



## **P16-0371 Panorama Project**

# **Panorama Immunization Management User Manual**

## **Panorama Navigation**

Version 1.0

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## 1 PURPOSE

The purpose of this course is to provide an overview of the Panorama system. This course is intended for all prospective Panorama users, e.g., nurses and clerks, and is a pre-requisite to all the remaining Panorama courses.

After completing the course, users should be able to:

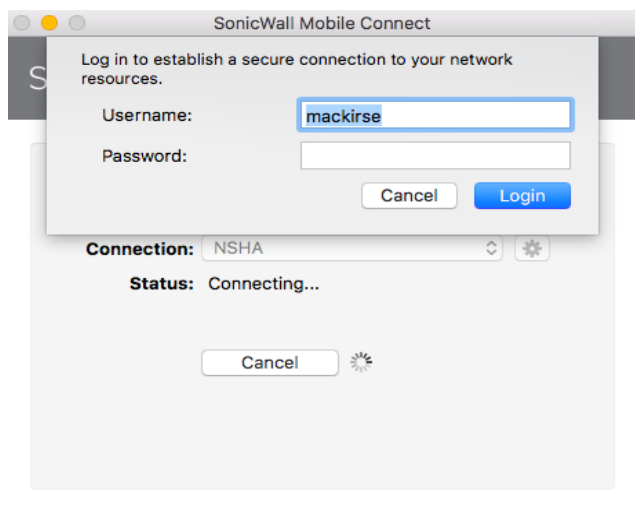
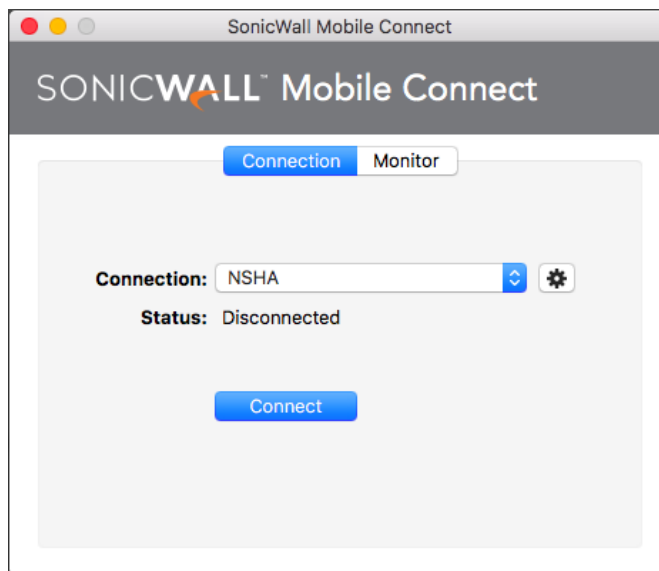
- Login/Logout of the system
- Navigate the system screens
- Use the most common fields and screen buttons
- Set user defaults

## 2 USER LOGIN

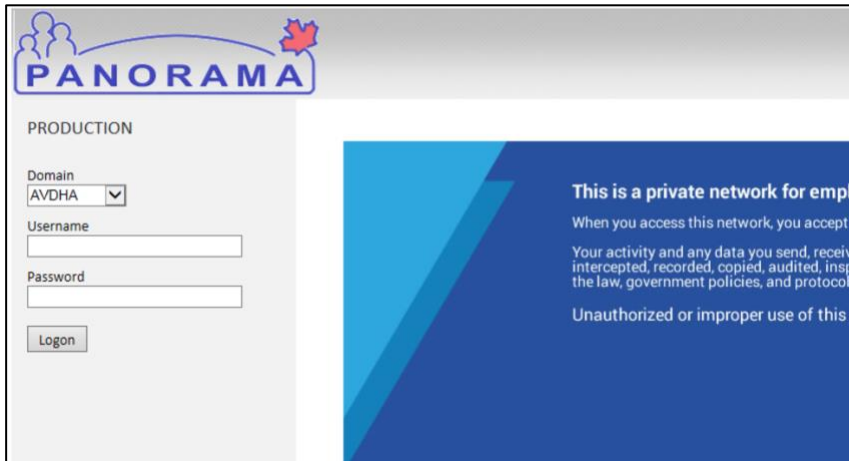
Each registered user on Panorama will have their own respective username and password. These usernames and passwords will be provided to the Users by the Panorama Team.

Before a user can begin using Panorama, a user must login into Panorama. Below are the steps outlined for registered users to login into Panorama.

