



P16-0371 Panorama Project

Panorama Immunization Management User Manual

CLT 101 Basic Client Records Management

Version 1.0

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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:

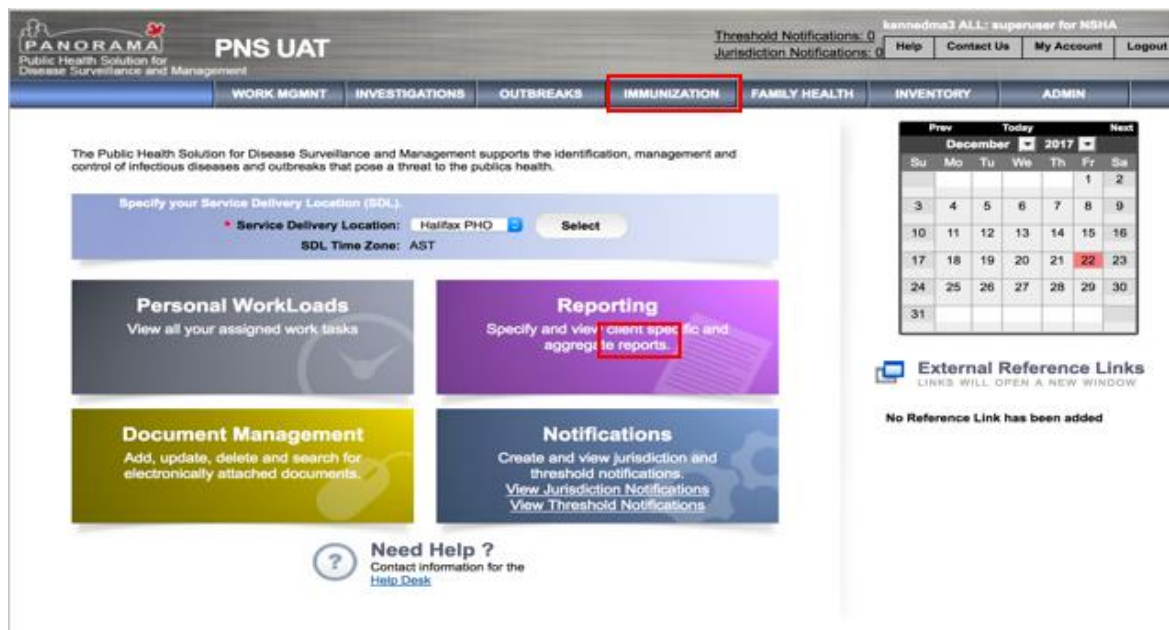
1. Search by Client Health Card Number
2. Search by Demographic Information (last name, first name, date of birth, gender)
3. Wildcard Search, phonetic search
4. Advanced Search

Once the client record is found, the user can either:

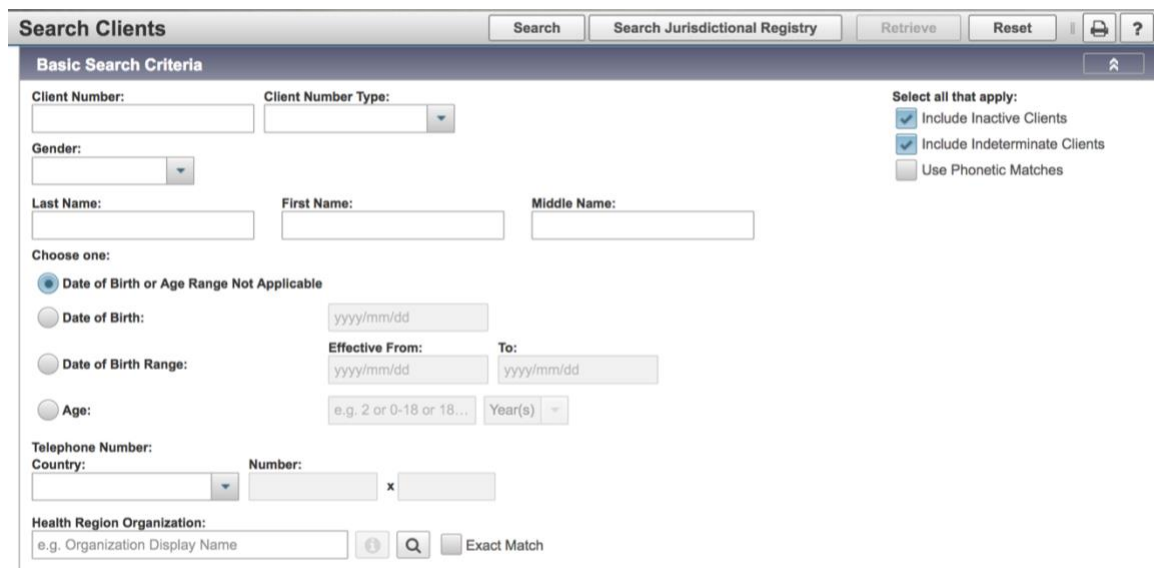
1. Preview Client
2. Update Client
3. Set Client in Context
4. Client Immunization Profile

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.

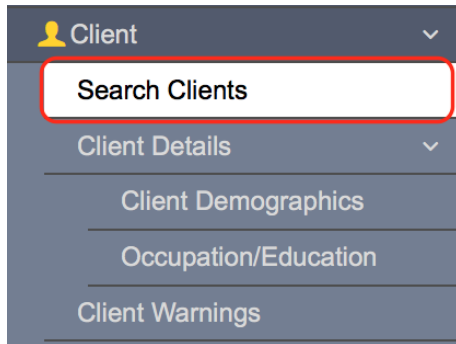


1. The system automatically displays the **Search Clients** screen.




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**.



Client

Search Clients

Client Details

Client Demographics

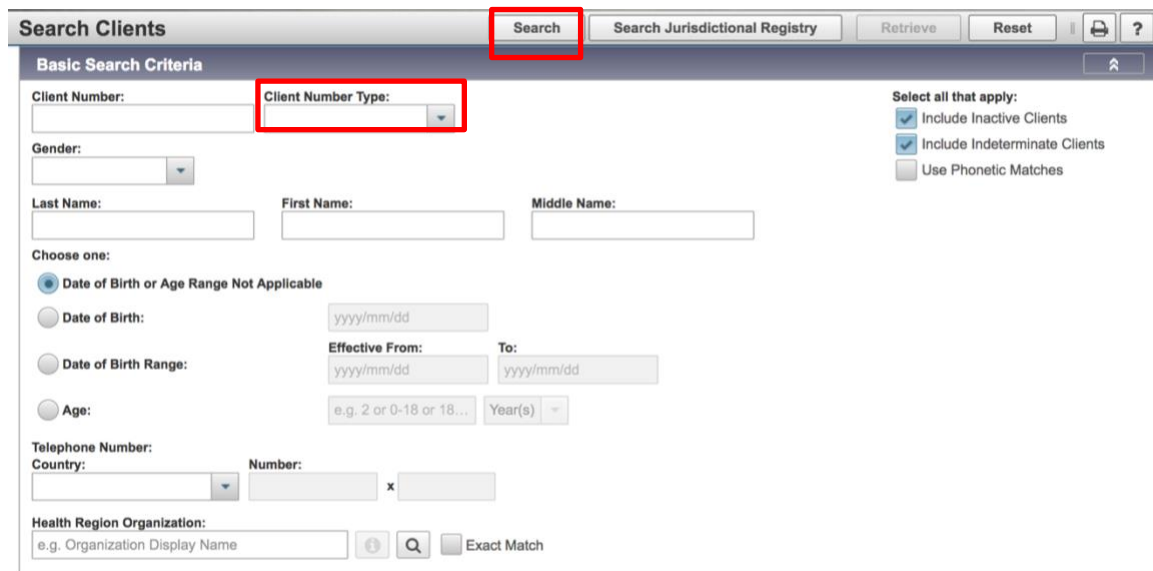
Occupation/Education

Client Warnings

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,



Search Clients

Search Search Jurisdictional Registry Retrieve Reset

Basic Search Criteria

Client Number: Client Number Type: **Health Card Number**

Gender: **Female**

Last Name: First Name: Middle Name:

Choose one:

☒ Date of Birth or Age Range Not Applicable

☐ Date of Birth:

☐ Date of Birth Range: Effective From: To:

☐ Age: Year(s)

Telephone Number: Country: Number: x

Health Region Organization: ☐ Exact Match

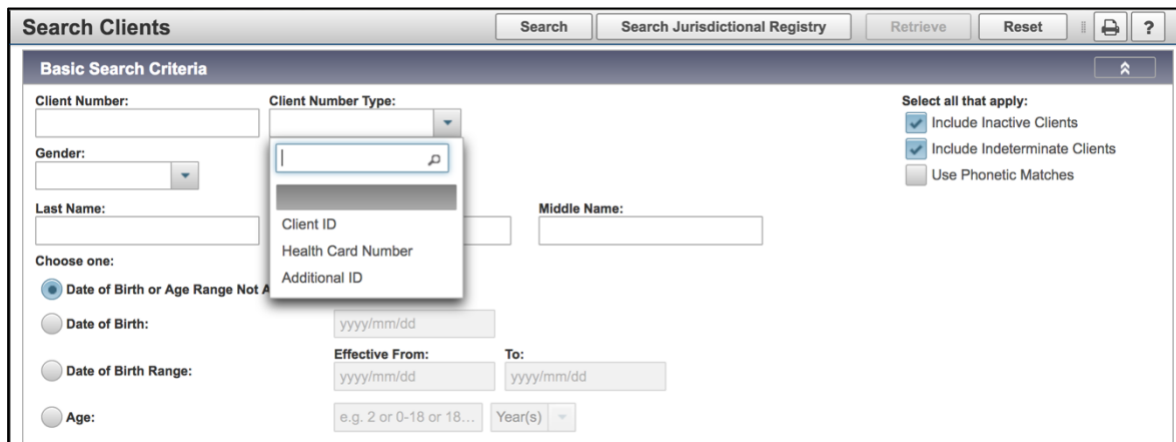
Select all that apply:

☒ Include Inactive Clients

☒ Include Indeterminate Clients

☐ Use Phonetic Matches

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




Tip: Search by Alternate IDs

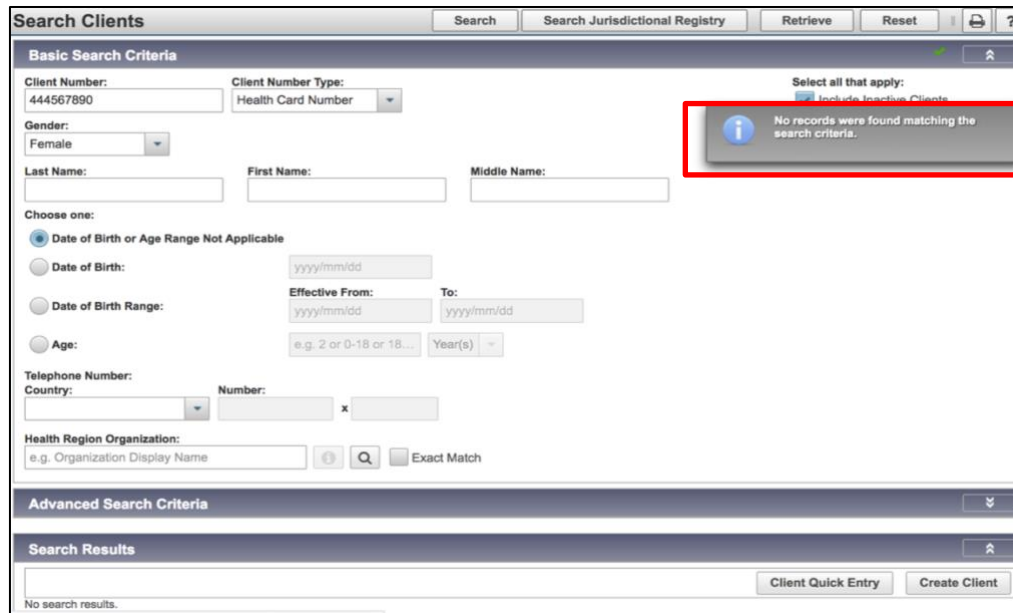
If a Nova Scotia Health Card Number is not available or the client does not have a Nova Scotia Health Card Number, another identifier may be used to search for the client record, such as DND number or other identifier. This additional identifier may be recorded in the **Client Number** field. Select **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

- 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.

Search Clients Search Search Jurisdictional Registry Retrieve Reset ?

Basic Search Criteria

Client Number: Client Number Type:

Gender: Male

Last Name: John First Name: MacDonald Middle Name:

Choose one:

☒ Date of Birth or Age Range Not Applicable

☐ Date of Birth: yyyy/mm/dd

☐ Date of Birth Range: Effective From: yyyy/mm/dd To: yyyy/mm/dd

☐ Age: e.g. 2 or 0-18 or 18... Year(s)

Telephone Number:

Country: Number: x

Health Region Organization: e.g. Organization Display Name ? Q Exact Match

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.

Choose one:

☒ Date of Birth or Age Range Not Applicable

☐ Date of Birth: yyyy/mm/dd

☐ Date of Birth Range: Effective From: yyyy/mm/dd To: yyyy/mm/dd

☐ Age: e.g. 2 or 0-18 or 18... Year(s)

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.

Search Clients

Search

Search Jurisdictional Registry

Retrieve

Reset

?

Basic Search Criteria

Client Number:

Client Number Type:

Gender:

Last Name:

First Name:

Middle Name:

Choose one:

☒ Date of Birth or Age Range Not Applicable

☐ Date of Birth:

☐ Date of Birth Range:

☐ Age:

Effective From:

To:

Year(s)

Telephone Number:

Country:

Number:

Health Region Organization:

Exact Match

Select all that apply:

☒ Include Inactive Clients

☒ Include Indeterminate Clients

☐ Use Phonetic Matches

Advanced Search Criteria

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

Advanced Search Criteria

School Information

School:

School Year:

Grade:

Class:

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

Client Location

Address Format:

☒ Structured
 ☐ General
 ☐ Semi-Structured

Unit No.:

Street No.:

Street Name:

Street Type:

Street Direction:

P.O. Box:

STN:

RPO:

Rural Route:

Country:

Province / Territory:

City / Town:

Postal Code:

Health Services

Provider:

Service Delivery Location:

2.1.4 Selecting the Client

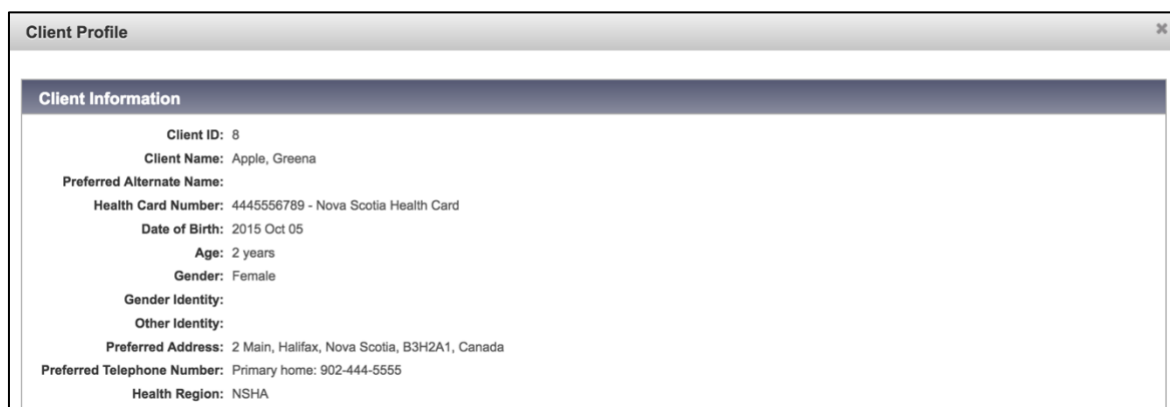
Once the desired client has been found and is displayed in the **Client Index: Search Results** table, select the client by checking the checkbox next to the client name in the table.

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.

Search Results

Client Quick Entry Create Client

Preview **Update** Set In Context Create Cohort Client Imms Profile

	Client ID	Health Card Number	Last Name	First Name	Gender	Date of Birth	Health Region	Active
<input checked="" type="checkbox"/>	8	4445556789	Apple	Greena	Female	2015 Oct 05	NSHA	Active

Total: 1 1 20

Client Demographics Add to WQ Save Reset Save and Sync with Registry log ?

