 <p>Winnipeg Regional Health Authority Office régional de la santé de Winnipeg Caring for Health À l'écoute de notre santé</p> <p>PRIMARY HEALTH CARE OPERATIONAL GUIDELINE</p>	<p>Operational Guideline: Client Identification</p>	<p>Guideline Number: PCOG#23</p>
	<p>Approved By: Primary Care Service Area Leadership</p>	<p>Pages: 1 of 3</p>
	<p>Approval Date: January 27, 2022</p>	<p>Supersedes: August 2, 2019</p>

1. INTENT

- To provide staff with direction regarding a standard and consistent approach for the use of a minimum of two client-specific identifiers to improve safety and minimize risk within the Primary Health Care setting
- To meet the Required Organizational Practice around Patient Safety for Accreditation whereby all Health Care Organizations have a consistent and defined process for identifying clients using at least two client-specific identifiers prior to the provision of any service, procedure, or administering of medication to confirm the client receives the service or procedure intended for them

2. DEFINITIONS

Client: An individual registered to receive health care services from a provider within Primary Health Care. A client may also be referred to as a patient or resident depending on the setting.


Client Specific Identifier: Any demographic information that is person-specific or unique to a particular client. Examples include:

- Full Name
- Date of Birth (DOB)
- Personal Health Identification Number

Personal Health Information Number (PHIN): A health card consisting of a unique nine-digit numeric identifier assigned by Manitoba Health and Seniors Care to every person registered for health insurance in Manitoba; or equivalent from alternate jurisdictions.

3. GUIDELINE

- 3.1 When the client presents in the clinic, it is the responsibility of Primary Health Care staff to request the client's health card (PHIN) and/or other acceptable identification in order to confirm all relevant client demographic information.
- 3.2 All staff must verify at least two client-specific identifiers prior to the provision of any service, procedure, or administering of medication within their clinic. Using person-specific identifiers to confirm that clients receive the service or procedure intended for them can avoid harmful incidents such as privacy breaches, allergic reactions, medication errors and wrong-person procedures.
- 3.3 If staff cannot correctly identify the client, the examination is not to proceed (with the exception of emergencies).
- 3.4 The client-specific identifiers used depend on the population served and client preference. A standardized approach to the use of client-specific identifiers will be

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followed throughout all services; however different identifiers may be used in different service settings. The identifiers shall be consistent within each service and not simply whatever the individual staff person wishes to use.

3.5 Verification of a client's identity is required at the beginning of any encounter where misidentification poses a risk of harm. Examples of this include but are not limited to:

- Check-in for appointments
- Telephone triage or communication
- Assessment
- Provision of diagnosis or results
- Provision of client information
- Administration of any medication
- Closure and/or transfer of client file
- Provision of service by a staff not familiar with the client
- Requisitions, labeled specimen containers


3.6 The verification process of the client's identity will be done in the following manner:

3.6.1 Client Provision of Service/Procedure Identification:

- Staff will ask for full first and last name. The client will provide the information while the staff person verifies the information against the client's record.
- Staff will ask for a second client-specific identifier. The client will provide the information while the staff verifies the information against the client's record.
- In settings where there is long-term or continuing one-to-one service provision and the staff member is familiar or "knows" the client, direct facial recognition may serve as one client-specific identifier
- For services provided in the home, where the staff member is familiar or "knows" the client, the correct address may serve as one client-specific identifier

3.6.2 Client Telephone Contact Identification:

- Staff will ask for full first and last name. The client will provide the information while the staff person verifies the information against the client's record.
- Staff will ask for a second client-specific identifier. The client will provide the information while the staff verifies the information against the client's record.
- In situations of continuing one-to-one service provision, where the staff member is familiar or "knows" the client, voice recognition may serve as one client-specific identifier as long as no sensitive patient health information needs to be shared or disclosed
- In situations where sensitive health information needs to be shared with the client, or verbal consent to disclose client health information needs to be obtained, two client-specific identifiers other than voice recognition are required
- Staff can provide the critical conversation, treatment or procedure ONLY if the information matches
- Whenever sensitive client information is shared with the client or disclosed to others, or verbal consent to disclose information is obtained during telephone

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conversations, the two client-specific identifiers used will be noted as part of the regular documentation of the episode of care in the Progress Notes

Note: Staff should not ask “Yes” or “No” questions when verifying a client’s identity; the client should always be asked to provide the information first and avoid leading questions

3.7 When asking for client-specific identifiers prior to provision of service, staff will explain to the client the request is necessary to prevent risk and/or to ensure privacy. WRHA educational posters (APPENDIX A) are available to assist with communicating the need for and importance of client verification. All clinics shall have client identification posters posted in both the waiting room and clinic/treatment areas.

4. **APPENDICES**

- APPENDIX A – WRHA Patient Awareness Posters (English & French)

5. **REFERENCES**

- [WRHA Regional Policy #110-000-370 Client Identification](#)
- Accreditation Canada, Required Organizational Practices Handbook (January 2019 - Version 14)
- Consultation with Primary Care Service Area Leadership, Community Area Directors, Site Medical Leaders and Regional Primary Health Care Quality Team (January 2022)

SCOPE: Applicable to all WRHA Primary Care Direct Operated Clinics, Walk In Connected Care Clinics (including Access Winnipeg West, Access Fort Garry and McGregor), Midwifery Services, Antenatal Home Care, Interprofessional Team Demonstration Initiative and My Health Teams.

NOTE: While the Funded Community Health Agencies are out of scope of Primary Care Operating Guidelines, it is recommended the content and/or processes be adapted/adopted where applicable.

***Questions related this or any other Primary Care Operating Guideline should be directed to Primary Care Service Area Leadership**