1. When working off-site, you must access Panorama through a Virtual Private Network (VPN) connection. VPN products used are Aventail (used by DHW & NSHA staff) and Global Connect. Connect to NSHA and enter your Username and Password.



2. Log into Panorama by opening the web browser and entering the URL provided by the Panorama Team.
3. Enter **Username** and **Password**.



4. Select the appropriate role assigned to username. Click **OK**.

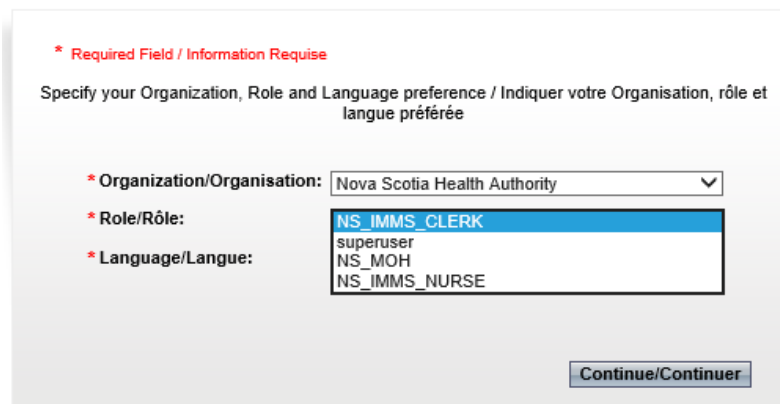
Roles are used by Panorama to define what users are authorized to view and perform while they are working with Panorama. A user may be provided with one or more roles, depending on the nature of the work and the responsibilities involved. A user may be assigned one or more Roles when they are registered to use the system.



**Tip: Multiple Roles**

*For those users with multiple roles, expand the Role drop-down list and select the correct role. Point your mouse pointer slowly to the name of the role you are about to select to ensure you are selecting the correct role for the organization you are supporting today. The full name of the Role and the Organization will be displayed in a yellow message box.*

## Login / Ouverture de session



## 3 NAVIGATE IN PANORAMA

Navigating around Panorama allows the User to access certain functionality across the system. This includes:

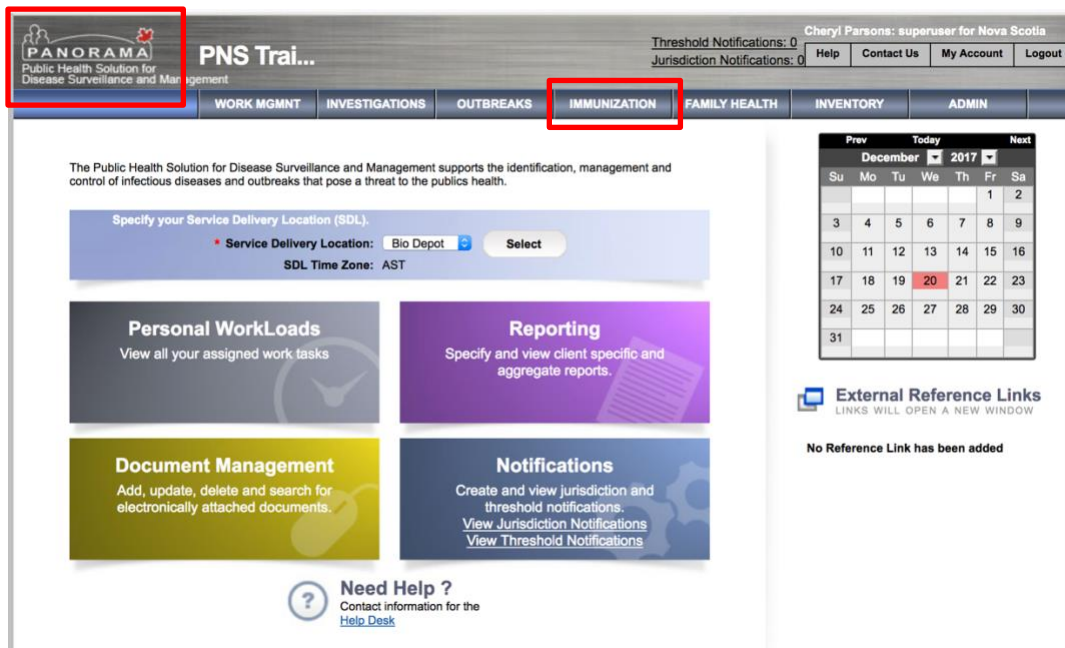
- Panorama Dashboard
- Using the Left-Hand Navigation
- Accessing Recent Work
- Using the Back Button
- Common Panorama Functions

### 3.1 Panorama Dashboard

The **Dashboard** page is the first page a user will see upon a successful login to Panorama. This page is accessible from anywhere in Panorama by clicking on the Panorama logo in the upper left-hand corner of any screen.