Active

Client ID: 8 Name (Last, First Middle)/Gender: Apple, Greena / Female Health Card No: 4445556789 Date of Birth / Age: 2015 Oct 05 / 2 years 0 months

Phone Number: 1-(902)-444-5555 (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

☐ Indeterminate

Last Name: Apple First Name: Greena Middle Name: Suffix: Date of Birth: 2015/10/05 Age: 2 years 0 months 0 days Estimated Gender: Female Gender Identity: Other Identity: Health Card Province: Nova Scotia Health Card Health Card Number: 4445556789 * Health Region Organization: NSHA Preferred Communication Method: Inactivate Inactive Reason: Date of Death: Ethnicity Information

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.

Search Results

Client Quick Entry Create Client

Preview Update **Set In Context** Create Cohort Client Imms Profile

	Client ID	Health Card Number	Last Name	First Name	Gender	Date of Birth	Health Region	Active
<input checked="" type="checkbox"/>	8	4445556789	Apple	Greena	Female	2015 Oct 05	NSHA	Active

Total: 1

Telephone Number: Country: Number: x

Health Region Organization: e.g. Organization Display Name Exact Match

Client ID 8 has been set into context.

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.

Search Results

Client Quick Entry Create Client

Preview Update Set In Context Create Cohort **Client Imms Profile**

	Client ID	Health Card Number	Last Name	First Name	Gender	Date of Birth	Health Region	Active
<input checked="" type="checkbox"/>	8	4445556789	Apple	Greena	Female	2015 Oct 05	NSHA	Active

Total: 1

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.

Client Demographics Add to WQ Save Reset Save and Sync with Registry log ?

Active

Client ID: 8	Name (Last, First Middle) / Gender: Apple, Greena / Female	Health Card No: 4445556789	Date of Birth / Age: 2015 Oct 05 / 2 years 0 months
Phone Number: 1-(902)-444-5555 (Primary home)	Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

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 health 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.



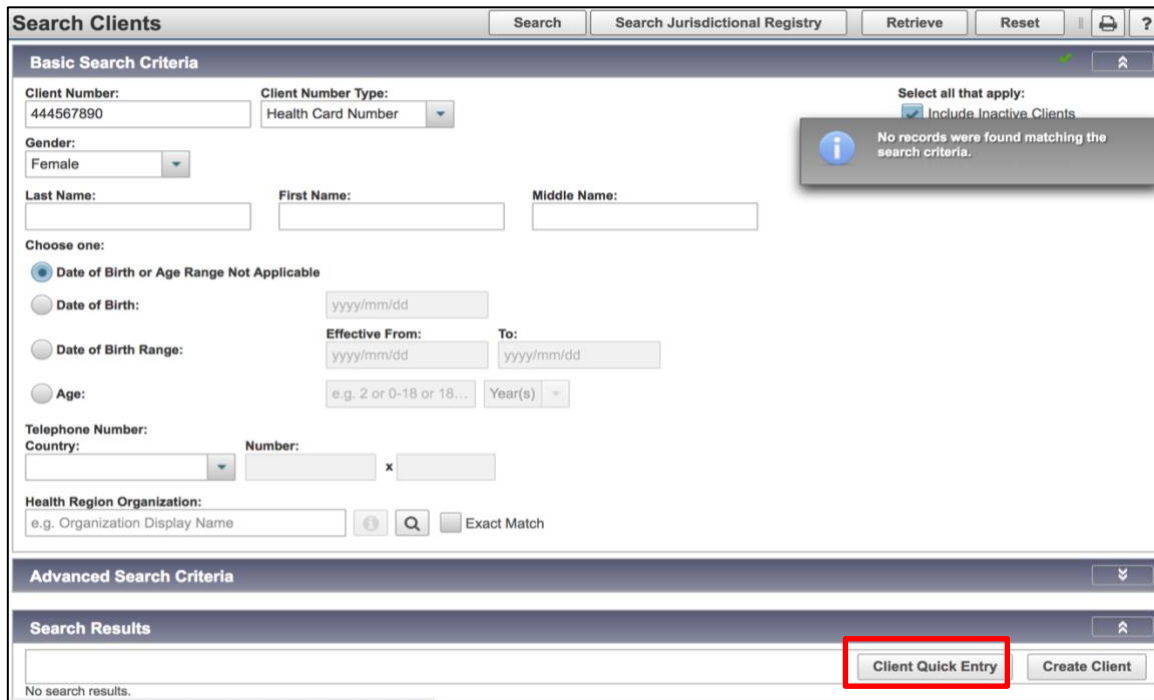
Tip: Quick Client Entry

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.

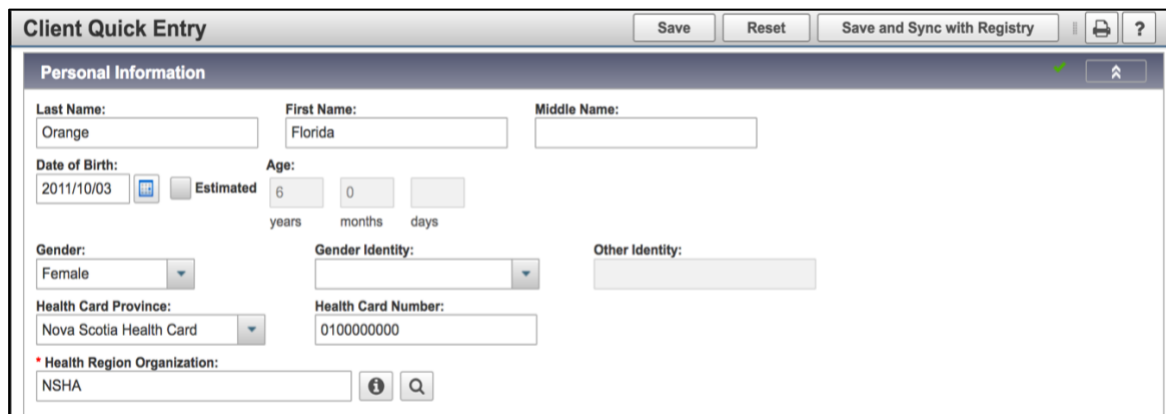
3.1.1 Search and Create

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.

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.



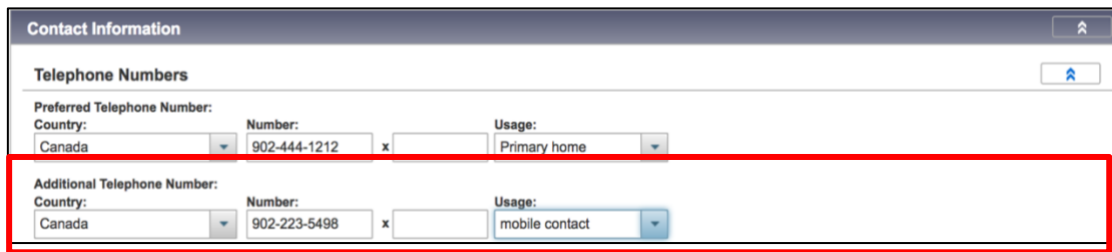
Tip: Additional IDs

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.

Client Quick Entry Save Reset Save and Sync with Registry ?

Address ?

Address Format:
☒ Structured ☐ General ☐ Semi-Structured

Address Type: Primary home Address on Reserve Administered By:

Unit No.: Street No.: Street Name: Street Type: Street Direction:
 1015 Queen Street

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

Country: Province / Territory: City / Town: Postal Code:
Canada Nova Scotia Halifax B3H-2R9

Other Address Details:
(100 characters remaining.)

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.

Email Address ?

Email Type: Email:
 email@domain.com

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.

For Students Only ?

Student Information ?

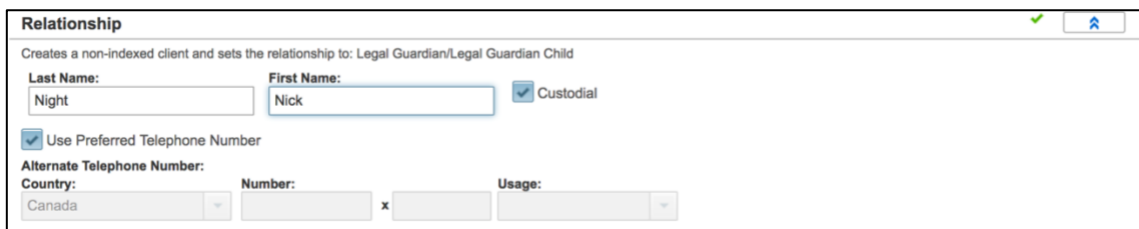
School: ABCSchoolBoard ? Q

School Year: Grade: Class:
2017 / 2018 Grade 2

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.



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.



3.2 Create Client

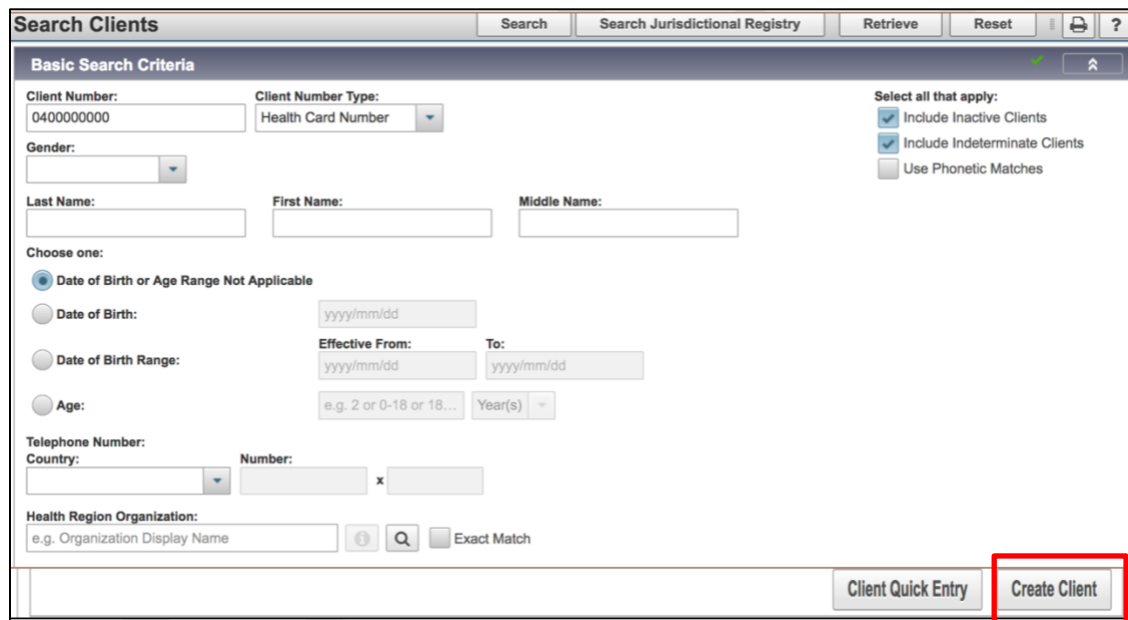
When a Client Search has failed to return an existing record for the client, the User must create a new client record. There are specific situations when the 'Client Quick Entry' is not advisable. These include:

- 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.

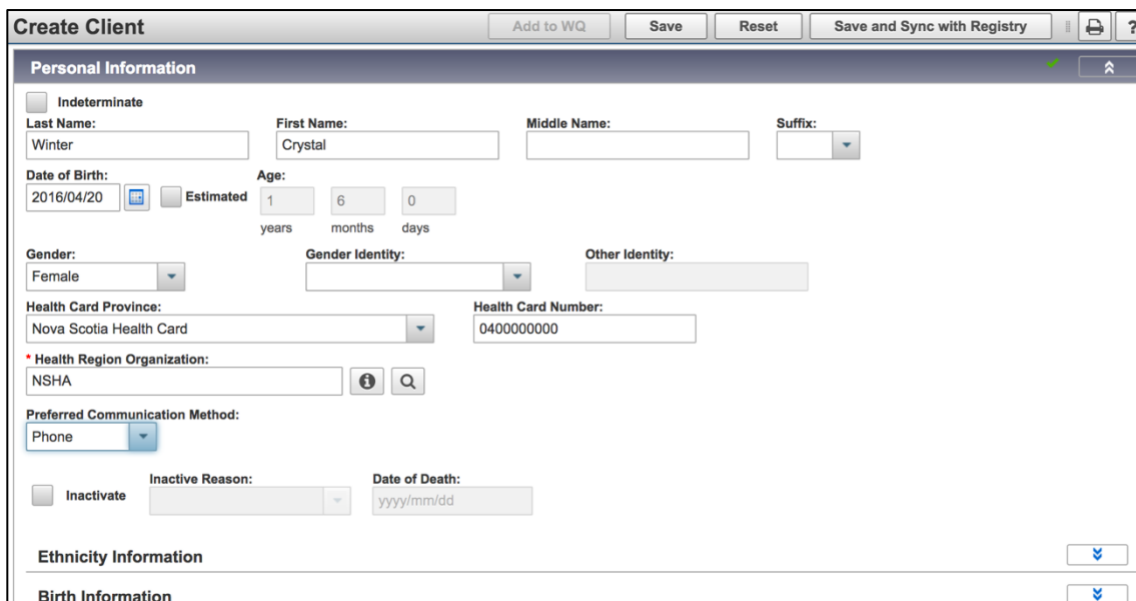
The steps below describe the 'Create Client' method.

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



The screenshot shows the 'Search Clients' interface. At the bottom right, the 'Create Client' button is highlighted with a red rectangular box. Other buttons visible include 'Client Quick Entry', 'Search', 'Search Jurisdictional Registry', 'Retrieve', and 'Reset'.

2. The **Create Client** screen displays. Below **Personal Information** are sections for demographic information that can expand/ collapse as needed.



The screenshot shows the 'Create Client' form with the 'Personal Information' section expanded. Fields include: Last Name (Winter), First Name (Crystal), Middle Name, Suffix, Date of Birth (2016/04/20), Age (1 year, 6 months, 0 days), Gender (Female), Health Card Province (Nova Scotia Health Card), Health Card Number (0400000000), Health Region Organization (NSHA), Preferred Communication Method (Phone), Inactive Reason, Date of Death, Ethnicity Information, and Birth Information. A red asterisk (*) is next to the 'Health Region Organization' field.

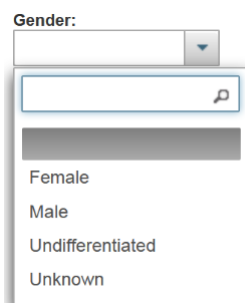
3. The User now completes the **Personal Information** section of the screen. Enter: **First Name** and **Last Name**. **Middle Name** is optional.
4. Mandatory or required data fields are indicated by the presence of a red asterisk (*). Note that **Last Name**, **Gender**, **Date of Birth** while not marked with a red

asterisk, are required fields and Panorama will not save the record unless they are completed.

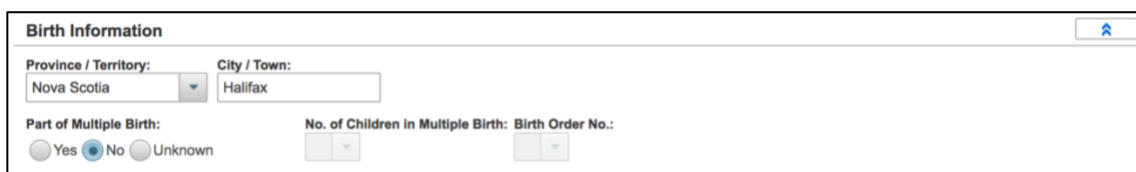
- To enter the **Birth Date**, the User can either click on the **Calendar** defaulted to today's date or enter it manually. Repeat the process as needed.



- 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.



- 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.



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

Client Demographics			
<div> Add to WQ Save Reset Save and Sync with Registry </div>			
Client ID: 14	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: -(-)	Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority	Additional ID Type / Additional ID: Provincial health service provider identifier / -	Active Client was successfully created.

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**.

Telephone Numbers
To create a new record click Add.
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.

Add Telephone Number			
<div> Apply Reset </div>			
Telephone Number: * Country: Canada * Number: 902-444-1987 x * Usage: Primary home			
* Effective From: 2017/04/20 To: yyyy/mm/dd			
			Apply Reset



Tip: Multiple Phone Numbers

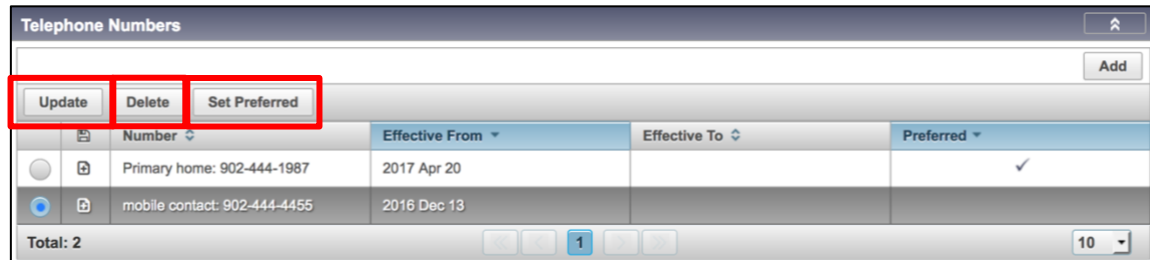
Panorama allows Users to add as many phone numbers as required for the client. Users can specify which phone numbers should be set to preferred. If only one phone number is added, it will automatically be set as the preferred phone number.

