P16-0371 Panorama Project

Panorama Immunization Management User Manual

CLT 101 Basic Client Records Management

Version 1.0

Dated: 2018-01-24

TABLE OF CONTENTS

1 PURPOSE

The purpose of this course is to provide detailed instructions on how to maintain basic client information on Panorama. The focus in this course is on demographic client data, and does not include clinical data. This course is intended for all prospective Panorama users, e.g., nurses and clerks, and is a pre-requisite to the advanced client record management course: CLT 102.

After completing the course, users should be able to:

1. Search for clients using different search methods

2. Create clients using different methods

3. Update client demographic information and maintain their relationships

2 MANAGE CLIENT RECORDS

Client search is the first step a user performs in Panorama. A thorough search will ensure that the client's demographic and health information is recorded in the correct record and reduce the number of duplicate clients in the system.

Note: All clients in the Nova Scotia Client Registry are in Panorama. New information from the Nova Scotia Client Registry is updated in Panorama daily.

If a client record is not found, the user will proceed with creating a new client record which is detailed in Section 4.

2.1   Search Panorama

There are a variety of ways a user can search for a client in Panorama. The following are the best practices for search capabilities in Panorama:
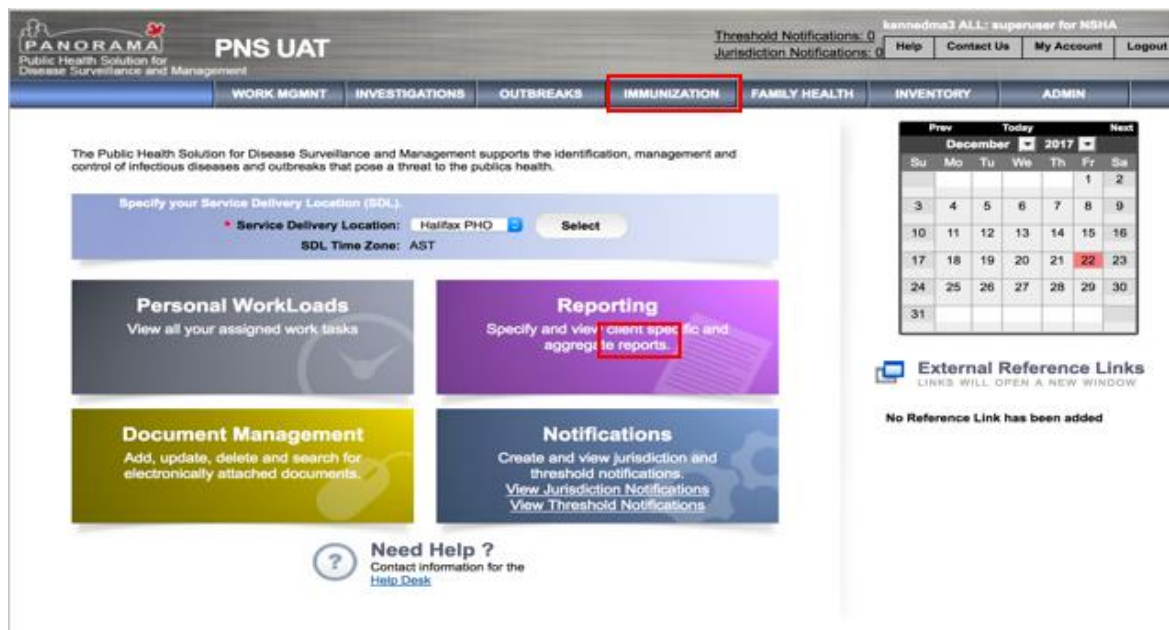
1. Search by Client Health Card Number

2. Search by Demographic Information (last name, first name, date of birth, gender)

3. Wildcard Search, phonetic search

4. Advanced Search

Once the client record is found, the user can either:
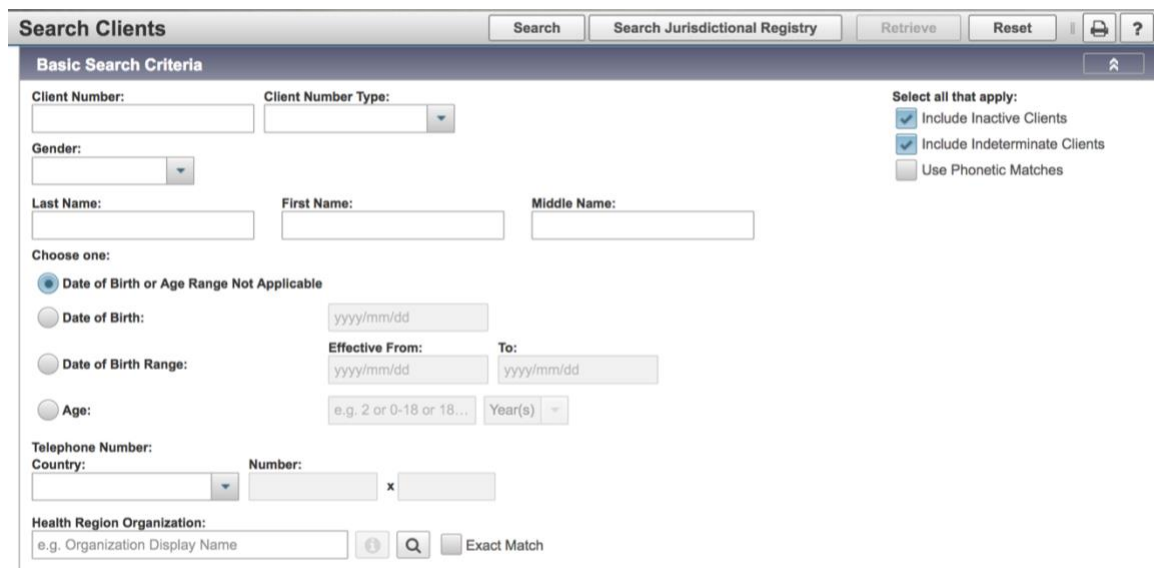
1. Preview Client

2. Update Client

3. Set Client in Context

4. Client Immunization Profile

To access the **Search Clients** screen on Panorama, complete the following steps:

1. Upon logging onto Panorama, select the **Immunization** module by clicking on the Immunization tab in the horizontal menu bar.

1. The system automatically displays the **Search Clients** screen.

💡 *Tip: Search Clients*

*If the user is already using the **Immunization** component, in the Left-Hand Navigation menu, click the **Client** menu to expand the sub-menu and click **Search Clients**.*
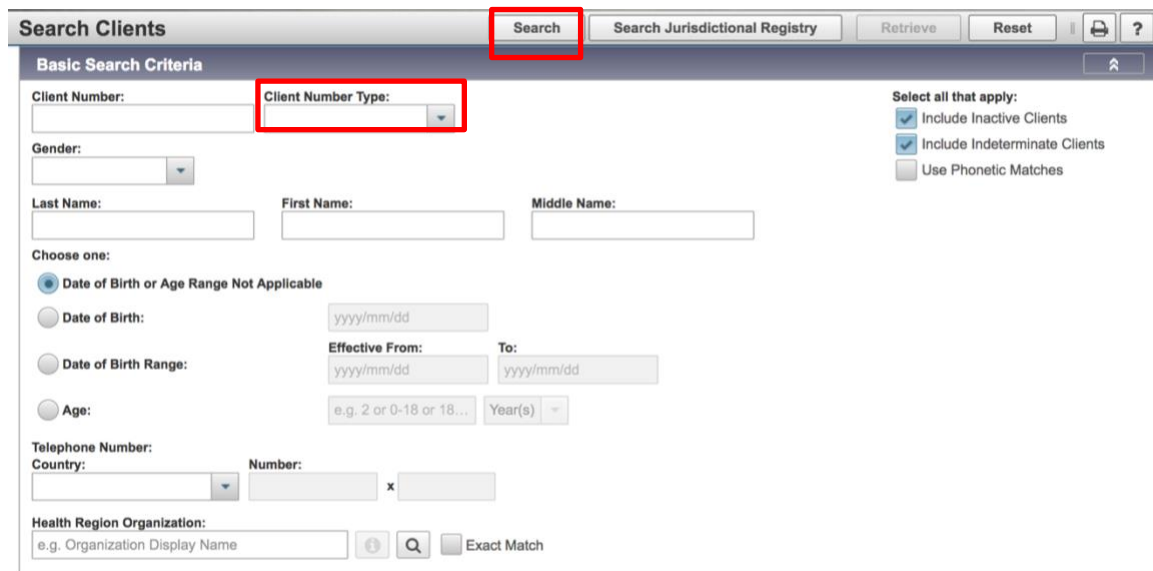
2.1.1 Search by Health Card Number

If a Nova Scotia Health Card number is available, always start the search using only this number.

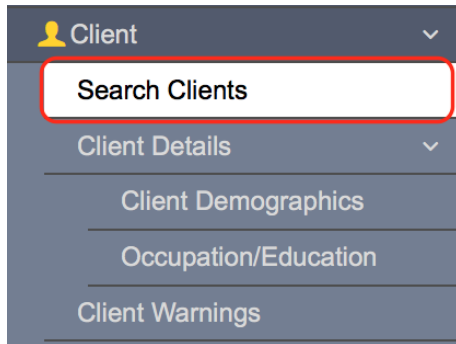1. Enter the Nova Scotia Health Card number in the **Client Number** field. Note: If the client does not have a NS Health Care, health card numbers from other provinces can be entered in the Client Number field,

2. Select **Health Card Number** from the **Client Number Type** dropdown list.

3.   Click **Search.**

💡 *Tip: Search by Alternate IDs*

If a Nova Scotia Health Card Number is not available or the client does not have a Nova Scotia Health Card Number, another identifier may be used to search for the client record, such as DND number or other identifier. This additional identifier may be recorded in the **Client Number** *field. Select* **Additional ID** *as the* **Client Number Type**. *If the client has a health card number (HCN) from a different province, this can be searched as an Alternate ID Type and added when creating a client record. When creating a client record, the out of province health card number can be identified by its province of origin and later searched as a health card number. Remember the initial search should be done as an alternate ID.*
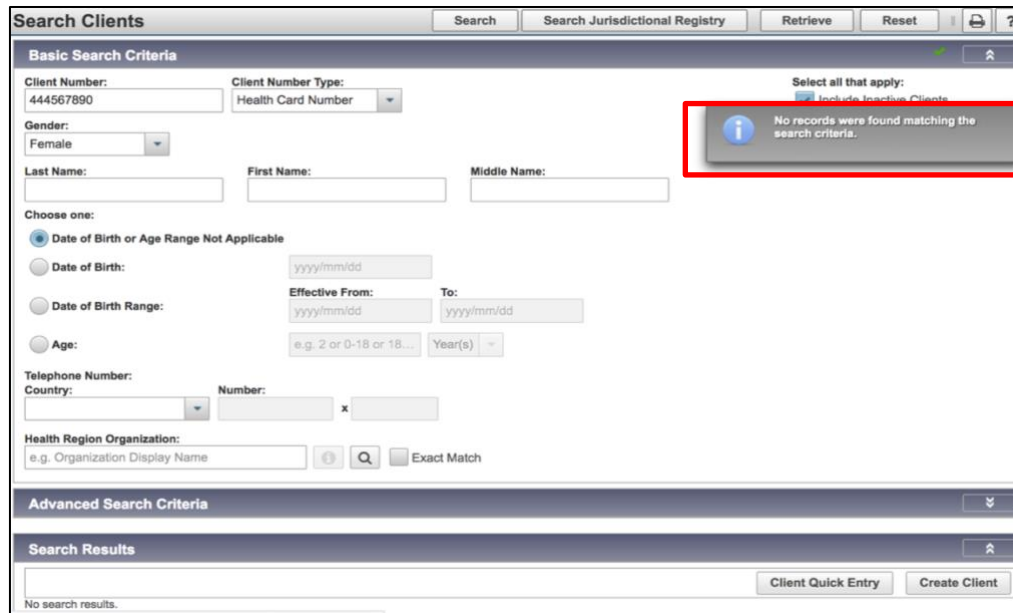
💡 *Tip: Search by Demographic Details*

Users can also search for clients by **Date of Birth**, **First Name, Last Name** *in the basic search.*

4. The system performs the search and the screen refreshes. Search results will be displayed in the **Client Index: Search Results** table. If a client has not been found, the system will display a **No results found** message.

2.1.2 Search by Names, Gender, Date of Birth

5. If the search using a Nova Scotia Health Card Number returns no results, the user should try another search by a combination of Last Name, First Name, Gender, and Date of Birth. Searching only by the Last Name and First Name is too generic and does not meet the best search practices of electronic information systems.

💡 *Tip: Wild Card Sign %*

The wild card, a '%' sign, may be used to support a search by names with alternative spelling. A '%' allows for the system to search for various spellings of a name. A search by J%n will return Jan, Jane, June, and Jon. A search by Br%an will return both Brian and Bryan.

💡 *Tip: Phonetic Matches*

A user can also select the Phonetic Matches check box to search for names that sound alike. For example: When searching for "Sara", "Sarah" is a valid match. When you search for "John", "Jon" is a valid match. When Phonetic Matches search is selected, wildcard characters are not allowed.

6. If no search results appear, try searching again with fewer criteria or use an age or date range if searching by age or a date of birth.

7. Users can enter the date directly in the **Date of Birth** fields.

2.1.3 Advanced Search

If no results are returned on the client search, click the chevrons (arrows) on the right side of the **Advanced Search** section to expand the Advanced Search criteria section. Enter school, grade, address, and other information if available.

Users can search by elements of the address such as city if desired, or by School Information.

If too many search results appear, try searching again with additional criteria to narrow the search.


2.1.4   Selecting the Client

Once the desired client has been found and is displayed in the **Client Index: Search Results** table, select the client by checking the checkbox next to the client name in the table.