The **Dashboard** does not contain client information; therefore, it can be used as a “clean” page to quickly bring forward when someone else is present. Keep in mind that if you are in the middle of a transaction, you will lose your work if you do not save before clicking the logo.

To start working with client data, a user needs to click the **Immunization** tab in the top navigation bar.

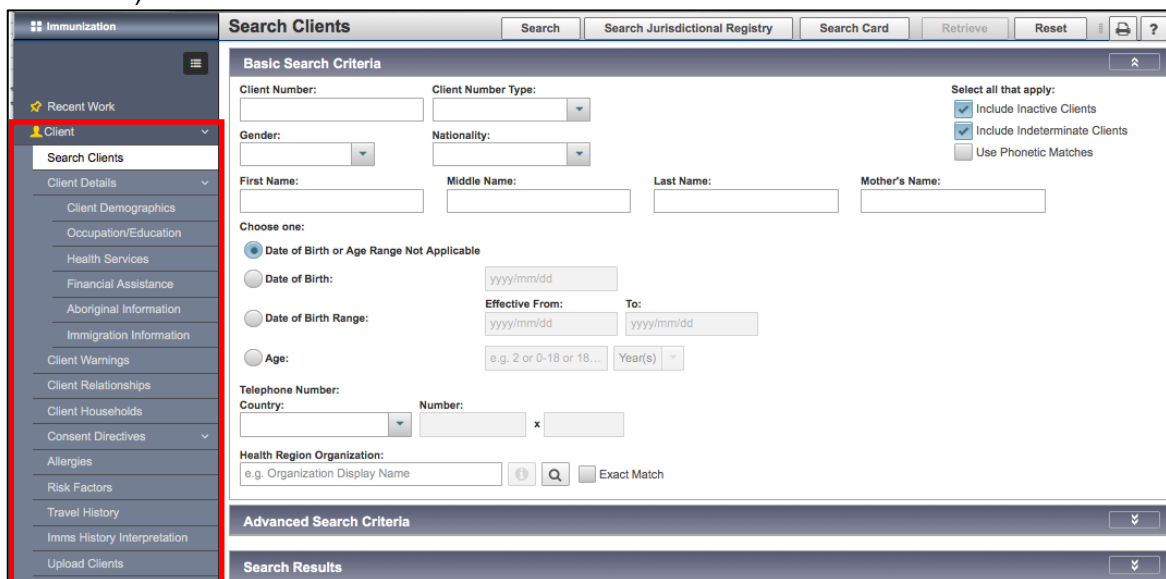




## 3.2 Left-Hand Navigation

The **Left-Hand Navigation** menu bar allows users to easily move between Panorama screens. To access a screen, move your mouse pointer to the name of the Panorama function you need to access.

Some functions are grouped in categories. To see what functions are available within a group, click the arrow next to the name of the primary function (e.g., Client). The menu will expand and display additional functions available (e.g., Immunization Service and All Services).