Telephone Numbers			
<div> Update Delete Set Preferred </div>			
Add			
<input type="checkbox"/>	Number Primary home: 902-444-1987	Effective From 2017 Apr 20	Effective To
			Preferred
Total: 1			



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**.

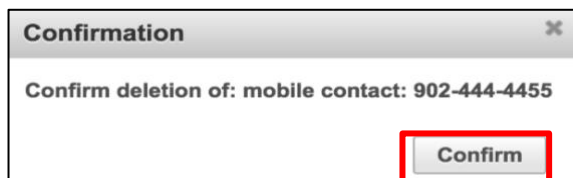


	Number	Effective From	Effective To	Preferred
<input type="radio"/>	Primary home: 902-444-1987	2017 Apr 20		<input checked="" type="checkbox"/>
<input type="radio"/>	mobile contact: 902-444-4455	2016 Dec 13		<input type="checkbox"/>

Total: 2

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 in 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.



Confirmation

Confirm deletion of: mobile contact: 902-444-4455

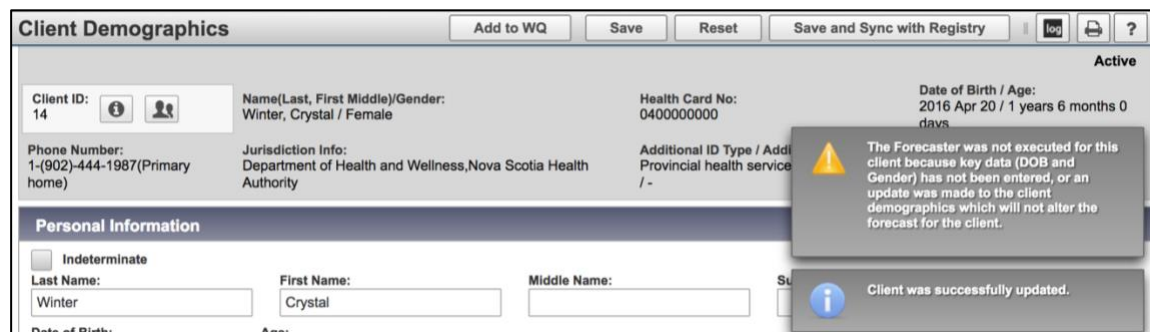
Confirm



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.



Client Demographics [Add to WQ] [Save] [Reset] [Save and Sync with Registry]

Client ID: 14 | 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 / Address: Provincial health service / -

Personal Information

☐ Indeterminate

Last Name: Winter | First Name: Crystal | Middle Name: | Date of Birth: | Age: |

Notifications:

- The Forecaster was not executed for this client because key data (DOB and Gender) has not been entered, or an update was made to the client demographics which will not alter the forecast for the client.
- Client was successfully updated.



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

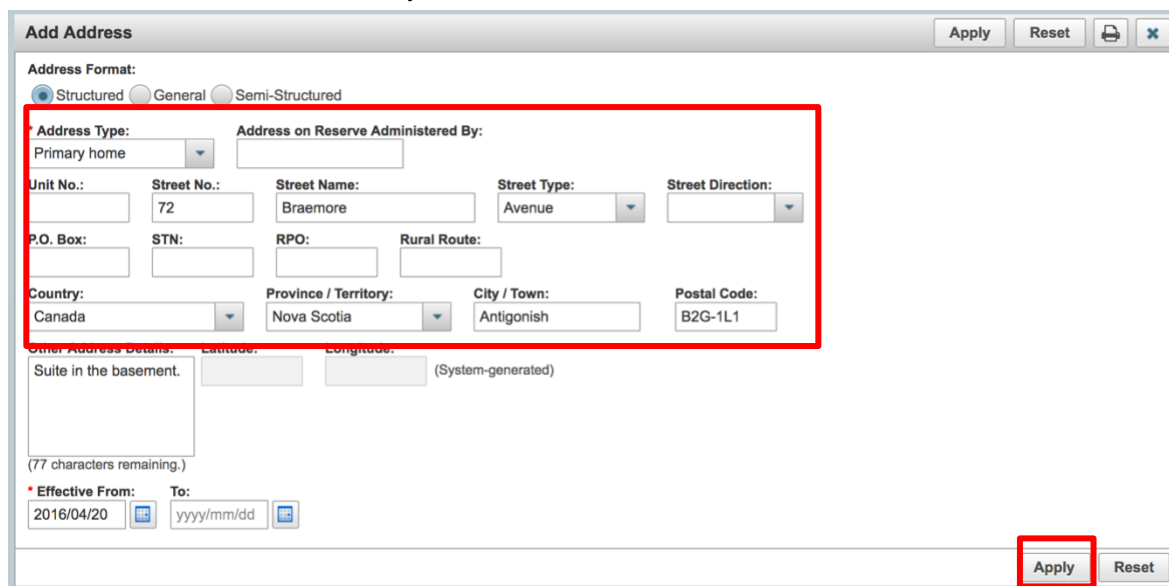


3.2.2 Adding Addresses

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



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] [Print] [Close]

Address Format:
☒ Structured ☐ General ☐ Semi-Structured

Address Type: Primary home [v] Address on Reserve Administered By: [v]

Unit No.: [v] Street No.: 72 Street Name: Braemore Street Type: Avenue [v] Street Direction: [v]

P.O. Box: [v] STN: [v] RPO: [v] Rural Route: [v]

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

Other Address Details: Suite in the basement. [v] (77 characters remaining.)

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

[Apply] [Reset]

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

Addresses

Update

Delete

View Map

Set Preferred



Add

		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		✓		—	

Total: 1

1

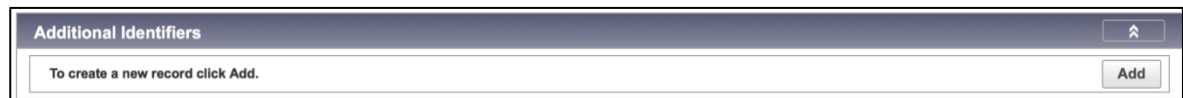
10

- Address is now displayed under the **Addresses** section. Until saved, the following symbol will display next to the radio button. 
- Click **Save** at the top of the page. The  symbol will no longer be visible.

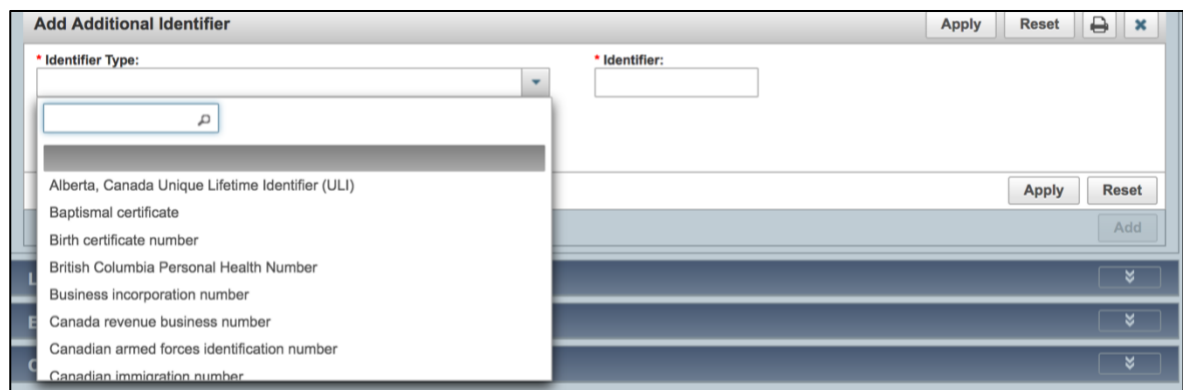
3.2.3 Adding Additional Identifiers

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.

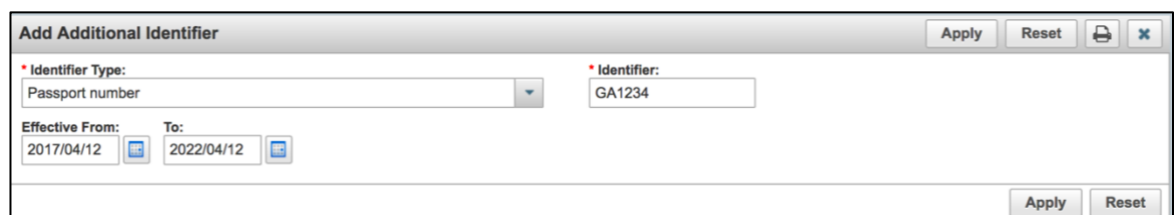
- Expand the **Additional Identifiers** section and click **Add**.



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



- The Additional identifier will be displayed in the Additional Identifiers table.

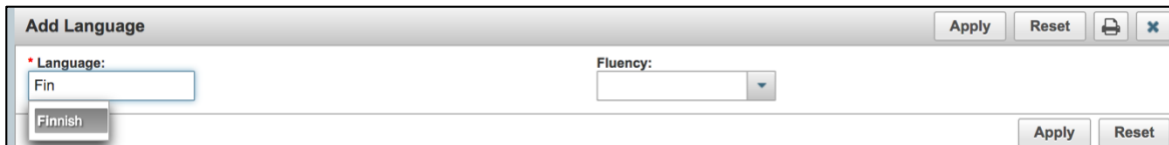


3.2.4 Adding a Language

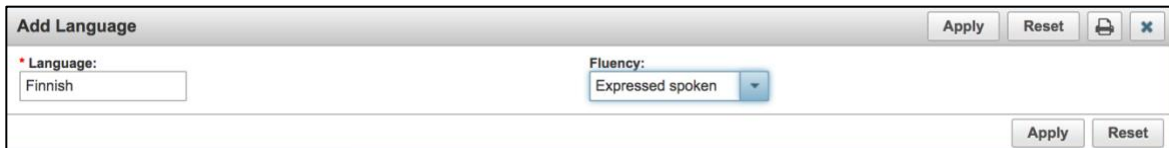
- Expand the **Languages** section by clicking on the down arrow. Click **Add**.



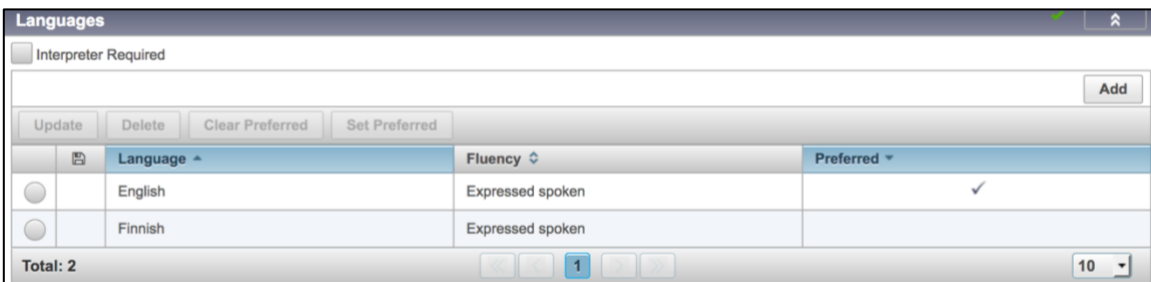
- The **Add Language** screen displays. Type the language under **Language**. Note this field is a type ahead field. Type the first few letters of the Language and select the appropriate one.



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













- Set the language as the preferred language by clicking on the radio button beside the added language and clicking **Set Preferred**.
- Click **Save** at the top of the page.




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	log	Print	?
Active										
Client ID: 14	 	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 										

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: Collin Daniel	Middle Name: 	* Last Name: 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: Collin	Middle Name: Daniel	* Last Name: 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: Mann	First Name: Baby	Middle Name: Ronald
---------------------------	----------------------------	-------------------------------

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

Last Name: Mann	First Name: Horatio	Middle Name: 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

Update

Delete

Clear Preferred

Set Preferred

Add

	Alternate Name Type	Last Name	First Name	Middle Name	Preferred
<input checked="" type="radio"/>	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.

Gender:

Male

Female

Male

Undifferentiated

Unknown

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.

Health Card Province: Health Card Number:

* Health Region Organization:

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

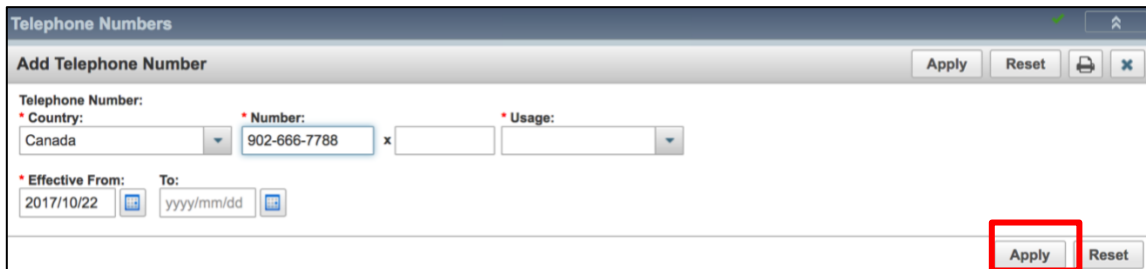
If a client reports a change of phone number for an existing type (e.g., change in mobile number), add the new phone number to the **Telephone Numbers** section.

Telephone Numbers

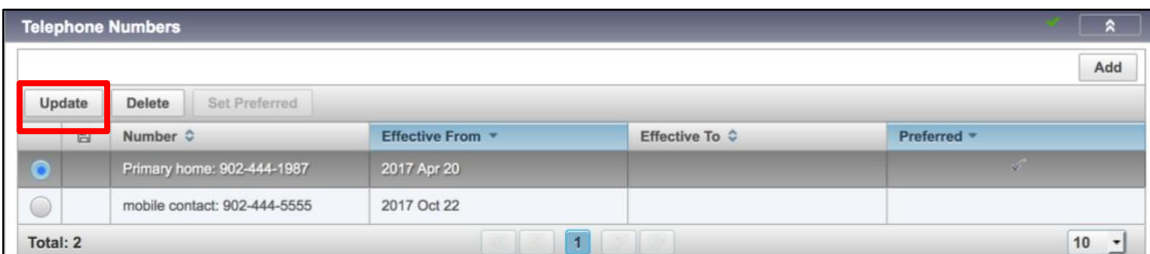
To create a new record click Add.

Add

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.

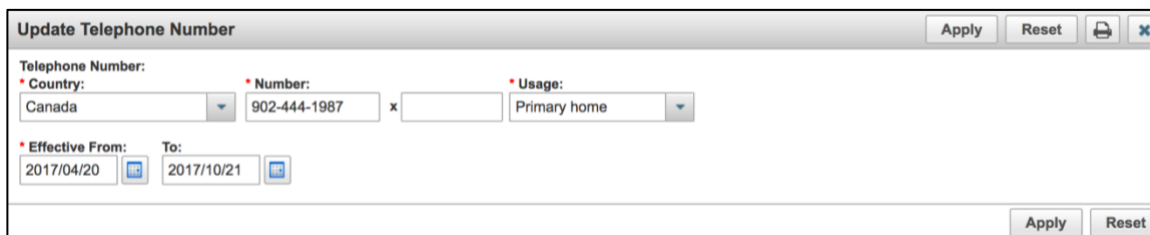
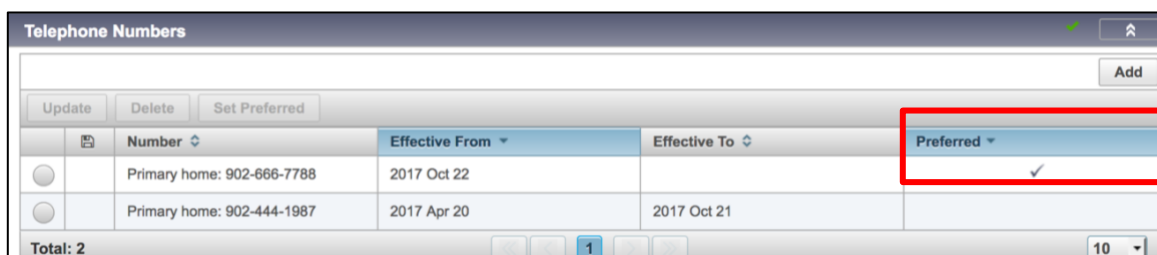


2. Click **Apply**.
3. Click **Save**.
4. Do not delete the previous number. Instead, select the previous number by clicking on the radio button beside it and selecting **Update**.



