



P16-0371 Panorama Project

Panorama Immunization Management User Manual

CLT 102 Advanced 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 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.



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.

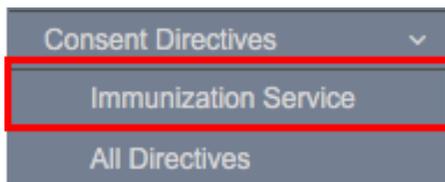


3. Click on the **View Consent** tab to review existing consent information.

ID	Directive Status	Antigen	Instruction	Effective From	Effective To	User's Organization
6	Confirmed	HPV-4	Grant	2017 Aug 14		Nova Scotia
Total: 1						

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).



Status	Instruction	Directive Type	Antigen	Active	Effective From	Effective To
Confirmed	Grant	Service: Immunization	HPV-4	Active	2017 Aug 11	

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

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



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



Client ID	Client Name	Date of Birth	Gender	Immunizing Agent	Forecast Status	Consent Readiness	Event Status
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

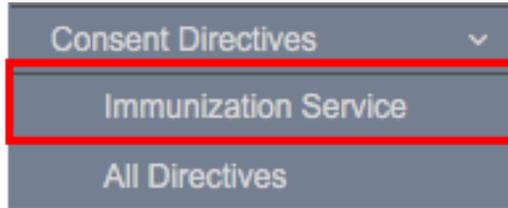
Similar to viewing the consent in the section above, there are three ways to add consent:

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

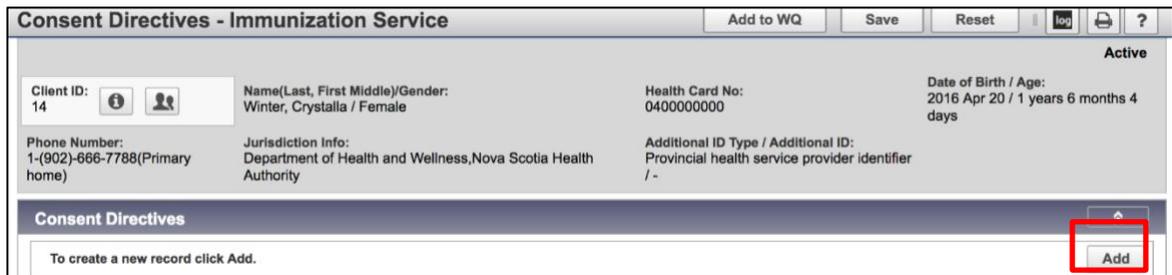
#1 - The steps below outline how to record a granted consent for a client in context through the **Consent Directive** screen:

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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 Save Reset log ?

Active

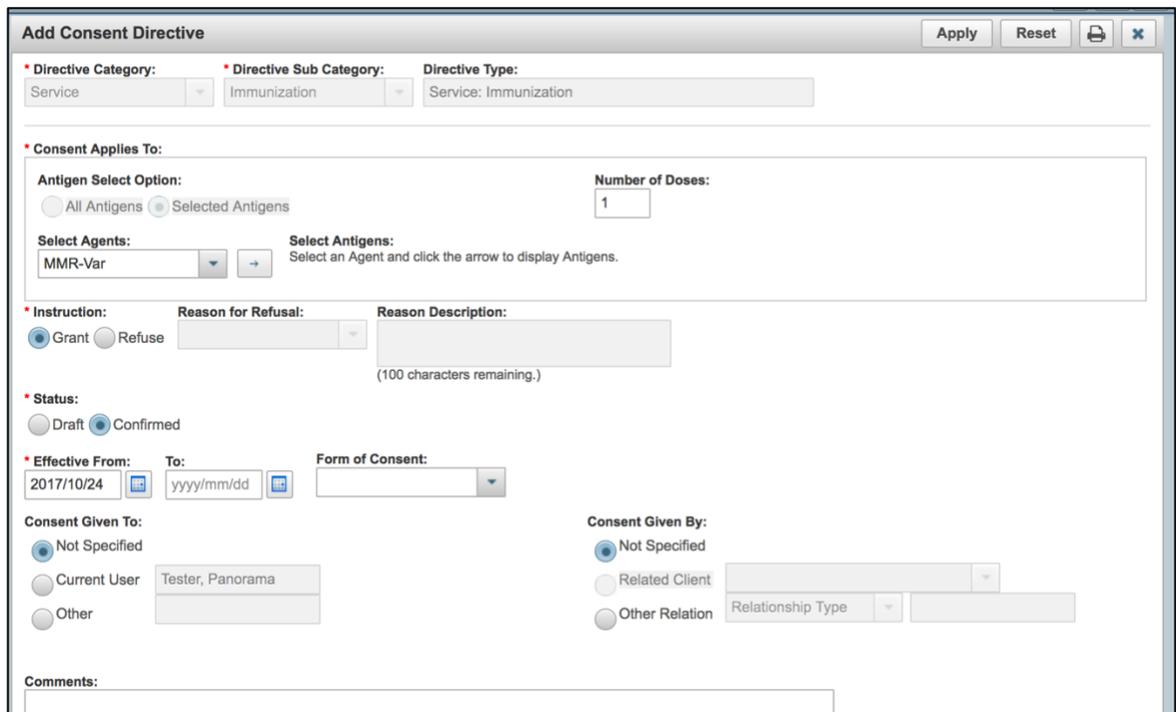
Client ID: 14 Name(Last, First Middle)/Gender: Winter, Crystalla / Female Health Card No: 040000000 Date of Birth / Age: 2016 Apr 20 / 1 years 6 months 4 days

