

P16-0371 Panorama Project

Panorama Immunization Management User Manual

CLT 102 Advanced Client Records Management

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1 PURPOSE

The purpose of this course is to provide detailed instructions on how to maintain advanced client information on Panorama. The focus in this course is on clinical client data such as allergies and client warnings. This course is intended for all prospective Panorama users, including nurses and clerks, and is a continuation of the basic client record management course: CLT 101.

After completing the course, users should be able to:

- Manage client consent directives
- View and record clinical notes
- Manage client warnings and allergies



2 CLIENT CONSENT

Obtaining a valid informed consent before providing service is a professional requirement and a legal responsibility. Documentation of granted consents in Panorama provides current and accurate information to ensure that only those vaccines that are consented to are provided, and that reasons for consent refusal are documented.

This section covers the following:

- 1. Viewing Consents for Immunizations
- 2. Recording Consent Granted
- 3. Recording Consent Refusal
- 4. Updating and Expiring Consent

2.1 View Consent for Immunizations

When the client presents for service, an immunization provider will verify the availability of consent in Panorama for a vaccine to be administered and will document consent if it is missing from the system.

Even if a written consent is available in a paper file, consent must be documented in Panorama. If required, the written consent may be scanned and attached to the appropriate client record in addition to the consented documented by the user.

Consent for a vaccine/vaccine series only needs to be documented once in Panorama, however, consent should be documented to cover each immunization.

Consents for school clinics are gathered and recorded in advance of the immunization clinic. Consent for other clinics is gathered and entered during the clinic.

DHW/NSHA Policy

Several options exist regarding consent management.

- 1. Users should seek consent for the relevant immunizations on each client encounter.
- 2. Users should seek consent for all immunizations in a one-year period.

2.1.1 View Client Consent Status

Clinicians must verify the consent status for vaccines in advance of, or during, a client encounter or immunization clinic. There are three ways to view consent for single immunizations:



- Through the client's Immunization Profile
- Through the Consent Directive section
- On the worksheet during an immunization clinic

Listed below are steps to view a client's consent status through the client's **Immunization Profile**:

1. After setting a client in context, access the **Immunization Profile** from the **Left-Hand Navigation** menu.

🔗 Immunizations	~
Immunization Profile	
Special Considerations	
Adverse Events (AEFI)	

2. Below the **Immunization History-Detailed Data Table**, the component tabs will be displayed. If existing consents are recorded, a check mark will appear on the **Consent** tab.

Immunization Details	
Immunization History - Detailed Data Table	
To create a new record click Add.	Add Single Immunization Add One or More Immunizations
Special Considerations AEFI Allergies Deferrals Risk Factors TB Skin Tes	st IGRA Tests 🖌 Mass Imms Event View Consent IHI

3. Click on the View Consent tab to review existing consent information.

pecial	Considerations	AEFI	Allergies	Deferrals	Risk Factors	TB Skin Test	IGRA Tests	✓ Mass	Imms Event	✓ Vie	w Consent	IHI
▼	ID *	1	Directive Statu	s Antig	en ≎	Instruction O	Effective	From 🗘	Effective To	0	User's Organizati	on ¢
0	6	(Confirmed	HPV-	4	Grant	2017 Aug	14			Nova Scotia	а

Listed below are the steps to view a client's consent status through the **Consent Directives** screen:

1. After setting a client in context, go to the Left-Hand Navigation menu and Consent Directive section. Select **Immunization Services**.





2. View the client's consent directives (if any exist).

Consent Di	rective	s						
								Add
Update	View	Confirm	Expire Now Dis	card Delete	Copy as Draft	Documents		
	8	Status 🗘 Filter On 👻	Filter -	Directive Type	Antigen ≎ Filter 👻	Active 🗘 Filter On 👻	Effective From	Effective To 🗘
•		Confirmed	Grant	Service: Immunization	HPV-4	Active	2017 Aug 11	
Total: 1					1 2 2			10 -

A consent may also be viewed on an immunization event worksheet.

- 1. Search for and select the Mass Imms Event.
- 2. Click Worksheet.

Search Mass Immunization	Event	Search	Retrieve	Reset		?
					Cre	ate
Update View Delete W	/orksheet					

3. The consent status is listed for each client on the worksheet.

Ev	ent	Worksh	eet									
Eve Eve Eve	Svent Title: Exent Date: 16 Event Zour: 2017 Dec 01 Location: Svent Type: School Immunization Status: Displaying 20 out of 20 clients Event Status: Status:											
1	Record Consent Record Immunization Client Event Status Client Event Summary Deferrals Preview Client View Consent Update Client Generate Letters Assess and Immunize Example Client Example Client											
		\$	Client ID 💠	Client Name *	Date of Birth \$	Gender ≎ Filter -	Immunizing Agent ≎ Filter 👻	Forecast Status 🗢	Consent Readiness ≎ Filter -	Event Status ≎ Filter ◄		
			43	Autumn, Andrew	2005 Sep 27	Male	Men- C-ACYW	Due	Granted			
			43	Autumn, Andrew	2005 Sep 27	Male	HB-regular	Not Forecasted	Missing			
			43	Autumn, Andrew	2005 Sep 27	Male	HPV-4	Due	Granted			

2.2 Record Consent Granted

Similar to viewing the consent in the section above, there are three ways to add consent:

- Through the client's Immunization Profile
- Through the **Consent Directive** section
- On the Mass Imms Event worksheet

#1 - The steps below outline how to record a granted consent for a client in context through the **Consent Directive** screen:



1. Go to the Left-Hand Navigation menu and Consent Directive section. Select Immunization Services.



2. The **Consent Directives** screen will display. Click on **Add** to document a new consent.

Consent Directives	- Immunization Service	Add to WQ Sa	ve Reset I 너 🔒 ?
Cilent ID: 14	Name(Last, First Middle)/Gender: Winter, Crystalla / Female	Health Card No: 040000000	Active Date of Birth / Age: 2016 Apr 20 / 1 years 6 months 4 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 ider / -	tifier
Consent Directives			
To create a new record clic	k Add.		Add

3. In the Add Consent Directives screen, select the Immunizing Agent in the Select Agent field. Add the number of doses the consent will include.

Add Consent Directive	Apply	Reset	₽	×
• Directive Category: • Directive Sub Category: Directive Type: Service Immunization Service: Immunization				
* Consent Applies To:				
Antigen Select Option: Number of Doses:				
Select Agents: Select Antigens: MMR-Var Image: Select an Agent and click the arrow to display Antigens.				
Instruction: Reason for Refusal: Refuse Grant Refuse (100 characters remaining)				
* Status:				
Effective From: To: Form of Consent: 2017/10/24 yyyy/mm/dd				
Consent Given To: Consent Given By:				
Current User Tester, Panorama Related Client				
Other Conter Relation Relationship Type				
Comments:				



4. Once the Immunizing Agent is identified, click on the arrow to the right of the data field.

* Consent Applies To:	
Antigen Select Option: All Antigens Selected Antigen	Number of Doses:
Select Agents: MMR-Var →	Select Antigens: Select an Agent and click the arrow to display Antigens.

5. All the component antigens in the agent will automatically be selected and their consent readiness (the status of the consent) is displayed. If consents already exist for any antigens, click on the checkbox to deselect so the existing consent is not overwritten.

Antigen Select Option:				Number of Doses:
All Antigens Selected A	ntige	ns		1
Select Agents:		Select	Antigens:	
*	+	~	Antigens	Consent Readiness
		~	Measles (M)	Missing
			Mumps (Mu)	Missing
			Rubella (R)	Missing
			Varicella (Var)	Missing

- 6. Once the correct antigens are confirmed, proceed down the page and select the consent status. To record granted consent leave the **Instruction** field unchanged as the default value is **Grant**.
 - School consents will be entered in Draft Status by the Immunizations Clerk. The nurse will review and change the status to Confirmed. In some situations, one nurse will create the Draft consent, and it will be changed to Confirmed by another nurse.
 - Enter the **Effective From** and **Effective To** dates.
 - Follow DHW policy when determining whether to record who provided the consent and who the consent was provided to.
- 7. Specify the form of consent by selecting from the drop-down menu.



Form of Consent:



8. Click **Apply** to complete the Consent directive. The new consents will appear in the table with a pending icon in the second column. Remember to click **Save** at the top of the page to ensure this new consent is added to the client record. Once saved, the pending icon will no longer be visible.