Users can click one of the buttons above the table to perform the following tasks:

1. Client Preview

Click 'Preview' to view a brief summary of the client demographic details. Users can scroll down the window to review additional client information in the **Preview** screen. When the review is complete, users can close the Preview screen by clicking on the "x" in the top right-hand corner of the **Preview** window and return to the search results screen.
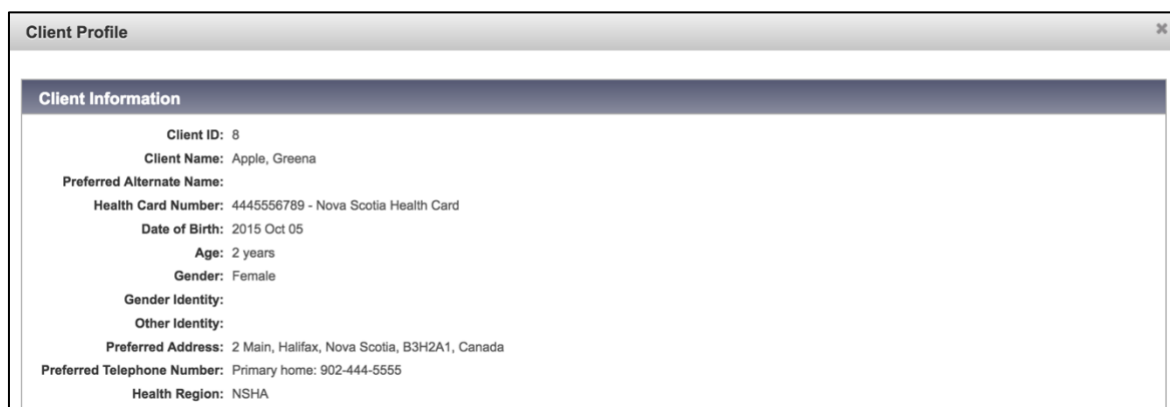
2. Update

Click **Update** to set the client in context and to view or update the **Personal Information Screen**. The Client Record is automatically Set into Context with this option.

3. Set in Context

Click **Set in Context** to work with this client and record clinical information. A message bar will appear at the top of the screen indicating that the client has been set into User Interface (UI) context. This means that the client record is now active and the user can commence documenting.

💡 *Tip: Setting a Client in Context*

*It is essential that the client record is **Set in Context** (either through this step or **Update** or **Client Immunization Profile**). Failure to set the client into Context will prevent any documentation completed in the client record from being saved, even if the user clicks the **Save** button.*

4. Client Immunization Profile

Click **Immunization Client Profile** to set the client in context and to view the **Client Immunization Profile** screen. This screen will contain a list of all immunizations recorded for the client in Panorama, a summary of clinical events relevant to the client's immunization history, and the vaccine forecast as generated by Panorama according to the Nova Scotia Routine Childhood Immunizations Schedule. The Client Record is automatically Set into Context with this option.

💡 *Tip: Client in Context Header*

*When the client record is in context, Panorama will display a summary of client information at the top of every screen. This is called a **Context Header**. As the Users move through various Panorama screens, the **Context Header** serves as a reminder in which client record they are recording.*

Users must always verify the client record is in context before recording any new information to ensure the correct client record is open.

3   CREATE CLIENT RECORDS

Creating client records is creating a new client record, with all necessary demographic and immunization information. The user must begin with searching for a client (Chapter 2) before creating a new client record.

There are a variety of ways a user can create a client:

- Quick Client Entry

- Create Client

3.1   Client Quick Entry

The Client Quick Entry method enables the creation of new client records with minimal basic demographic information including information. It is useful for the entry of multiple client records (e.g. historical data back entry).

The Client Quick Entry method is not recommended if:

1. A client's exact date of birth is unknown

2. A client has more than one ID (e.g., multiple visa numbers) (Note: NS will only be collecting heath cards from other provinces and no other Alternate IDs.)

3. A client has an alternate name (a nickname or alias)

4. A client has more than one address and/or more than two phone numbers

If you are creating a record for a client meeting any of these criteria you should use the Create Client method to add a new client record. See Create Client Records – Create Client Method section for more information.
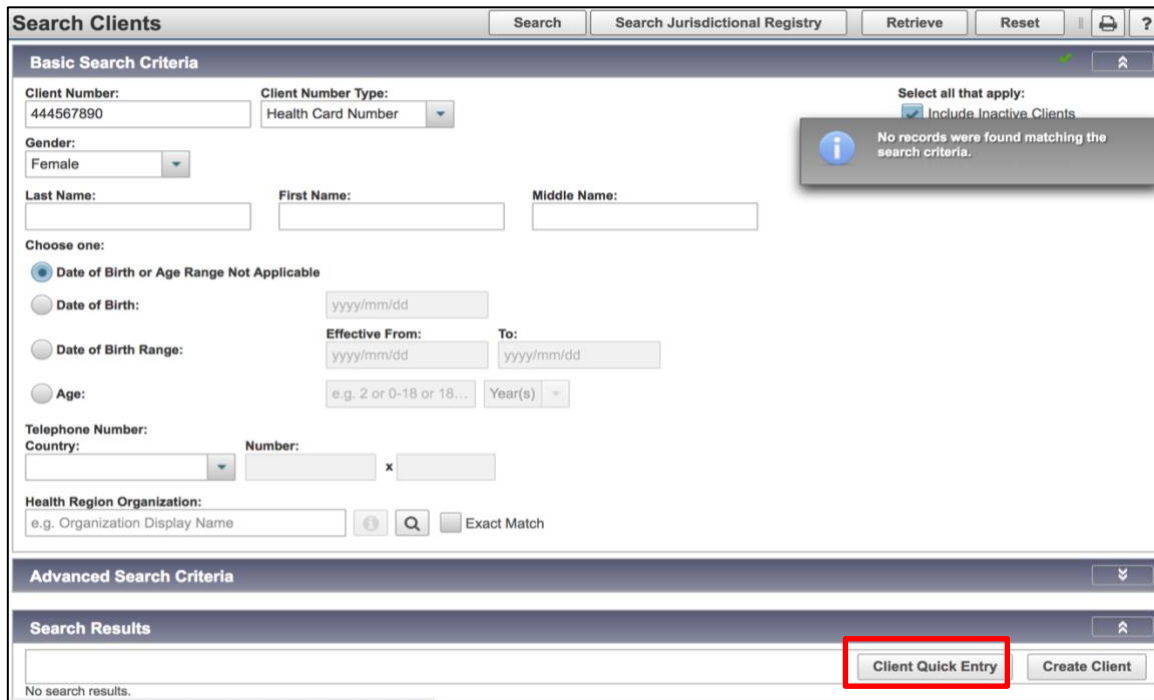
💡 *Tip: Quick Client Entry*

Information entered in the 'Search Clients' screen will automatically be transferred to the 'Client Quick Entry' screen. Information does not have to be entered again.
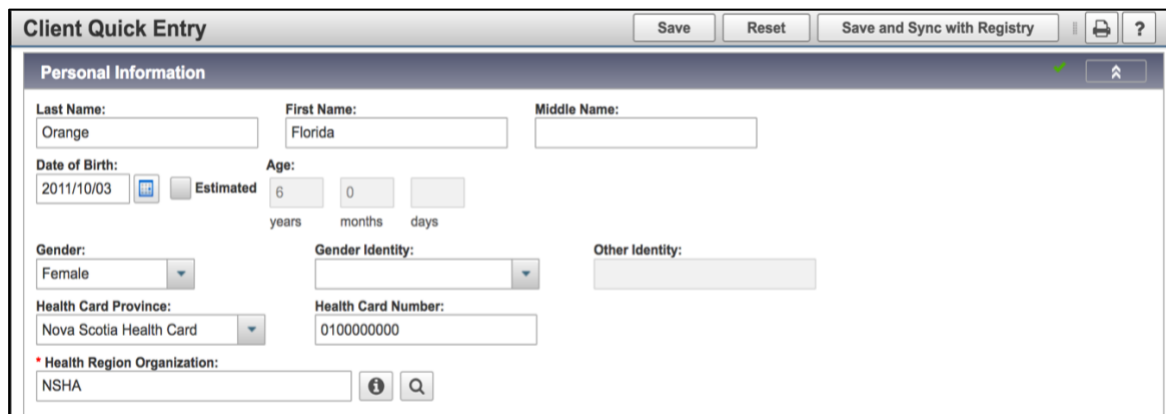
3.1.1   Search and Create

The steps below outline how to search and create a new client.

1. After performing an unsuccessful Search, users can create a new client record by clicking the 'Client Quick Entry' button. Panorama will use the information used to perform the search to create the new client record.

2. A User must enter all mandatory fields which are marked with a red asterisk (*) before saving the record. If any of the mandatory fields are empty, an error message will appear when the user tries to save the client record.

Nova Scotia has determined the mandatory client fields. At a minimum, populate the following fields:

Last Name: The 'Last Name' field should be used to record the client's last name. Ensure you use proper capitalization. Panorama will retrieve records regardless of capitalization, but best practice for documentation requires correct capitalization. If a client has an alternate last name, it is strongly recommended to add it to the record on the 'Personal Information' screen once you finish the quick entry. This will support future searches for the client and help prevent duplicates in Panorama.

P16-0371 Panorama Implementation Project - PNS CLT 101

First Name: The 'First Name' field should be used to record the client's first legal name. If a client has an alternate name that may or may not be preferred, it is strongly recommended to add it to the record on the 'Personal Information' screen once you finish the quick entry. This will support future searches for the client and help prevent duplicates in Panorama.

Gender: The 'Gender' field should be completed for the client's biological gender.

Date of Birth: The 'Date of Birth' field should be used to record an exact date of birth per documentation. If the exact date of birth is unavailable, use the 'Create Client' method where you can enter the client's age and Panorama will estimate a date of birth based on the client's age and a current date.

If additional client information is available, the User may decide to add it now. If not, Users can add additional information at any time by going to the Left-Hand Navigation, in the Client section, and selecting the Client Demographics, Occupation/Education, or other screens.

Tip: Gender and Date of Birth

Gender and Date of Birth fields must be completed for a client as this information is required by the forecaster to determine which antigens the client can receive and which age-appropriate schedule should be used.

Nova Scotia Health Card Number: If the user searched Panorama using a Nova Scotia Health Card Number, this will be transferred to the Client Quick Entry screen.
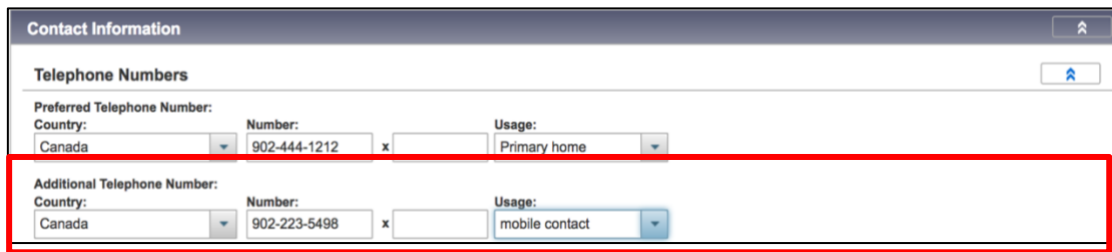
Tip: Additional IDs

If a client has another type of ID such as a driver's license or passport number, the user can add the IDs to the 'Additional ID' section once the 'Client Quick Entry' is completed successfully. The user must proceed to the 'Personal Information' screen under 'Client Demographics'. Click 'Add' to proceed to the 'Add Additional Identifier' screen where users can select the specific type of identifier to add to the client record. Proceed to Section 3.2 for more information.

Telephone Number(s): A user can enter up to two numbers on the **Client Quick Entry** screen. Additional phone numbers can be added on the 'Personal Information' screen once a user finishes the quick entry.

On the 'Client Quick Entry' screen, select the country phone number from the Country drop-down list and enter the corresponding number in the 'Number' field. Select the type of number from the 'Usage' dropdown menu.

Repeat the previous step for an additional phone number if available, using the **Additional Telephone Number** fields.

Tip: Preferred Telephone Number

The first telephone number entered on the 'Client Quick Entry' screen will be identified as the Preferred Number. Added numbers will be identified as Additional Numbers. Users can change this in the Client Demographic screen after the client record is created and saved.

Address(es): A user can enter only one address on the 'Client Quick Entry' screen. Additional addresses can be added on the 'Personal Information' screen once a user finishes the entry and saves the record.

Users can select from three different address formats. The general address format enables user to enter address information in the least structured way, using two open text lines to record address. The semi-structured address format provides additional fields to add more structure to the address. The most detailed format is the structured address, which enables users to record the most comprehensive information about addresses in highly discrete fields.

Select an address type from the 'Address Type' drop-down list, and enter the information in the fields. Dropdown menus are also present for Country, Province/Territory, Street Type, and Street Direction. Province/Territory must be selected to enable the City/Town field.

In the **Street Name** field, enter only the name of the street. Enter the number in the **Street Number** field. The **Street Type** dropdown contains options such as Street or Avenue.

Remember to slowly type the name in these fields until the value displays in the drop-down list. Once the desired value displays, click it to add the value to the field.

Email Address: A user can enter only one email address on the 'Client Quick Entry' screen. Additional email addresses can be added on the 'Personal Information' screen once a user finishes the entry and saves the record. At present, NS does not collect email addresses for clients.

Student Information: This section can be used to enter information for students in Nova Scotia. Note: The Student Information System provides monthly updates to Panorama. Panorama clients will be updated to reflect changes provided by the student information system. This information enables running reports, Reminder/Recall immunization status lists, and client searches by school and grade. To enter student information, navigate to the Student Information subsection.

Click Find in the School Name field and slowly type the name of the school, waiting for the full name to display. Once the desired value displays, click to add it to the field, and then click **Select**. Populate the School Grade and School Year fields.
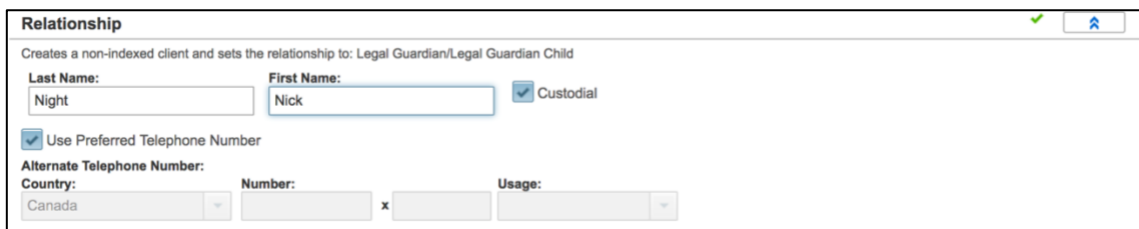
Relationship: This section should be used to enter information for one custodial parent/guardian who is not a client of Panorama, if this information is available. Most often, users will not have sufficient information on school consent forma to identify the parent in the Client Registry and will need to be added as a Non-Indexed Client.