	Number	Effective From	Effective To	Preferred
<input checked="" type="radio"/>	Primary home: 902-444-1987	2017 Apr 20		✓
<input type="radio"/>	mobile contact: 902-444-5555	2017 Oct 22		

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.

	Number	Effective From	Effective To	Preferred
<input type="radio"/>	Primary home: 902-666-7788	2017 Oct 22		✓
<input type="radio"/>	Primary home: 902-444-1987	2017 Apr 20	2017 Oct 21	

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.

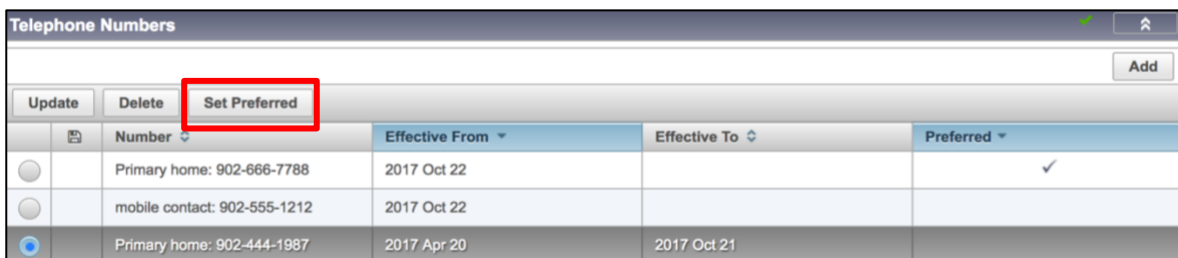


Telephone Numbers

To create a new record click Add.

Add

If a new number is preferred, select the new number in the table and click **Set Preferred**.

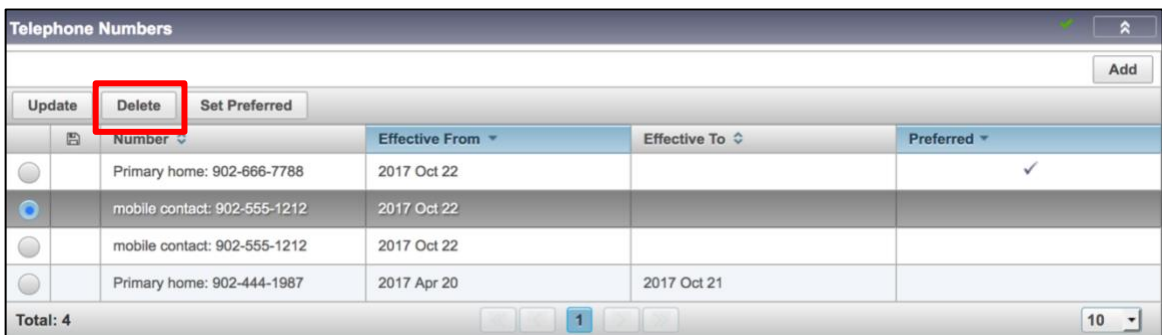


Telephone Numbers					
Add					
Update Delete Set Preferred					
	Number	Effective From	Effective To	Preferred	
<input type="radio"/>	Primary home: 902-666-7788	2017 Oct 22		<input checked="" type="checkbox"/>	
<input type="radio"/>	mobile contact: 902-555-1212	2017 Oct 22		<input type="checkbox"/>	
<input checked="" type="radio"/>	Primary home: 902-444-1987	2017 Apr 20	2017 Oct 21	<input type="checkbox"/>	

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**.



Telephone Numbers					
Add					
Update Delete Set Preferred					
	Number	Effective From	Effective To	Preferred	
<input type="radio"/>	Primary home: 902-666-7788	2017 Oct 22		<input checked="" type="checkbox"/>	
<input checked="" type="radio"/>	mobile contact: 902-555-1212	2017 Oct 22		<input type="checkbox"/>	
<input type="radio"/>	mobile contact: 902-555-1212	2017 Oct 22		<input type="checkbox"/>	
<input type="radio"/>	Primary home: 902-444-1987	2017 Apr 20	2017 Oct 21	<input type="checkbox"/>	

Total: 4

1 10

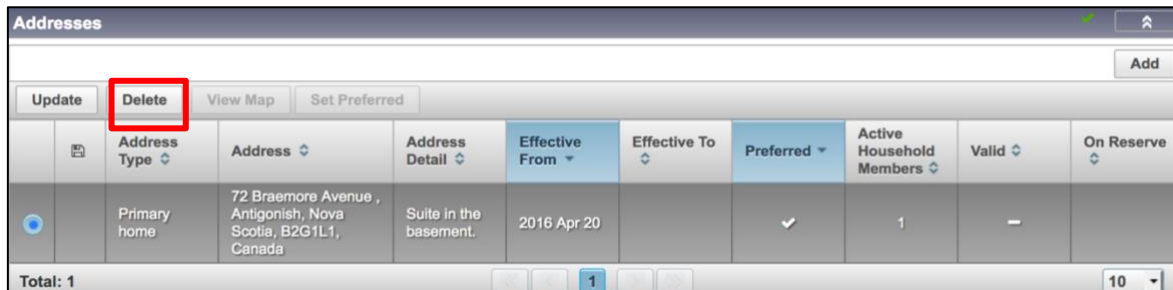
4.6 Address Update

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.



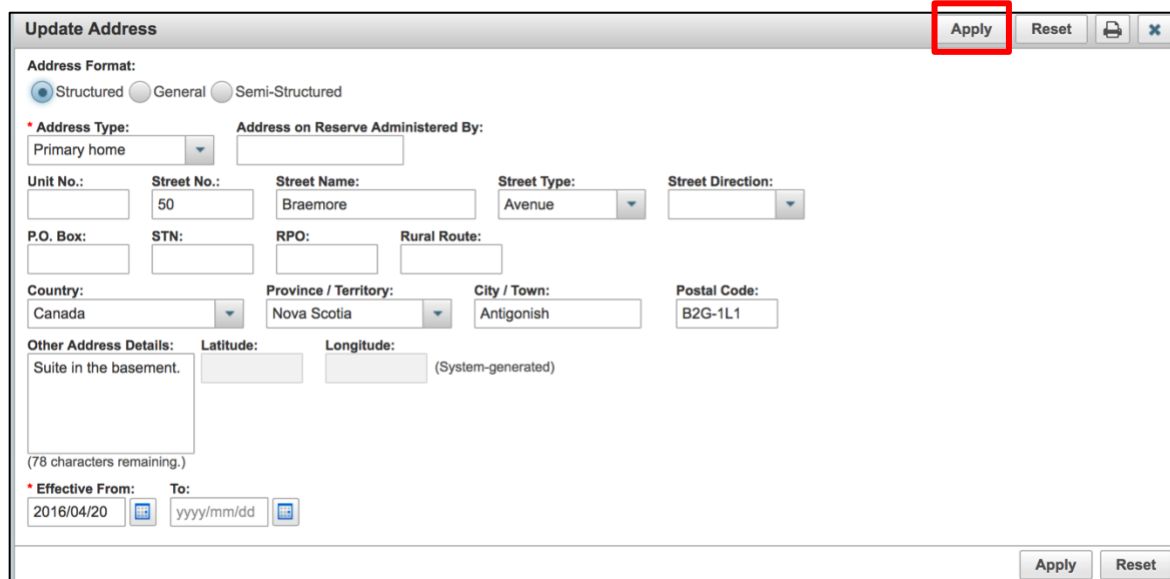
1. Select the existing address by clicking the radio button in the **Address** table and click **Update**.



Addresses									
<input type="button" value="Update"/> <input type="button" value="Delete"/> <input type="button" value="View Map"/> <input type="button" value="Set Preferred"/> <input type="button" value="Add"/>									
	Address Type	Address	Address Detail	Effective From	Effective To	Preferred	Active Household Members	Valid	On Reserve
<input checked="" type="radio"/>	Primary home	72 Braemore Avenue , Antigonish, Nova Scotia, B2G1L1, Canada	Suite in the basement.	2016 Apr 20		✓	1	-	

Total: 1

2. Make the necessary updates to the client address.



Update Address

Apply Reset

Address Format:

☒ Structured
 ☐ General
 ☐ Semi-Structured

* Address Type:

Primary home

Address on Reserve Administered By:

Unit No.:

Street No.:

Street Name:

Street Type:

Street Direction:

P.O. Box:

STN:

RPO:

Rural Route:

Country:

Province / Territory:

City / Town:

Postal Code:

Other Address Details:

Suite in the basement.

Latitude:

Longitude:

(System-generated)

(78 characters remaining.)

* Effective From:

To:

2016/04/20

yyyy/mm/dd

Apply Reset

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.

Addresses
















Update

Delete

View Map

Set Preferred

Add

		Address Type 	Address 	Address Detail 	Effective From 	Effective To 	Preferred 	Active Household Members 	Valid 	On Reserve 
		Primary home	50 Braemore Avenue , Antigonish, Nova Scotia, B2G1L1, Canada	Suite in the basement.	2016 Apr 20			1		
		Primary home	15 Queen , Bedford, Nova Scotia, B3B1K7, Canada		2017 Oct 01			1		

Total: 2

1
















10

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






Addresses


UpdateDeleteView MapSet Preferred

Add

		Address Type 	Address 	Address Detail 	Effective From 	Effective To 	Preferred 	Active Household Members 	Valid 	On Reserve 
		Primary home	50 Braemore Avenue , Antigonish, Nova Scotia, B2G1L1, Canada	Suite in the basement.	2016 Apr 20			1		
		Primary home	15 Queen , Bedford, Nova Scotia, B3B1K7, Canada		2017 Oct 01			1		

Total: 2



10 

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

Update Address

Apply

Reset

Address Format:

Structured

General

Semi-Structured

* Address Type:

Primary home

Address on Reserve Administered By:

Unit No.:

Street No.:

Street Name:

Street Type:

Street Direction:

50

Braemore

Avenue

P.O. Box:

STN:

RPO:

Rural Route:

Country:

Province / Territory:

City / Town:

Postal Code:

Canada

Nova Scotia

Antigonish

B2G-1L1

Other Address Details:

Latitude:

Longitude:

Suite in the basement.

(System-generated)

(78 characters remaining.)

* Effective From:

To:

2016/04/20

2017/10/23

Apply

Reset

- 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.

Addresses

UpdateDeleteView MapSet Preferred

Address Type

Address

Address Detail

Effective From

Effective To

Preferred

Active Household Members

Valid

On Reserve

Primary home

15 Queen , Bedford, Nova Scotia, B3B1K7, Canada

2017 Oct 01

2017 Oct 23

1

-

Primary home

50 Braemore Avenue , Antigonish, Nova Scotia, B2G1L1, Canada

Suite in the basement.

2016 Apr 20

2017 Oct 23

1

-

Total: 2

1

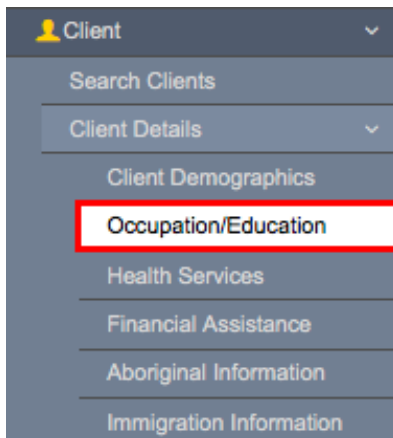
10

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

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



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

Education and Occupation Add to WQ Save Reset ?

Active

Client ID: 14 Info Person Name (Last, First Middle)/Gender: Winter, Crystalla / Female Health Card No: 0400000000 Date of Birth / Age: 2016 Apr 20 / 1 years 6 months 3 days

Phone Number: 1-(902)-666-7788 (Primary home) Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority Additional ID Type / Additional ID: Provincial health service provider identifier / -

Education Information ↑

To create a new record click Add. Add

Occupations ↑

To create a new record click Add. Add

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.

Add Occupation Apply Reset Print Close

* Occupations:

Heal

Health Care Worker

2015/09/14 Calendar yyyy/mm/dd Calendar

Apply Reset

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**.

Add Occupation Apply Reset Print Close

* Occupations:

Health Care Worker

* Effective From: To:

2015/09/14 Calendar yyyy/mm/dd Calendar

Apply Reset

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.

Occupations ✓ ↑

Add

Update Delete

	Occupations	Effective From	Effective To
	Health Care Worker	2015 Sep 14	

Total: 1 1 10

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

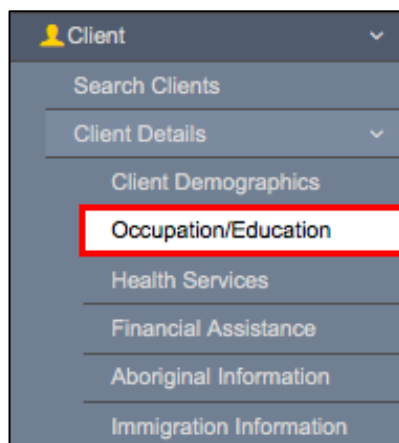
Student information can be added to Panorama manually when creating a new client using the Client Quick Entry method, or at any time in the **Occupation/Education** screen.



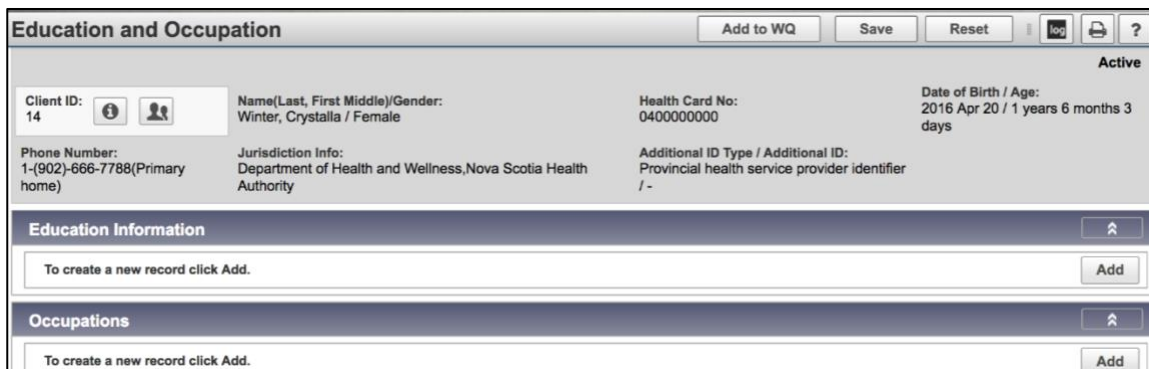
Important: Updating Student Information

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 will not provide correct results.

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.



Education and Occupation [Add to WQ] [Save] [Reset] [log] [print] [help]

Active

Client ID: 14 [info] [person]
 Name (Last, First Middle) / Gender: Winter, Crystalla / Female
 Health Card No: 040000000
 Date of Birth / Age: 2016 Apr 20 / 1 years 6 months 3 days

Phone Number: 1-(902)-666-7788 (Primary home)
 Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority
 Additional ID Type / Additional ID: Provincial health service provider identifier / -

Education Information [up arrow]
 To create a new record click Add. [Add]

Occupations [up arrow]
 To create a new record click Add. [Add]

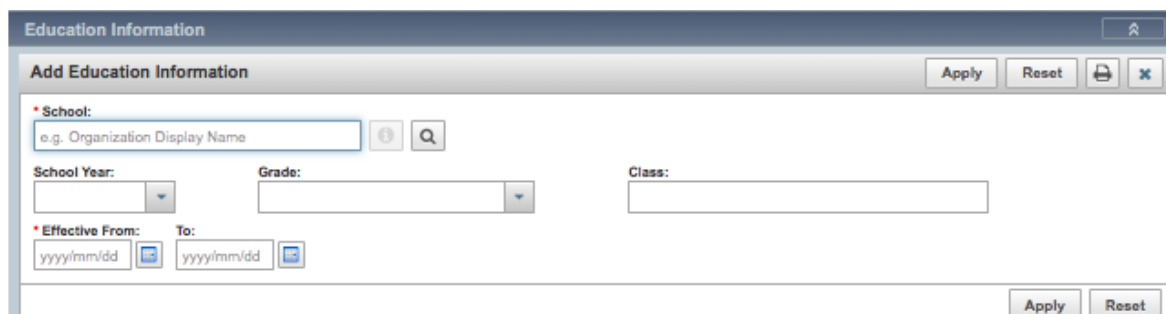
5. Only record new student information if no student records exist for a client. If there is an existing record, update the information if required.
6. To enter new student information, navigate to the **Education Information** screen and click **Add**.