Cons	ent D	irect	ives - Immuni	zation Service			Add to WQ	Save	Reset	ii log	₽?
Client 14 Phone 1-(902) home)	Client ID: Name(Last, First Middle)/Gender: Health Card No: Date of Birth / Age: 14 Winter, Crystalla / Female 0400000000 2016 Apr 20 / 1 years 6 months 4 days Phone Number: Jurisdiction Info: Department of Health and Wellness,Nova Scotia Health Authority Additional ID Type / Additional ID:										
Con	sent Di	rective	98							ų,	*
											Add
Up	date	View	Confirm	Expire Now Disc	ard Delete	Copy as Draft	Documents				
	V	8	Status 🗘 Filter On 👻	Instruction ≎ Filter ▼	Directive Type ≎	Antigen ≎ Filter 👻	Active 🗘 Filter On 👻	Effecti	ive From	Effectiv	∕e To ≎
	0		Confirmed	Grant	Service: Immunization	Measles (M)	Active	2017 0	Oct 24		
	0		Confirmed	Grant	Service: Immunization	Mumps (Mu)	Active	2017 0	Oct 24		
	0		Confirmed	Grant	Service: Immunization	Rubella (R)	Active	2017 0	Oct 24		
	0		Confirmed	Grant	Service: Immunization	Varicella (Var)	Active	2017 0	Oct 24		

#2 - The second way to record consent before providing immunization services to the client is through the client's **Immunization Profile.**

The steps below can be done in the same way for either Add Single Immunizations or Add One or More Immunizations. The steps provided below use Add Single Immunizations:

1. After setting a client in context, access the **Immunization Profile** from the **Left-Hand Navigation** menu.





2. Select Add Single Immunization and click on either Add Non-Provider Recorded or Add Provider Recorded.

	*
 Add Single Immunization 	✓ Add One or More Immunizations
Add Historical	
t Add Non-Provider Recorded	: ✓ View Consent IHI
Add Provider Recorded	
s	 Add Single Immunization Add Historical Add Non-Provider Recorded Add Provider Recorded

3. Select the appropriate **Agent** and **Date of Administration** click **Record Consent**. *Refer to IMM 101 for guidance on recording immunizations.*

Add Immunization	Record Consent Apply Reset				×	
Immunization Type: Non-Provider Recorded Include non-inventoried agents * Agent: DTaP-IPV-Hib	Date Administered: 2017/10/24 hh:mm ADT	Age at Administration:	days			
Consent Readiness: Missing	Consent for Service Override/Bypass Reason:					

4. Select **Grant** under **Instruction**, the appropriate **Effective From** and **Effective To** dates, and the **Form of Consent**. Click **Save**.



Record Consent for Service		×
Clients: Winter, Crystalla	Consent will be recorded for agents	:
Instruction: Reason for Refusal: Grant	Reason Description:	
• Effective From: To: 2017/10/24 2018/06/29	Number of Doses: Form of Consent: 1 Written	
Consent Given To:	Consent Given By:	
Not Specified	Not Specified	
Current User Tester, Panorama	Related Client	· ·
Other	Other Relation	Relationship Type
Comments:		
		Save

5. Verify **Consent Readiness** status has changed to **Granted.**

Immunization Type: Non-Provider Recorded	
Include non-inventoried agents	* Date Administered:
* Agent:	2017/10/24 🛛 🔠 🖉 hh:mm 🖉 ADT
DTaP-IPV-Hib	
Consent Readiness: Granted	

#3 - The third way to add a consent is to add it on the Mass Imms Event worksheet.

- 1. Search for and select the Mass Imms Event.
- 2. Click Worksheet.
- 3. Select the client who requires a consent completed.



Event Worksheet							*
Event Title: Eastern - Sydney Acade Event Date: 2017 Dec 01 Event Type: School Immunization	my		Event ID: 1 Location: 5 Status: Op Created By:	6 Sydney Academy en Berard, Rene	,		
Displaying 20 out of 20 clients							
Record Consent Record In	munization	nt Event Status	Client Event Sum	mary Defer	rals Preview Client	:	
View Consent Update Clier	Generate Lette	ers Assess and I	mmunize				
Client ID \$	Client Name 🔺	Date of Birth \$	Gender ≎ Filter 👻	Immunizing Agent ≎ Filter 👻	Forecast Status ≎ Filter ▼	Consent Readiness ≎ Filter ▼	Event Status ≎ Filter ▼
43	Autumn, Andrew	2005 Sep 27	Male	Men- C-ACYW	Due	Granted	
43	Autumn, Andrew	2005 Sep 27	Male	HB-regular	Not Forecasted	Missing	

- 4. Click the **Record Consent** button.
- 5. The **Record Consent for Service** screen displays. Complete the consent and click **Save**.

Record Consent for Service		×
Clients: Autumn, Andrew	Consent will be recorded for agents: HB-regular HPV-4 Men-C-ACYW-135	
* Instruction: Reason for Refusal:	Reason Description:	
Grant	~	
* Effective From: To:	Number of Doses: Form of Consent:	
2017/12/19	1 Written	
Consent Given To:	Consent Given By:	
Not Specified	Not Specified	
Current User ALL, parsoncm	Related Client	
Other	Other Relation Legal Guardian	
Comments:		
	Save	set

2.2.1 Attach a Scanned Consent

A signed consent form may be scanned and attached to the client file.

1. Select the consent under Consent Directives – Immunization Services.



onse	ent Di	irective	95						Adu
Upd	ate	View	Confirm	Expire Now Disc	ard Delete	Copy as Draft	ocuments		Aut
]	▼	8	Status ≎ Filter On 👻	Instruction 🗘	Directive Type	Antigen ≎ Filter ▼	Active 🗘 Filter On 👻	Effective From	Effective To \$
2	0		Confirmed	Grant	Service: Immunization	Meningococcal (Men- P-ACYW-135)	Active	2017 Dec 14	
	0		Confirmed	Grant	Service: Immunization	HPV-4	Active	2017 Dec 14	2018 Jun 29

- 2. Click **Documents.**
- 3. Under Context Documents Document List, click Add New.
- 4. Click **Browse** to find and select the document.

Document	Management	? 🗏
Add New Doc	ument	
X Upload file be	ore submitting changes	
* File name: B File uploaded: Selected Doc * Document	rowse Signed Consent.docx Upload File ument: ittle:	
* Effective Date:	2017 / 19 Expiration / III yyyy mm dd Date: yyyy mm dd	
Status: * ac Enter Keyword:	tive CTRL key for multiple selections.	
Description:	ded by : ALL, parsoncm on : 2017 Dec 19	
	Submit Clear Cancel	

- 5. Add the File Name under **Document Title**.
- 6. Click Upload File.
- 7. Click Submit.
- 8. The scanned consent will display under **Documents** in the **Consent Directive** screen.



							Context Documer
Docι	uments						
Op	en						
	Document Title 🔺	Size 🗘	Туре 🗘	Posted By 💠	Posted On 💠	Description 💠	Status 💠
	Signed Consent	22.59 KB	VND.OPENXMLF OFFICEDOCUM	ALL, parsoncm	2017 Dec 19		active
Tota	Total: 1 3 3 10 -						
							Apply Reset

2.3 Record Consent Refusal

Consistent documentation of client immunization refusals in Panorama will inform other users of the client/guardian's decision to refuse vaccines and will ensure that refused vaccines are not administered in error.

Documentation of an immunization refusal in Panorama does not remove the eligible vaccine(s) from the forecasted vaccines or prevent the immunization Provider from offering the vaccine(s) at routine times or as opportunities are presented (for as long as the client is eligible for the vaccine).

A documented refusal is considered valid until a consent grant has been obtained from the client/guardian and documented.

Tip: Recording Refused Consent

To record a **refusal for all antigens** in Panorama, select **All Antigens** (selects all Antigens in the system). This step will save you time by adding all the antigens the consent should include for refusal. In most instances, however, Users will record Consent Refusals for only a limited number of immunizations. In this case, select the **Selected Antigens**.

Below are the steps to record **Refusal Consent** through the **Consent Directives** screens:

1. Go to the Left-Hand Navigation menu and Consent Directive section. Select Immunization Services.



2. The **Consent Directives** screen will display. Click on **Add** to document a new consent refusal.



Consent Directives	Reset 🛛 🗐 🔒 ?		
			Active
Client ID: 0	Name(Last, First Middle)/Gender: Avocada, Isabelle / Female	Health Card No: 1400000000	Date of Birth / Age: 2011 May 25 / 6 years 4 months
Phone Number: 1-(902)-989-5575(Primary home)	Jurisdiction Info: Department of Health and Wellness,Nova Scotia Health Authority	Additional ID Type / Additional ID: Provincial health service provider identifier / -	
Consent Directives			
To create a new record click	k Add.		Add

3. In the Add Consent Directives screen, note that Selected Antigens is defaulted. Select the Immunizing Agent in the Select Agents field. Add the number of doses the consent refusal will include.

Antigen Select Option:		Number of Doses:
All Antigens Select	ed Antigens	1
Select Agents: DT	Select Antigens: Select an Agent and click the arrow to dis	splay Antigens.
	for Refusal: Reason Description:	
DT-IPV	(100 characters remaining	g.)
DTaP-HB-IPV-Hib		
DTaP-IPV	Form of Consent:	
2 DTaP-IPV-Hib DTwP-HB-Hib	/dd	

4. Once the Immunizing Agent is identified, click on the arrow to the right of the data field.

Antigen Select Option:		Number of Doses:
All Antigens Sele	cted Antigens	1
Select Agents:	Select Antigens:	
DTaP-IPV	→ Select an Agent and	I click the arrow to display Antigens.

5. All the component antigens in the agent will automatically be selected and their consent readiness (the status of the consent) is displayed. If consents already exist for any antigens, click on the checkbox to deselect so the existing consent is



not overwritten. If the client is withdrawing consent for an antigen or agent with pre-existing consent, do not deselect and simply record the consent refusal.