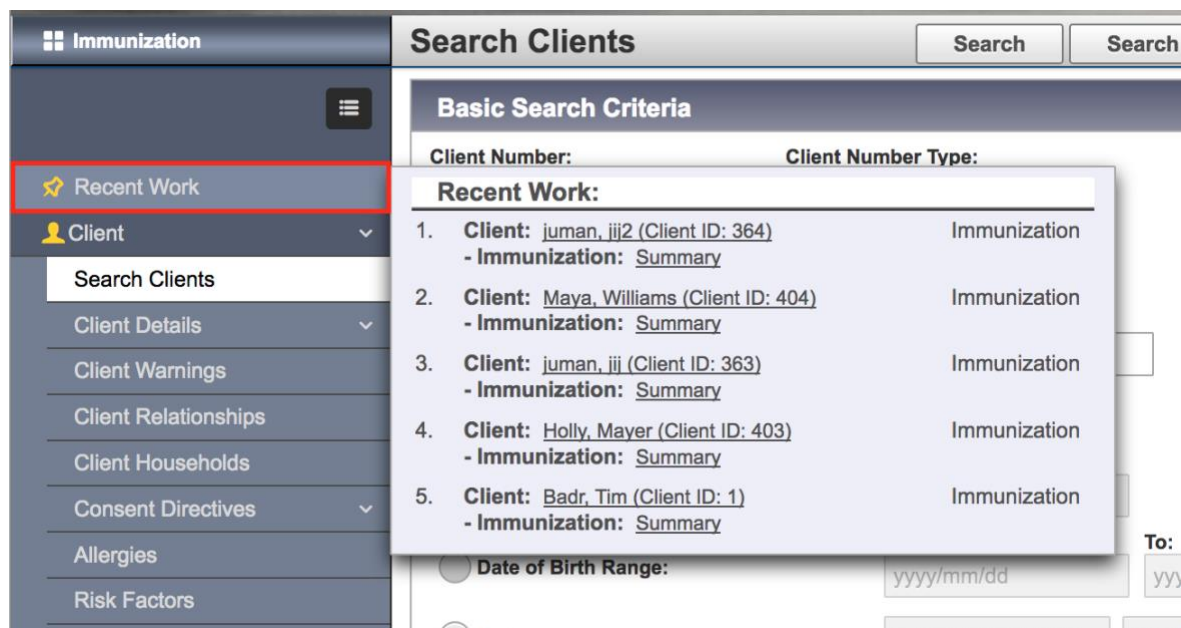


The screenshot shows the 'Search Clients' interface. On the left, a navigation menu is expanded under the 'Client' category, listing various functions. The main content area is titled 'Search Clients' and contains a 'Basic Search Criteria' section with fields for Client Number, Gender, Nationality, First Name, Middle Name, Last Name, and Mother's Name. There are also options to select all that apply (Include Inactive Clients, Include Indeterminate Clients, Use Phonetic Matches) and a 'Choose one' section with radio buttons for Date of Birth or Age Range Not Applicable, Date of Birth, Date of Birth Range, and Age. The bottom section is titled 'Advanced Search Criteria' and includes a 'Search Results' section.

## 3.3 Recent Work

The **Recent Work** feature of Panorama allows a user to bypass client search and quickly access the last ten clients the user has worked with.

To access the **Recent Work** list, click **[Recent Work]** in the top of the **Left-Hand Navigation** menu. The **Recent Work** list will expand to show a list of the last ten clients a user has accessed. The **Recent Work** will store information about these clients even after the end of the user's Panorama session and logout from the system.



**Immunization**

**Search Clients** [Search] [Search]

**Basic Search Criteria**

Client Number: Client Number Type:

**Recent Work:**

1. Client: juman, jij2 (Client ID: 364) Immunization  
- Immunization: Summary
2. Client: Maya, Williams (Client ID: 404) Immunization  
- Immunization: Summary
3. Client: juman, jij (Client ID: 363) Immunization  
- Immunization: Summary
4. Client: Holly, Mayer (Client ID: 403) Immunization  
- Immunization: Summary
5. Client: Badr, Tim (Client ID: 1) Immunization  
- Immunization: Summary

Date of Birth Range: yyyy/mm/dd To: yy

### 3.4 Back Button

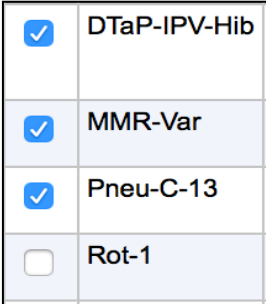


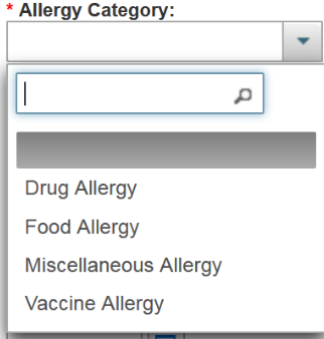
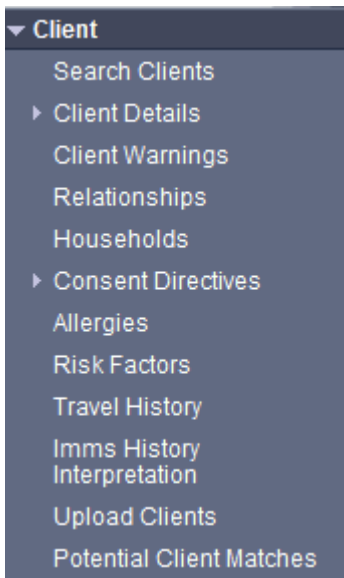
Users should not use the back button of the internet browser to move/return to the previous screen of Panorama. The most common way to safely exit the active screen and return to the previous screen is by clicking the **Cancel** or **Close** buttons.




Other methods of exiting a specific screen will be described in this manual where applicable.