Information for non-custodial relationships should be entered on the Relationships screen – see the Parent/Guardian Relationship Information section for more information.

1. Enter the legal guardian's name in the Last Name and the First Name fields. Check the Custodial checkbox to confirm if the person is a custodial parent if known.
2. If the telephone number entered in the Telephone Number 1 field is the same contact number for the legal guardian, check the Use Preferred Telephone Number checkbox.
3. To enter an alternate phone number, uncheck the Use Telephone Number 1 checkbox, select the phone number type from the Number Type drop-down list, and enter the number in the Number field.

Relationship   ✔   ⌃

Creates a non-indexed client and sets the relationship to: Legal Guardian/Legal Guardian Child

| Last Name: | First Name: | |
| Night | Nick | ☑ Custodial |

☑ Use Preferred Telephone Number

Alternate Telephone Number:

| Country: | Number: | Usage: |
| Canada | x | |

4. Once all demographic information has been entered, user must click **Save** to ensure the new client record is saved. A message "Client was successfully updated" will appear confirming the record is successfully saved.

ⓘ Client was successfully updated. ✕
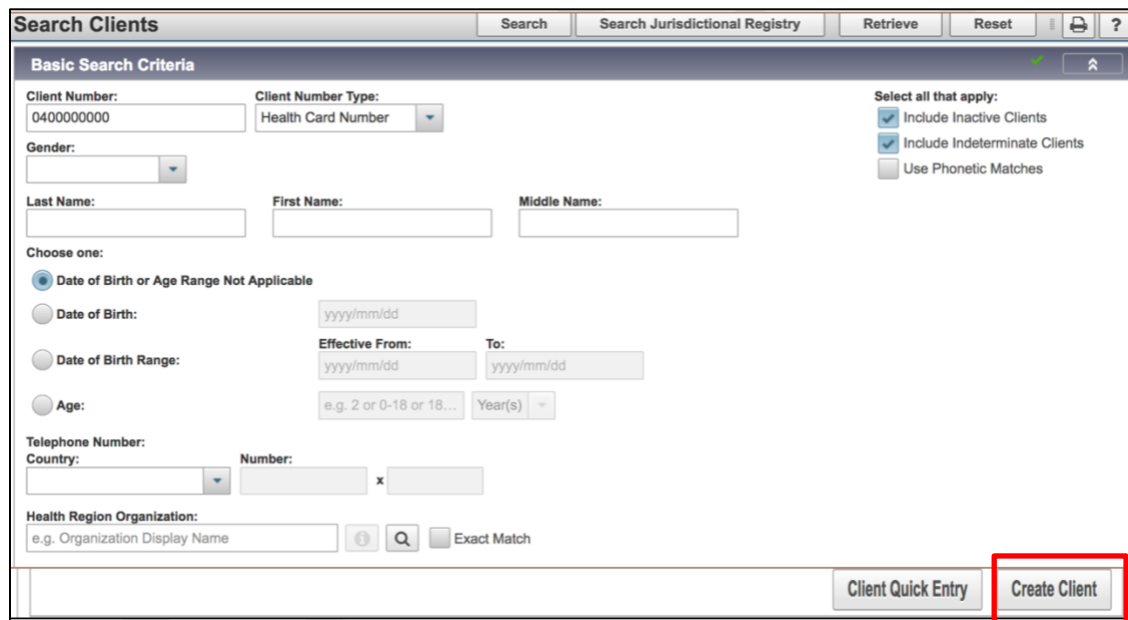
3.2 Create Client

When a Client Search has failed to return an existing record for the client, the User must create a new client record. There are specific situations when the 'Client Quick Entry' is not advisable. These include:

- A client has more than one address.

- A client has more than two phone numbers.

- Date of birth is unknown and must be estimated.

- Client has alternate names (nicknames, former legal names).

- Client has two Health Card numbers or other additional IDs.

In these cases, it is necessary to choose a client entry method which provides a more robust and complete path to creating new client records.
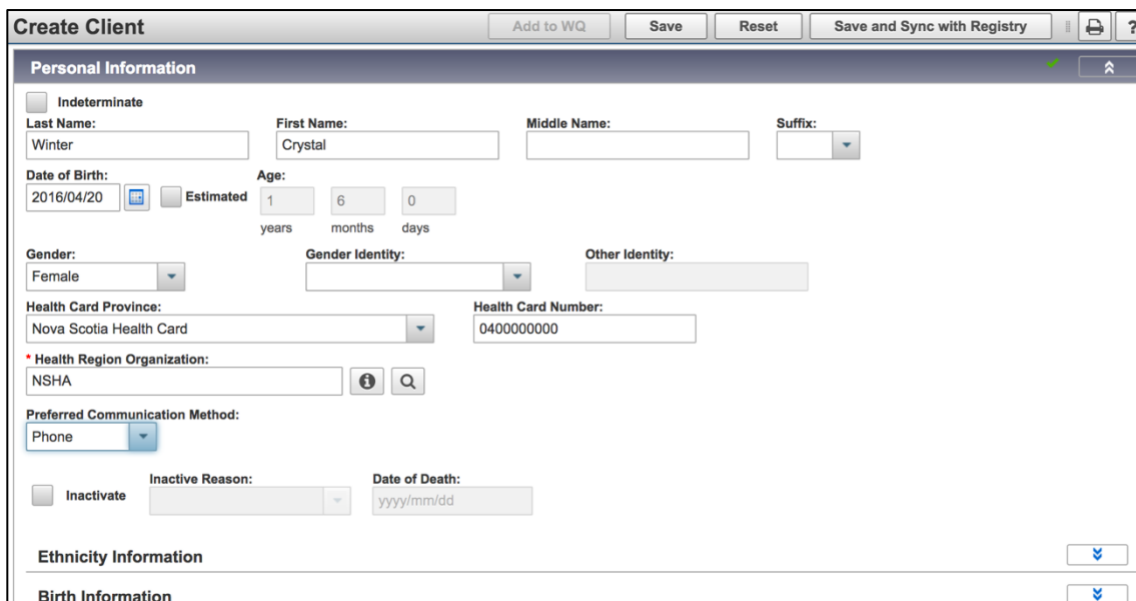
The steps below describe the 'Create Client' method.

1. After the Client Search is completed with no results, click **Create Client**.

2. The **Create Client** screen displays. Below **Personal Information** are sections for demographic information that can expand/ collapse as needed.
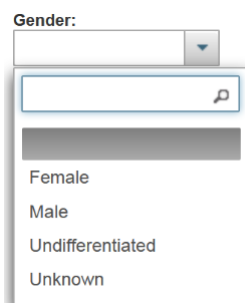
3. The User now completes the **Personal Information** section of the screen. Enter: **First Name** and **Last Name**. **Middle Name** is optional.

4. Mandatory or required data fields are indicated by the presence of a red asterisk **(*).** Note that **Last Name**, **Gender, Date of Birth** while not marked with a red

asterisk, are required fields and Panorama will not save the record unless they are completed.
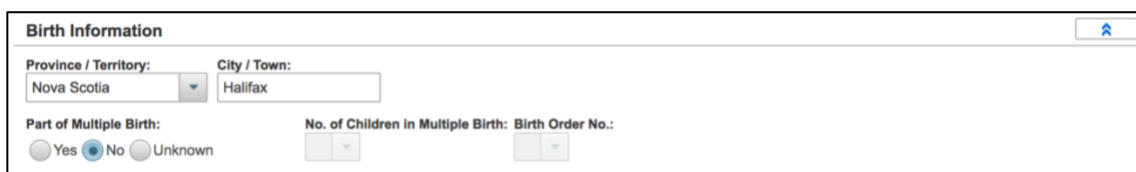
5. To enter the **Birth Date,** the User can either click on the **Calendar** defaulted to today's date or enter it manually. Repeat the process as needed.

6. To enter **Gender,** click on the field and a dropdown list appears as well as a type ahead field. Either click on the applicable Gender or start to type and the closest match will display and can be clicked on to populate the field.

7. The User can also add **Birth Information** for the client. This is an optional data field but helps to provide a complete record for the client. Click on the arrow on the right side to expand the section.

8. Indicate if the client was **Part of Multiple Birth** by clicking on the appropriate radio button. Click **Save** at the top of the page.

9. The Client now has been assigned a **Client ID** displayed on the left-hand side of the Context Header. The User can proceed to enter additional information in the additional sections below.

These sections of data are not all mandatory and can be recorded as necessary for a complete client record and as information is or becomes available.

3.2.1 Adding Telephone Numbers

1. To add a client's telephone number(s), expand the **Telephone Numbers** section and click **Add.**

2. A pop-up will appear to add all telephone number details. Select the **Country** from the dropdown list, and proceed with adding a **Number**. Select the appropriate **Usage** from the dropdown menu to specify what this number will be used for. Specify the Effective From and To dates and click **Apply** when done.

💡 *Tip: Multiple Phone Numbers*
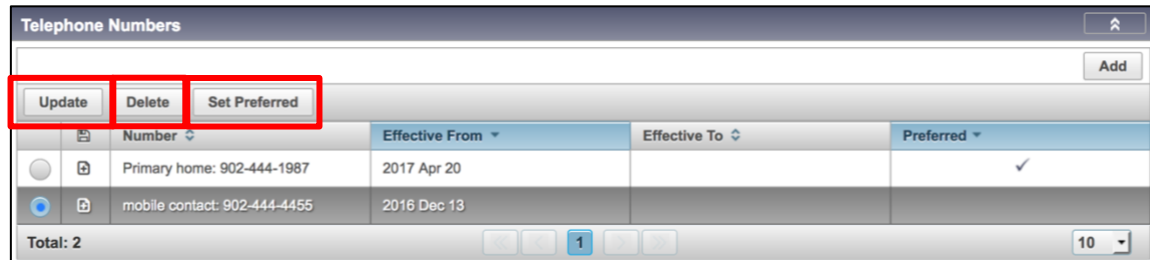
Panorama allows Users to add as many phone numbers as required for the client. Users can specify which phone numbers should be set to preferred. If only one phone number is added, it will automatically be set as the preferred phone number.

💡 Tip: Setting Preferred Number

If multiple phone numbers are added, then the User can manually set which number is the Preferred phone number by selecting the radio button of the desired number and clicking **Set Preferred.**
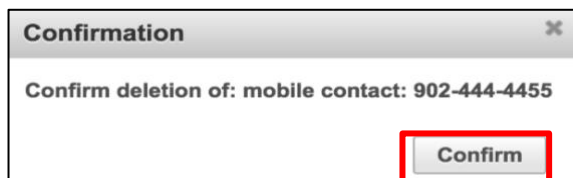
If a client informs the User of an update to the current phone number, the User can record this by selecting the phone number and clicking **Update.** If the recorded phone number was entered in error or is no longer is use, the User can select **Delete.**

When deleting a phone number, Panorama will prompt the user to click **Confirm** before proceeding with the deletion of the registered phone number. To complete the process, click **Save** at the top of the screen.
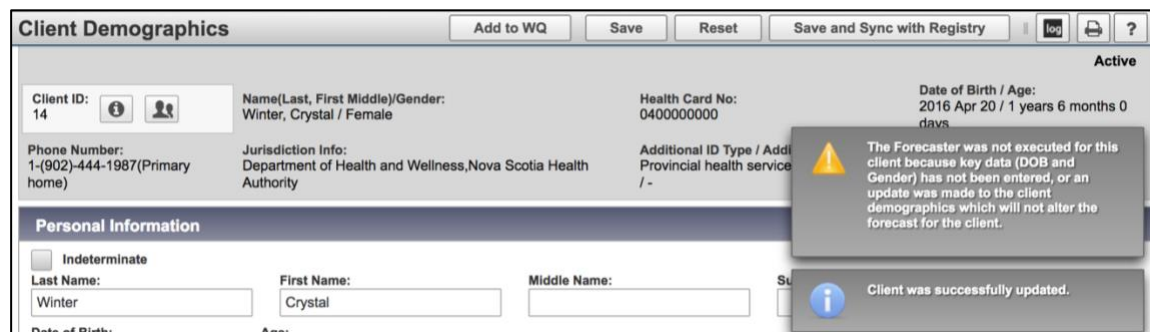
💡 Tip: Saving your Work

Before navigating to the next screen, ensure you always click **Save** *at the top of the page. This can also be done when all demographic details on this screen are collected. However, it's best to always click* **Save** *once information is collected from each section.*

Once saved, the client in context header will update with the preferred phone number and a notification will appear to show the confirmation of the save.

Note: Once a section contains information, a green arrow will display next to the dropdown arrow.

3.2.2 Adding Addresses

1. To enter address, click on the **Addresses** down arrow. The section expands and click **Add**. The section further expands to **Add Address.**

Addresses	
To create a new record click Add.	Add

2. Structured is the default for **Address Format** in Nova Scotia.
3. Enter all necessary information in the address screen. Keep in mind that **City/Town, District** and **Area** are all type ahead fields. Repeat as needed.
4. Further address detail may be added in the **Other Address Details** field.

Add Address Apply Reset

Address Format:
◉ Structured ○ General ○ Semi-Structured

* Address Type: Primary home
Address on Reserve Administered By:

Unit No.:
Street No.: 72
Street Name: Braemore
Street Type: Avenue
Street Direction:

P.O. Box:
STN:
RPO:
Rural Route:

Country: Canada
Province / Territory: Nova Scotia
City / Town: Antigonish
Postal Code: B2G-1L1

Other Address Details: Suite in the basement.
Latitude:
Longitude:
(System-generated)

(77 characters remaining.)