Antigen Select Option:			Number of Doses:
All Antigens 💿 Sele	cted Antige	ns	1
ect Agents:		Select Antigens:	
	• →	Antigens	Consent Readiness
		Diphtheria (D)	Missing
		Pertussis (aP)) Missing
		Polio (IPV)	Missing
		Tetanus (T)	Missing

 Once the correct antigens are confirmed, proceed down the page and select the consent status. To record consent refusal, click **Refuse**. Select the appropriate **Reason for Refusal** from the dropdown menu. If the reason is "**Other**", provide a brief note in the adjacent **Reason Description** field.

* Instruction:	* Reason for Refusal:	Reason Description:
Grant 💿 Refuse	-	
	م ا	characters remaining.)
* Status:		
Draft Confirmed	Parent/Guardian/Client Re	efusal
* Effective From: To		n consent:

- In many cases, the immunization clerk will create the consent in Draft status, and the Nurse will change to Confirmed upon review. Follow the NS policy on this point.
- Enter the Effective From and To dates.
- If available, record who provided the consent and who the consent was provided to.
- 7. Specify the form of consent by selecting from the drop-down menu.



Form of Consent:

 Click Apply to complete the Consent directive. The new consent refusal will appear in the table with a pending icon in the second column. Remember to click Save at the top of the page to ensure this new consent refusal is added to the client record.

Conse	ent D	irect	ives - Immun	ization Servic	e		Add to WQ	Save	Reset	1 🔤 🖨 ?
Client I 21 Phone M 1-(902) home)	Client ID: 21 Name(Last, First Middle)/Gender: Avocada, Isabelle / Female Phone Number: -(902)-989-5575(Primary nome) Department of Health and Wellness,Nova Scotia He Authority						Health Card No: 140000000 Additional ID Type / Additional ID: Provincial health service provider identifier			Active inth / Age: 25 / 6 years 4
Cons	ent D	irectiv	es							
Up	date	View	Confirm	Expire Now Dis	card Delete	Copy as Draft	Documents			Add
	V	8	Status ≎ Filter On 👻	Filter	Directive Type	Antigen 🗘 Filter 👻	Active 🗘 Filter On 👻	Effective	From	Effective To \$
	0	Ð	Confirmed	Refuse	Service: Immunization	Tetanus (T)	Active	2017 Oct :	24	2018 Oct 23
	0	Ð	Confirmed	Refuse	Service: Immunization	Polio (IPV)	Active	2017 Oct :	24	2018 Oct 23
	0	Ð	Confirmed	Refuse	Service: Immunization	Pertussis (aP)	Active	2017 Oct :	24	2018 Oct 23
	0	Ð	Confirmed	Refuse	Service: Immunization	Diphtheria (D)	Active	2017 Oct :	24	2018 Oct 23
Total	: 4					1				10 -

2.4 Update and Expire Consent

If a consent directive is no longer valid or was recorded in error, Users have several options available to them:

- Create a new directive for the same agent that will override the existing directive and automatically expire it
- Update the existing directive by setting the **Effective To** date of a directive to a date in the past, or
- Use the **Expire** function



) Tip: Expiring Consent

Choose the **Expire** function if you need to expire multiple consent directives or need to expire consent directives for multi-antigen vaccines (e.g., MMR-Var, DTaP-IPV-Hib). Using the **Expire** function will set the **Effective To** date of the **Consent Directive** to the current date. You will not be able to add comments to explain why the consent was expired. If you want to correct the consent directives recorded in a Mass Immunization Event, it is not recommended to use the Expire function as the consent status of the expired directive will not properly display in the Mass Immunization Event. It is recommended to use the **Update Consent Directive** method instead.

2.4.1 Updating Consent Directive

To update the consent directive, follow these steps:

- 1. Go to the **Consent Directives** and **Immunization Service** from the **Left-Hand Navigation** menu.
- 2. The **Consent Directives Immunization Services** screen is displayed.
- 3. Select the desired consent to be updated by clicking on the checkbox beside each consent.

Cons	sent D	irective	s						
									Add
Up	date	View	Confirm	Expire Now Dis	card Delete	Copy as Draft	Documents		
	V	8	Status 🗘 Filter On 👻	Filter -	Directive Type	Antigen 🗢 Filter 👻	Active O	Effective From	Effective To 🗘
	0		Confirmed	Refuse	Service: Immunization	Diphtheria (D)	Active	2017 Oct 24	2018 Oct 23
	0		Confirmed	Refuse	Service: Immunization	Pertussis (aP)	Active	2017 Oct 24	2018 Oct 23
	0		Confirmed	Refuse	Service: Immunization	Polio (IPV)	Active	2017 Oct 24	2018 Oct 23
	0		Confirmed	Refuse	Service: Immunization	Tetanus (T)	Active	2017 Oct 24	2018 Oct 23
Tota	l: 4					1			10 -

A number of options are available to the User once the specific consent is selected, including options to View, Expire, Delete, or Copy as Draft. To update a consent, select the **Update** in the menu at the top of the table. The Update Consent Directive screen will appear. Enter the **Effective To Date**. Note that most fields are greyed out, which means that the user is unable to edit these.



Update Consent Directive	Apply	Reset	₽	×
Directive ID: 23 Directive Category: * Directive Sub Category: Directive Type: Service Immunization Service: Immunization				
* Consent Applies To:				
Antigen Select Option: Number of Doses: All Antigens Selected Antigens Select Antigens: Diphtheria (D)				
Instruction: Grant Refuse Refuse Parent/Guardian/Clie (100 characters remaining.)				
Status: Draft Confirmed				
Confirmed By: Confirmed On: Tester, Panorama 2017 Oct 24 Effective From: Form of Consent: 2017/10/24 [2018/04/23]				
Consent Given To: Consent Given By: Not Specified Not Specified Current User Tester, Panorama Other Other Relation	•			
Comments To create a new record click Add.			Ad	ld

- 4. Click Add to record any relevant comments (optional). Click Apply.
- 5. The new consent refusal will appear in the table with an icon in the second column that indicates the consent has pending editorial changes.

lent ID:	Jirect	ves - immun		3	Health C	and No:	Date of	f Birth / Age:
Avocada, Isabelle / Female				1400000	000	2011 N months	/lay 25 / 6 years 5 s	
one Number 902)-989-55 ne)	r: 575(Prim	ary Departm Authorit	don Info: ient of Health and Well /	Iness,Nova Scotia Hea	Additional ID Type / Additional ID: Provincial health service provider identifier / -			
onsent D	irective	s						
								Add
Update	View	Confirm	Expire Now Dis	card Delete	Copy as Draft	Documents		
	B	Status O	Instruction Filter	Directive Type	Antigen 🗘 Filter 👻	Active 🗢 Filter On 👻	Effective From	Effective To 🗘
	8.0			Service:				
0	/	Confirmed	Refuse	Immunization	Diphtheria (D)	Active	2017 Oct 24	2018 Apr 23
0	/	Confirmed	Refuse	Immunization Service: Immunization	Diphtheria (D) Pertussis (aP)	Active	2017 Oct 24	2018 Apr 23 2018 Oct 23
0		Confirmed Confirmed	Refuse Refuse Refuse	Immunization Service: Immunization Service: Immunization	Diphtheria (D) Pertussis (aP) Polio (IPV)	Active Active Active	2017 Oct 24 2017 Oct 24 2017 Oct 24 2017 Oct 24	2018 Apr 23 2018 Oct 23 2018 Oct 23

6. Remember to click **Save** at the top of the page to ensure this new consent update is saved to the client record.



Tip: Consents on Antigen Level

Consent directives are created at the antigen level, not the agent level. To update consent/refusal for a compound vaccine, you will need to individually update each consent directive for all antigens that comprise that specific vaccine. However, you can select all the consents that you need to update at once.

2.4.2 Expiring Consent Directive

To expire the consent directive, follow the steps outlined below.

- 1. Go to the **Consent Directives** and **Immunization Service** from the **Left-Hand Navigation** menu.
- 2. The **Consent Directives** screen is displayed.
- 3. Select the desired consent to be updated by clicking on the checkbox beside each consent.

Cons	ent Di	rective	es							
									Add	
Up	Update View Confirm Expire Now Discard Delete Copy as Draft Documents									
	⊽	8	Status 🗘 Filter On 👻	Filter -	Directive Type	Antigen O	Active 🗘 Filter On 👻	Effective From	Effective To 🗘	
	0		Confirmed	Grant	Service: Immunization	Tetanus (T)	Active	2017 Oct 24	2018 Jun 29	
	0		Confirmed	Grant	Service: Immunization	Polio (IPV)	Active	2017 Oct 24	2018 Jun 29	
	0		Confirmed	Grant	Service: Immunization	Pertussis (aP)	Active	2017 Oct 24	2018 Jun 29	
	0		Confirmed	Grant	Service: Immunization	Haemophilus influenzae type b (Hib)	Active	2017 Oct 24	2018 Jun 29	
	0		Confirmed	Grant	Service: Immunization	Diphtheria (D)	Active	2017 Oct 24	2018 Jun 29	
	0		Confirmed	Grant	Service: Immunization	Measles (M)	Active	2017 Oct 24		
	0		Confirmed	Grant	Service: Immunization	Mumps (Mu)	Active	2017 Oct 24		
	0		Confirmed	Grant	Service: Immunization	Rubella (R)	Active	2017 Oct 24		
	0		Confirmed	Grant	Service: Immunization	Varicella (Var)	Active	2017 Oct 24		

4. Select the **Expire Now** in the menu at the top of the table. The consent will then display Inactive in the Active column.