#### 3.4.1 Common Panorama Fields and Screen Buttons

The following table provides a list and descriptions of common screen elements and buttons in Panorama.

BUTTON/FIELD TYPE	DESCRIPTION
<input type="radio"/> Radio Button  <b>Part of Multiple Birth?</b> <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown	A <b>Radio Button</b> is used to select <u>only one</u> value from a predefined set of options. It can be selected or deselected.

	<p>A <b>Checkbox</b> is used to select <u>one or more</u> than one value from a predefined set of options. It can be selected or deselected.</p>
	<p>A <b>Command button</b> is used to initiate an immediate action that is invoked when the user clicks on the button. For example, clicking the  button will initiate a client search.</p>
	<p>A <b>Dropdown list</b> is used to select one value from a list. When a dropdown list is inactive, it displays a single value. When activated, it displays (drop downs) a list of values from which the user can select one.</p>
	<p>The <b>Left-Hand Navigation</b> menu allows the user to easily navigate between the screens once a user has accessed one of Panorama's main sections or components.</p>

<p><b>Last Name:</b></p> <input type="text"/>	<p><b>Free text</b> fields allow users to enter text of their choice. There may be a limitation to the number of characters a user can enter in a field.</p>
<p><b>* Last Name:</b></p> <input type="text" value="Mohammed"/>	<p><b>Mandatory</b> fields must be populated before the information on the screen can be saved. Mandatory fields will be marked by a red asterisk.</p>
<p><b>* Occupations:</b></p> <input type="text" value="Heal"/> <div>Health Care Worker</div>	<p><b>Type-ahead</b> fields are programmed to anticipate what the user is typing and provide suggestions for the user to choose from. A user can only enter one of the suggested values.</p>
	<p>A <b>date</b> field is used to enter dates using a predefined yyyy-mm-dd format.</p>
 	<p>A <b>calendar</b> field in Panorama can be used to enter the date by picking the date from the calendar. To display the calendar field, a user can click the calendar widget in the date field. By default, the current date is automatically selected. A user can select another date as needed. Single right and left-facing arrows can be used to select a required month. Double right and left-facing arrows can be used to select a required year.</p>

## 4 SET-UP USER DEFAULTS

User defaults in Panorama are designed to minimize data entry and reduce the time required to enter the same information repeatedly on different Panorama screens. A user can define how Panorama will fill out specific fields on most immunization screens in advance.

User defaults enable users to view and update their preferences for immunization default values. The default values are used to automatically populate specific data entry fields on immunization screens. Immunization defaults will support data entry for routine clinical services at the point of service or for historical documentation.

Set up your Immunization Defaults before entering any data in Panorama. Any information entered in the Immunization Defaults may be updated as often as required.

### 4.1 Updating User Profile

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Users must be assigned to one or more Nova Scotia Health Authority Organizations to use Panorama. There are different types of Organizations in Panorama. These include Nova Scotia Health Authority-related Organizations (called Jurisdictional Organisations or JOrgs in Panorama) and School-related Organizations. More details on the Organizations are included in the ADM 101 training course for System Administrators.

User Profiles will be automatically populated when the user is registered in Panorama. In the situation where users belong to more than one organization, they will select their Organization upon login and the specific Service Delivery Location (SDL) at the Panorama Dashboard page.

A **Service Delivery Location** (SDL) is the physical location where Providers provide immunization services. A user can be assigned to one or more SDLs and will have the option to choose which SDL to record information for by selecting the correct item from the **Service Delivery Location** dropdown list and clicking the **Select** button. You may return to this page and change your SDL at any time during your session.

WORK MGMNT

INVESTIGATIONS

OUTBREAKS

IMMUNIZATION

FAMILY HEALTH

INVENTORY

ADMIN

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: Sample JOrg SDL
Select

SDL Time Zone: Sample JOrg SDL

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.

[View Jurisdiction Notifications](#)
[View Threshold Notifications](#)

Need Help ?

Contact information for the [Help Desk](#)

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Today

Next

March

2017

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12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

External Reference Links

LINKS WILL OPEN A NEW WINDOW

No Reference Link has been added

Next you will select **My Account** on the top right-hand corner of the **Dashboard** page, then select **User Profile**. Users should validate their user preferences and update fields as necessary to ensure information is complete (i.e. telephone number and email).