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 identifier / -

Consent Directives

To create a new record click 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: Service **Directive Sub Category:** Immunization **Directive Type:** Service: Immunization

Consent Applies To:

Antigen Select Option: All Antigens Selected Antigens **Number of Doses:** 1

Select Agents: MMR-Var **Select Antigens:** Select an Agent and click the arrow to display Antigens.

Instruction: Grant Refuse **Reason for Refusal:** **Reason Description:** (100 characters remaining.)

Status: Draft Confirmed

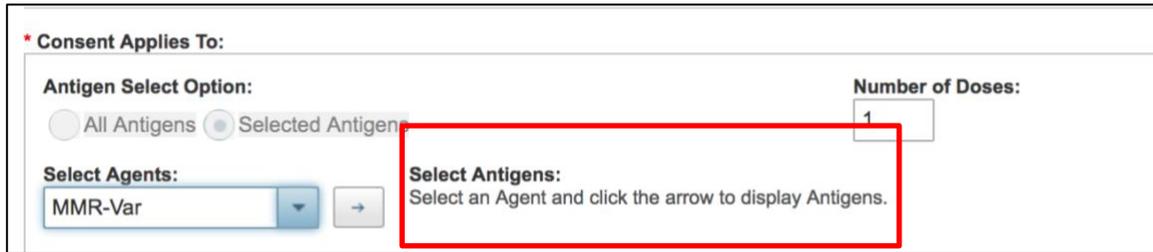
Effective From: 2017/10/24 **To:** yyyy/mm/dd **Form of Consent:**

Consent Given To: Not Specified Current User: Tester, Panorama Other

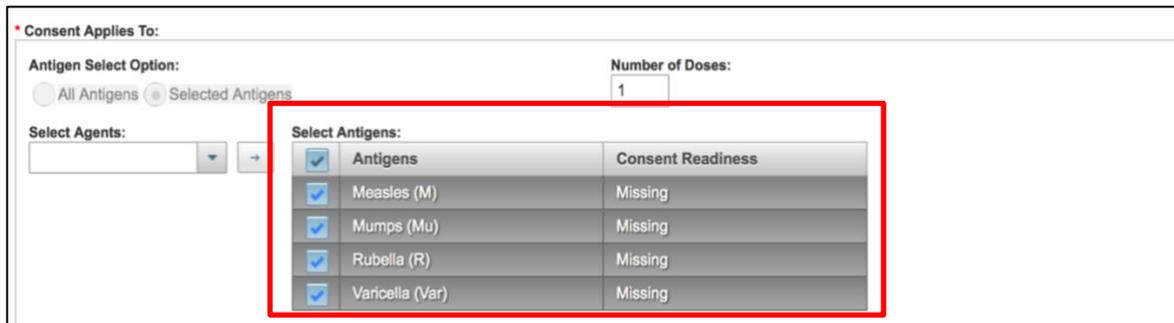
Consent Given By: Not Specified Related Client: Relationship Type Other Relation

Comments:

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



- 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.



Antigens	Consent Readiness
<input checked="" type="checkbox"/> Measles (M)	Missing
<input checked="" type="checkbox"/> Mumps (Mu)	Missing
<input checked="" type="checkbox"/> Rubella (R)	Missing
<input checked="" type="checkbox"/> Varicella (Var)	Missing

- 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.
- Specify the form of consent by selecting from the drop-down menu.

Form of Consent:

Implied

Verbal

Written

- 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.