* Effective From: 2016/04/20   To: yyyy/mm/dd

Apply Reset

5. Once complete, click **Apply**.

	💾	Address Type ⇕	Address ⇕	Address Detail ⇕	Effective From ▼	Effective To ⇕	Preferred ▼	Active Household Members ⇕	Valid ⇕	On Reserve ⇕
○	⊞	Primary home	72 Braemore Avenue , Antigonish, Nova Scotia, B2G1L1, Canada	Suite in the basement.	2016 Apr 20		✔	—		

Addresses Add
Update Delete View Map Set Preferred

Total: 1   1   10 ▾
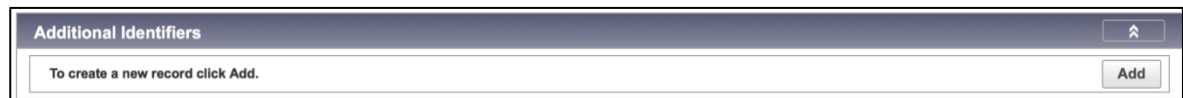
6. Address is now displayed under the **Addresses** section. Until saved, the following symbol will display next to the radio button.

7. Click **Save** at the top of the page. The symbol will no longer be visible.
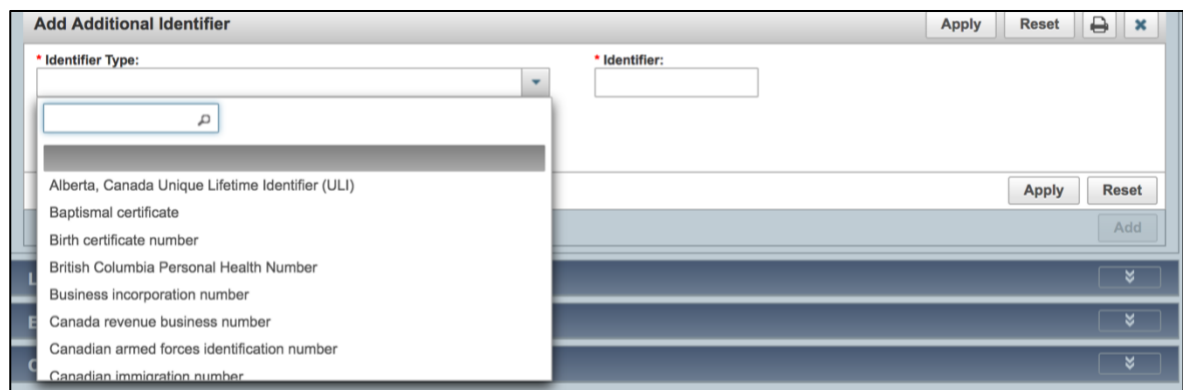
3.2.3 Adding Additional Identifiers

Additional identifiers are other identifiers that can be used to search for the client. This will mostly be used if a client does not have a Nova Scotia Health Card.
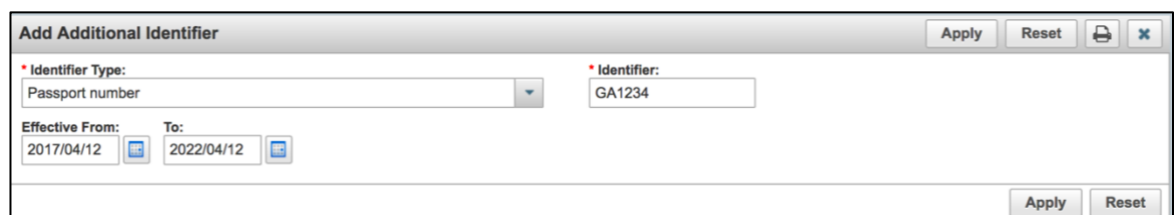
1. Expand the **Additional Identifiers** section and click **Add.**

2. Select the appropriate **Identifier Type** and manually type the identifier under **identifier.**
3. Click **Apply.** Click **Save** at the top of the screen.

4. The Additional identifier will be displayed in the Additional Identifiers table.
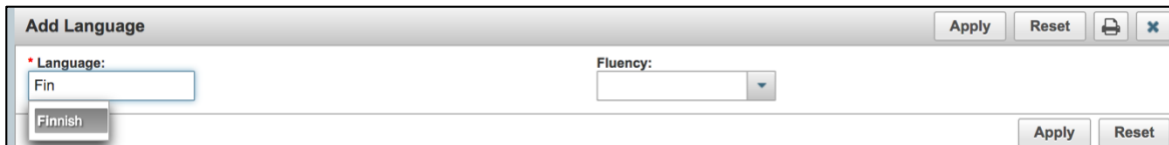
3.2.4 Adding a Language
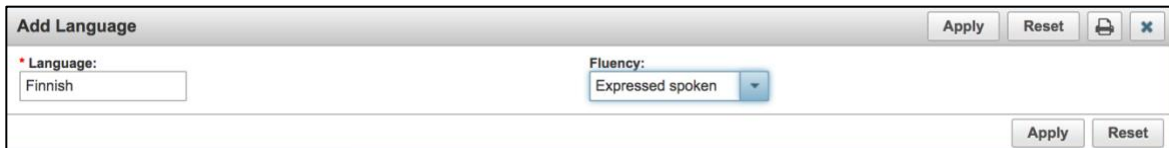
1. Expand the **Languages** section by clicking on the down arrow. Click **Add.**
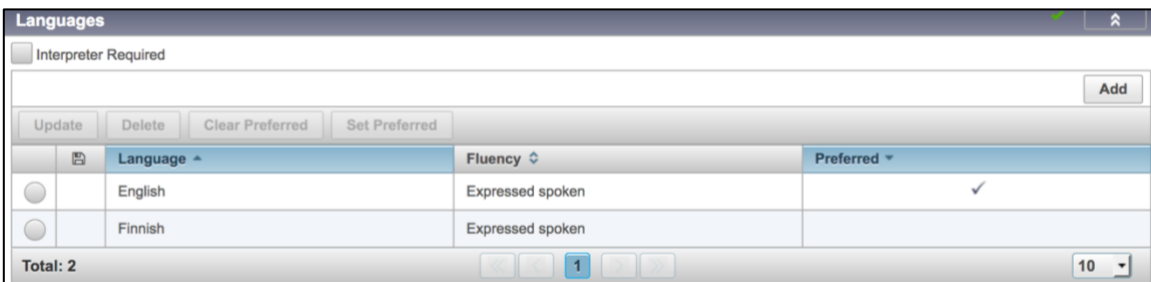
2. The **Add Language** screen displays. Type the language under **Language.** Note this field is a type ahead field. Type the first few letters of the Language and select the appropriate one.

Add Language		Apply	Reset	🖶	✖
* Language: Fin Finnish	Fluency: ▾			Apply	Reset

3. Select the **Fluency.** Once complete, click **Apply.**

Add Language		Apply	Reset	🖶	✖
* Language: Finnish	Fluency: Expressed spoken ▾			Apply	Reset

4. Set the language as the preferred language by clicking on the radio button beside the added language and clicking **Set Preferred.**

5. Click **Save** at the top of the page.

Languages				✔	⌃
☐ Interpreter Required					
					Add
Update	Delete	Clear Preferred	Set Preferred		
○	💾	Language ▲	Fluency ⇕	Preferred ▾	
○		English	Expressed spoken	✔	
○		Finnish	Expressed spoken		
Total: 2			⟨⟨ ⟨ **1** ⟩ ⟩⟩		10 ▾

💡 *Tip: Information Audit*

At every client encounter, make sure to review the demographic information collected from the previous client encounter. This keeps the data accurate, especially in cases where the client updates their addresses or phone numbers.

Once all the necessary information has been added to the sections, the sections can be collapsed by clicking on the chevrons/arrows on the right. Users will now see that sections where information was entered now have a green check mark to flag that information Is recorded in that section.

Client Demographics

	Add to WQ	Save	Reset	Save and Sync with Registry		loc 🖨 ?

Active

Client ID: 14 ℹ️ 👥	**Name(Last, First Middle)/Gender:** Winter, Crystal / Female	**Health Card No:** 0400000000	**Date of Birth / Age:** 2016 Apr 20 / 1 years 6 months 0 days
Phone Number: 1-(902)-444-1987(Primary home)	**Jurisdiction Info:** Department of Health and Wellness,Nova Scotia Health Authority	**Additional ID Type / Additional ID:** Provincial health service provider identifier / -	

Personal Information	✓	⌄
Telephone Numbers	✓	⌄
Addresses	✓	⌄
Alternate Names		⌄
Additional Identifiers	✓	⌄
Languages	✓	⌄
Email Addresses	✓	⌄
Online Names		⌄

P16-0371 Panorama Implementation Project - PNS CLT 101

25

4 UPDATE CLIENT INFORMATION

During each client encounter, the Panorama user is expected to review personal information with the client or guardian and update the client record as necessary. School Immunization Clinics differ slightly, as reviews occur in advance as individual records are updated with consents, etc.

Once the client record is successfully identified in a search, choose the option of **Set in Context** and navigate to the **Client Details** section to review **Client Demographics** information. If the user selects the **Update** option, this will take the user directly to the **Personal Information** screen in **Client Demographics**.

At a minimum, the following data should be reviewed with the client or parent and updated as necessary:

1. Name – verify the First, Last, and Middle Name fields

2. Date of Birth

3. Gender

4. Nova Scotia Health Card and Additional IDs

5. Telephone Number

6. Addresses

If sections of the record are empty and the user has new information to add, follow the instructions in Chapter 3 – Create Client Record for adding content to the client record. Where changes are required to existing personal information and sections of the client record, these changes may be made following the steps below.

Remember to click **Save** after all changes or updates are complete.

4.1 Name Changes

If any changes are required for the spelling of the client's name, correct the information in the appropriate fields.

4.1.1 Middle Name Recorded as Part of First Name

First Name:	Middle Name:	* Last Name:
Collin Daniel		Smith

If this is the case, delete the middle name from the **First Name** field and enter it in the **Middle Name** field. ('Cut' and 'paste' commands from the Edit menu of the Internet browser if desired.)

First Name:	Middle Name:	* Last Name:
Collin	Daniel	Smith

4.1.2 A Temporary Name Recorded as a First Name

The **First Name** field may contain a nickname or a non-legal name such as 'Baby'.

Last Name:	First Name:	Middle Name:
Mann	Baby	Ronald

Enter the client's legal name in the **First Name** field.

Last Name:	First Name:	Middle Name:
Mann	Horatio	Ronald

4.1.3 Name Change

If a client has informed the User of a name change (vs. an error), add the previous name to the **Alternate Names** section. It is important to retain the former name in Panorama as it can later be used to search for the client.

1. From the **Name Type** drop-down list, select 'Legal'.

Add Alternate Name			Apply	Reset	🖶	✖
* Alternate Name Type:						
Legal ▾						
Last Name:	First Name:	Middle Name:				
					Apply	Reset

2. The previous name is now displayed in the **Alternate Names** table. Users may identify one of the **Alternate Names** as preferred. Simply click on the radio button beside the desired Alternate Name and click on **Set Preferred**. A check mark will appear in the Preferred column.

Alternate Names					✓ ⌃
					Add
Update	Delete	Clear Preferred	Set Preferred		
⦿	🖫	Alternate Name Type ▲	Last Name ⇕	First Name ⇕	Middle Name ⇕	Preferred ▾
⦿		Legal	Winter	Crystal		
Total: 1			⟨ ⟨ 1 ⟩ ⟩		10 ▾

3. Users will then enter the current name in the **Last Name** and **First Name** fields. The client now has two name sets – primary and alternate.

4. To add a nickname or an additional name/alias, follow the same steps outlined above to add a former/previous name. For an Alias, set the Alias value from the dropdown menu in the 'Name Type'.

5. Click **Save**. The symbol will no longer be visible.

4.2   Date of Birth Updates

If changes are required to the client's date of birth, correct the information in the appropriate fields.

The date of birth may need to be changed if the exact date of birth was unavailable when creating the record and the estimated date of birth was used instead. Follow the steps outlined below to record the exact date of birth instead of estimated.

- The **Estimated Date of Birth** field is unavailable for editing in Panorama. It will be greyed out and the Estimated checkbox will be checked.

- To enter a known date of birth, click the **Estimated** checkbox to remove the checkmark. The **Date of Birth** fields will then become available for editing. Change the date of birth as required.

4.3   Gender Updates

Gender must be populated for all clients in Panorama. If the gender is incorrect, enter the correct value.

4.4   Health Card Number Changes

In some cases, the **Health Card Number** field for the number type may display as blank. All clients with NS Health Card Numbers will be in the Client Registry and their health card numbers will display. Out of province students may be in the NS Client Registry. For out of province students, search for the client using their provincial health card number and the client number type "additional id".

Clients with health card numbers from other jurisdictions may be added, and their provincial health cards documented in the **Client Demographics** screen under **Personal Information** as follows:

Verify the **Health Card Province** with the client, select from the dropdown menu, and then enter the number.

If a card type is unavailable, clear the number field, as it will not be saved without a number type.