PANORAMA

Public Health Solution for Disease Surveillance and Management

PNS Test

Threshold Notifications: 0  
Jurisdiction Notifications: 0

Tester Panorama: supervisor for NSHA

Help

Contact Us

My Account

Change Role

Logout

WORK MGMNT

INVESTIGATIONS

OUTBREAKS

IMMUNIZATION

FAMILY HEALTH

INVENTORY

ADMIN

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: Halifax PHO
Select

SDL Time Zone: ADT

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.

[View Jurisdiction Notifications](#)
[View Threshold Notifications](#)

Need Help ?

Contact information for the [Help Desk](#)

Notification Preferences

Next

Network Speed Test

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

External Reference Links

LINKS WILL OPEN A NEW WINDOW

No Reference Link has been added

Recent Work

Indices

Terminology

Templates

Security

Miscellaneous

Reporting & Analysis

Notifications

WORK MGMT

INVESTIGATIONS

OUTBREAKS

IMMUNIZATION

FAMILY HEALTH

INVENTORY

ADMIN

Manage User Profile

?

Save

Reset

Personal Information

Hide Personal Information

User ID :

PERMISSIONS

\* Preferred Language :

English

Name:

ALL PERMISSIONS

Default SDL :

Sample JOrg SDL

Organizational Membership Information

Hide Organizational Membership Information

Organization Name :

Sample Jurisdictional Organization

Phone Number(s)

A maximum of 3 phone numbers can be entered

\* Type:

emergency contact

\* Number:

( ) - ext.

Add

Clear

Row Action:

Update

Remove

Type	Number	ext.

Email:

To specify a Service Delivery Location first click on the 'Find' button. Then search, or type the name of the Service Delivery Location you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Clear

Service Delivery Location:

Sample Jurisdictional Organization > [Sample JOrg SDL]

Find

Add SDL

Row Action:

Remove

Associated Service Delivery Location(s)	Default
Sample JOrg SDL	✓

Default Encounter Group and Service Provider

Hide Default Encounter Group and Service Provider

Click Find to select a provider:

Encounter Group:

Service Provider:

Doctor Test

Clear Provider

Provider:

Find

Save

Reset

## 4.2 Setting Immunization Preferences

Users may also set preferences based on their typical practices for administration of vaccine and pharmacologic products. Panorama enables documentation of age-specific preferences to allow for anatomical sites that appropriate for each client age range.