Education Information [up arrow]
 To create a new record click Add. [Add]

Occupations [up arrow]
 To create a new record click Add. [Add]

7. The **Add Education Information** screen will appear.



Add Education Information [Apply] [Reset] [print] [close]

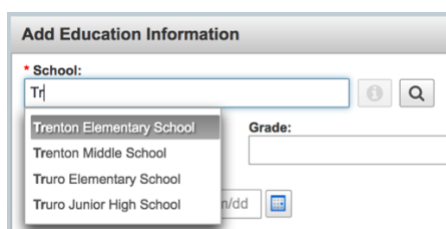
* **School:**
 e.g. Organization Display Name [info] [search]

School Year: [dropdown] **Grade:** [dropdown] **Class:** [text box]

* **Effective From:** [date picker] **To:** [date picker]

[Apply] [Reset]

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.



Add Education Information

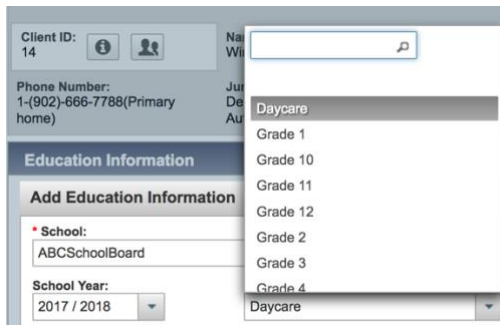
* **School:**
 Tr [info] [search]

- Trenton Elementary School
- Trenton Middle School
- Truro Elementary School
- Truro Junior High School

Grade: [dropdown] **Class:** [text box]

[date picker] [date picker]

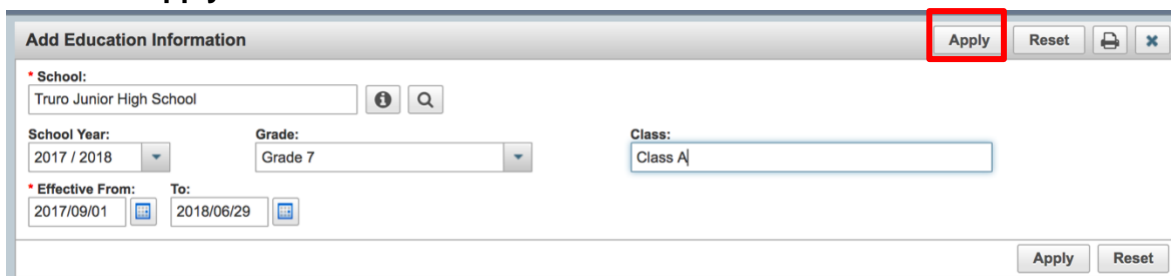
9. Populate the **School Year** and **Grade** from the dropdown menu in each field.



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.

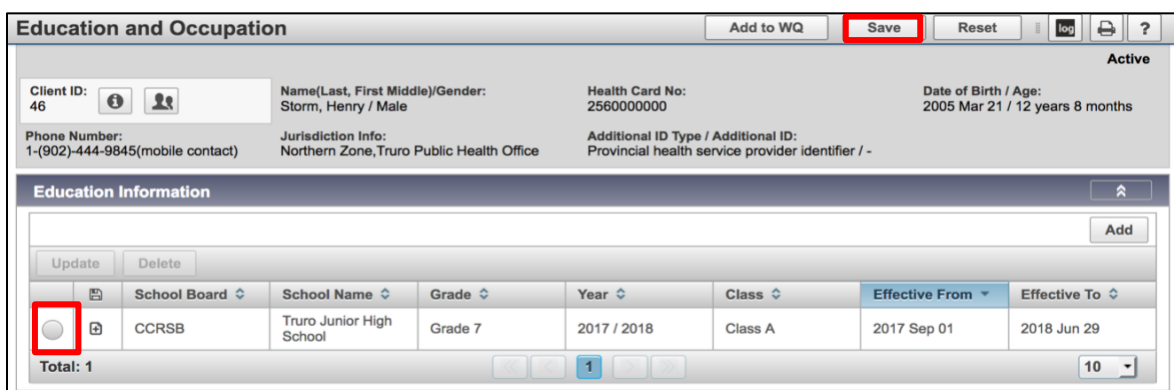
12. Click **Apply**.




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**.



	School Board	School Name	Grade	Year	Class	Effective From	Effective To
<input checked="" type="radio"/>	CCRSB	Truro Junior High School	Grade 7	2017 / 2018	Class A	2017 Sep 01	2018 Jun 29

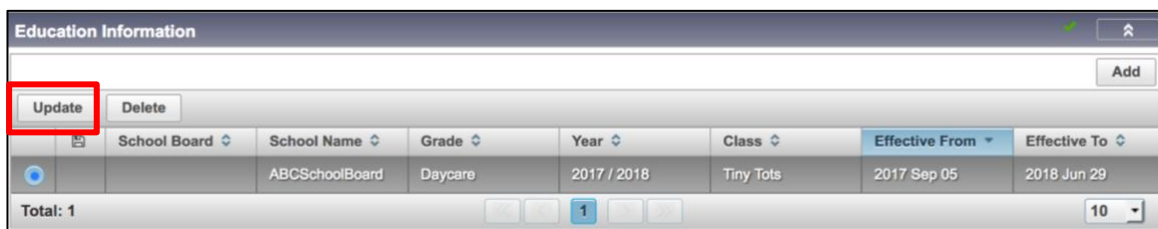
Updating School Information

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.

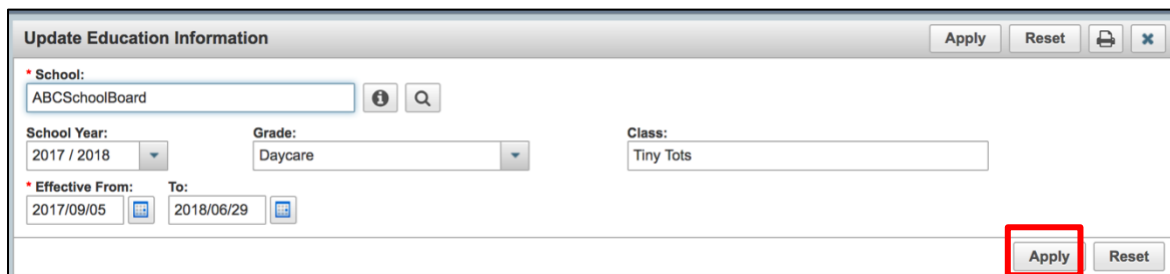
To update the student information, following the below steps:

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**.



The screenshot shows the 'Education Information' window. At the top, there are 'Update' and 'Delete' buttons. Below them is a table with columns: School Board, School Name, Grade, Year, Class, Effective From, and Effective To. The first row contains the data: ABCSchoolBoard, Daycare, 2017 / 2018, Tiny Tots, 2017 Sep 05, and 2018 Jun 29. The 'Update' button is highlighted with a red box.

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.



The screenshot shows the 'Update Education Information' window. It contains several input fields: School (ABCSchoolBoard), School Year (2017 / 2018), Grade (Daycare), Class (Tiny Tots), Effective From (2017/09/05), and To (2018/06/29). At the bottom right, there are 'Apply' and 'Reset' buttons. The 'Apply' button is highlighted with a red box.

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.



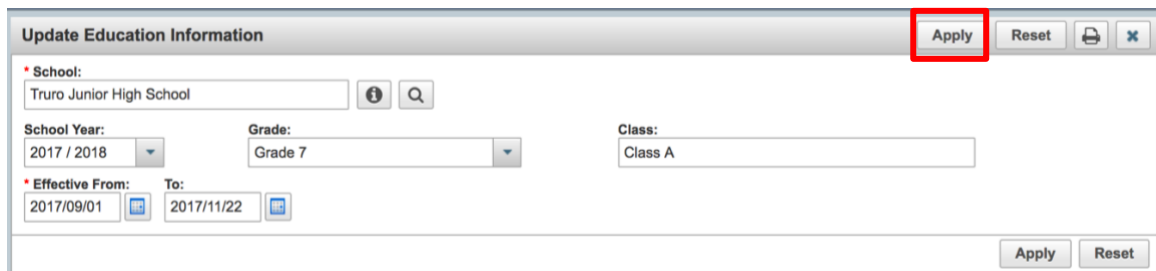
	School Board	School Name	Grade	Year	Class	Effective From	Effective To
	CCRSB	Truro Junior High School	Grade 7	2017 / 2018	Class A	2017 Sep 01	2018 Jun 29

Total: 1

1

10

2. Enter the date the record stopped being effective in the Effective To date field. Click **Apply**.



Update Education Information

School: Truro Junior High School



School Year: 2017 / 2018 Grade: Grade 7 Class: Class A

Effective From: 2017/09/01 To: 2017/11/22


Apply Reset

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.

Education and Occupation Add to WQ Save Reset log ? Active

Client ID: 46   Name (Last, First Middle) / Gender: Storm, Henry / Male Health Card No: 2560000000 Date of Birth / Age: 2005 Mar 21 / 12 years 8 months

Phone Number: 1-(902)-444-9845 (mobile contact) Jurisdiction Info: Northern Zone, Truro Public Health Office Additional ID Type / Additional ID: Provincial health service provider

 Occupation/Education information was successfully updated.

Education Information Add

Update Delete

	School Board	School Name	Grade	Year	Class	Effective From	Effective To
<input type="radio"/>	CCRSB	Truro Junior High School	Grade 7	2017 / 2018	Class A	2017 Sep 01	2017 Nov 22

Total: 1 1 10

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**.

Education Information Add

Update Delete

	School Board	School Name	Grade	Year	Class	Effective From	Effective To
<input checked="" type="radio"/>	CCRSB	Truro Junior High School	Grade 7	2017 / 2018		2017 Sep 04	
<input type="radio"/>	CCRSB	Truro Junior High School	Grade 7	2017 / 2018	Class A	2017 Sep 01	2017 Nov 22

Total: 2 1 10

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

Confirmation ×

Confirm deletion of: Truro Junior High School

Confirm

Click **Save**.

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

 Occupation/Education information was successfully updated.

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.

Client ID: 8	Name (Last, First Middle)/Gender: Apple, Greena / Female	Health Card No: 4445556789	Date of Birth / Age: 2015 Oct 05 / 2 years 0 months	Active
Phone Number: 1-(902)-444-5555 (Primary home)	Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority	Additional ID Type / Additional ID: Provincial health service provider identifier / -		

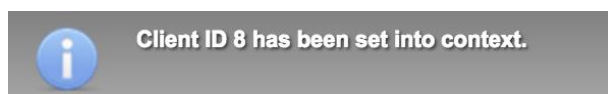


Tip: Client in Context Header

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.

Search Results									
<div> <div>Client Quick Entry</div> <div>Create Client</div> </div>									
Preview	Update	Set In Context	Create Cohort	Client Imms Profile					
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Client ID	Health Card Number	Last Name	First Name	Gender	Date of Birth	Health Region	Active
<input checked="" type="checkbox"/>	<input type="checkbox"/>	8	4445556789	Apple	Greena	Female	2015 Oct 05	NSHA	Active
Total: 1				1		20			



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.

Client Relationships								
<div> <div>Update</div> <div>View</div> <div>Delete</div> <div>Preview Related Client</div> <div>Set in Context</div> </div> <div>Add</div>								
<input type="radio"/>	<input type="radio"/>	Related Client Name	Deceased	Indexed	Relationship to in-context Client	Effective From	Effective To	Custodial
<input checked="" type="radio"/>	<input type="radio"/>	Apple, Red			Legal Guardian	2017 Oct 19		<input checked="" type="checkbox"/>
Total: 1		1			10			

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

View Relationship

Relationship to in-context Client:

Legal Guardian

Relationship from in-context Client:

Legal Guardian Child

Effective From:

2017/10/19

To:

yyyy/mm/dd

☒ Custodial

Last Name:

Apple

First Name:

Red

Telephone Number:

Country:

Canada

Number:

902-444-5555

Usage:

Primary home

Address

Comments

To create a new record click Add.

Add

Custodial History

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).

The screenshot shows a 'Relationship' form. At the top, it says 'Creates a non-indexed client and sets the relationship to: Legal Guardian/Legal Guardian Child'. Below this, there are fields for 'Last Name' (containing 'October') and 'First Name' (containing 'Ollie'). To the right of the 'First Name' field is a checkbox labeled 'Custodial' which is checked. Below these fields is a checkbox labeled 'Use Preferred Telephone Number' which is unchecked. Underneath is the 'Alternate Telephone Number' section, which includes a 'Country' dropdown (set to 'Canada'), a 'Number' field (containing '902-444-5567'), a multiplication sign 'x', and a 'Usage' dropdown (set to '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).

The screenshot shows an 'Add Relationship' pop-up window. It has two dropdown menus. The first is labeled 'Relationship to in-context Client' and has 'Mother' selected. The second is labeled 'Relationship from in-context Client' and has 'Daughter' selected. At the top right of the window are buttons for 'Apply', 'Reset', a printer icon, and a close icon (X).

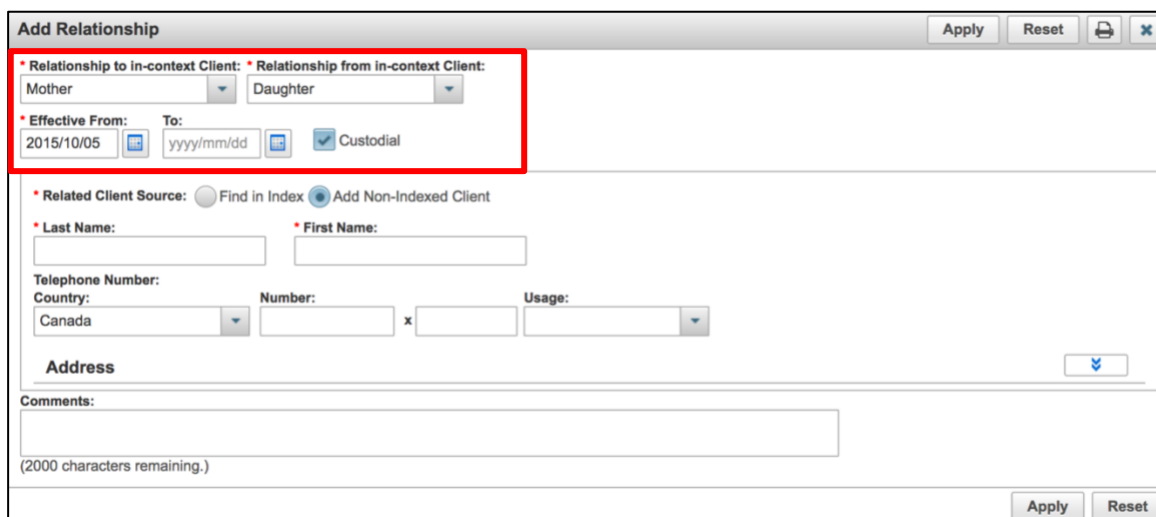
5. Enter the **Effective From** date, which is the child's date of birth when creating relationships for parents and older family members. Relationships to younger siblings would be effective from the younger child's date of birth.



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.



Add Relationship [Apply] [Reset] [Print] [Close]

* Relationship to in-context Client: * Relationship from in-context Client:
 Mother Daughter

* Effective From: 2015/10/05 To: yyyy/mm/dd ☒ Custodial

* Related Client Source: ☐ Find in Index ☒ Add Non-Indexed Client

* Last Name: * First Name:

Telephone Number:
 Country: Canada Number: x Usage:

Address [Add]

Comments:
 (2000 characters remaining.)

[Apply] [Reset]

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.