Note: If the user would like to expire the consent, then create another one that day, <u>do not select</u> **Expire Now**. Instead, end date the consent. **Expire Now** will create an end date with today's date, and another one cannot be created until the next day.



ons	ent D)irect	ives - Immun	ization Servic	e		Add to WQ	Save Reset	
ome)	2	1250	Authority	1		1-			
Cons	sent Di	irective	s						^
									Add
Up	date	View	Confirm	Expire Now Dis	card Delete	Copy as Draft	Documents		
	⊽	8	Status O Filter On -	Filter -	Directive Type	Antigen 🗢 Filter 👻	Active O	Effective From	Effective To 🗘
	0	1	Confirmed	Grant	Service: Immunization	Tetanus (T)	Inactive	2017 Oct 24	2017 Oct 26
	0	1	Confirmed	Grant	Service: Immunization	Polio (IPV)	Inactive	2017 Oct 24	2017 Oct 26
	0		Confirmed	Grant	Service: Immunization	Pertussis (aP)	Active	2017 Oct 24	2018 Jun 29
	o		Confirmed	Grant	Service: Immunization	Haemophilus influenzae type b (Hib)	Active	2017 Oct 24	2018 Jun 29
	0		Confirmed	Grant	Service: Immunization	Diphtheria (D)	Active	2017 Oct 24	2018 Jun 29
	0		Confirmed	Grant	Service: Immunization	Measles (M)	Active	2017 Oct 24	
	0		Confirmed	Grant	Service: Immunization	Mumps (Mu)	Active	2017 Oct 24	
	0		Confirmed	Grant	Service: Immunization	Rubella (R)	Active	2017 Oct 24	
	0		Confirmed	Grant	Service:	Varicella (Var)	Active	2017 Oct 24	

5. Click **Save.** Panorama will now remove the inactive consent from the table and display only the active consents.

Upd	late	View	/ Confirm	Expire Now Dis	card Delete	Copy as Draft	Documents		
	◙	8	Status 🗘 Filter On 👻	Filter -	Directive Type	Antigen ≎ Filter 👻	Active 🗘 Filter On 👻	Effective From	Effective To 🗘
	0		Confirmed	Grant	Service: Immunization	Pertussis (aP)	Active	2017 Oct 24	2018 Jun 29
	0		Confirmed	Grant	Service: Immunization	Haemophilus influenzae type b (Hib)	Active	2017 Oct 24	2018 Jun 29
	0		Confirmed	Grant	Service: Immunization	Diphtheria (D)	Active	2017 Oct 24	2018 Jun 29
	0		Confirmed	Grant	Service: Immunization	Measles (M)	Active	2017 Oct 24	
	0		Confirmed	Grant	Service: Immunization	Mumps (Mu)	Active	2017 Oct 24	
	0		Confirmed	Grant	Service: Immunization	Rubella (R)	Active	2017 Oct 24	
	0		Confirmed	Grant	Service: Immunization	Varicella (Var)	Active	2017 Oct 24	



If Users wish to see all consents (both active and inactive), click the arrows at the top of the Active column and ensure that both active and Inactive are checked.





2.4.3 Display and Disclosure

A Display and Disclosure directive limits the client information that can be viewed. Users should not set-up, nor change any display and disclosure directives. Always select **Service**.

Add Consent Directive		Apply Reset 🖨 🗙
Directive Category:	Directive Sub Category: Directive Type:	
Display and Disclosure Service	In for Refusal: (100 characters remaining.)	

If a **Display and Disclosure** directive is in place, and must be overridden for emergency reasons, follow the steps below.

- 1. Search for the client by Health Card Number, or if a Health Card Number is not available, search by First Name, Last Name, Gender, and Date of Birth.
- If a Display and Disclosure directive is in place, the top row will contain an Override Consent button and a message stating "Consent for Disclosure – a block exists on the display of some client(s) data".

PNS UAT			ALL, parsoncm 🚨 🌲 🔅 🕩
Search Clients	Override Consent	Search	Search Jurisdictional Registry Retrieve Reset 😝 ?
Health Region Organization: e.g. Organization Display Name		act Match	
Advanced Search Criteria			Consent for Disclosure - a block exists on the display of some client(s) data.

- 3. To override, click the **Override Consent** button.
- 4. A confirmation message will display. Select **Override Reason** either **Written** or **Verbal Consent**. Note that Implied Consent is not an option.

			^
Override Reason:		_	
	-		
م	٦		
		-	
Verbal Consent			
Written Consent		Confirm	
	_		



- 5. Click Confirm.
- 6. The client's data will be available to view.



3 CLINICAL NOTES

Clinical notes allow users to record notes specific to a client in a free-text form. Clinicians can record any nurse's notes, physician instructions, or any other clinical observations that cannot be stored in other location in Panorama.

3.1 View Clinical Notes

There are two ways to view Clinical Notes:

- 1. Through the Client in Context Header
- 2. Through the Notes section

3.1.1 Viewing Notes from the Client Context Header

The first way to view notes is from the **Client in Context Header**.

1. Go to the **Client Header** and click on the yellow **Notes** icon in the top left-hand corner.

Client Demographic	S Add to	o WQ Save	Reset	Save and Sync with	h Registry		?
1 Notes						Ad	ctive
Client ID: 14	Name(Last, First Middle)/Gender: Winter, Crystalla / Female	Hea 040	Ith Card No: 0000000	[2 0	Date of Birth / Ag 2016 Apr 20 / 1 y days	e: ears 6 monti	hs 6
Phone Number: 1-(902)-666-7788(Primary home)	Jurisdiction Info: Department of Health and Wellness,Nova S Authority	Add cotia Health Pro /-	itional ID Type vincial health se	Additional ID: ervice provider identifier			

2. The **Clinical Notes** screen will appear. A summary table will display all documented clinical notes.



linical Not	es												?	
Notes													ACT	IVE
Client ID:		Name(Las Winter, Cr	st, First M ystalla / F	liddle)/G emale	ender:	Health Card No 0400000000	:		Date of E	Birth / Ag 20 / 1 yes	e: ars 6 mon	ths 6 days		
Phone Number:		Jurisdicti	on Info:			Additional ID	ype /							
1-(902)- 666-7788(Primary home)		Departme Wellness, Authority	nt of Healt Nova Scot	th and tia Health	1	Provincial healt provider identifi	h servid er / -	ce						
otes													tide N	Notes
isplay Notes For:	Client: W	Vinter, Cry	stalla		1	Include Rela	ted En	tities: 💽	2					
Subject Line:						Status:						2		
Workgroup for Author:						S Workgro Transcrit	up for er:							0
Author:						C Transcrit	er:							٢
Note Type:						0								
Note Date:	From:		1	1	===		To:		1	1		l.		
		уууу	mm	dd				уууу	mm	dd				
					*******		**********	*****	*******			Display	Clea	ır
results found.					To view	w a Note below, cl	ck on it	ts Note D	ate. The	list reflect	ts the reco	ords you hav	/e acces	s to.
Row Actions: View	w All Note	es in Tabl	e Upda	ate Note	View No	ote Corrections	Delet	te Note		Au	thor Note	Transc	ribe Not	te
Move	e selected	i note to					• M	love Not	Ð					
Created Date	/Time	Note D	ate/Time		Note Type	Subject Line	• <u>Au</u>	<u>ithor</u>		Attached		tatus 🔻 C	orrecte	₫▼
O 2017 Oct 26 1	3:10 ADT	<u>2017 O</u>	ct 26 13:0	0 ADT	Clinician	Clinic Visit	Tes	ster, Pan	orama	Client 14	C	omplete		

3. Users can click on the hyperlink in the **Note Date/Time column** to display the **Note Details**.

Note Details		☆ Hide Note Details
M Age 1 of 1 🕨 M		
Note is associated with Client ID 14		
Note ID: 5	Status: Complete	
Author: Tester, Panorama	Note Date: 2017 Oct 26 13:00 ADT	
Role: superuser	Created Date/Time: 2017 Oct 26 13:10 ADT	
Note Type: Clinician	Completed Date: 2017 Oct 26	
Subject Line: Clinic Visit		
Client was brought to the clinic for an assessment of	cold symptoms, prior to receiving a vaccine. She was seen by Dr. Greene.	
M 🖪 Page 1 of 1 🕨 🗎		

3.1.2 Viewing Clinical Notes from Notes

The second way to view documented clinical notes is directly through the **Notes** process as outlined in the following steps:



1. Go to the Left-Hand Navigation menu and click on the Notes section.



2. The **Clinical Notes** screen will be displayed. Any documented **Clinical Notes** will be displayed in the summary table.

