferred Telephone Number: Primary Home: 204-444-4444</p> <p>Health Region: Southern Health - Sante Sud</p> <p>Relationships:</p>

Identifier Type	Identifier	Effective From	effective To
British Columbia Personal Health Number	256987451	1947 Oct 19	2008 Jan 09
Total: 1			

Ethnicity Information	
Ethnicity: White (North American, Canadian, European, Other)	Ethnicity Reported by: Self
Birth Information	
Province / Territory: British Columbia	City / Town: Victoria
Part of Multiple Birth: No	
Languages	
Interpreter Required: <input checked="" type="checkbox"/>	

Searching for a Client Record

If 'no' continue your search



Search using the Additional ID client number type. This allows you to search by the following identifiers that could have been used when creating the client in PHIMS e.g.:

- Manitoba Health 6 digit family number (found on the Manitoba Health Card)
- Health card numbers from other provinces
- Citizen/Immigration Identification Number
- RCMP Regiment Number
- Treaty Number

Enter the number in the **Client Number** field and select **Additional ID** from the **Client Number type** drop-down list, click **Search**

A screenshot of the "Search Clients" web application. The "Search" button in the top right corner is circled in red. The "Basic Search Criteria" section contains several input fields: "Client Number" (with "123456" entered and circled in purple), "Client Number Type" (a dropdown menu with "Additional ID" selected and circled in yellow), "Last Name", "Middle Name", "Gender", "Date of Birth" (with a "Choose one:" radio button), and "Effective From: To:". A search icon is visible in the top right of the dropdown menu.

If 'no' continue search



Search by **Last Name & First Name**, ensure the client's **legal registered name** is being searched. Clients might be using their middle name, might be using a pseudonym (e.g. Bill for legal name William). Clients might use their maiden name. Ensure you are using the **client's legal name** that is on the Manitoba Health Card or the client's Manitoba Driver's License.

Searching for a Client Record

The screenshot shows the 'Search Clients' interface. The 'Search' button is circled in red. The 'Basic Search Criteria' section includes fields for 'Client Number', 'Client Number Type', 'Last Name' (containing 'Fields'), 'First Name' (containing 'Paul'), and 'Middle Name'. A message box at the bottom states: 'No records were found matching the search criteria.'

If 'no' continue search

Search by **Last Name & First Name & DOB**

The screenshot shows the 'Search Clients' interface. The 'Search' button is circled in red. The 'Basic Search Criteria' section includes fields for 'Client Number', 'Client Number Type', 'Last Name' (containing 'Fields'), 'First Name' (containing 'Paul'), 'Middle Name', and 'Gender'. The 'Date of Birth' field is set to '1984/11/24' and is circled in red. A message box at the bottom states: 'No records were found matching the search criteria.'

If 'no' continue search

If the client does not display in the **Search Results** factory table, check the spelling 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.

Searching for a Client Record

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

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

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

Search Clients Search Re

Basic Search Criteria

Client Number: Client Number Type:

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

Gender:

Select
 In
 In
 U:

Placeholders can also be used if the exact spelling is not known

(e.g. Kar_n for Karyn or Karen)

If you see a pop up with "**Consent for Disclosure – a block exists on the display of some client(s) data**", click **Override Consent** to proceed

Search Clients Override Consent Search Retrieve Reset ?

e.g. Organization Display Name Exact Match

School Information

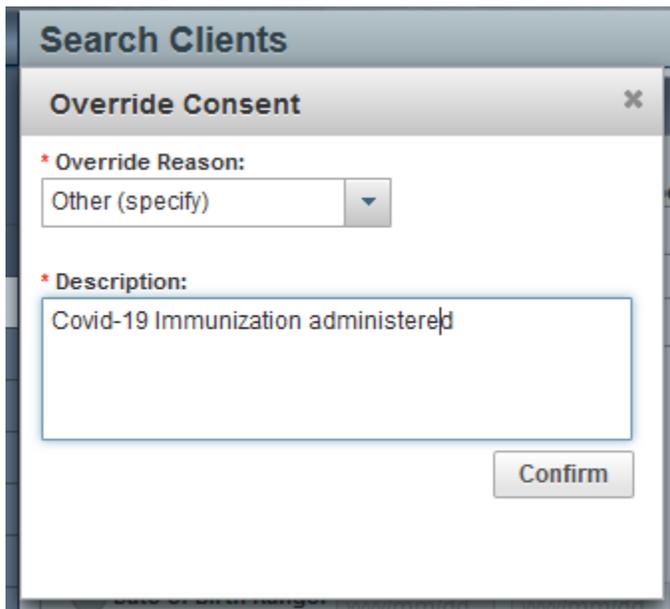
School:

School Year: Grade: Class:

Consent for Disclosure - a block exists on the display of some client(s) data.

Searching for a Client Record

Select *Override Reason* from the drop-down list, enter ***Discription***, click **Confirm**



The screenshot shows a software window titled "Search Clients". Inside, there is a sub-dialog box titled "Override Consent" with a close button (X). The sub-dialog contains two fields:

- * Override Reason:** A dropdown menu with "Other (specify)" selected.
- * Description:** A text input field containing the text "Covid-19 Immunization administere|d".

A "Confirm" button is located at the bottom right of the sub-dialog.

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