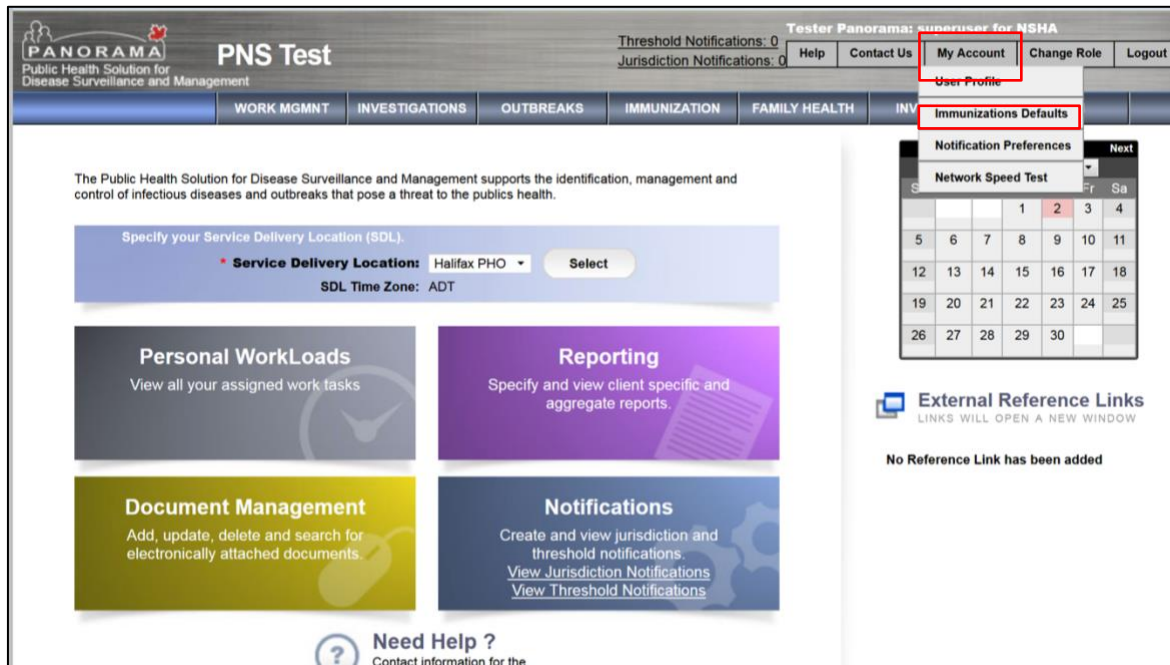
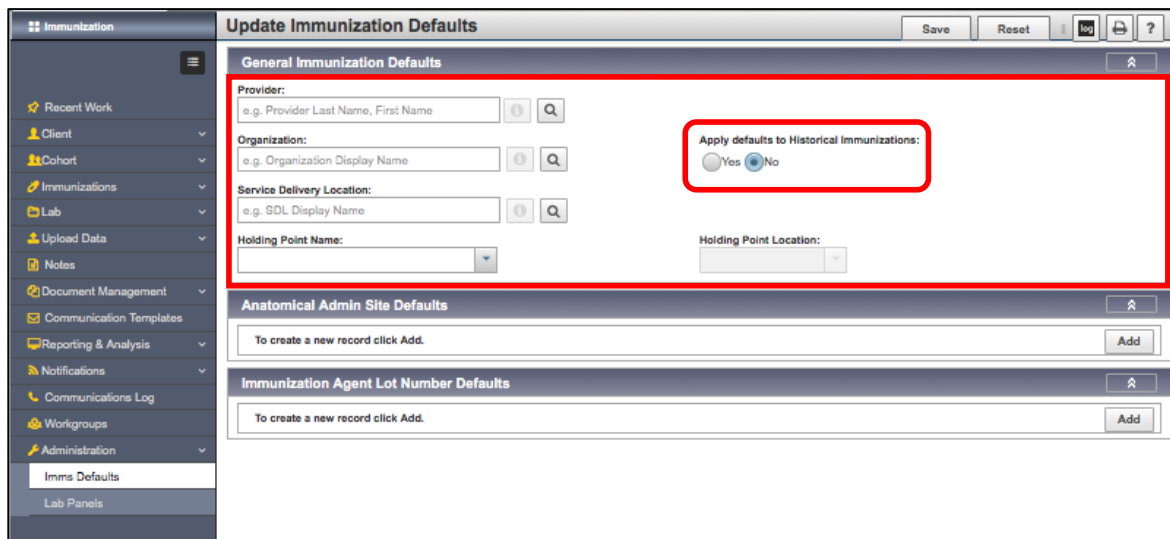
Setting Immunization Preferences supports faster documentation and auto-populates the user's documented preferences for point of service and historical documentation.

The **Update Immunization Default** screen displays a summary of current Immunization Default settings for the user including:

- General Immunization Defaults



- Anatomical Admin Site Defaults
- Immunizing Agent Defaults

### 4.3 Provider Default

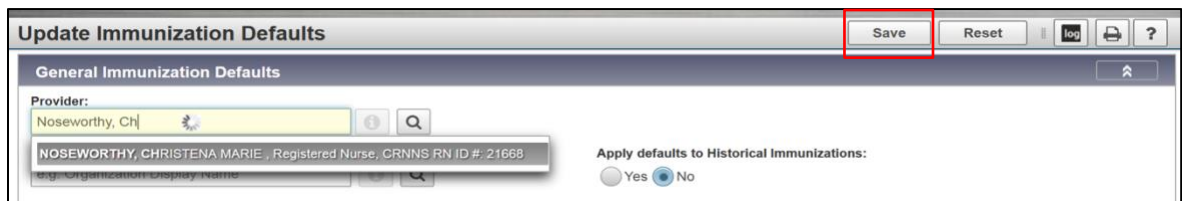
It is recommended that nurses leave the Provider section vacant. Panorama will automatically default to the Provider who has signed in when they are documenting provider recorded immunizations.



Additionally, nurses should select 'No' regarding applying default to historical immunizations. Users will still be able to select any provider for the administration of immunizations but this will not be auto-populated when documenting historical immunizations.

Nurses who are recording many immunizations on behalf of another provider may want to set the Provider default setting to reflect another provider's name when documenting non-provider recorded immunizations.

Click on the **Provider** field to type the first few letters of the Provider's **last name**. Allow the name to appear and then click on it to select. Click Save after updating each default field or update all fields and then click **Save**.

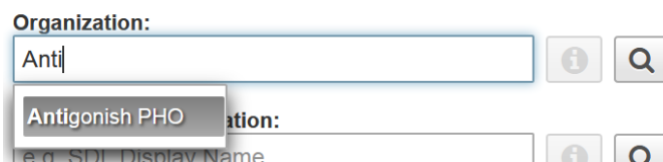



**Tip: Clear Default Settings**

Remember to clear/update the default setting when you are finished entering information for a different provider.