Clinical Not	es												?	
Notes													ACT	IVE
Client ID:	N	lame(Last Vinter, Crys	, First Middle) stalla / Female	/Gender:	Health 040000	Card No:		1	Date of I 2016 Apr	Birth / Age: 20 / 1 year	rs 6 month	is 6 days		
Phone Number:	J	urisdictio	n Info:		Additio	nal ID Ty	pe /							
1-(902)- 666-7788(Primary home)	D V A	epartment Vellness,N uthority	t of Health and ova Scotia Hea	llth	Additio Provinc provide	nal ID: ial health r identifier	service r / -	e						
Notes												:	🕆 Hide N	lotes
Subject Line: Workgroup for Author: Author: Note Type:					S VV Ti C Ti	tatus: /orkgrouj ranscribe ranscribe	p for er: er:	(((0
Note Date:	From:		1 1				To:		1	1				
		уууу	mm dd					уууу	mm	dd				
												Display	Clea	r
1 results found.				To viev	w a Note b	elow, clic	k on its	Note D	ate. The	list reflects	the recor	ds you hav	e acces	s to.
Row Actions: View	w All Notes	s in Table	Update Not	te View No	ote Correc	ctions	Delete	Note		Aut	hor Note	Transc	ribe Not	e
Move	selected	note to				-	Mo	ove Note	•					
Created Date	/Time 🔻	Note Dat	te/Time	Note Type	Subje	ect Line 1	Aut	hor		Attached	To 🔻 Sta	itus 🔻 <u>C</u>	orrected	4
O 2017 Oct 26 1	3:10 ADT	2017 Oct	26 13:00 ADT	Clinician	Clinic	Visit	Test	er, Pano	orama	Client 14	Co	mplete		

3. Users can click on the hyperlink in the **Note Date/Time** column to display the **Note Details.**



Note Details		☆ Hide Note Details
Page 1 of 1		
Note is associated with Client ID 14		
Note ID: 5	Status: Complete	
Author: Tester, Panorama	Note Date: 2017 Oct 26 13:00 ADT	
Role: superuser	Created Date/Time: 2017 Oct 26 13:10 ADT	
Note Type: Clinician	Completed Date: 2017 Oct 26	
Subject Line: Clinic Visit		
Client was brought to the clinic for an assessment of c	old symptoms, prior to receiving a vaccine. She was seen by Dr. Greene.	
Page 1 of 1		

3.2 Record Clinical Notes

To record a new Clinical Note, follow the steps below.

1. Go to the Left-Hand Navigation menu and click on the Notes section. The Clinical Notes screen will be displayed. Click Author Note.

Notes												*	Hide Notes
Display Notes For:	Client:	Winter, Cry	vstalla			0	nclude Related En	tities:					
Subject Line:							Status:				0		
Workgroup for Author:						0	Workgroup for Transcriber:						٥
Author:						٢	Transcriber:						٢
Note Type:						0							
Note Date:	From:		1	1			To:		/	1	=		
		уууу	mm	dd				уууу	mm	dd			
											[Display	Clear
0 results found.					To v	iew a N	ote below, click on it	s Note I	Date. The lis	st eflecte	t he record	you have	access to.
Row Actions: Vie	ew All No	tes in Tab	le Up	date Not	e View	Note C	orrections Delet	e Note		Auth	or Note	Transcrit	be Note

 The Author Note screen will be displayed. Enter the Subject, Note Date and Note Time. The date and time will default to the time the note is documented. The Note Type can be selected from the drop-down menu. The role is the user's role in Panorama. The Common Phrases and Common Phrases List will not be used in NS.



uthor Note				0 4
				ACTIVE
Client ID: 14	Name(Last, First Middle)/Gender: Winter, Crystalla / Female	Health Card No: 0400000000	Date of Birth / Age: 2016 Apr 20 / 1 years 6 months 6	days
Phone Number:	Jurisdiction Info:	Additional ID Type /		
1-(902)- 666-7788(Primary home)	Department of Health and Wellness,Nova Scotia Health Authority	Provincial health service provider identifier / -		
ote is being creat	ted for Client ID 14			
te ID: -		Status: -		
Required Field				
Author:	Tester, Panorama	Role: superuser		
Subject:	Clinic Visit			
Note Date:	2017 / 10 / 26 🔛 yyyy mm dd	★ Note Time: 13	: 00 :ADT mm	
Note Type:	Clinician	0		
Common Phrases List:			_	
Common Phrases:		Add to Note	9	
Note:	rr Arial	비 로콜콜 듣는 개념	I	
Client was brough Dr. Greene.	t to the clinic for an assessment	of cold symptoms, price	or to receiving a vaccine. She	e was seen by

3. Type the note in the Note field. Click **Note Complete**. Users can also record a note and select **Save as Draft.** The note can then be completed at a later time.

Tip: Difference Between Author and Transcribe Notes

An **Author Note** is a note written and documented by the user themselves. A **Transcribe Note** is a note written on behalf of another clinician. While the **Transcribe Note** functionality is available in NS, it will not be used. Clerks do not have permission to create notes.



Authors write a note and complete it in order to save it. Once completed, it becomes part of the clinical record and it is available for others to see. The author is permitted to correct it, but those changes are tracked. The original note and all subsequent corrected versions are still accessible in the system.

Panorama will then display a confirmation that the **Note** was saved, and the new note will be added to the **Notes** in the Client Header.

View Note				? E
A Notes				ACTIVE
Client ID:	Name(Last, First Middle)/Gender: Winter, Crystalla / Female	Health Card No: 040000000	Date of Birth / Age: 2016 Apr 20 / 1 years 6 months 6 days	
Phone Number:	Jurisdiction Info:	Additional ID Type /		
1-(902)- 666-7788(Primary	Department of Health and Wellness,Nova Scotia Health Authority	Additional ID: Provincial health service provider identifier / -		
Note IS associ	ated with Client ID 14	Status:	Complete	
Author:	Tester, Panorama	Note Date:	2017 Oct 26 13:00 ADT	
Role:	superuser	Completed Date:	2017 Oct 26	
Note Type:	Clinician			
Subject:	Clinic Visit			
Client was brought to	the clinic for an assessment of cold symptoms, p	rior to receiving a vaccine. She	e was seen by Dr. Greene.	
			Correct Note	Close

3.3 Update Clinical Notes

- 1. To update a note, search for the note following the search process.
- 2. Select the note and click **Update Note**.

1 results found.		To view a N	lote below, click or	n its Note Date. Th	e list reflects the r	ecords you h	ave access to
Row Actions: View All Notes	in Table Update Note	View Note C	orrections	lete Note	Author N	lote Trans	scribe Note
Move selected n	ote to			Move Note			
Created Date/Time	Note Date/Time	Note Type 🔻	Subject Line 🔻	Author 🔻	Attached To	Status 🔻	Corrected
2017 Dec 19 13:38 AST	2017 Dec 19 13:36 AST	Immunization	Clinic Visit	ALL, parsoncm	Client 14	Complete	
Total: 1	ge 1 of 1 🕨 💌					Jump to page	ə: 📃 🛃

3. The Correct Note screen displays. Make the update and click Note Complete.



Subject:	Clinic Visit
Note Date:	2017 / 12 / 19 🔛 Note yyyy mm dd Time: 13 : 36 :AST hh mm
Note Type:	Immunization
Common Phrases List:	
Common Phrases:	C Add to Note
T Normal 🗧 T 🗸	Arial 📀 7pt 🜍 b i Ц ≧ Ξ Ξ 🗄 🗄 🚈 🛀
T Normal O T	Arial \bigcirc 7pt \bigcirc b $i \underline{u} \equiv \equiv \equiv \equiv \pm \pm \pm$
T Normal Client saw Dr. Greene	Arial \bigcirc 7pt \bigcirc b i \underline{u} $\geqq \geqq \blacksquare \doteq \blacksquare \bigstar$
T Normal Client saw Dr. Greene	Arial \bigcirc 7pt \bigcirc b $i \ \underline{u} \equiv \underline{a} \equiv \underline{a} \equiv \underline{b} = \underline{b} = \underline{b} = \underline{b}$ e to investigate a cough.
T Normal Client saw Dr. Greene	Arial \bigcirc 7pt \bigcirc b i $\underline{u} \cong \cong \exists \vdots \equiv 2 $
T Normal Client saw Dr. Greene	Arial \bigcirc 7pt \bigcirc b $i \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ $

4. To view corrections to a note, click **View Note Corrections**.

selected note	to						
			_	Move Note			
/Time Voi	te Date/Time	Note Type	Subject Line	Author	Attached To	Status 🔻	Corrected
3:38 AST 201	7 Dec 19 13:36 AST	Immunization	Clinic Visit	ALL, parsoncm	Client 14	Complete	√
	3:38 AST 201	Note Date/Time 3:38 AST 2017 Dec 19 13:36 AST	3:38 AST 2017 Dec 19 13:36 AST Immunization	Note Date/Time Note Type Subject Line 3:38 AST 2017 Dec 19 13:36 AST Immunization Clinic Visit	Note Date/Time Note Type Subject Line Autnor 3:38 AST 2017 Dec 19 13:36 AST Immunization Clinic Visit ALL, parsoncm	Author Author Author 3:38 AST 2017 Dec 19 13:36 AST Immunization Clinic Visit ALL, parsoncm Client 14	Author Author Author Author Author Author 3:38 AST 2017 Dec 19 13:36 AST Immunization Clinic Visit ALL, parsoncm Client 14 Complete