4.5   Phone Number Update

4.5.1   Change in Phone Number
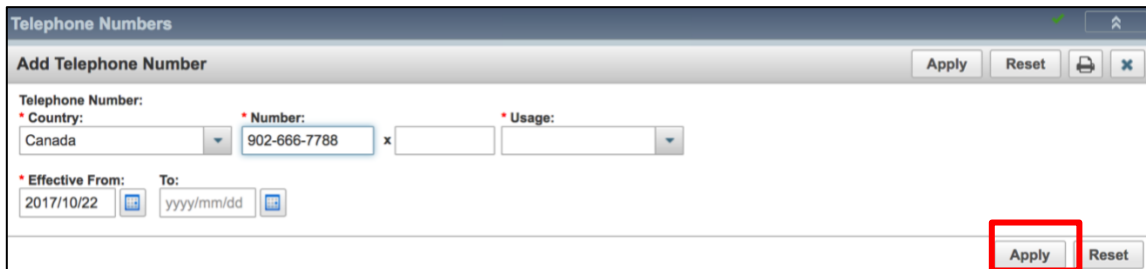
If a client reports a change of phone number for an existing type (e.g., change in mobile number), add the new phone number to the **Telephone Numbers** section.
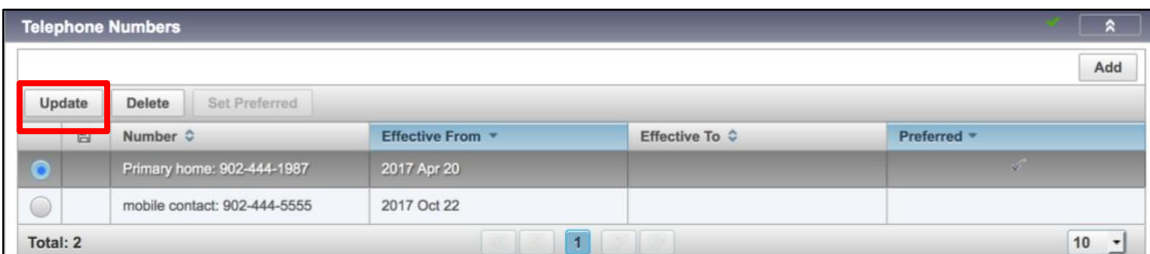
1. Select the **Country** from the dropdown menu (Canada is the default value), and enter the new telephone number in the **Number field**. The user must add the type of number in the Usage field from the dropdown menu.
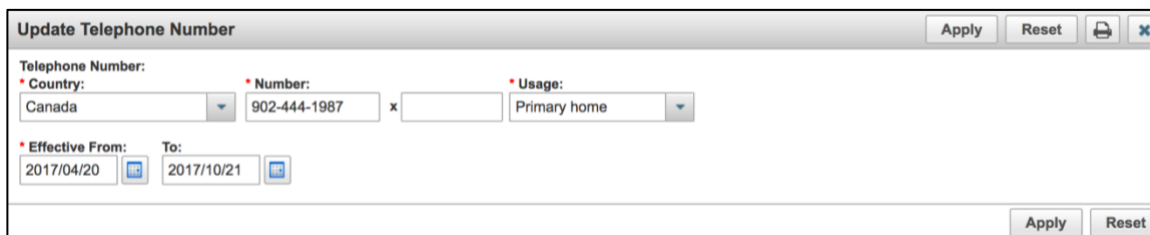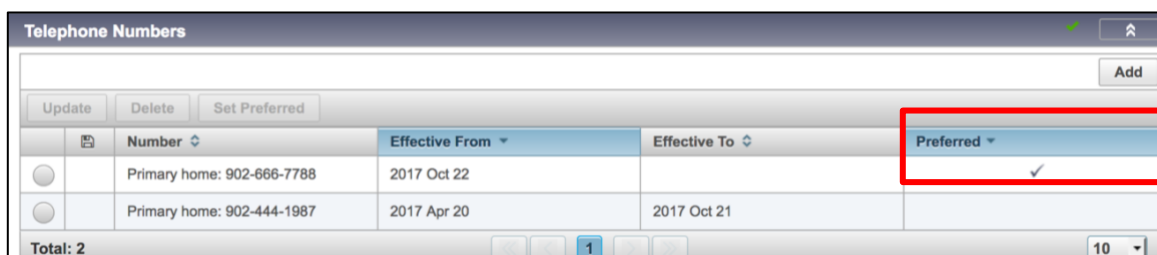
2. Click **Apply**.

3. Click **Save**.

4. Do not delete the previous number. Instead, select the previous number by clicking on the radio button beside it and selecting **Update**.

5. Enter the date that this telephone number was no longer valid in the **Effective To** field. Click **Apply**. The previous telephone number is now expired, and the new number that is effective will be automatically set as the 'Preferred' number.

4.5.2 Phone Number

If a client mentions an additional phone number, select **Add** to add it to the table. Follow the steps previous steps to add the new telephone number. Remember to click **Apply** when complete.
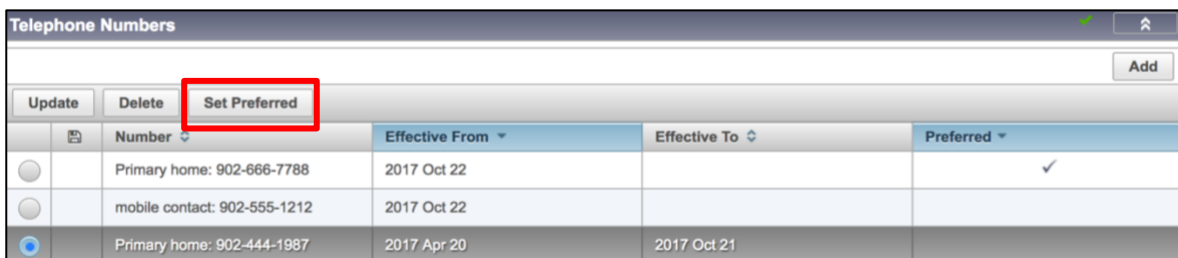
If a new number is preferred, select the new number in the table and click **Set Preferred**.
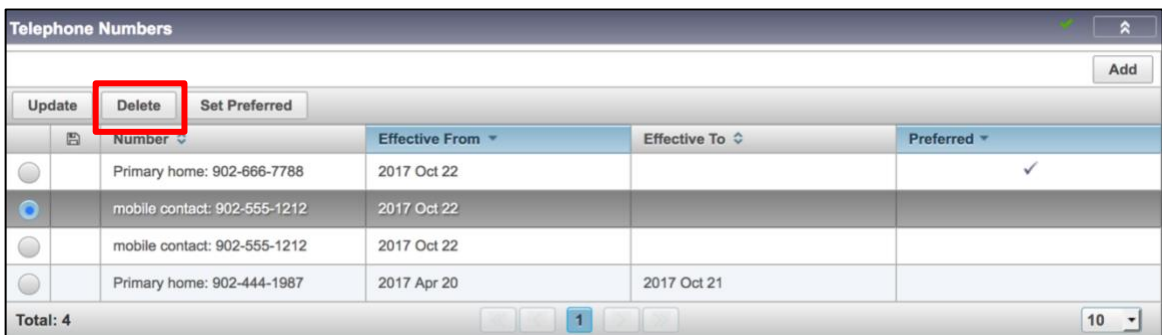
4.5.3 Duplicate Phone Numbers

If two identical phone numbers have been recorded for the client, select the number in the table that has the fewest details. If you need to remove the preferred phone number, reset the preferred indicator to another number before deleting the duplicate entry.

 Click **Delete**.
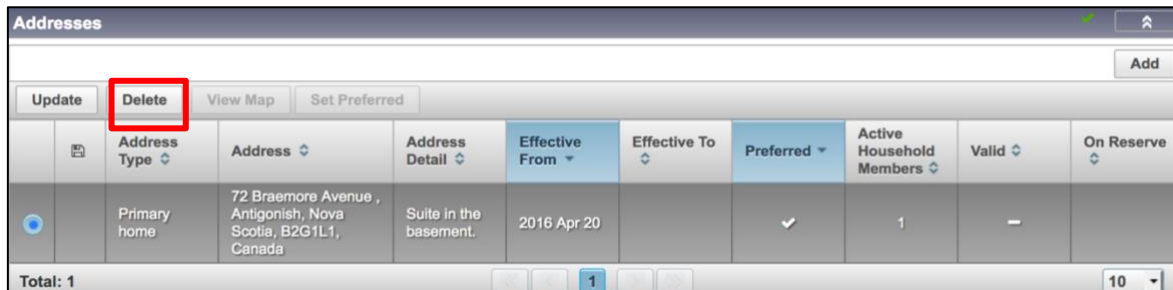
4.6 Address Update

4.6.1 Updating Existing Address

When a client provides additional information for an existing address, scroll down to the **Addresses** section. Note that when information is contained in each section, there is a green checkmark visible on the section header.

1. Select the existing address by clicking the radio button in the **Address** table and click **Update**.

2. Make the necessary updates to the client address.

3. Click **Apply**. The updated address will be redisplayed in the address table.

4.6.2 Change of Address

If the client advises of a complete change of address for the existing address type (e.g., an entirely new home address), add the new address, including the address type, and click **Apply.**

The address will be added to the address table. Expire the old address rather than delete it as it can be used in future searches for the client.

1. To expire the address, select the address that is no longer valid and click **Update**.

2. In the **Effective To** field enter today's date or the date the address was no longer in use. Click **Apply**.

3. The old address will be redisplayed in the address table as expired (end-dated). Note that the **Preferred** indicator will no longer apply to the expired address and the new address will be reset as Preferred.

4.7 Recording Education/Occupation Information

Users can record client Occupation and/or Education information under the **Occupation/Education** screen. Education information can also be uploaded through **Quick Client Entry** or through a **Client Upload Template.**

4.7.1 Occupation Information

1. Client Occupation may be recorded by going to the Left-Hand Navigation, and under Client Details, selecting **Occupation/Education**.

2. The Education and Occupation screen is displayed. Click **Add** to record the client's occupation.

3. Slowly type a few letters of the occupation in the type ahead **Occupation** field. Panorama will present options that match the letters. Click on the desired occupation.

4. Enter the **Effective From** date manually or by clicking on the calendar icon. Leave the **To** date blank if the client is still working in this role. Click **Apply**.

5. The Occupation will be displayed in the summary table with an icon to indicate the occupation will be added after the user save the record. Click **Save** at the top of the page.

6. Panorama will display a message confirming the occupation is saved.

7. If the client changes occupations, the **To** date may be entered to expire the former occupation. A new occupation can be added using the process identified above.

4.7.2 Education Information

Student information can be added to Panorama manually when creating a new client using the Client Quick Entry method, or at any time in the **Occupation/Education** screen.
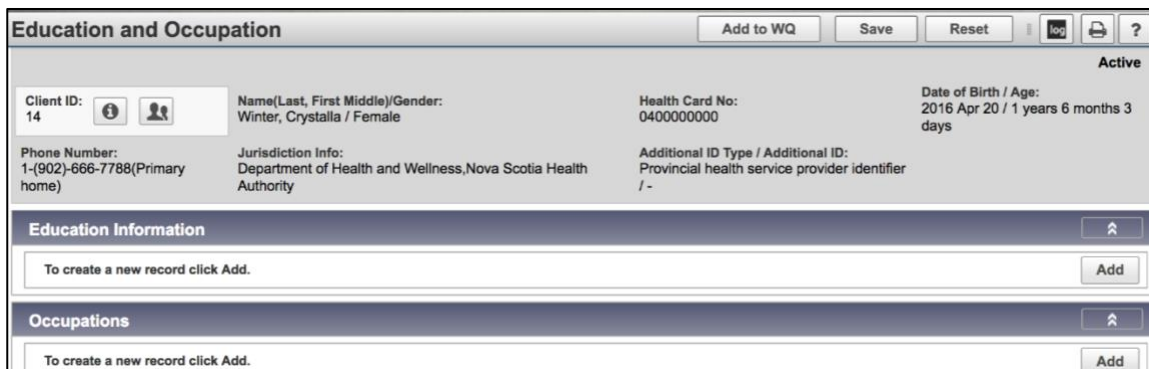
💡 ***Important: Updating Student Information***

Student Information must be updated every year to reflect the change in grade/school year. Student information will be updated from the Student Information System. This information should only need to be manually updated for new students. Updates will be processed monthly from the Student Information System. If this information is not accurate, Search Client Forecast query results, coverage reports, and searches based on school and grade <u>will not provide correct results</u>.

1. If a client is not in context, search for the client, select the client of interest from the **Client Index: Search Results** table and click **Set in Context**. To view the existing student information for the client, check the **Client Context Header** to ensure the correct client is In Context.

2. In the **Left-Hand Navigation** menu, click **Occupation/Education.**

3. The Occupation/Education screen displays.

4. If no information is currently recorded in the client record, the Education section will appear blank. Users can confirm this by noting that sections containing information will have a green checkmark in the section header.

5. Only record new student information if no student records exist for a client. If there is an existing record, update the information if required.

6. To enter new student information, navigate to the **Education Information** screen and click **Add.**

7. The **Add Education Information** screen will appear.
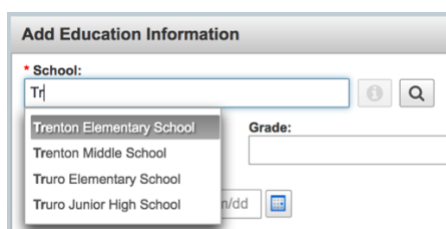
8. Users can slowly type the name of the school in the **School** field. This is a type ahead field and will display options that match the typed letters. Allow the options to appear and then select the desired school name by clicking on the name in the displayed list.
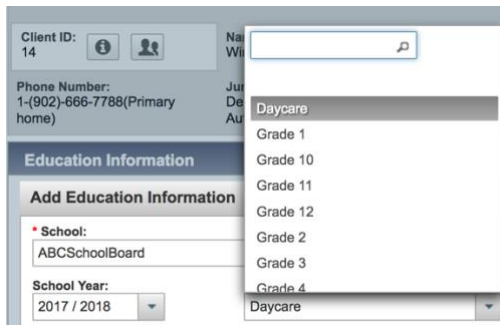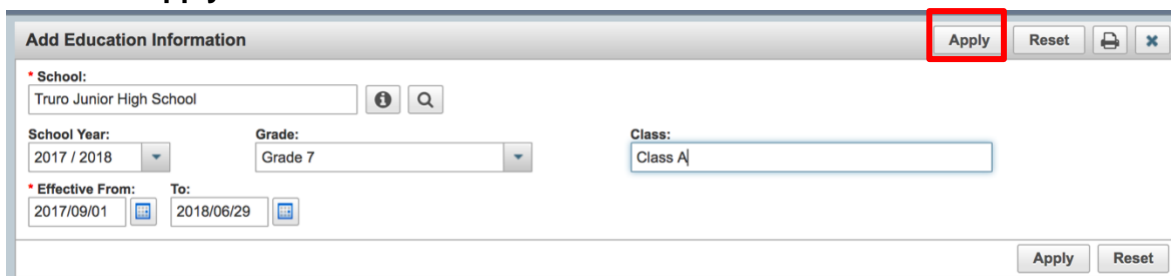
9. Populate the **School Year** and **Grade** from the dropdown menu in each field.