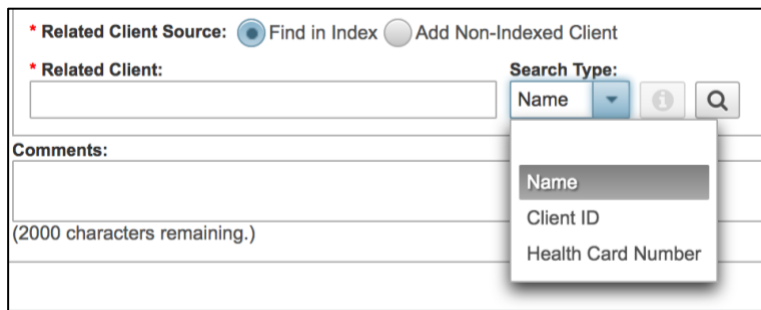


* Related Client Source: ☒ Find in Index ☐ Add Non-Indexed Client

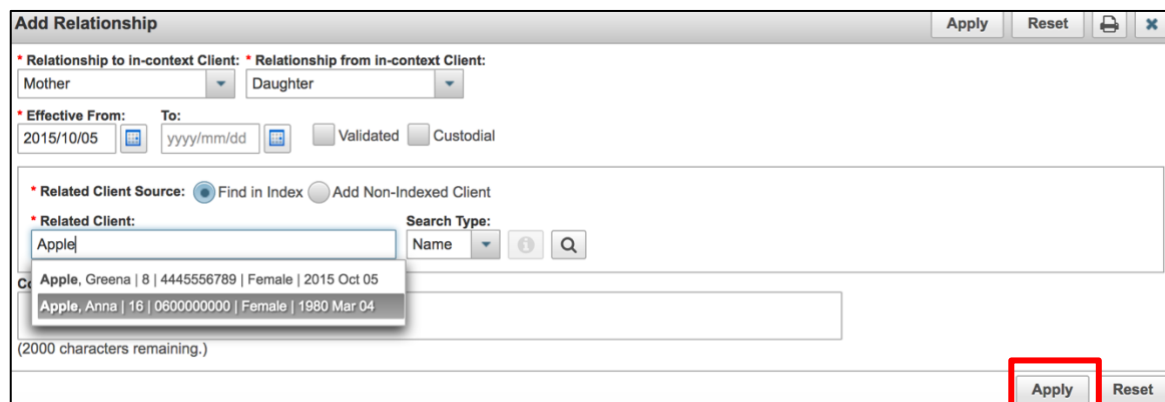
5.2.1 Find and Add an Indexed Client

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.

Active			
Client ID: 16	Name (Last, First Middle)/Gender: Apple, Anna / Female	Health Card No: 0600000000	Date of Birth / Age: 1980 Mar 04 / 37 years
Phone Number: 1-(902)-444-5555 (Primary home)	Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority	Additional ID Type / Additional ID: Provincial health service provider identifier / -	



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.



Any two indexed clients can only have one active relationship between them.

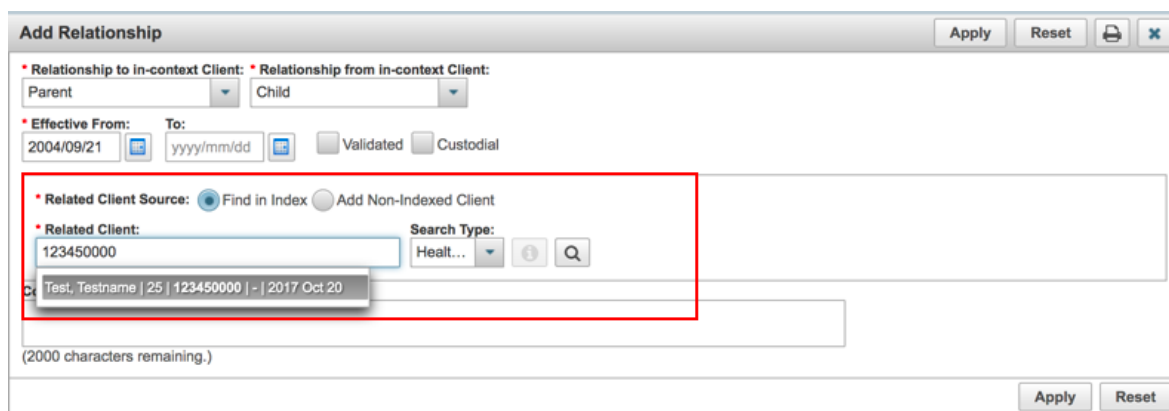
5.2.2 Searching for Indexed Client Using Health Card Number

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.

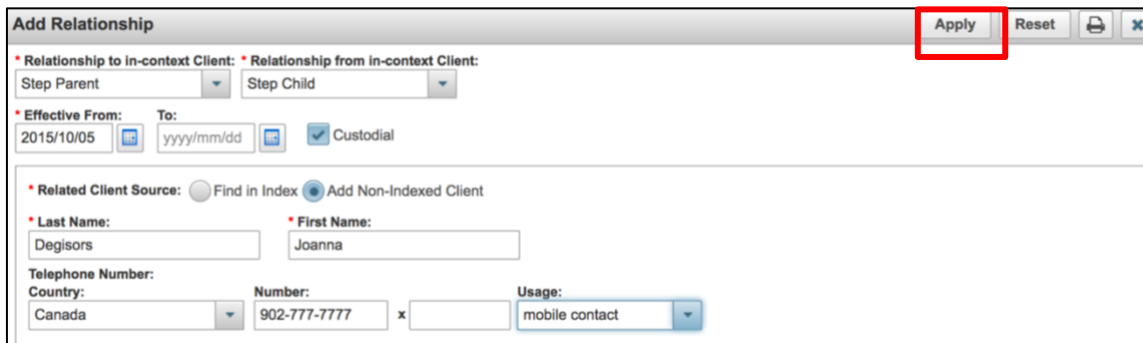


2. Click **Apply**. Remember to click **Save** when done to ensure the relationships are effectively recorded on the client record.

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.

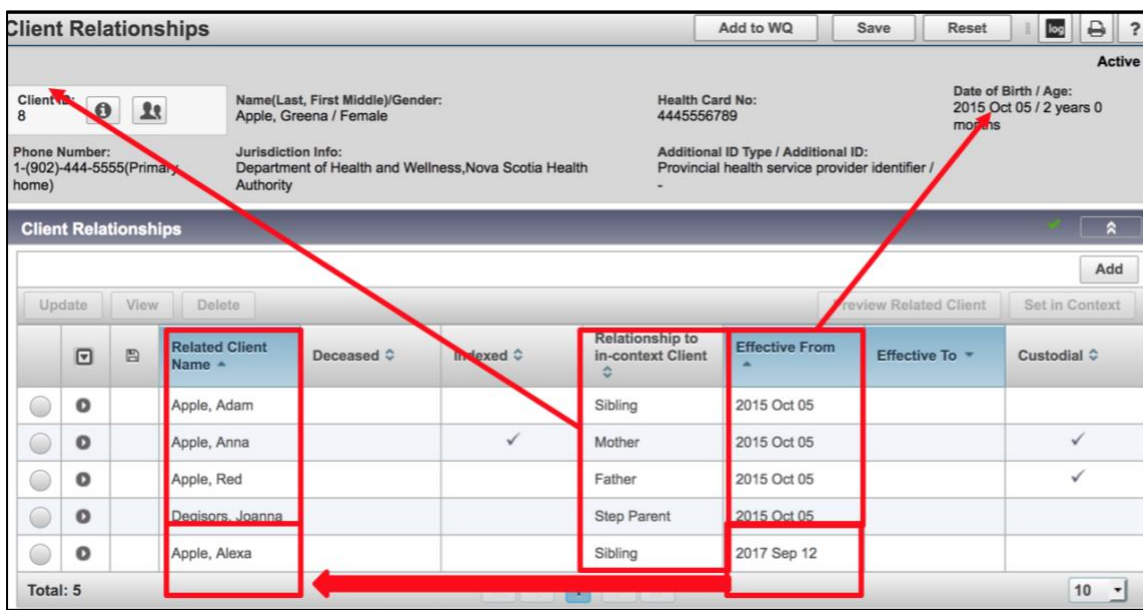
1. Click on the radio button to select the **Add Non-Indexed Client** option. Additional fields will appear to allow the user to document the person's information.
2. Enter **First Name**, **Last Name**, and **Telephone Number** (including **Country**, **Number**, and **Usage**).



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.



Related Client Name	Deceased	Indexed	Relationship to in-context Client	Effective From	Effective To	Custodial
Apple, Adam			Sibling	2015 Oct 05		
Apple, Anna		✓	Mother	2015 Oct 05		✓
Apple, Red			Father	2015 Oct 05		✓
Decisors, Joanna			Step Parent	2015 Oct 05		
Apple, Alexa			Sibling	2017 Sep 12		

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**.

Client Relationships								
<div> <div>Update</div> <div>View</div> <div>Delete</div> <div>Preview Related Client</div> <div>Set in Context</div> </div>								
		Related Client Name	Deceased	Indexed	Relationship to in-context Client	Effective From	Effective To	Custodial
		Apple, Adam			Sibling	2015 Oct 05		
		Apple, Anna		✓	Mother	2015 Oct 05		✓
		Apple, Red			Father	2015 Oct 05		✓
		Degisors, Joanna			Step Parent	2015 Oct 05		
		Apple, Alexa			Sibling	2017 Sep 12		

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.

Update Relationship		Apply	Reset	Print	Close
<div> <div>Relationship to in-context Client:</div> <div>Relationship from in-context Client:</div> </div>					
<div> <div>Sibling</div> <div>Sibling</div> </div>					
<div> <div>Effective From:</div> <div>To:</div> </div>					
<div> <div>2017/09/13</div> <div>yyyy/mm/dd</div> <div><input type="checkbox"/> Custodial</div> </div>					
<div> <div>Last Name:</div> <div>First Name:</div> </div>					
<div> <div>Apple</div> <div>Alexa</div> </div>					
<div> <div>Telephone Number:</div> <div>Country:</div> <div>Number:</div> <div>Usage:</div> </div>					
<div> <div>Canada</div> <div>902-444-5555</div> <div>x</div> <div>Primary home</div> </div>					

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**.

Client Relationships								
<div> <div>Update</div> <div>View</div> <div>Delete</div> <div>Preview Related Client</div> <div>Set in Context</div> </div>								
		Related Client Name	Deceased	Indexed	Relationship to in-context Client	Effective From	Effective To	Custodial
		Apple, Adam			Sibling	2015 Oct 05		
		Apple, Anna		✓	Mother	2015 Oct 05		✓
		Apple, Red			Father	2015 Oct 05		✓

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

Address

Update Delete Set Preferred Add

	Address Type	Address	Address Detail	Effective From	Effective To	Preferred
	Primary home	1975 Water Street, Nova Scotia, B3H4R2, Canada		2016 May 17		

Total: 1 1 10

- 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**.

Address

Apply Reset

Address Format:
☒ Structured ☐ General ☐ Semi-Structured

* Address Type:
 Primary home

Unit No.:

Street Type:
 Street

P.O. Box:

Rural Route:

Country:
 Canada

Postal Code:
 B3H-4R2

Other Address Details:

 (100 characters remaining.)

* Effective From: 2016/05/17 To: yyyy/mm/dd

Street No.:
 1976

Street Direction:

STN:

Province / Territory:
 Nova Scotia

Street Name:
 Water

RPO:

City / Town:

Apply Reset

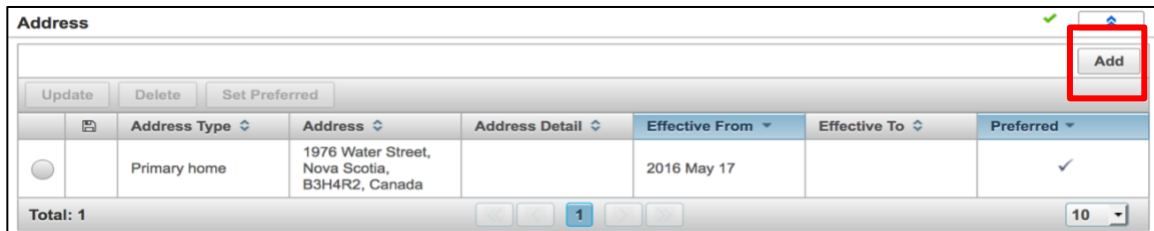
- The updated address will be added to the address table.
- To add a totally new address for a client, select the specific client and click **Update**.

Client Relationships

Update View Delete Preview Related Client Set in Context Add

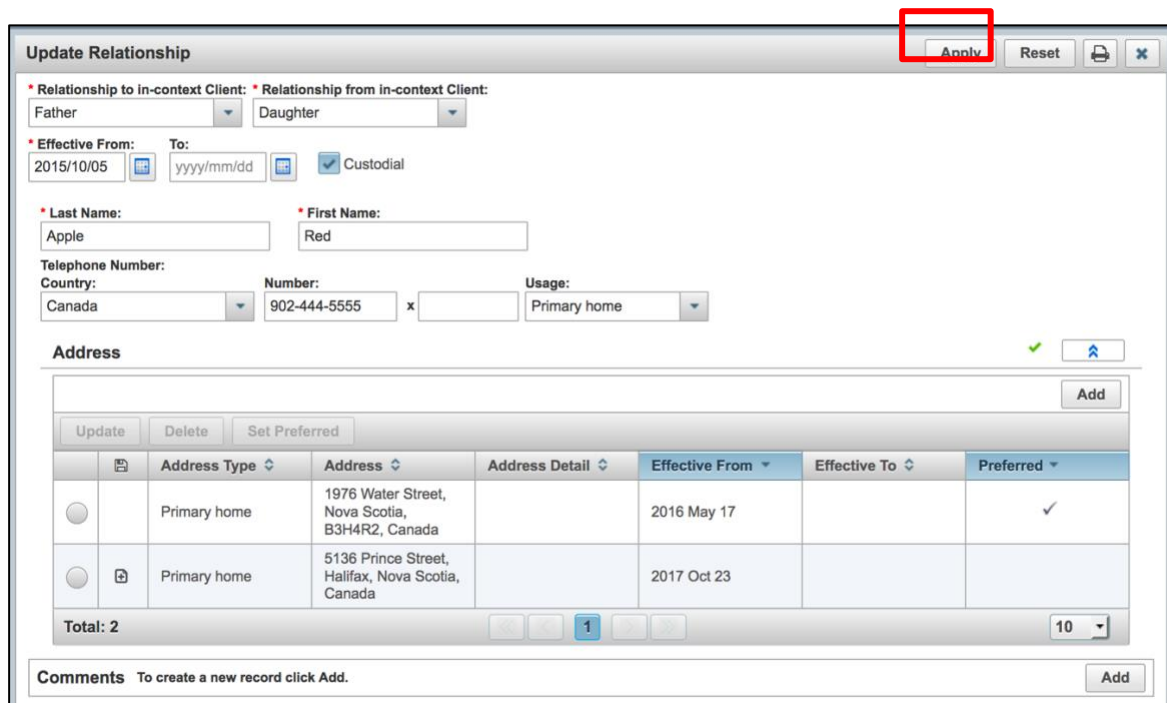
	Related Client Name	Deceased	Indexed	Relationship to in-context Client	Effective From	Effective To	Custodial
	Apple, Adam			Sibling	2015 Oct 05		
	Apple, Anna			Mother	2015 Oct 05		
	Apple, Red			Father	2015 Oct 05		

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



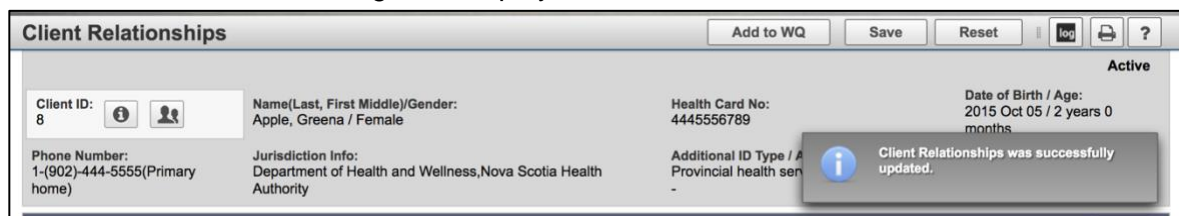
The screenshot shows the 'Address' section of the 'Update Relationship' screen. It includes a table with columns: Address Type, Address, Address Detail, Effective From, Effective To, and Preferred. A single row is visible with 'Primary home' as the address type and '1976 Water Street, Nova Scotia, B3H4R2, Canada' as the address. The 'Effective From' date is '2016 May 17'. The 'Preferred' column has a checkmark. The 'Add' button is highlighted with a red box.

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.