Consent Directives - Immunization Service Add to WQ Save Reset

Active

Client ID:
14

Phone Number:
1-(902)-666-7788(Primary home)

Name(Last, First Middle)/Gender:
Winter, Crystalla / Female

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

Health Card No:
040000000

Additional ID Type / Additional ID:
Provincial health service provider identifier / -

Date of Birth / Age:
2016 Apr 20 / 1 years 6 months 4 days

Consent Directives Add

Update View Confirm Expire Now Discard Delete Copy as Draft Documents

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Status Filter On	Instruction Filter	Directive Type	Antigen Filter	Active Filter On	Effective From	Effective To
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Measles (M)	Active	2017 Oct 24	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Mumps (Mu)	Active	2017 Oct 24	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Rubella (R)	Active	2017 Oct 24	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Varicella (Var)	Active	2017 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**:

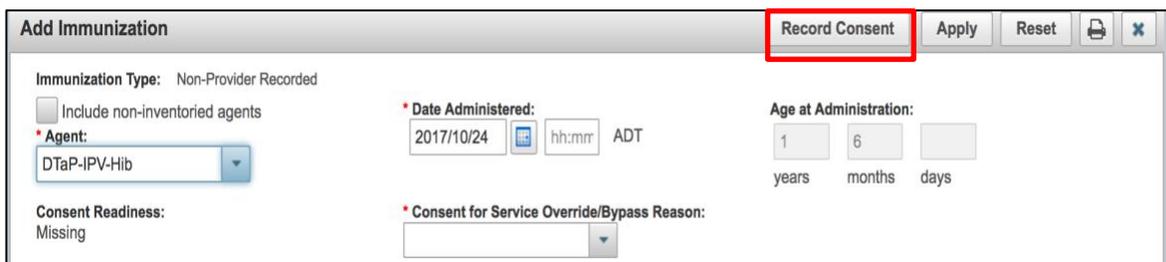
- After setting a client in context, access the **Immunization Profile** from the **Left-Hand Navigation** menu.



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



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



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: DTaP-IPV-Hib

* Instruction: Grant Reason for Refusal: Reason Description:

* Effective From: 2017/10/24 To: 2018/06/29 Number of Doses: 1 Form of Consent: Written

Consent Given To: Not Specified Current User: Tester, Panorama Other

Consent Given By: Not Specified Related Client Other Relation: Relationship Type

Comments:

Save Reset

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

Immunization Type: Non-Provider Recorded

Include non-inventoried agents

* **Agent:** DTaP-IPV-Hib

* **Date Administered:** 2017/10/24 hh:mm ADT

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 Academy Event ID: 16
 Event Date: 2017 Dec 01 Location: Sydney Academy
 Event Type: School Immunization Status: Open
 Created By: Berard, Rene

Displaying 20 out of 20 clients

Record Consent Record Immunization Client Event Status Client Event Summary Deferrals Preview Client

View Consent Update Client Generate Letters Assess and Immunize

	Client ID	Client Name	Date of Birth	Gender	Immunizing Agent	Forecast Status	Consent Readiness	Event Status
<input type="checkbox"/>	43	Autumn, Andrew	2005 Sep 27	Male	Men-C-ACYW-...	Due	Granted	---
<input checked="" type="checkbox"/>	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: Grant Reason for Refusal: Reason Description:

* Effective From: 2017/12/19 To: 2018/06/29 Number of Doses: 1 Form of Consent: Written

Consent Given To:

Not Specified
 Current User ALL, parsoncm
 Other

Consent Given By:

Not Specified
 Related Client
 Other Relation Legal Guardian

Comments:

Save Reset

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**.

Consent Directives								
<input type="button" value="Update"/> <input type="button" value="View"/> <input type="button" value="Confirm"/> <input type="button" value="Expire Now"/> <input type="button" value="Discard"/> <input type="button" value="Delete"/> <input type="button" value="Copy as Draft"/> <input type="button" value="Documents"/> <input type="button" value="Add"/>								
<input type="checkbox"/>	<input type="checkbox"/>	Status Filter On	Instruction Filter	Directive Type	Antigen Filter	Active Filter On	Effective From	Effective To
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Meningococcal (Men- P-ACYW-135)	Active	2017 Dec 14	
<input type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	HPV-4	Active	2017 Dec 14	2018 Jun 29

Total: 2

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 Document

✗ Upload file before submitting changes

* File name: Signed Consent.docx

File uploaded:

Selected Document:

* Document Title:

* Effective Date: / /
yyyy mm dd

Expiration Date: / /
yyyy mm dd

Status: *

Enter Keyword:

Selected Keywords:

Use CTRL key for multiple selections.

Description:

Document Added by : ALL, parsoncm on : 2017 Dec 19

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.

Documents							Context Document
Document Title	Size	Type	Posted By	Posted On	Description	Status	
Signed Consent	22.59 KB	VND.OPENXMLF... OFFICEDOCUM...	ALL, parsoncm	2017 Dec 19		active	

Total: 1

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.