10. Enter the Class Name in the **Class** field. This is a free text field and may contain alphanumeric characters.

11. Enter the school dates in the **Effective From** and **To** fields. The **Effective From** and **To** dates typically reflect the dates for the school year.
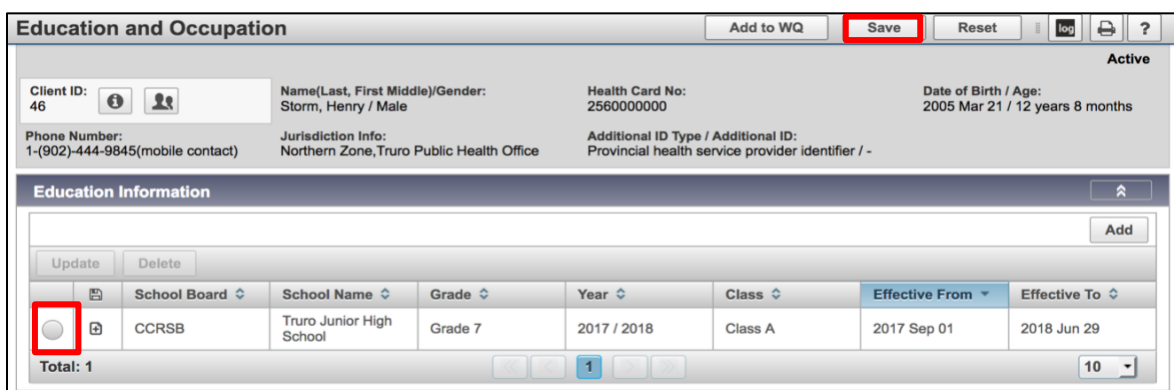
12. Click **Apply.**

💡 *Tip: Effective To and From Dates*

*Set the **To** field to the end of the school year if you want the old student record to expire automatically at the end of the school year. This way you will ensure that reports using school information will not include the outdated student information.*

13. The completed school information will appear on the **Education Information** screen. After reviewing it and verifying that it is correct, click **Save**.
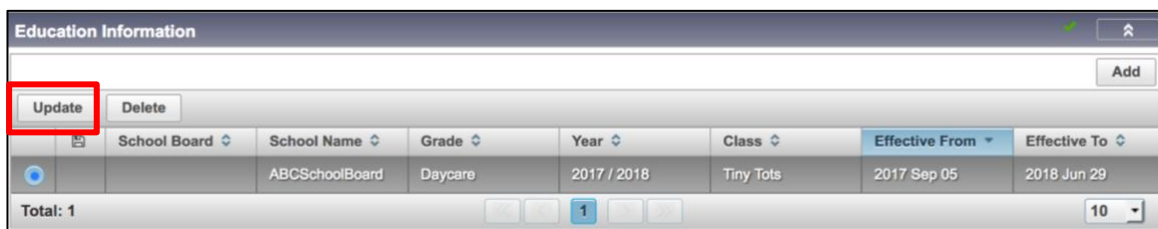
Updating School Information

Existing student records should always be updated to reflect the most current student status. If a user adds a new more current record, and leaves an outdated record in place, the student will have two concurrently active records which will result in inaccurate reports based on school information. Updates to a student record will not be overwritten by the Nova Scotian Student Information System.

It is recommended to keep the old student records only if a student changed schools, in case there is ever a need to contact the previous school. In this case, a user must expire the record that is no longer active.
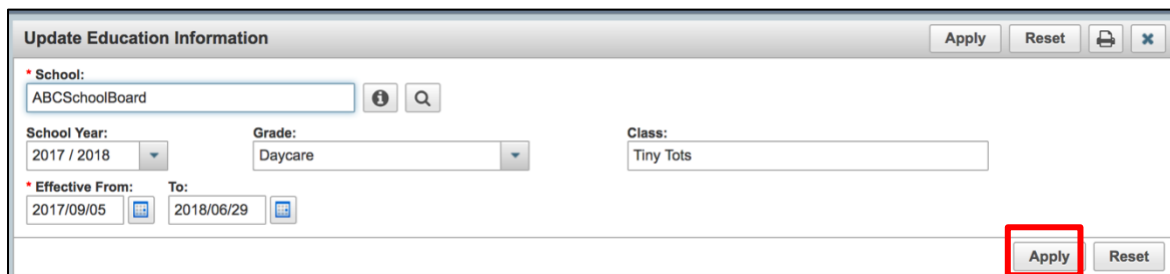
To update the student information, following the below steps:

1. Check the **Client Context Header** to ensure the correct client is In Context. If a client is not in context, search for the client, select the client of interest from the **Client Index: Search Results** table, and click **Set in Context**.

2. In the **Left-Hand Navigation** menu, click on **Occupation/Education**.

3. In the **Occupation/Education Information**, click the radio button beside the school record and click **Update.**

4. The current student information will appear in the fields above the table and can now be modified. Users can update any elements as required. Most often, Users will update the **Effective From** and **To** dates, **School Year** and **Grade** fields to reflect the student's progression to the next grade.

5. Once all the information has been updated, click **Apply**. The table will now display the updated record.

6. Click **Save**. The screen will be updated with a message confirming the successful update of a student record.

Expiring and Deleting School Information

Users are discouraged from deleting any student records other than duplicate records or records created in error.

If the student record is no longer valid, and no new information is available, it is recommended to expire the record by setting the **Effective To** date to the date the record was no longer in effect. This may be helpful if there is ever a need to contact a student's former school.

To expire a student record, follow the steps outlined below.

1. Select the student record that needs to be updated from the table and click **Update**. The current student information will appear in the fields above the table and can now be modified.
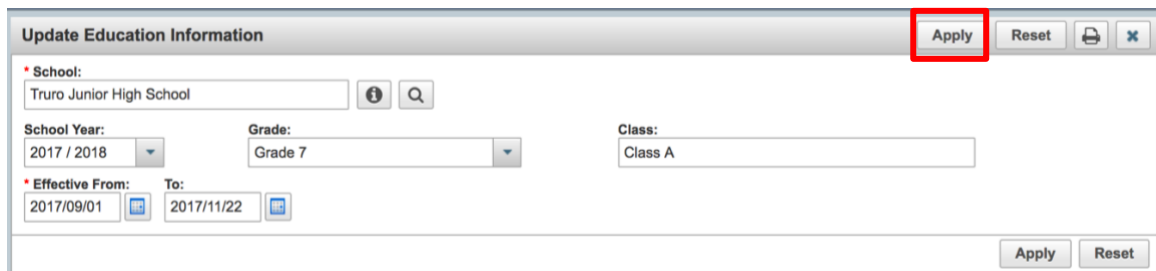
2. Enter the date the record stopped being effective in the Effective To date field. Click **Apply**.

3. The table will now display an updated record. The record is now expired and will no longer be included in reports using student information. Click **Save**.

4. The screen will be updated with a message confirming the successful update of the student record.

If two duplicate student records were created for a student for the same school – remove the record that is no longer effective. To remove a duplicate record, select the radio button corresponding to the record and click **Delete**.

Panorama will ask the user to confirm that deleting the record is desired. Click **Confirm**. The record will be removed.

Click **Save**.

The screen will be updated with a message confirming the successful update.

P16-0371 Panorama Implementation Project - PNS CLT 101

5 RELATIONSHIPS

Information about a client's parents/guardians or siblings is stored in Panorama in the **Relationships** section. Relationships to an indexed client (i.e., a client in Panorama) may be created linking either another client in the client index or a person not recorded in the client index. The Nova Scotia Student Information System will upload relationship information for a Non-Indexed Parent.

5.1 View Relationships

Before proceeding with viewing a client's relationships, make sure the correct client is in context by reviewing the Context Header at the top of the page.

1. Set **Client in Context** or search for the appropriate client.

💡 *Tip: Client in Context Header*

*If a client is **In Context**, the Client Context Header will be displayed at the top of the page. It serves as a visual confirmation to the User regarding which record is currently open and in use.*

*If a client is not in context, search for a client, select the client of interest from the **Client Index: Search Results** table, and click **Set in Context**. A confirmation message will display.*

2. Select **Client Relationships** from the left-hand navigation to access the Relationships screen.

3. The **Client Relationships** screen displays.

4. If any existing relationships were previously recorded for this client, a green arrow will be displayed in the section header.

5. Select the radio button corresponding to the record and click View.

6. View the information on the **View Relationship** screen.

5.2   Record Relationships

Tip: Quick Client Entry

*The **Client Quick Entry** method can be used to create a relationship with one legal guardian who is not a client in Panorama. This method is only available at the time of creating the child's record. On the **Client Quick Entry** screen, the user adds a Last Name, First Name, and one telephone number, including Usage (e.g., Primary Home).*

Creating a client relationship on the **Client Relationships** screen allows for the addition of greater detail than in **Client Quick Entry**.

1. Select **Client Relationships** from the left-hand navigation menu to access the **Client Relationships** screen.

2.   Click **Add** to document a relationship for this client.

3. Once the user clicks **Add** in the **Client Relationships screen,** a pop up appears to add all relevant **Relationship** information.

4. Begin by identifying the type of relationship to be added. Select the relationship type from the dropdown menu in the **Relationship to in-context Client** field. This describes how this additional person is related to the client in context (e.g., mother, father, sibling). Once selected, this will limit the options in the dropdown menu for the **Relationship from in-context Client** field (the role of the actual Client) to only those that are appropriate.

    •   For example, if the User decides to add a relationship to the client's mother, the mother role should be selected for the **Relationship to in-context Client** (how the mother is related to the child). By choosing this relationship type, only types that reflect the mother child relationship will be displayed for the **Relationship from in-context Client** (how the child is related to the mother).
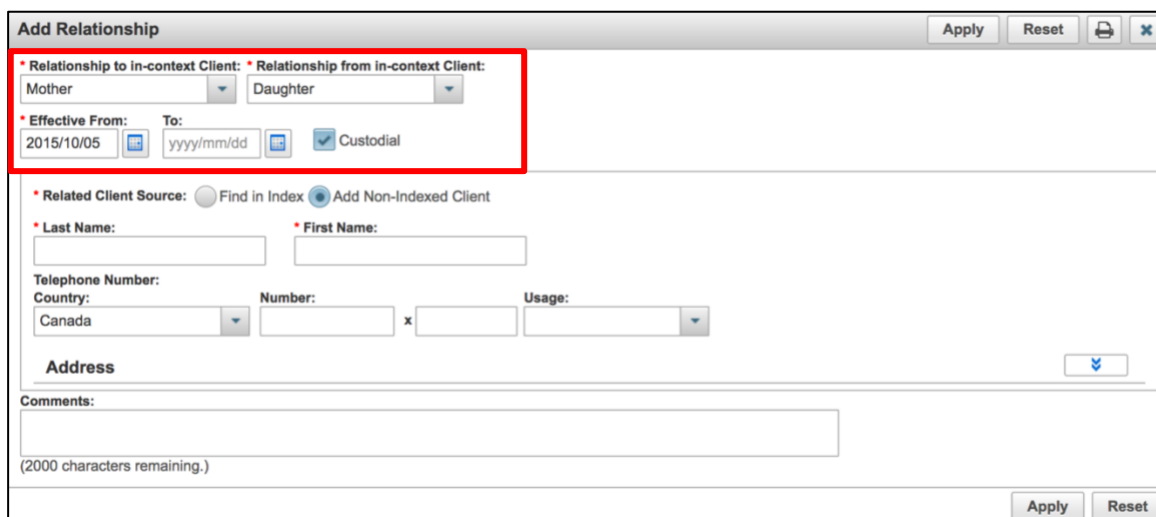
5. Enter the **Effective From** date, which is the child's date of birth when creating relationships for parents and older family members. Relationships to younger siblings would be effective from the younger child's date of birth.

💡 *Tip: Effective To Dates*

*Leave the **Effective To** date blank. This should only be recorded after a death and appropriate notification of death.*

6. Confirm if the relationship is that of a custodial parent or guardian by clicking the **Custodial** checkbox.

There are two methods of identifying the person for whom the relationship information is recorded in the **Add Relationship** screen:

1. **Find in Index**
   Use this option if the parent/guardian already has a record in the system or will need a record in Panorama.

2. **Add Non-Indexed Client**
   Use this option to record a parent's/guardian's demographic information for parents/guardians who will not receive immunization services to be documented in Panorama. The parent/guardian will not be created as a client in Panorama and their information will be only accessible through their child's record, which means that you will not be able to search Panorama for this parent/guardian.

   It may also be necessary to add parents as non-Indexed clients based on a lack of information on school consents. As only the parent's name is recorded on consents, users may not have sufficient information to find the parent's record in the Client Registry/Index.

💡 *Tip: Knowing if the Relationships is Indexed or Non-Indexed*

*If you are unsure whether a parent has a record in Panorama, use **Find in Index** and **Add as a Relationship** method first.*

P16-0371 Panorama Implementation Project - PNS CLT 101
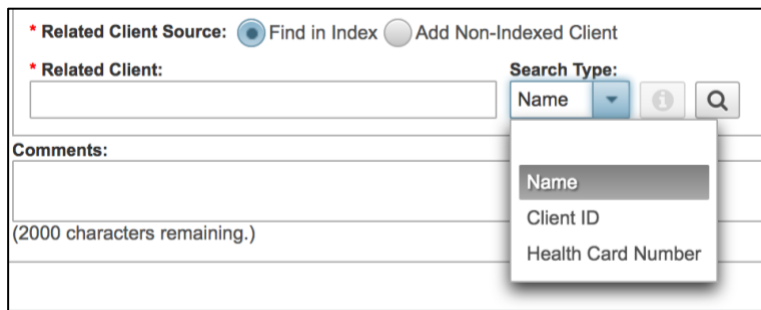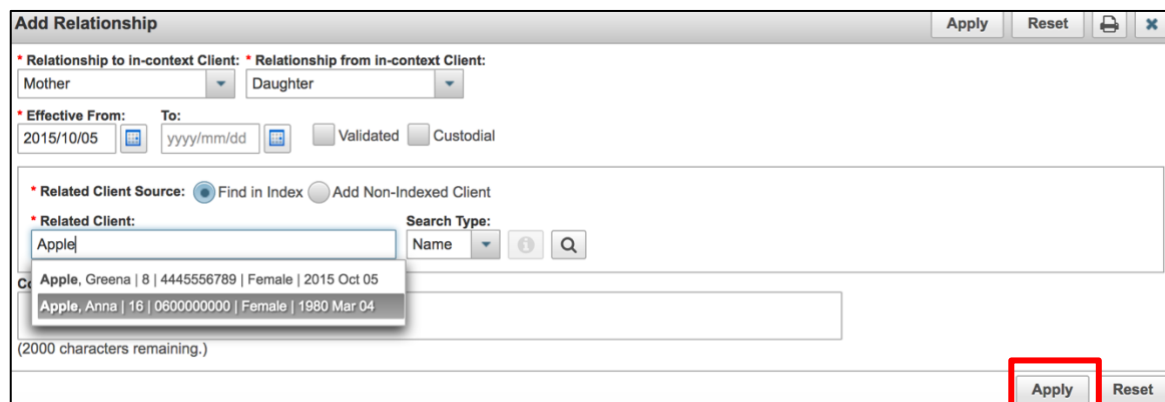
5.2.1 Find and Add an Indexed Client

The steps below outline how to find an indexed client. Use this option if the parent/guardian already has a record in the system or will need a record in Panorama.