5. The corrections will display.



te ID:	27		Status:	Complete	
thor:	ALL, parsoncm		Role:	superuser	
mpleted Date:	2017 Dec 19				
orrection #1 (Cu	rrent Note):				
Corrector:	ALL, parsonce	m	Correction Date: 201	/ Dec 19 13:42 AST	
Note Date:	2017 Dec 19	Note Time: 13:36			
Note Type:	Immunization				
Subject:	Clinic Visit				
Note:					
Client saw Dr	. Greene to investigate a	i cough <mark>and elevated</mark>	temperature.		
Client saw Dr	. Greene to investigate a	ı cough <mark>and elevated</mark>	temperature.		
Client saw Dr riginal Note: Note Date:	2017 Dec 19	cough <mark>and elevated</mark> Note Time: 13:36	temperature.		
Client saw Dr riginal Note: Note Date: Note Type:	. Greene to investigate a 2017 Dec 19 Immunization	cough <mark>and elevated</mark> Note Time: 13:36	temperature.		
Client saw Dr vriginal Note: Note Date: Note Type: Subject:	. Greene to investigate a 2017 Dec 19 Immunization Clinic Visit	n cough <mark>and elevated</mark> Note Time: 13:36	temperature.		
Client saw Dr vriginal Note: Note Date: Note Type: Subject: Note:	. Greene to investigate a 2017 Dec 19 Immunization Clinic Visit	n cough <mark>and elevated</mark> Note Time: 13:36	temperature.		
Client saw Dr vriginal Note: Note Date: Note Type: Subject: Note: Client saw Dr	. Greene to investigate a 2017 Dec 19 Immunization Clinic Visit : Greene to investigate a	Note Time: 13:36	temperature.		
Client saw Dr vriginal Note: Note Date: Note Type: Subject: Note: Client saw Dr	. Greene to investigate a 2017 Dec 19 Immunization Clinic Visit : Greene to investigate a	Note Time: 13:36	temperature.		
Client saw Dr vriginal Note: Note Date: Note Type: Subject: Note: Client saw Dr	. Greene to investigate a 2017 Dec 19 Immunization Clinic Visit . Greene to investigate a	Note Time: 13:36	temperature.		
Client saw Dr vriginal Note: Note Date: Note Type: Subject: Note: Client saw Dr	. Greene to investigate a 2017 Dec 19 Immunization Clinic Visit . Greene to investigate a	Note Time: 13:36	temperature.		

6. Click Close.



4 CLIENT WARNINGS

Panorama provides client warnings as fast and consistent ways to communicate important information to be considered when providing services to a client. The information contained in the **Client Warnings** should not include any explicit clinical details. Users should consider the client's privacy and the protection of sensitive information when creating client warnings.

Some types of Warnings are created automatically by Panorama:

- Special Considerations
- Allergies

Warnings may also be created manually.

This section contains the following subsections:

- 1. View Client Warnings
- 2. Record Client Warnings
- 3. Update Client Warnings
- 4. Delete Client Warnings

4.1 View Client Warnings

There are two ways to view client warnings. The first method demonstrates the ease and speed with which clinicians can alert others to key information about the client. The following steps outline this process.

1. Go to the **Client Context Header** and click on the yellow **Alerts** icon in the top left-hand corner.

Alerts			Active
Client ID: 0	Name(Last, First Middle)/Gender: Avocada, Isabelle / Female	Health Card No: 140000000	Date of Birth / Age: 2011 May 25 / 6 years 5 months
Phone Number: 1-(902)-989-5575(Primary home)	Jurisdiction Info: Department of Health and Wellness,Nova Scotia Health Authority	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

2. The **Client Warnings** screen will appear. A summary table will display client warnings, as well as any Special Considerations. Special Considerations will be covered in IMM 101.



Clier	nt Warr	ings			× (*
					Add
Up	date	View Delete			
	B	Effective From *	Effective To 🗘	Message 🗘	
		2017 Oct 26		Client has a significant fear of needles. Allow for extra time during immunizations.	
Tota	l: 1				10 -

The second way to view documented client warnings is directly through the Client Warning process as outlined in the following steps:

1. Go to the Left-Hand Navigation menu and click on the Client Warnings section.

🔗 Recent Work							
LClient V							
Search Clients							
Client Details ~							
Client Demographics							
Occupation/Education							
Health Services							
Financial Assistance							
Aboriginal Information							
Immigration Information							
Client Warnings							
Client Relationships							

2. The **Client Warnings** screen will be displayed. Any documented Client Warnings will be displayed in the summary table.

pdate Cli	ent Warning	js		Add to WQ	Save	Reset	log	0	?
1 Alerts								Act	tive
Client ID: 21	<u><u><u></u></u></u>	Name(Last, First Middle)/Gende Avocada, Isabelle / Female	er: H 1	lealth Card No: 400000000		Date of Bi 2011 May months	rth / Age: 25 / 6 ye	ars 5	
Phone Number: Jurisdiction Info: 1-(902)-989-5575(Primary Department of Health and Wellner home) Authority		Iness,Nova Scotia Health F	dditional ID Type / Addition Provincial health service pro	nal ID: ovider identifier	1				
Client Warn	ings						Ý	\$	
								Ad	ld
Update	View Dele	te							
8	Effective From	▼ Effective To ≎	Message ≎						
	2017 Oct 26		Client has a significant fear of ne	eedles. Allow for extra time	during immuni	zations.			
Total: 1							(10	•



4.2 Record Client Warnings

To record a new Client Warning, follow the steps below.

1. Go to the **Left-Hand Navigation** menu and click on the **Client Warnings** section. The **Add Client Warnings** screen will be displayed. Click **Add**.

Π	Client	Warn	ings		×	*
						Add
	Upd	ate	View Delete			
			Effective From *	Effective To 🗘	Message 🗘	
			2017 Oct 26		Client has a significant fear of needles. Allow for extra time during immunizations.	
			2017 Oct 26		Client has extensive psoriasis on upper torso and arms. Orders received to administer immunizat thigh until further notice.	tions on

- 2. The Add Client Warnings screen will be displayed. Enter the Effective From date. If this is an ongoing issue, leave the Effective To date blank.
- 3. Type the relevant client warning information in the **Message** field. Click **Apply**.

Add Client Warning	Apply	Reset	₽.	×
* Effective From: To: 2017/10/26 I yyyy/mm/dd				
* Message:				
Client is scheduled to start six weeks of Prednisone therapy as of October 26, 2017.				
(165 characters remaining.)	1			
		Apply	Rese	et

4. Panorama will then display the new client warning in the summary table with an icon to indicate a pending Client Warning.

Clien	t Warı	nings		
				Add
Up	date	View Delete		
		Effective From *	Effective To 🗘	Message 🗘
	Ð	2017 Oct 26		Client is scheduled to start six weeks of Prednisone therapy as of October 26, 2017.
		2017 Oct 26		Client has a significant fear of needles. Allow for extra time during immunizations.
		2017 Oct 26		Client has extensive psoriasis on upper torso and arms. Orders received to administer immunizations on thigh until further notice.
Total	1: 3			

5. Click **Save** to add the new Client Warning.



Update Client Warning	S		Add to WQ	Save Reset 1 6 2				
Alerts				Active				
Client ID: 21	Name(Last, First Middle)/Gender Avocada, Isabelle / Female	Health Card No: 140000000	Date of Birth / Age: 2011 May 25 / 6 years 5 months					
Phone Number: 1-(902)-989-5575(Primary home)	Phone Number: 1-(902)-989-5575(Primary home) Jurisdiction Info: Department of Health and Wellness,Nova Scotia Health Authority Additional ID Type / A Provincial health sen - Client Warnings was successfully updated. Client Warnings was successfully updated.							
Client Warnings				*				
				Add				
Update View Dele	te							
Effective From	 Effective To \$ 	Message 🗘						
2017 Oct 26		Client is scheduled to start s	six weeks of Prednisone the	rapy as of October 26, 2017.				
2017 Oct 26		Client has a significant fear of needles. Allow for extra time during immunizations.						
2017 Oct 26		Client has extensive psorias thigh until further notice.	is on upper torso and arms	Orders received to administer immunizations on				

4.3 Update Client Warnings

If changes are required to the client's Client Warning, users can perform this easily.

- 1. Go to the **Left-Hand Navigation** and the **Client Warnings** section. The summary table will display current Client Warnings.
- 2. Select the desired Client Warning to be updated. Click **Update**.