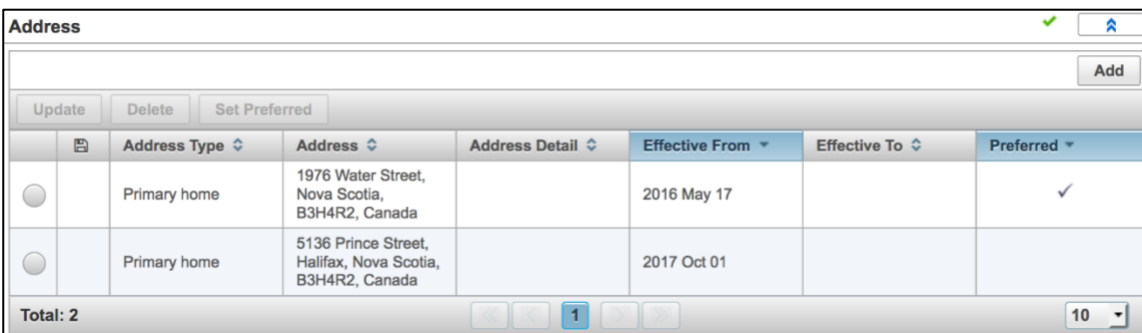
The screenshot shows the 'Update Relationship' screen. At the top, the 'Apply' button is highlighted with a red box. Below it, there are fields for 'Relationship to in-context Client' (Father) and 'Relationship from in-context Client' (Daughter). There are also fields for 'Effective From' (2015/10/05) and 'Effective To' (yyyy/mm/dd). Below these are fields for 'Last Name' (Apple) and 'First Name' (Red). There are also fields for 'Telephone Number' (Country: Canada, Number: 902-444-5555, Usage: Primary home). Below the telephone number fields is the 'Address' section, which is the same as the one in the previous screenshot. The 'Add' button is highlighted with a red box.

11. Click **Save** at the top of the screen.
12. A confirmation message will display.



The screenshot shows the 'Client Relationships' screen. At the top, there are buttons for 'Add to WQ', 'Save', 'Reset', 'log', and '?'. Below these are fields for 'Client ID' (8), 'Name (Last, First Middle)/Gender' (Apple, Greena / Female), 'Health Card No.' (4445556789), and 'Date of Birth / Age' (2015 Oct 05 / 2 years 0 months). Below these are fields for 'Phone Number' (1-(902)-444-5555 (Primary home)), 'Jurisdiction Info' (Department of Health and Wellness, Nova Scotia Health Authority), and 'Additional ID Type / A' (Provincial health ser). A confirmation message is displayed: 'Client Relationships was successfully updated.'

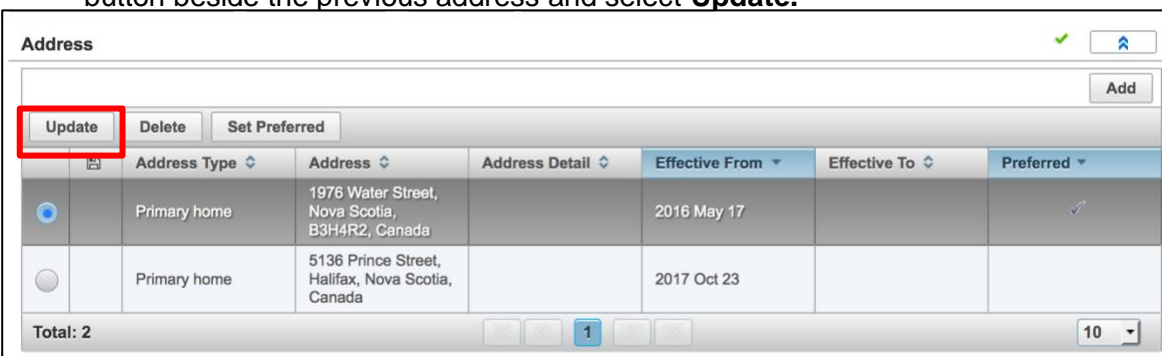
13. The new address will appear in the Non-Indexed Client's Address Summary Table. It is recommended to expire the old address, rather than deleting it, for future reference.



	Address Type	Address	Address Detail	Effective From	Effective To	Preferred
<input type="radio"/>	Primary home	1976 Water Street, Nova Scotia, B3H4R2, Canada		2016 May 17		✓
<input type="radio"/>	Primary home	5136 Prince Street, Halifax, Nova Scotia, B3H4R2, Canada		2017 Oct 01		

Total: 2

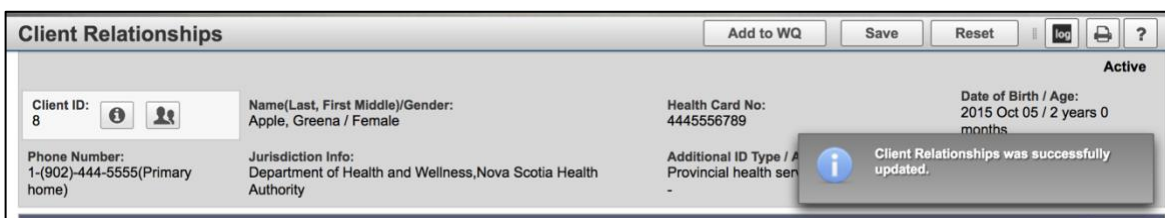
14. To expire the address, select the address that is no longer valid and click the radio button beside the previous address and select **Update**.



	Address Type	Address	Address Detail	Effective From	Effective To	Preferred
<input checked="" type="radio"/>	Primary home	1976 Water Street, Nova Scotia, B3H4R2, Canada		2016 May 17		✓
<input type="radio"/>	Primary home	5136 Prince Street, Halifax, Nova Scotia, Canada		2017 Oct 23		

Total: 2

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.



Client Relationships

Client ID: 8

Name (Last, First Middle)/Gender: Apple, Greena / Female

Health Card No: 4445556789

Date of Birth / Age: 2015 Oct 05 / 2 years 0 months

Phone Number: 1-(902)-444-5555 (Primary home)

Jurisdiction info: Department of Health and Wellness, Nova Scotia Health Authority

Additional ID Type / Provincial health service: -

Active

Client Relationships was successfully updated.

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 ✓ [↑](#)

[Add](#)

Update Delete Set Preferred

	Address Type	Address	Address Detail	Effective From	Effective To	Preferred
<input type="radio"/>	Primary home	5136 Prince Street, Halifax, Nova Scotia, Canada		2017 Oct 23		✓
<input type="radio"/>	Primary home	1976 Water Street, Nova Scotia, B3H4R2, Canada		2016 May 17	2017 Oct 20	

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**.

Client Relationships ✓ [↑](#)

[Add](#)

Update View Delete Preview Related Client Set in Context

		Related Client Name	Deceased	Indexed	Relationship to in-context Client	Effective From	Effective To	Custodial
<input type="radio"/>	<input type="radio"/>	Apple, Adam			Sibling	2015 Oct 05		
<input type="radio"/>	<input type="radio"/>	Apple, Anna		✓	Mother	2015 Oct 05		✓
<input type="radio"/>	<input type="radio"/>	Apple, Red			Father	2015 Oct 05		✓
<input checked="" type="radio"/>	<input checked="" type="radio"/>	Degisors, Joanna			Step Parent	2015 Oct 05		

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

Update Relationship [Apply] [Reset] [Print] [Close]

* Relationship to in-context Client: Step Parent * Relationship from in-context Client: Step Child

Effective From: 2015/10/05 To: 2017/10/20 ☐ Custodial

* Last Name: Degisors * First Name: Joanna

Telephone Number: Country: Canada Number: 902-777-7777 Usage: mobile contact

Address [Add]

To create a new record click Add. [Add]

Comments To create a new record click Add. [Add]

- 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.

Client Relationships [Add] [Update] [View] [Delete] [Preview Related Client] [Set in Context]

		Related Client Name	Deceased	Indexed	Relationship to in-context Client	Effective From	Effective To	Custodial
<input type="radio"/>	<input type="radio"/>	Apple, Adam			Sibling	2015 Oct 05		
<input type="radio"/>	<input type="radio"/>	Apple, Anna		✓	Mother	2015 Oct 05		✓
<input type="radio"/>	<input type="radio"/>	Apple, Red			Father	2015 Oct 05		✓
<input type="radio"/>	<input type="radio"/>	Apple, Alexa			Sibling	2017 Sep 13		
<input type="radio"/>	<input type="radio"/>	Degisors, Joanna			Step Parent	2015 Oct 05	2017 Oct 20	

- 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.

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

Client Relationships								
<div> <div>Update</div> <div>View</div> <div>Delete</div> </div>			<div> <div>Preview Related Client</div> <div>Set in Context</div> </div>					
			Related Client Name	Deceased	Indexed	Relationship to In-context Client	Effective From	Effective To
			Apple, Adam			Sibling	2015 Oct 05	
			Apple, Anna		✓	Mother	2015 Oct 05	✓
			Apple, Red			Father	2015 Oct 05	✓
			Degisors, Joanna			Step Parent	2015 Oct 05	
			Apple, Alexa			Sibling	2017 Sep 13	
			Apple, Alexa			Sibling	2017 Oct 17	✓
Total: 6			<div> <div>1</div> <div>10</div> </div>					

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

Confirmation

Confirm deletion of: Apple, Alexa

Confirm

- 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.

Client Relationships

Add to WQ

Save

Reset

log

?

Active

Client ID: 8

Name (Last, First Middle) / Gender: Apple, Greena / Female

Health Card No: 4445556789

Date of Birth / Age: 2015 Oct 05 / 2 years 0 months

Phone Number: 1-(902)-444-5555 (Primary home)

Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority

Additional ID Type / A Provincial health ser

Client Relationships was successfully updated.

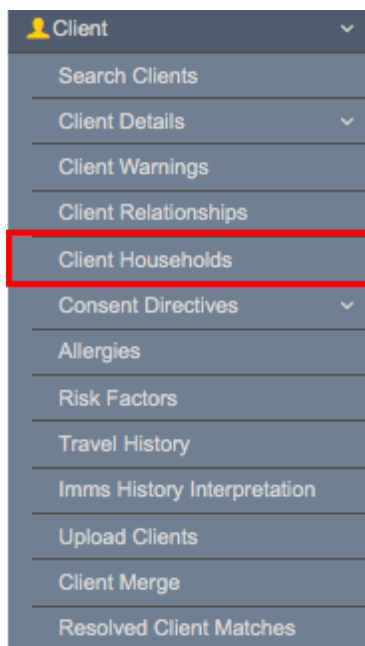
6 CLIENT HOUSEHOLD

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.

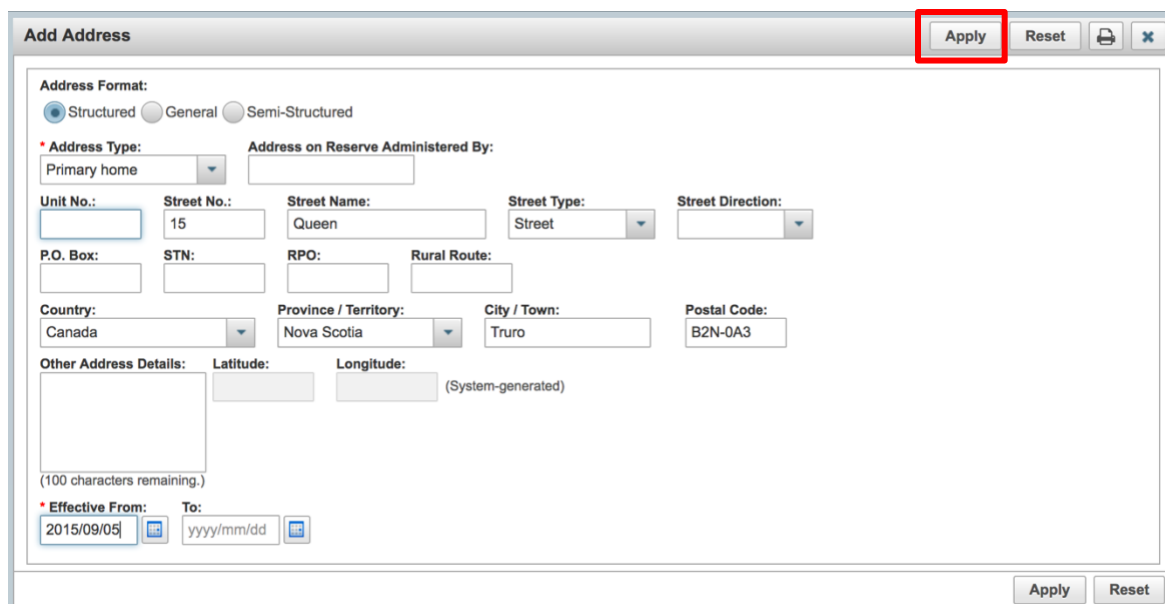
6.2 Record Household Information

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.

Client Households Add to WQ **Save** Reset log ?

Join Household Add Address

Delete View Members Set Preferred

	Address ^	Address Detail ^	Effective From ^	Effective To ^	Active Household Members ^	Preferred ^
<input type="radio"/>	15 Queen Street , Truro, Nova Scotia, B2N0A3, Canada		2015 Sep 05		1	✓

Total: 1 1 10

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

Client Households Add to WQ Save Reset log ?

Join Household Add Address

Delete **View Members** Set Preferred

	Address ^	Address Detail ^	Effective From ^	Effective To ^	Active Household Members ^	Preferred ^
<input checked="" type="radio"/>	15 Queen Street , Truro, Nova Scotia, B2N0A3, Canada		2015 Sep 05		1	✓

Total: 1 1 10

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.

View Household Members Apply Reset ?

Household Address:
15 Queen Street , Truro, Nova Scotia, B2N0A3, Canada

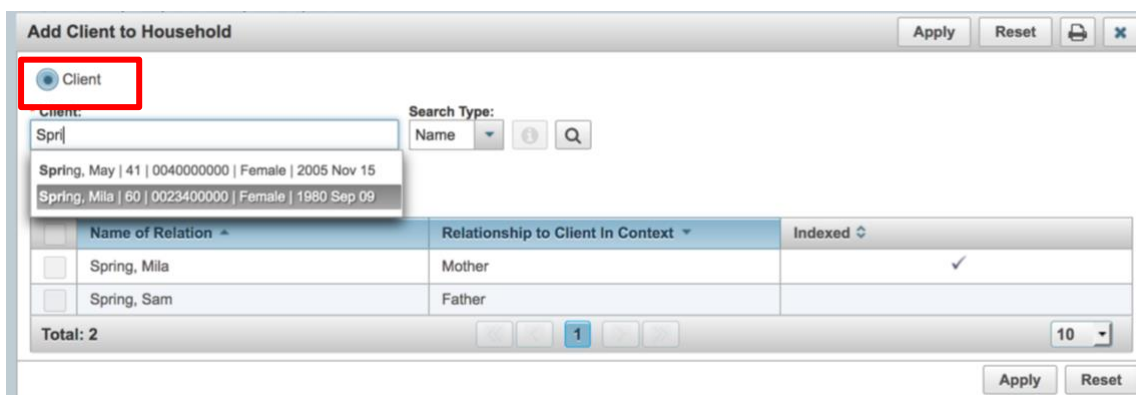
Delete Update Preview Household Members **Add**

	Household Member ^	Relationship to in-Context Client ^	Indexed ^	Effective From ^	Effective To ^	Household Membership Status ^
<input type="checkbox"/>	Spring, May	(self)	✓	2015 Sep 05		Active

Total: 1 1 10

Apply Reset

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.



Add Client to Household

☒ Client

Client: Search Type: Name [i] [Q]

Spring, May | 41 | 0040000000 | Female | 2005 Nov 15
Spring, Mila | 60 | 0023400000 | Female | 1980 Sep 09

Name of Relation ^	Relationship to Client In Context ^	Indexed ^
<input type="checkbox"/> Spring, Mila	Mother	✓
<input type="checkbox"/> Spring, Sam	Father	

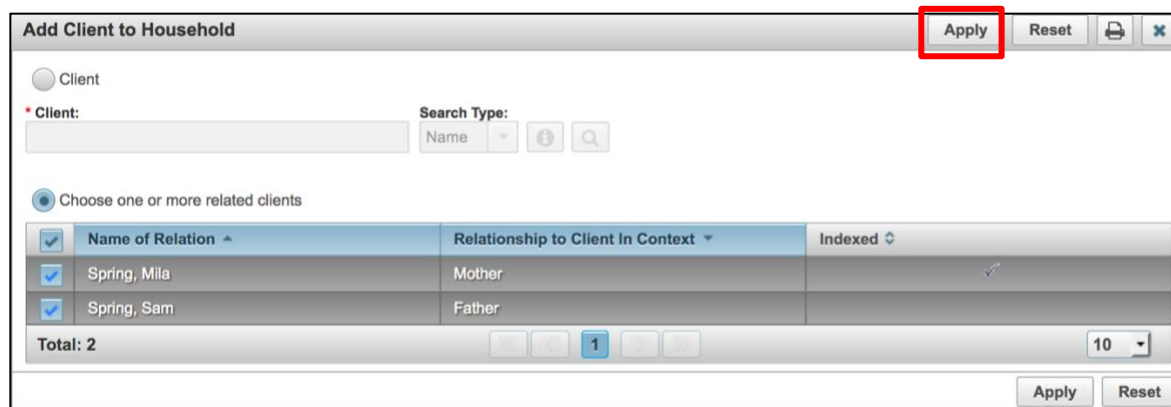
Total: 2 [1] 10 [Apply] [Reset]

Search Type:

[v] [i] [Q]

Name
Client ID
Health Card Number

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**.