1. Select the **Search Type** from the dropdown menu. **Name**, **Client ID** (automatically generated by Panorama) or **Health Care Number** can be used to identify the person in the index.

2. To search for an indexed client using the **Name**, select the **Name** value from the dropdown menu in the **Search Type** field.

3. In the **Related Client** field, type the **last Name** for the person to be added. When the name value is used, all client records with that last name will be displayed and the user can select the correct client by clicking on the specific name.

4. Click **Apply**. The newly added relationship will appear in the table below. Remember to click **Save** when you are done adding relationships.

Tip: Duplicate Indexed Relationships

Panorama will not allow users to create duplicate relationships between indexed clients. An error message will be return if users inadvertently attempt to create a duplicate record.

> **X** Any two indexed clients can only have one active relationship between them.
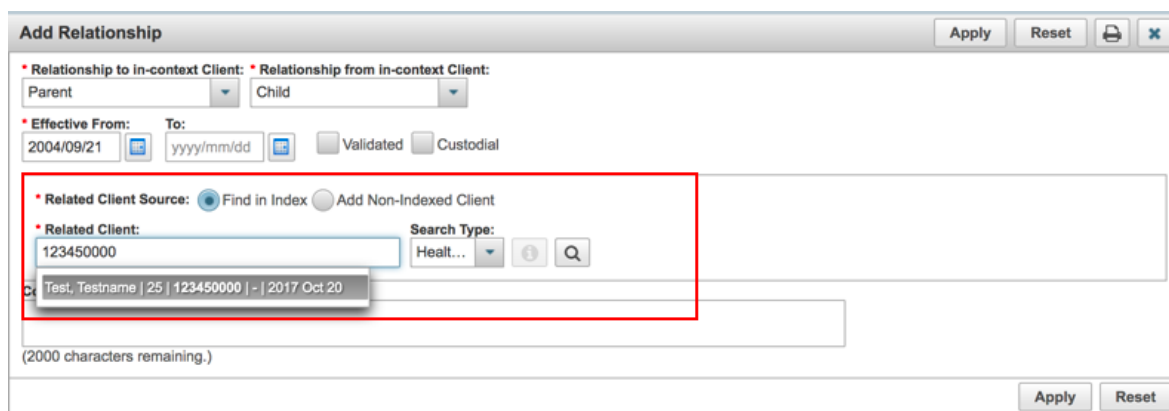
5.2.2 Searching for Indexed Client Using Health Card Number

To search for an indexed client using a **Health Card Number**, select the **Health Card Number** value from the dropdown menu in the **Search Type** field.

1. In the **Related Client** field, type the **Health Card Number** for the person to be added. The client name, Client ID, gender, and date of birth will be displayed. Click on the name to select this record.

Note: Only one client should be displayed when using the Health Card Number.
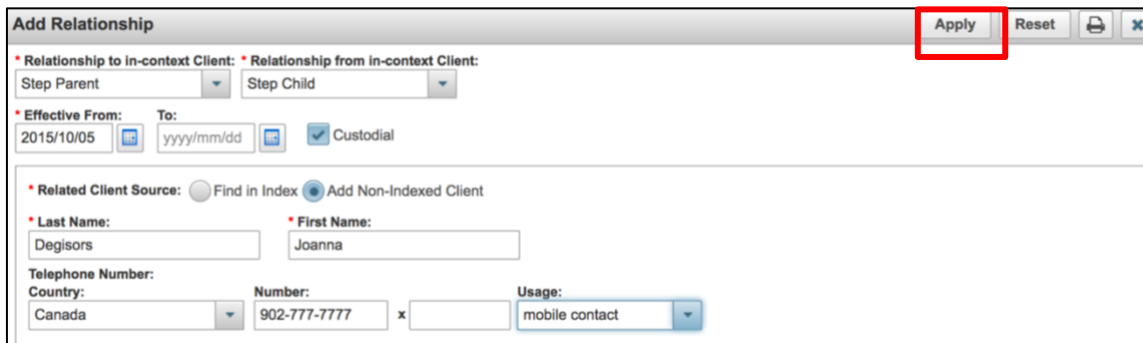
2. Click **Apply**. Remember to click **Save** when done to ensure the relationships are effectively recorded on the client record.

5.2.3 Add a Non-Indexed Client

Below are the steps outlined for adding a Non-Indexed client. Use this option to record a parent's/guardian's demographic information for parents/guardians who will not receive immunization services to be documented in Panorama or who cannot be identified as an indexed client as a result of insufficient information. The parent/guardian will not be created as a client in Panorama and their information will be only accessible through their child's record, which means that you will not be able to search Panorama for this parent/guardian.
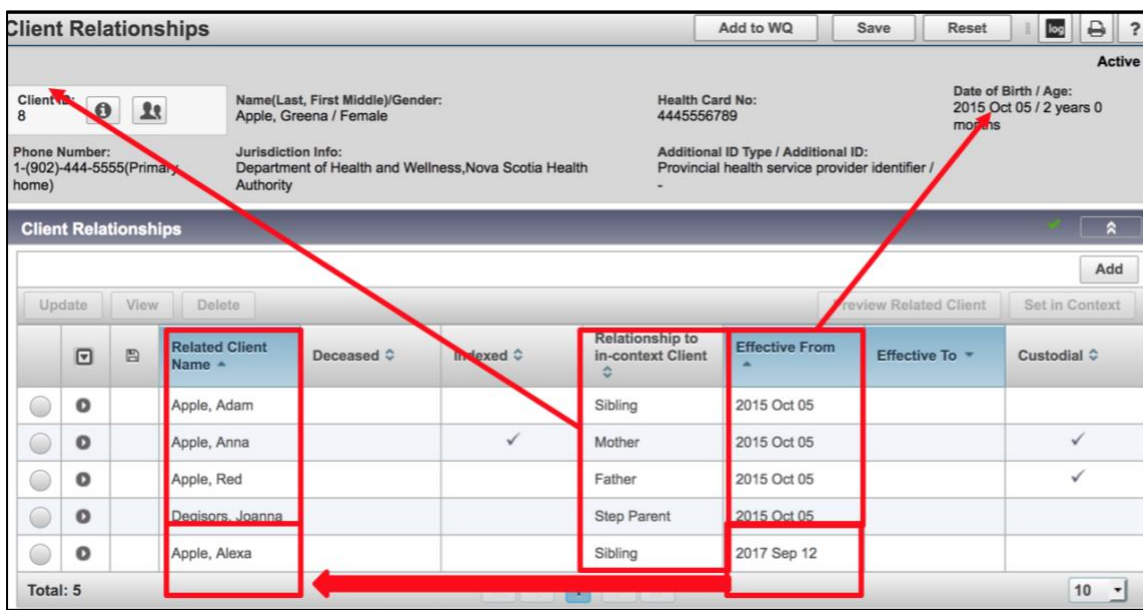
1. Click on the radio button to select the **Add Non-Indexed Client** option. Additional fields will appear to allow the user to document the person's information.

2. Enter **First Name**, **Last Name**, and **Telephone Number** (including **Country**, **Number**, and **Usage**).

3. Click **Apply**.

4. Click **Save**.

💡 **Note**: The screenshot below illustrates the relationships to an in-context client. The Effective From date for most of relationships begins on the in-context client's date of birth. The Effective From date for the sibling begins on the sibling's date of birth.

5.3   Update Relationship Information

All types of relationships can be modified through the **Client Relationships** screen. The level of detail available for the update depends on the type of relationship and the extent of information available from the client.

1. Select the relationship that needs to be updated from the **Client Relationships** table and click **Update**.

2. The **Update Relationship** screen will appear and the user can update information as required (such as **Effective To:** date) or add a Comment. Click **Apply** and **Save** to ensure updates are effectively recorded on the client record.

For a non-indexed client, users can update all the demographic details including names, telephone number and addresses. As only one telephone number can be maintained for a non-indexed client, it is recommended to use the best number where the parent/guardian can be reached.

3. If new details become available for an existing address for one of the clients, select the specific client and click **Update**.

4. Select the address from the **Address** table and click **Update**.

5. The Address screen will appear. Enter the new details for the existing address (e.g., street number, street name, street type, city, and a postal code) in the appropriate fields and click **Apply.**
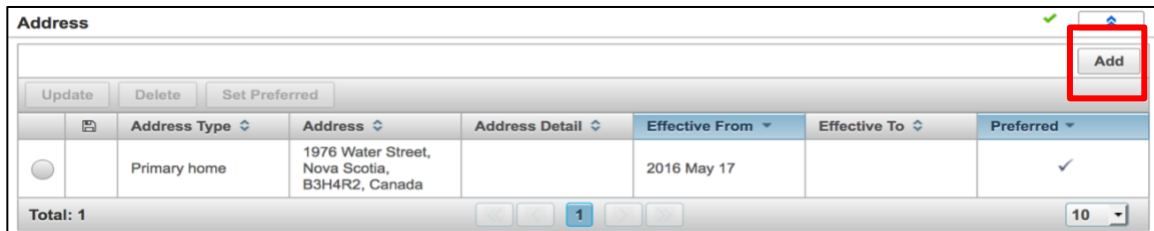
6. The updated address will be added to the address table.

7. To add a totally new address for a client, select the specific client and click **Update**.

8. Once in the **Update Relationship** screen, go to the **Address** section and click **Add.**

9. The **Address** screen will appear. Enter the address type, populate the relevant fields for the new address as described above and click **Apply**.

10. In order to **Save**, click **Apply** in the **Update Relationship** section.

11. Click **Save** at the top of the screen.

12. A confirmation message will display.

13. The new address will appear in the Non-Indexed Client's Address Summary Table. It is recommended to expire the old address, rather than deleting it, for future reference.

14. To expire the address, select the address that is no longer valid and click the radio button beside the previous address and select **Update.**

15. In the **Effective To** field enter today's date or the date the address was no longer in use. Click **Apply.**

16. Click **Apply** in the **Update Relationship** section.

17. Click **Save**.

18. The **Relationship** screen will be re-displayed with a confirmation of a successful update.

19. The old address will be redisplayed in the address table as expired. Note that the **Preferred** indicator will no longer apply to the expired address and will be reset to the new address.

		Address Type ⇕	Address ⇕	Address Detail ⇕	Effective From ▼	Effective To ⇕	Preferred ▼
○		Primary home	5136 Prince Street, Halifax, Nova Scotia, Canada		2017 Oct 23		✓
○		Primary home	1976 Water Street, Nova Scotia, B3H4R2, Canada		2016 May 17	2017 Oct 20	

Address

Add

Update   Delete   Set Preferred

Total: 2   « ‹ 1 › »   10 ▾

5.4   Delete/Expire Relationships

Users are strongly discouraged from removing any relationships other than for duplicate relationships (may have been created when duplicate parent information was recorded as part of Create Client Quick Entry process), or relationships created in error.

If the relationship is no longer valid, it is recommended to expire the relationship by setting the **Effective To** date to the date the relationship was no longer in effect. This may be helpful to use in temporary custodianship situations.

5.4.1   Expire a Relationship

1. To expire a relationship, select the relationship that needs to be updated from the **Summary of Relationships** table and click **Update.**

2. Enter the date the relationship became no longer valid in the **Effective To Date** field. Click **Apply**.

3. The **Client Relationships** screen will redisplay with confirmation of a successful update. The expired relationship will still be displayed in the **Summary of Relationships** table with a new Effective To date.

4. Click **Save**.

5.4.2 Delete a Relationship

If two identical relationships were created for a client – remove the relationship that was created as a non-indexed client. If both are non-indexed relationships, remove the relationship that has fewer details.

1. To remove a relationship, select the radio button corresponding to the relationship and click **Delete.**

2. Panorama will request the user to confirm that the relationship is to be deleted. Click **Confirm**.

3. Click **Save** to ensure the deletion is effectively saved on the client record. After saving, Panorama will return a message confirming the client record is successfully updated.

6 CLIENT HOUSEHOLD

This section contains information that will not be used in the Immunization module, but will be used by the Investigation and Outbreak Management (IOM) module. Those users involved only with the Immunization program will not be trained on Households.

Households are a way to group related or unrelated individuals living in a single location or household. Household members must have a relationship to the **Client In Context** either as an **Indexed or Non-Indexed** client before adding them to the household.