## 4.4 Organization Default

Click in the **Organization** field to and type the first few letters of the **Organization**. Allow the name to appear and then click on it to select.






**Tip: Select the Organization that provides the vaccine supply.**

## 4.5 Service Delivery Location Default

Click in the **Service Delivery Location** field to and type the first few letters of the **Service Delivery Location (SDL)**. Allow the name of the SDL to appear and then click on it to select. This will set the **Default SDL** and will make it easier for you to enter SDL data in your immunization service delivery.

**Service Delivery Location:**

Port Hawkesbury PHO, Port Hawkesbury, Nova s



**Note:** This default is the location you deliver immunizations.

## 4.6 Holding Point Name Default


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Adding the **Holding Point Name** to the defaults will ensure that when immunizations are delivered, the product is auto-decremented from the Holding Point associated with the provider's public health office.

1. Click in the **Holding Point Name** field and type the first few letters of the Holding Point. Allow the name of the **Holding Point** to appear and then click on it to select. This will set the **Holding Point Name**.

**Holding Point Name:**

Port Hawkesbury PHO



2. Click **Save**.

## 4.7 Holding Point Location Default

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Each **Holding Point** contains several **Holding Point Locations** (HPLs) where inventory is stored. Inventory intended for immunizations is stored in operational **Holding Point Locations**. Once a **Holding Point Location** default is set, the immunizations you provide will automatically auto-decrement from it. If setting up a **Holding Point Location** default, consult with your Biological Coordinator to confirm which **Holding Point Location** should be selected.



**Note:** If a nurse delivers immunizations at both school and Public Health Office clinics, two different HPLs will be used.

1. Click in the **Holding Point Location** field and make a selection.

**Holding Point Location:**

PtHawkes-HPL1-Op  
PtHawkes-HPL2-Clinic  
PtHawkes-HPL5-SC

**Holding Point Location:**  
PtHawkes-HPL2-Cli...

2. Click **Save**.

## 4.8 Anatomical Admin Site Default

The Anatomical Admin Site Defaults are an optional process where the preferred sites of administration can be identified for some or all vaccines. This default value is used to record immunization preferences for the anatomical site for a specific immunizing agent administered to a pre-defined age group. Once an immunizing agent is selected for a client of a matching age, Panorama will automatically populate the anatomical site for this vaccination.

1. To add a new Anatomical Admin Site default, click **Add** on the right side of the section.

**Update Immunization Defaults**

**General Immunization Defaults**

Provider: e.g. Provider Last Name, First Name

Organization: e.g. Organization Display Name

Service Delivery Location: e.g. SDL Display Name

Holding Point Name:

Holding Point Location:

Apply defaults to Historical Immunizations: ☐ Yes ☒ No

**Anatomical Admin Site Defaults**

To create a new record click Add.

**Immunization Agent Lot Number Defaults**

To create a new record click Add.

2. Select the **Immunizing Agent** by scrolling down the dropdown list or by typing the first few letters of the desired agent. Click on the desired agent to select it.

- Next, select the desired anatomical site location from the dropdown menu.

- Finally, enter the Minimum and Maximum ages, then click **Apply**. If the default should apply to older children and adults, leave the maximum age field blank. To add more defaults for other agents, simply click **Add** again and repeat this process.

	Immunizing Agent	Anatomical Site	Min Age	Max Age
	DTaP-IPV	Deltoid, right	25 mo.	
	DTaP-IPV-Hib-HB	Anterolateral thigh, right	0 mo.	24 mo.
	Pneumococcal Prevnar 13	Deltoid, right	25 mo.	
	Pneumococcal Prevnar 13	Anterolateral thigh, right	0 mo.	24 mo.

Total: 4

In the example above, the user has set a preference for administering Pevnar 13 in the anterolateral thigh for children ages 0-24 months, and for all clients older than 24 months, the default site is the deltoid. DTaP-IPV-Hib-HB is similarly set for the anterolateral thigh from 0-24 months, with the deltoid site defaulted for DTaP-Hib after age 25 months.

5. After adding all default preferences, click **Save** to ensure User Preferences are successfully added to the profile.



**Tip: Changing Defaults**

*Defaults may be changed at any time by the user. Additionally, when documenting an immunization, the user can select a different value other than the default simply by clicking on the field and selecting a different value. For example, you may have a default set for the left deltoid, but if the client requires a different sit of administration for some reason, the Provider can simply select a different site from the available options in the dropdown menu.*