Add Client to Household [Apply] [Reset] [Print] [Close]

☐ Client

* Client: Search Type: Name [i] [Q]

☒ Choose one or more related clients

<input checked="" type="checkbox"/> Name of Relation ^	Relationship to Client In Context ^	Indexed ^
<input checked="" type="checkbox"/> Spring, Mila	Mother	✓
<input checked="" type="checkbox"/> Spring, Sam	Father	

Total: 2 [1] 10 [Apply] [Reset]

16. Click **Apply** again.

View Household Members Apply Reset Print Close

Household Address:
15 Queen Street , Truro, Nova Scotia, B2N0A3, Canada

Delete Update Preview Household Member Add

<input type="checkbox"/>	<input type="checkbox"/>	Household Member ^	Relationship to in-Context Client ^	Indexed ^	Effective From ^	Effective To ^	Household Membership Status ^
<input type="checkbox"/>	<input type="checkbox"/>	Spring, May	(self)	✓	2015 Sep 05		Active
<input type="checkbox"/>	<input type="checkbox"/>	Spring, Mila	Mother	✓	2017 Nov 23		Active
<input type="checkbox"/>	<input type="checkbox"/>	Spring, Sam	Father		2017 Nov 23		Active

Total: 3 1 10

Apply Reset

18. Click **Save**.

Client Households Add to WQ Save Reset Log Print Help

Phone Number: 1-(902)-555-7890(Primary home) Jurisdiction Info: Northern Zone,Truro Public Health Office Additional ID Type / Additional ID: Provincial health service provider identifier / -

Client Households Client Household was successfully updated.

Delete View Members Set Preferred

<input type="checkbox"/>	<input type="checkbox"/>	Address ^	Address Detail ^	Effective From ^	Effective To ^	Active Household Members ^	Preferred ^
<input type="checkbox"/>	<input type="checkbox"/>	15 Queen Street , Truro, Nova Scotia, B2N0A3, Canada		2015 Sep 05		3	✓

Total: 1 1 10

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**.

Client Households Add to WQ Save Reset log ?

Phone Number: 1-(902)-555-7890(Primary home) Jurisdiction Info: Northern Zone, Truro Public Health Office Additional ID Type / Additional ID: Provincial health service provider identifier / -

Client Households Join Household Add Address

Delete **View Members** Set Preferred

	Address ▲	Address Detail ▾	Effective From ▾	Effective To ▾	Active Household Members ▾	Preferred ▾
<input type="checkbox"/>	15 Queen Street , Truro, Nova Scotia, B2N0A3, Canada		2015 Sep 05		3	✓

Total: 1 1 10

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

View Household Members Apply Reset Print Close

Household Address: 15 Queen Street , Truro, Nova Scotia, B2N0A3, Canada Add

Delete **Update** Preview Household Member

	Household Member ▲	Relationship to in-Context Client ▾	Indexed ▾	Effective From ▾	Effective To ▾	Household Membership Status ▾
<input type="checkbox"/>	Spring, May	(self)	✓	2015 Sep 05		Active
<input checked="" type="checkbox"/>	Spring, Mila	Mother	✓	2017 Nov 23		Active
<input type="checkbox"/>	Spring, Sam	Father		2017 Nov 23		Active

Total: 3 1 10

Apply Reset

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.

Update Household Members **Apply** Reset Print Close

Household Address: 15 Queen Street , Truro, Nova Scotia, B2N0A3, Canada

Household Members:

Household Member Name ▲	Relationship to Client in Context ▾	Effective From ▾	Effective To ▾
Spring, Mila	Mother	2017 Nov 23	

* Effective From: To:

Apply Reset

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.

Client Households

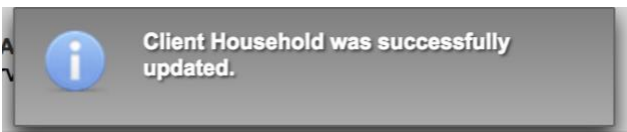
Join Household Add Address

Delete View Members Set Preferred

	Address ^	Address Detail ^	Effective From ^	Effective To ^	Active Household Members ^	Preferred ^
	15 Queen Street , Truro, Nova Scotia, B2N0A3, Canada		2015 Sep 05		3	✓

Total: 1

7. Click **Save** at the top of the screen.
8. A confirmation message will display.



9. The dates have been changed.

View Household Members

Apply Reset

Household Address:
15 Queen Street , Truro, Nova Scotia, B2N0A3, Canada

Add

Delete Update Preview Household Member

	Household Member ^	Relationship to in-Context Client ^	Indexed ^	Effective From ^	Effective To ^	Household Membership Status ^
<input type="checkbox"/>	Spring, May	(self)	✓	2015 Sep 05		Active
<input type="checkbox"/>	Spring, Mila	Mother	✓	2015 Sep 05		Active
<input type="checkbox"/>	Spring, Sam	Father		2015 Sep 05		Active

Total: 3

Apply Reset

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.

Client Households


Join Household **Add Address**

Delete View Members Set Preferred

	Address ^	Address Detail ^	Effective From ^	Effective To ^	Active Household Members ^	Preferred ^
	15 Queen Street , Truro, Nova Scotia, B2N0A3, Canada		2015 Sep 05		3	✓

Total: 1

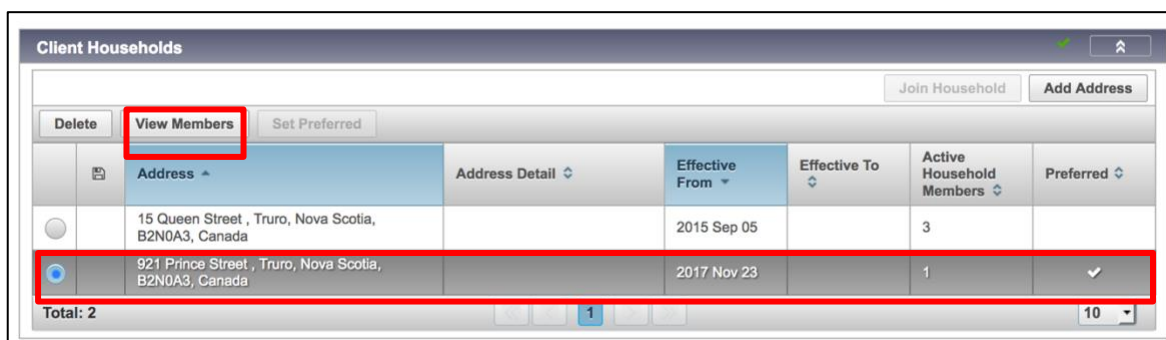
1. Once the new address is added and displayed in the summary table, click on the radio button beside the new address and click **Set Preferred**. Click **Save**.



Client Households						
<input type="button" value="Delete"/> <input type="button" value="View Members"/> <input type="button" value="Set Preferred"/> <input type="button" value="Join Household"/> <input type="button" value="Add Address"/>						
	Address ^	Address Detail ^	Effective From ^	Effective To ^	Active Household Members ^	Preferred ^
<input type="radio"/>	15 Queen Street , Truro, Nova Scotia, B2N0A3, Canada		2015 Sep 05		3	<input checked="" type="checkbox"/>
<input type="radio"/>	921 Prince Street , Truro, Nova Scotia, B2N0A3, Canada		2017 Nov 23		1	<input type="checkbox"/>

Total: 2

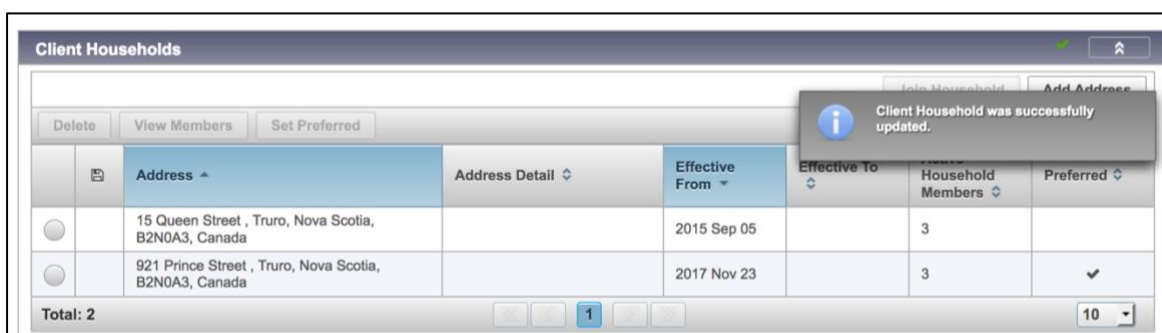
2. The old address can be deleted or left for the purposes of traceability.



Client Households						
<input type="button" value="Delete"/> <input type="button" value="View Members"/> <input type="button" value="Set Preferred"/> <input type="button" value="Join Household"/> <input type="button" value="Add Address"/>						
	Address ^	Address Detail ^	Effective From ^	Effective To ^	Active Household Members ^	Preferred ^
<input type="radio"/>	15 Queen Street , Truro, Nova Scotia, B2N0A3, Canada		2015 Sep 05		3	<input type="checkbox"/>
<input checked="" type="radio"/>	921 Prince Street , Truro, Nova Scotia, B2N0A3, Canada		2017 Nov 23		1	<input checked="" type="checkbox"/>

Total: 2

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.



Client Households						
<input type="button" value="Delete"/> <input type="button" value="View Members"/> <input type="button" value="Set Preferred"/> <input type="button" value="Join Household"/> <input type="button" value="Add Address"/>						
	Address ^	Address Detail ^	Effective From ^	Effective To ^	Household Members ^	Preferred ^
<input type="radio"/>	15 Queen Street , Truro, Nova Scotia, B2N0A3, Canada		2015 Sep 05		3	<input type="checkbox"/>
<input type="radio"/>	921 Prince Street , Truro, Nova Scotia, B2N0A3, Canada		2017 Nov 23		3	<input checked="" type="checkbox"/>

Total: 2

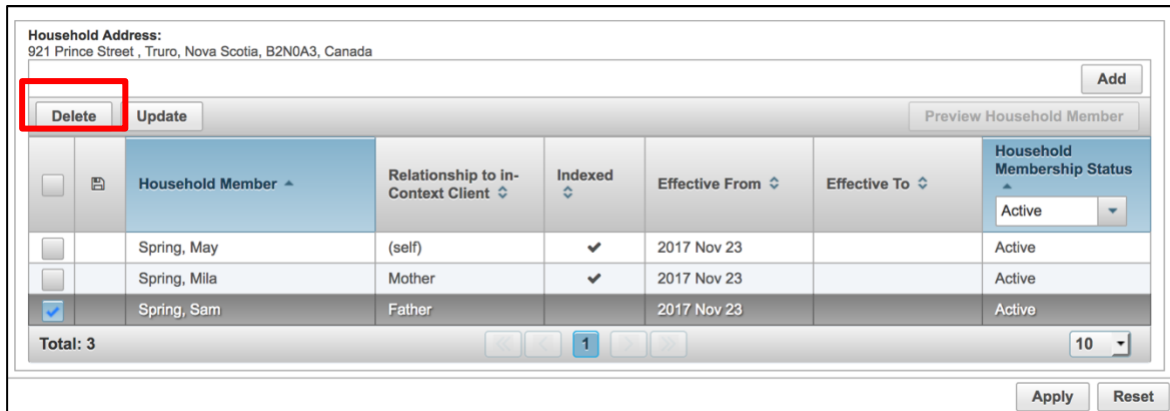
Client Household was successfully updated.

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 beside the household member to be deleted. Click **Delete**.



Household Address:
921 Prince Street , Truro, Nova Scotia, B2N0A3, Canada

Buttons: Delete, Update, Add, Preview Household Member

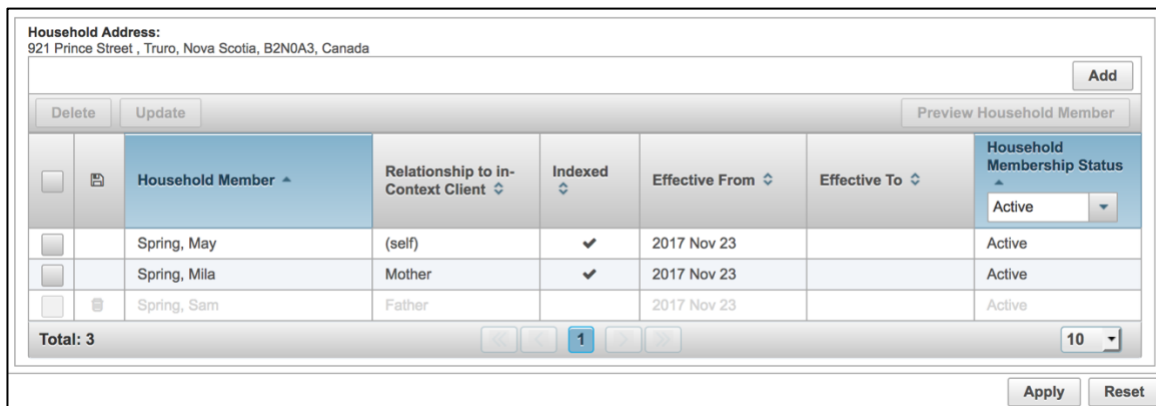
	Household Member	Relationship to in-Context Client	Indexed	Effective From	Effective To	Household Membership Status
<input type="checkbox"/>	Spring, May	(self)	✓	2017 Nov 23		Active
<input type="checkbox"/>	Spring, Mila	Mother	✓	2017 Nov 23		Active
<input checked="" type="checkbox"/>	Spring, Sam	Father		2017 Nov 23		Active

Total: 3

Page: 1 of 10

Buttons: Apply, Reset

4. The deleted client file is displayed as greyed out.



Household Address:
921 Prince Street , Truro, Nova Scotia, B2N0A3, Canada

Buttons: Delete, Update, Add, Preview Household Member

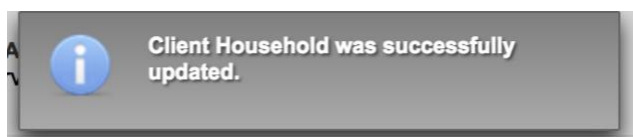
	Household Member	Relationship to in-Context Client	Indexed	Effective From	Effective To	Household Membership Status
<input type="checkbox"/>	Spring, May	(self)	✓	2017 Nov 23		Active
<input type="checkbox"/>	Spring, Mila	Mother	✓	2017 Nov 23		Active
<input type="checkbox"/>	Spring, Sam	Father		2017 Nov 23		Active

Total: 3

Page: 1 of 10

Buttons: Apply, Reset

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 Households

View Household Members [Apply] [Reset] [Print] [Close]

Household Address:
921 Prince Street , Truro, Nova Scotia, B2N0A3, Canada

[Delete] [Update] [Preview Household Member] [Add]

	Household Member	Relationship to in-Context Client	Indexed	Effective From	Effective To	Household Membership Status
<input type="checkbox"/>	Spring, May	(self)	<input checked="" type="checkbox"/>	2017 Nov 23		Active
<input type="checkbox"/>	Spring, Mila	Mother		2017 Nov 23		Active

Total: 2 [1] [10]

[Apply] [Reset]

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**.

Client Households [Join Household] [Add Address]

[Delete] [View Members] [Set Preferred]

	Address	Address Detail	Effective From	Effective To	Active Household Members	Preferred
<input checked="" type="radio"/>	921 Prince Street , Truro, Nova Scotia, B2N0A3, Canada		2017 Nov 23		2	<input checked="" type="checkbox"/>

Total: 1 [1] [10]

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

Client Households [Add to WQ] [Save] [Reset] [log] [Print] [Help]

Client Households [Join Household] [Add Address]

[Delete] [View Members] [Set Preferred]

	Address	Address Detail	Effective From	Effective To	Active Household Members	Preferred
<input type="radio"/>	921 Prince Street , Truro, Nova Scotia, B2N0A3, Canada		2017 Nov 23		2	<input checked="" type="checkbox"/>

Total: 1 [1] [10]

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

i

Client Household was successfully updated.