Clie	ent Wa	rnings		1. A.	\$
		_			Add
L	Jpdate	View Delete			
	8	Effective From *	Effective To 🗘	Message 🗘	
0		2017 Oct 26		Client is scheduled to start six weeks of Prednisone therapy as of October 26, 2017.	
		2017 Oct 26		Client has a significant fear of needles. Allow for extra time during immunizations.	
)	2017 Oct 26		Client has extensive psoriasis on upper torso and arms. Orders received to administer immunization thigh until further notice.	ons on

3. The **Update Client Warning** screen will be displayed. Enter the updated information in the appropriate fields.

Update Client Warning	Apply	Reset	Ð)	6
Effective From: To: 2017/10/26 Jyyy/mm/dd					
* Reason for Update: Comment:					
* Message:					
Client is scheduled to start six weeks of Prednisone therapy as of October 26, 2017.					
(166 characters remaining.)					
		Apply	R	teset	



4. Select the Reason for Update from the dropdown menu.



5. If the reason is not present in the list, select Other and add a comment in the Comment field. Click **Apply.**

Update Client Warning	Apply	Reset	•	×
* Effective From: Io: 2017/10/26 2017/10/26 * Reason for Update: Comment: Other, specify ✓ Mother does not want her daughter to take Prenisone. Physician has agreed to this request.				
* Message:				
(166 characters remaining.)				
		Apply	Res	et

6. The updated Client Warning will be displayed in the summary table with an icon indicating that an update is pending.

Updat	e Cl	ient Warnings	S			Add to WQ	Save	Reset	1	log	₽?
Aler Client II 21 Phone N 1-(902)- home)	rts D: C lumber 989-55	575(Primary	Name(Last, First Middle)/Gend Avocada, Isabelle / Female Jurisdiction Info: Department of Health and We Authority	ler: Ilness,Nova Scotia Health	Health Ci 1400000 Additiona Provincia	ard No: 000 al ID Type / Additi al health service p	onal ID: rovider identifié	Date of 1 2011 Ma months	Birth / A ay 25 / 6	ge: i year:	Active
Clien	t War	nings								/ [Add
Upo	late	View Delete	2								
	8	Effective From *	Effective To \$	Message 🗘							
		2017 Oct 26	2017 Oct 26	Client is scheduled to sta	art six weeks of	Prednisone thera	py as of Octob	er 26, 2017.			
		2017 Oct 26		Client has a significant fe	ear of needles.	Allow for extra tim	e during immu	nizations.			
		2017 Oct 26		Client has extensive pso thigh until further notice.	oriasis on upper	torso and arms. C	Orders received	to administer	immun	izatio	ns on

7. Click **Save**. A message will appear confirming the update was saved.



Update Cli	ent Warnings				Add to WQ		Save	Reset	ii log	₽?
Alerts										Active
Client ID: 21		ame(Last, First Middle)/Gende vocada, Isabelle / Female	er:	Healti 14000	h Card No: 000000			Date of I 2011 Ma months	Birth / Age: ny 25 / 6 ye	ars 5
Phone Number: Jurisdiction Info: 1-(902)-989-5575(Primary Department of Health and Wellness, home) Authority			llness,Nova Scotia Health	Additi Provin -	ional ID Type / A ncial health serv	1	Client W updated	arnings was s	uccessfull	′
Client Warr	nings								Ý	*
										Add
Update	View Delete									
	Effective From 💌	Effective To 🗘	Message ≎							
	2017 Oct 26	2017 Oct 26	Client is scheduled to start	six weeks	of Prednisone th	erapy a	s of Octobe	er 26, 2017.		
	2017 Oct 26 Client has a significant fear of needles. Allow for extra time during immunizations.									
2017 Oct 26 Client has extensive psoriasis on upper torso and arms. Orders received to administer immunization thigh until further notice.				immunizat	ions on					
Total: 3										10 -

4.4 Delete Client Warnings

There may be occasions when a Client Warning should be deleted from a client record. Remember that Panorama will retain an audit record of all transactions in client records for security purposes, but Users can and should delete warnings made in error.

- 1. Go to the **Left-Hand Navigation** and the **Client Warnings** section. The summary table will display current Client Warnings.
- 2. Select the desired Client Warning to be updated by clicking on the checkbox to the left. Click **Delete**.

Clier	nt War	nings			
					Add
Up	date	View	Delete		
	8	Effective	e From 🔻	Effective To 🗘	Message 🗘
0		2017 Oc	t 26		Client is scheduled to start six weeks of Prednisone therapy as of October 26, 2017.
		2017 Oc	t 26		Client has a significant fear of needles. Allow for extra time during immunizations.
		2017 Oc	t 26		Client has extensive psoriasis on upper torso and arms. Orders received to administer immunizations on thigh until further notice.

3. Panorama will prompt the user to confirm the deletion. Click **Confirm**.

Confirmation	×
Confirm deletion of: Client is scheduled to start six weeks of Prednisone therapy as of Oc	tober 26, 2017.
	Confirm



4. The Client Warning will appear grayed out in the summary table. Click **Save** to confirm the deletion is saved in the client record.

Jpdate C	ient Warning	gs			Add to WQ	Save	Reset 🛛 🖉 🕞
1 Alerts							Active
Client ID: 21		Name(Last, First Middle)/Gen Avocada, Isabelle / Female	der:	Health 14000	n Card No: 000000		Date of Birth / Age: 2011 May 25 / 6 years 5 months
Phone Numbe 1-(902)-989-5 home)	r: 575(Primary	Jurisdiction Info: Department of Health and We Authority	ellness,Nova Scotia Health	Additi Provir -	onal ID Type / Addition ncial health service p	onal ID: rovider identifier /	1
Client Wa	nings						× 👔
							Add
Update	View Dele	te					
8	Effective From	▼ Effective To ≎	Message 🗘				
	2017 Oct 26	2017 Oct 26	Client is scheduled to start	six weeks	of Prednisone thera	py as of October	26, 2017.
	2017 Oct 26		Client has a significant fea	r of needle	s. Allow for extra tim	e during immuniz	ations.
	2017 Oct 26		Client has extensive psoria thigh until further notice.	asis on upp	per torso and arms. C	orders received to	administer immunizations on
Total: 3							10 -

5. The deleted client warning will be removed from the summary table and Panorama will provide a message confirming the client warning was successfully updated (deleted).

Upda	ate Cli	ent Warning	js				Add to WQ	!	Save	Res	set		log	₽?
<u> </u>	lerts													Active
Clien 21	t ID:	Name(Last, First Middle)/Gender: Avocada, Isabelle / Female				Health Card No: Date of Bi 140000000 2011 May months				f Birth / Age: May 25 / 6 years 5				
Phone 1-(90) home	Phone Number: Jurisdiction Info: 1-(902)-989-5575(Primary Department of Health and Wellness,Nova home) Authority			ess,Nova Scotia Health	Additi Provir -	ional ID Type / A ncial health sen	(Client V update	Varnings d.	was s	ucces	sfully		
Clie	ent Warı	nings											× [*
														Add
U	pdate	View Dele	te											
	8	Effective From	• Effect	tive To 🗘	Message 🗘									
)	2017 Oct 26			Client has a significant fear of needles. Allow for extra time during immunizations.									
)	2017 Oct 26			Client has extensive psorias thigh until further notice.	sis on upp	per torso and arr	ms. Ord	ders received	d to admir	nister	immur	nization	is on



5 ALLERGIES

Allergies are complex physiologic self defense processes in response to environmental, biologic, or other irritants. Responses can range from mild to severe in overall severity, and can be life-threatening in some situations. Some allergies may impact clinical decisions informing the recommendation of vaccine administration.

The section includes the following sections:

- View Allergies
- Record Allergies
- Update Allergies
- Delete Allergies

5.1 View Allergies

The steps below are how to view a client's documented Allergies:

1. Go to the **Left-Hand Navigation** menu and, under the Client section, click on **Allergies**.



2. The **Allergies** screen will be displayed. Any documented **Allergies** will be displayed in the summary table.



Aller	gies			Add to WQ	Set No Known Allergi	es Save	Reset
Ale Client 33	ID:	Nam Ella,	e(Last, First Middle)/Gender: , Cinder / Female - Female	He 11	alth Card No: 11111104	Da 20	Active te of Birth / Age: 05 Dec 31 / 11 years 9 months
Phone -(-)	Number	: Juris Wes	sdiction Info: .tern Zone,Bridgewater Public Hea	Adualth Office Pro	ditional ID Type / Additional ID: ovincial health service provider i	identifier / -	
Aller	rgies						
							Add
Up	date	View Delete					
	8	Allergy 🗘	Severity 🗘	Reaction \$	Effective From *	Effective To 🗘	Client Warnings 🗘
		Menjugate (Men-C	C-C) Severe (prevents daily activities)	Anaphylaxis	2007 Jan 08		~
Tota	ıl: 1						10 -

3. The User may also go to the top left-hand corner of the Client Context Header and click on the **Alerts** icon.

Client Alerts					✓ Actions ¥
Client ID: 50	Client Avoca	Name: ada, Allen	He a 450	alth Card Number: 00000000	Date of Birth / Age: 2012 Jul 17 / 5 years 3 months
Effective From *	Effective To *	Туре +		Message	Last Edited By O
2015 Mar 15		Allergy		Allergy: Egg protein, Severity: Mild (does not interfere with daily activities), Reaction Desc: Skin/mucosal reaction	Panorama, Tester
2014 Feb 03		Client Warning		Client is very fearful of needles. Provide extra time for all immunizations.	Panorama, Tester
Total: 2	1.				10 -

4. Allergies will be displayed with the other documented Client Alerts.

5.2 Record Allergies

To record new Allergies, follow the steps below:

1. Go to the Left-Hand Navigation menu and click on the Allergies section. The Allergies screen will be displayed. Click Add.