6.1   View Household Information

With the client In Context, go to the **Left-Hand Navigation** menu, and under the Client section, click **Client Households**.
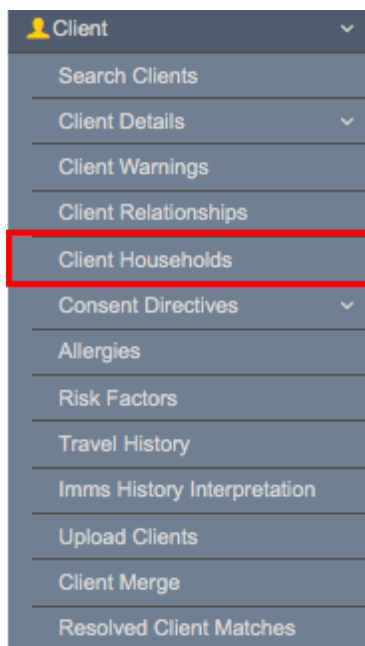
Existing households will be displayed in the **Client Households** screen.
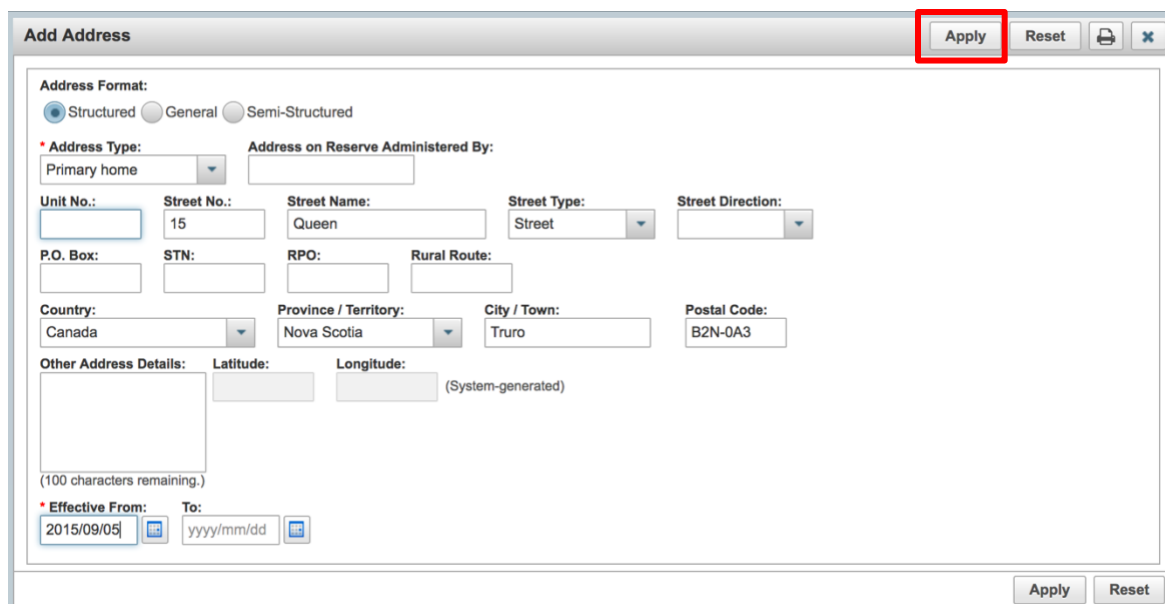
6.2   Record Household Information

Below are the steps outlined to record **Household Information.**

1. After setting a client In Context, go to the **Left-Hand Navigation** menu.

2. Under the Client section, click **Client Households**.

3. The **Client Households** screen displays. Click **Add Address** to record the household for this client.

4. The **Add Address** screen will display. Select the **Type** of address from the drop-down menu – for most clients, this will be a **Primary Home** address. Enter the **Address** information in the data fields.

5. Add the **Effective From** date. The **Effective To** date field may be left empty if the client still resides at this location.

6. Click **Apply**.

7. Click the **Save** button at the top of the page. A confirmation message will display.

8. The new household address will be displayed in the summary table. Click on the radio button beside the address and select **View Members**.

9. The **View Household Members** screen will display. The client that is In Context will automatically be listed in the summary table as a member of this household.
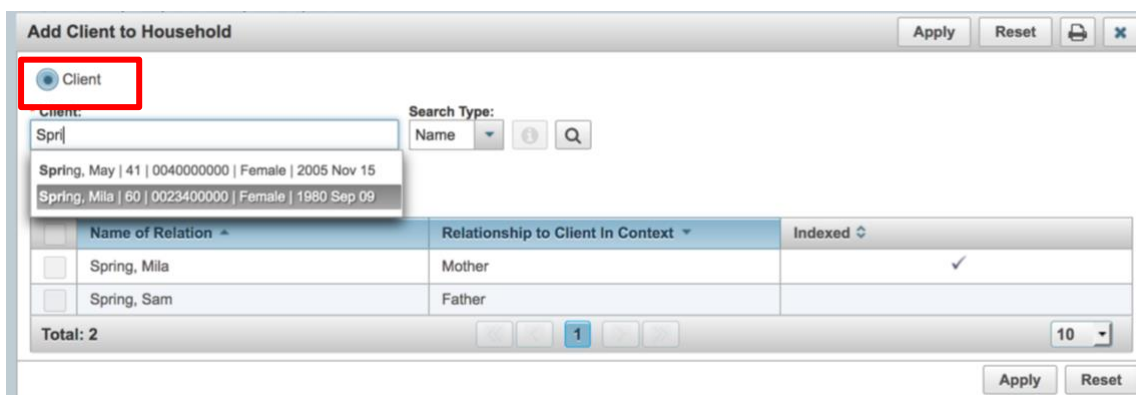
10. Click **Add** to record additional household members.

11. The **Add Client to Household** screen will appear. There are two ways to add a household member.

12. To add a household member who has a Panorama record, but is not listed under **Name of Relation** on the screen, select the **Client** radio button and search by **Client** and **Search Type**. Select the specific Search Type from the drop-down menu and enter the specific client information.
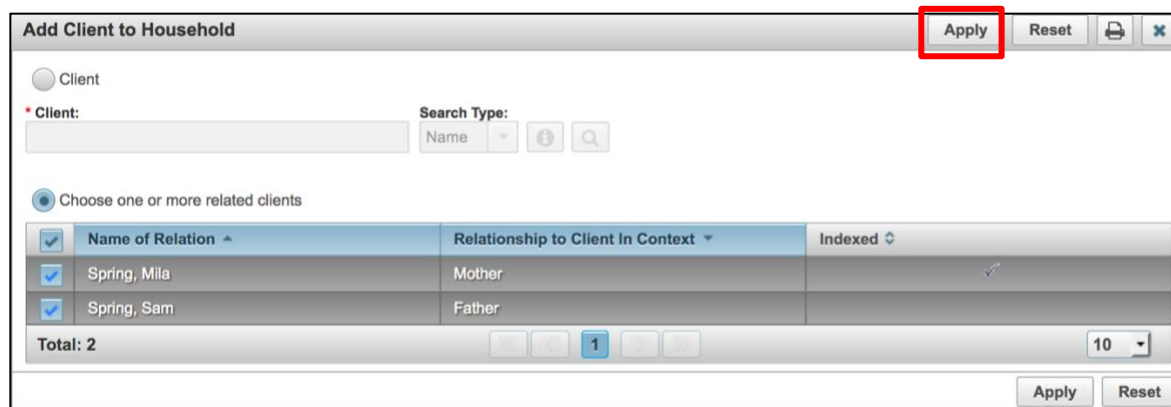
13. The Client is a type ahead field. Slowly type a few letters and options will be displayed matching the letters. Select the desired individual to add to the household. Click **Apply**.

14. Repeat this process until all the desired household members have been added to the summary table. Click **Apply.**

15. To add household members who have already been identified as relations and are listed under **Name of Relation**, select the **Choose one or more related clients** radio button names and click **Apply**.

16. Click **Apply** again.

18. Click **Save**.

19. Panorama will display a message confirming that the client record was successfully updated.

6.3 Update Household Information

Households may be updated in terms of membership in the household. Add new members by following the above steps. Existing members can be updated individually.

1. Starting with the client In Context, go to the **Left-Hand Navigation** menu, and under the Client section, click **Client Households**.

2. The **Client Households** screen displays. Select the Household and click **View Members**.

3. The **View Household Members** screen displays. Click the checkbox bedside the household member that requires an update. Click **Update**.

4. Most fields will be inactive except for the **Effective From** date. This date defaults to the date that the household is documented. The **Effective From** date should be recorded as the date the household membership became effective.

5. Click **Apply** after adjusting the date.

6. The updated record will be displayed in the summary table with an icon that a change is pending, and needs to be saved. Click **Apply** again. Complete this process for other household members.

P16-0371 Panorama Implementation Project - PNS CLT 101

7. Click **Save** at the top of the screen.

8. A confirmation message will display.
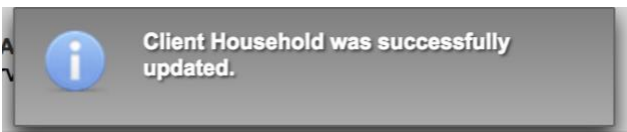
9. The dates have been changed.

6.4 Add a New Address

Households may change from time to time. If the household remains intact but simply moves to a new location, Users can add the new address. Follow the steps above to add a new address.

1. Once the new address is added and displayed in the summary table, click on the radio button beside the new address and click **Set Preferred**. Click **Save**.
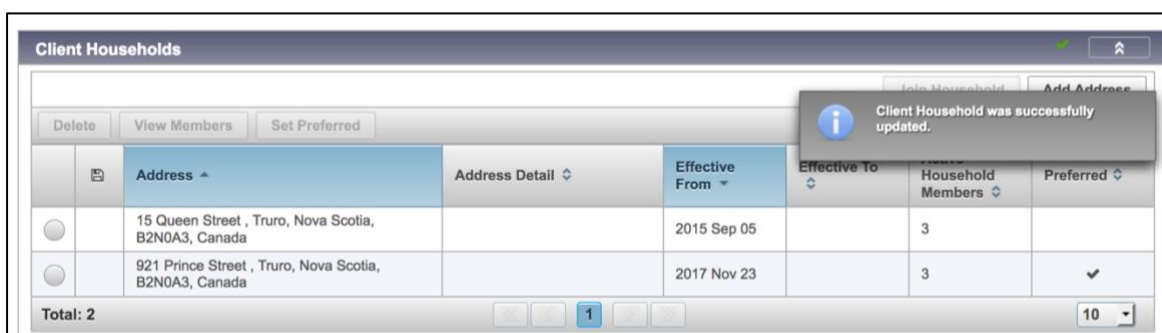
2. The old address can be deleted or left for the purposes of traceability.

3. Household members other than the in-context client will need to be added to the new address. Click View Members and follow the instructions in Section 6.4.
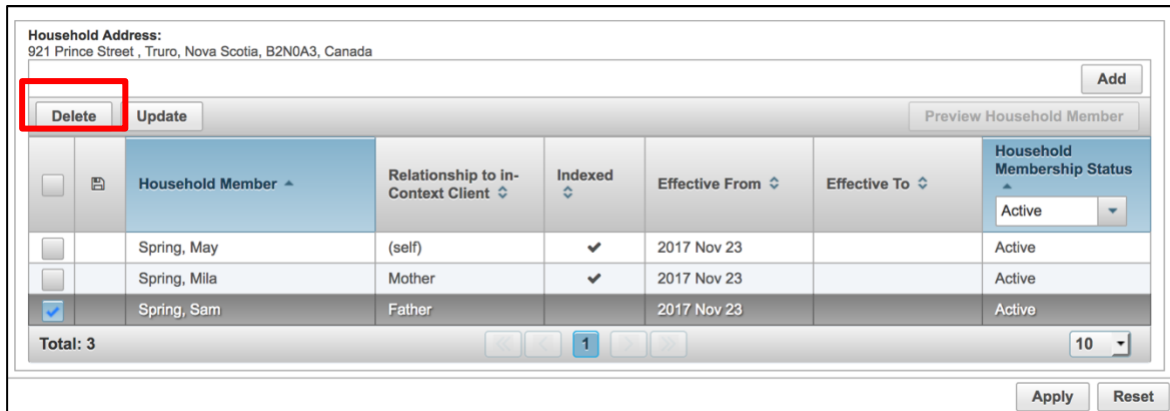
4. The members have been added to the new address.

6.4.1 Deleting Individual Household Members

On occasion, households may be created in error and can be deleted. Individual household members may also be deleted.

1. Starting with the client In Context, go to the **Left-Hand Navigation** menu, and under the Client section, click **Client Households**.

2. The **Client Households** screen displays. Select the Household and click **View Members**.

3. The **View Household Members** screen displays. Click the checkbox bedside the household member to be deleted. Click **Delete**.
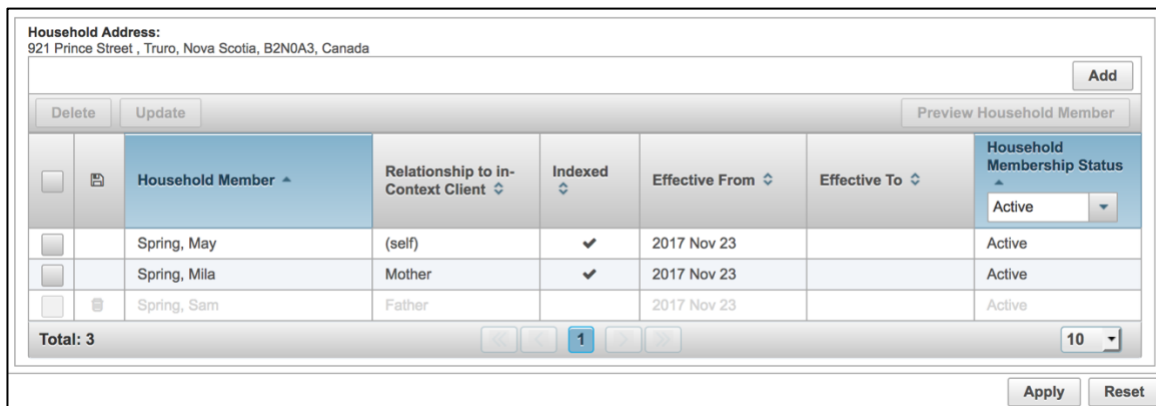
4. The deleted client file is displayed as greyed out.

5. Click **Apply**.

6. Click **Save** at the top of the page. The name will be deleted.

7. Panorama will display a message confirming that the household record is updated.

Client Household was successfully updated.

6.4.2 Deleting Households

1. To delete an entire household, go to the **Client Households** screen. Select the Household for deletion and click **Delete**.

2. The household will be greyed out. Click **Save** at the top of the page.

3. Panorama will display a message confirming that the record is updated.

Client Households

Add to WQ | Save | Reset | log | 🖶 | ?

Client Households

To create a new record click Add.

Join Household   Add Address

ℹ️ Client Household was successfully updated.