Allergies		Add to WQ	Set No Known Allergies	Save	Reset		× (•	?
Client ID: 50 D Phone Number: 1-(902)-444-5566(Primary home)	Name(Last, First Middle)/Gender: Avocada, Allen / Male Jurisdiction Info: Department of Health and Wellness,N Authority	Nova Scotia Health	Health Card No: 450000000 Additional ID Type / Addition Provincial health service pro	nal ID: ovider identifie	Date of 2012 Ju months	Birth / A I 17 / 5	ge: years 3	Activ	/e
Allergies								\$	
There is no data to display							1	Add	



2. The **Add Allergies** screen will be displayed. **Show as Client Warning** should be automatically checked. If not, click on the checkbox to add documented Allergies to the Client Alerts. Required fields are indicated with a red asterisk.

Add Allergy			Apply	Reset	₽	×
Show as Client Warning	Some allergy types require a comment.					
Allergy Category:	* Allergy Type:	Allergy Sub Type:				
Severity:						
• Reaction:	Other Reaction Description:					
10.1	(4000 characters remaining.)					
• Date Reported: yyyy/mm/dd	Source of Information:					
Effective From: To:	Reason for Status Change:					
yyyymmiad i yyyymmiad i						
comments.						
(4000 characters remaining.)						
				Apply	Res	set

3. Select the Allergy Category, from the dropdown menu.

* Allergy Category:	_
•	
م ا	
Drug Allergy	
Food Allergy	
Miscellaneous Allergy	
Vaccine Allergy	

- 4. Select the specific **Allergy Type** from the dropdown menu. The selections will depend on the **Category** selected.
- 5. Select the specific **Allergy Sub Type** from the dropdown menu. In some cases, a sub type may not be available. This is not a mandatory field.
- 6. Select the **Severity** from the drop-down menu.



Severity:
·
٩
Mild (does not interfere with daily activities)
Moderate (interferes with but does not prevent daily activities)
Severe (prevents daily activities)
Unknown

7. Enter the **Reaction** by selecting from the drop-down menu



8. If the reaction is 'Other' provide more information in the **Other Reaction Description** field.

* Reaction:		* Other Reaction Description:
Other	-	
		(4000 characters remaining.)

9. Enter **Source of Information**. Users can select from the drop-down menu.



Source of Information:									
Parent/guardian									
م									
Client									
Laboratory/allergy test									
Other									
Parent/guardian									
Physician									

10. Enter the **Effective From** date if known. If the allergy was linked to a specific event (reaction) or laboratory report, this can be used as the **Effective From** date. If this is an ongoing issue, leave the **Effective To** date blank.

The **Date Reported** will default to the date that the User is documenting the allergy; however, users should adjust the reported date if they were aware of the allergy earlier. Click **Apply**.

11. Panorama will then display the new Allergies in the summary table with an icon to indicate a pending Allergy will be added to the client record once the record is saved.

AI	Allergies				Add to WQ	Set No Known Allergies	Save	Reset	ii log	8	?
C 5 PI 1- ho	lient II 0 hone N (902)- ome)	D: Jumber: 444-556	56(Primary	Name(Last, First Middle)/Gender: Avocada, Allen / Male Jurisdiction Info: Department of Health and Weliness,I Authority	Nova Scotia Health	Health Card No: 450000000 Additional ID Type / Ad Provincial health servic -	ditional ID: :e provider identifier	Date of 2012 Ju months	Birth / Age: Il 17 / 5 yea	Act ars 3	tive
	Allerg	gies								*	
										Add	d
	Upo	late	View Delet	te							
			Allergy ≎	Severity 🗘	Reaction 🗘	Effective From *	Effective To 🗘	Cli	ent Warnir	ngs ≎	
		Ð	Egg protein	Moderate (interferes with but does not prevent daily activities)	Skin/mucosal reaction	2015 Mar 15			\checkmark		
	Total	: 1							ŀ	10 -	-

12. Click **Save** to add the new Allergy. A confirmation message will appear to advise the User that the Allergy has been successfully added.



5.3 Update Allergies

If changes are required to the client's Allergies, users can perform this easily.

1. Go to the **Left-Hand Navigation** and the **Allergies** section. The summary table will display current **Allergies**.



2. Select the desired Allergy to be updated by clicking on the radio button. Click **Update**.

Aller	gies								
	8	Allergy \$	Severity ≎	Reaction \$	Effective From *	Effective To 🗘	Client Warnings \$		
0		Egg protein	Moderate (interferes with but does not prevent daily activities)	Skin/mucosal reaction	2015 Mar 15		s		
Tota	1: 1						10 •		

- 3. The **Update Allergies** screen will be displayed. Enter the updated information in the appropriate fields. Click **Apply** to enforce the update.
- 4. The updated **Allergies** will be displayed in the summary table with an icon indicating that an update is pending.
- 5. Click Save. A message will appear confirming the update was saved.

AI	ergies						🤣 🚺 .
	Jpdate	View Delete					Add
	B	Allergy 🗘	Severity 🗘	Reaction ≎	Effective From *	Effective To 🗘	Client Warnings 🗘
		Egg protein	Mild (does not interfere with daily activities)	Skin/mucosal reaction	2015 Mar 15		\checkmark
				*		* 	



5.4 Delete Allergy

There may be occasions when an Allergy should be deleted from a client record. Remember that Panorama will retain an audit record of all transactions in client records for security purposes, but Users can and should delete allergies made in error or that turn out not to be allergies.

Below are the steps to delete an Allergy:

- 1. Go to the **Left-Hand Navigation** and the **Allergies** section. The summary table will display current Allergies.
- 2. Select the desired Allergy to be deleted by clicking on the checkbox to the left. Click **Delete**.



🔒 Alert	ts						Active	
Client ID: 50 Name(Last, First Middle)/Gender: Avocada, Allen / Male				Health Card No: 4500000000		Date of Birth / Age: 2012 Jul 17 / 5 years 3 months		
Phone No 1-(902)-4 home)	umber: 144-55	66(Primary	Jurisdiction Info: Department of Health and Wellnes Authority	s,Nova Scotia Health	Additional ID Type / Provincial health set	Additional ID: vice provider identifier /		
Allerg	Allergies							
							Add	
Upd	ate	View Delet	e					
	B	Allergy 🗸	Severity 🗘	Reaction 🗘	Effective From *	Effective To 🗘	Client Warnings 🗘	
$ \overline{} $		Acetaminophen (Tylenol)	Mild (does not interfere with daily activities)	Gastrointestinal reaction	2017 May 23		<i>s</i> .	
\bigcirc		Egg protein	Mild (does not interfere with daily activities)	Skin/mucosal reaction	2015 Mar 15		✓	
Total:	2						10 -	

3. Panorama will prompt the user to confirm the **Reason for Deletion**. Select the reason from the dropdown menu. Click **Confirm**.

Confirmation ×	Confirmation *
Select the reason for deletion of: Acetaminophen (Tylenol) Reason for Deletion Altered decision Entered in error. Deletion witnessed by (type full name)	Select the reason for deletion of: Acetaminophen (Tylenol) * Reason for Deletion: Entered in error. Deletio Confirm

4. The Allergy will appear grayed out in the summary table. Click **Save** to confirm the deletion is saved in the client record.

Allergies			Add to WQ	Set No Known Allergies	Save	Reset 🚺 🖨	?
Alerts						Ad	ctive
Client ID: 50		Name(Last, First Middle)/Gender: Avocada, Allen / Male		Health Card No: 450000000		Date of Birth / Age: 2012 Jul 17 / 5 years 3 months	
Phone Number: Jurisdiction Info: 1-(902)-444-5566(Primary Department of Health and Wellness,* home) Authority			s,Nova Scotia Health	Additional ID Type / Ad Provincial health servic -	ditional ID: e provider identifier i	1 1	
Allergies							*
						A	dd
Update	View Delet	e					
8	Allergy 🗘	Severity 🗘	Reaction \$	Effective From *	Effective To 🗘	Client Warnings \$	\$
0 0	Acetaminophen (Tylenol)	Mild (does not interfere with daily activities)	Gastrointestinal reaction	2017 May 23		~	
	Egg protein	Mild (does not interfere with daily activities)	Skin/mucosal reaction	2015 Mar 15		~	

5. The deleted Allergy will be removed from the summary table and Client Alerts. Panorama will provide a message confirming Allergies was successfully updated (deletion completed).



Allergies			Add to WQ	Set No Known Allergies	Save	Reset	
Alerts						Active	
Client ID: 50	1 1	Name(Last, First Middle)/Gender: Avocada, Allen / Male		Health Card No: 4500000000	Date of Birth / Age: 2012 Jul 17 / 5 years 3 months		
Phone Number: 1-(902)-444-5566(Primary home) Jurisdiction Info: Department of Health and Wellness,Nova Scotia Health Authority Additional ID Type / / Provincial health set							
Allergies							
						Add	
Update Vi	ew Delete						
🖺 All	ergy 🗘	Severity 🗘	Reaction 🗘	Effective From *	Effective To 🗘	Client Warnings 🗘	
Eg	g protein	Mild (does not interfere with daily activities)	Skin/mucosal reaction	2015 Mar 15		~	
Total: 1						10 -	