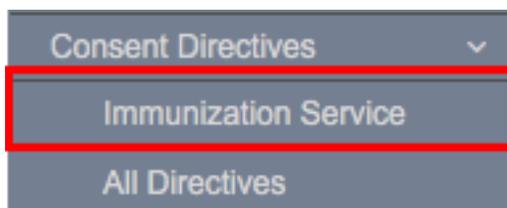


Tip: Recording Refused Consent

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 - Immunization Service Add to WQ Save Reset

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 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 Add. Add

- 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.

*** Consent Applies To:**

Antigen Select Option: All Antigens Selected Antigens **Number of Doses:**

Select Agents: **Select Antigens:** Select an Agent and click the arrow to display Antigens.

dt

DT

DT-IPV

DTaP

DTaP-HB-IPV-Hib

DTaP-IPV

DTaP-IPV-Hib

DTwP-HB-Hib

Reason for Refusal: **Reason Description:**
(100 characters remaining.)

Form of Consent:

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

Antigen Select Option: All Antigens Selected Antigens **Number of Doses:**

Select Agents: **Select Antigens:** Select an Agent and click the arrow to display Antigens.

- 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.

*** Consent Applies To:**

Antigen Select Option: All Antigens Selected Antigens

Number of Doses:

Select Agents:

<input checked="" type="checkbox"/>	Antigens	Consent Readiness
<input checked="" type="checkbox"/>	Diphtheria (D)	Missing
<input checked="" type="checkbox"/>	Pertussis (aP)	Missing
<input checked="" type="checkbox"/>	Polio (IPV)	Missing
<input checked="" type="checkbox"/>	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:** Grant Refuse

*** Reason for Refusal:**

Reason Description:

*** Status:** Draft Confirmed

*** Effective From:** **To:** **Form of Consent:**

Parent/Guardian/Client Refusal

- 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.
- Specify the form of consent by selecting from the drop-down menu.

Form of Consent:

Implied

Verbal

Written

8. 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.

Consent Directives - Immunization Service Add to WQ **Save** Reset   ?

Client ID: 21   **Name (Last, First Middle)/Gender:** Avocada, Isabelle / Female **Health Card No:** 140000000 **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 Add

Update View Confirm Expire Now Discard Delete Copy as Draft Documents

			Status Filter On	Instruction Filter	Directive Type	Antigen Filter	Active Filter On	Effective From	Effective To
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Confirmed	Refuse	Service: Immunization	Tetanus (T)	Active	2017 Oct 24	2018 Oct 23
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Confirmed	Refuse	Service: Immunization	Polio (IPV)	Active	2017 Oct 24	2018 Oct 23
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Confirmed	Refuse	Service: Immunization	Pertussis (aP)	Active	2017 Oct 24	2018 Oct 23
<input type="checkbox"/>	<input checked="" type="checkbox"/>		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



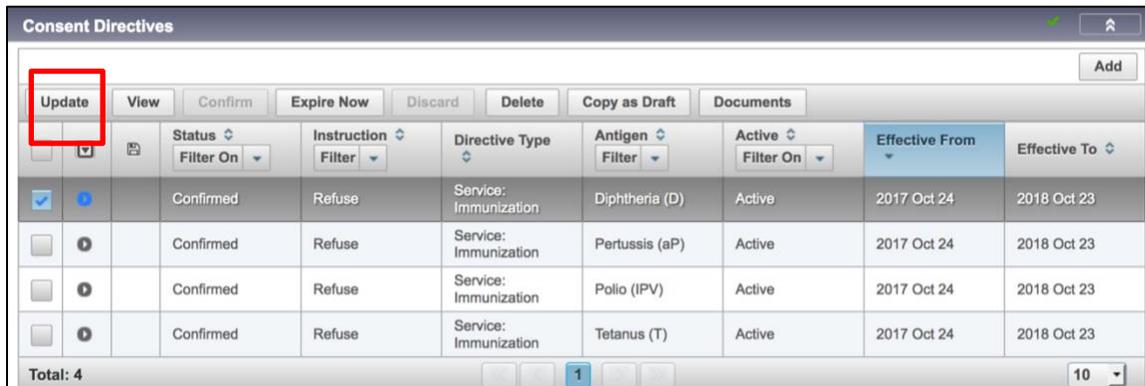
Tip: Expiring Consent

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.



Consent Directives									
<input type="checkbox"/> Update <input type="checkbox"/> View <input type="checkbox"/> Confirm <input type="checkbox"/> Expire Now <input type="checkbox"/> Discard <input type="checkbox"/> Delete <input type="checkbox"/> Copy as Draft <input type="checkbox"/> Documents <input type="button" value="Add"/>									
<input type="checkbox"/>	<input type="checkbox"/>	Status	Instruction	Directive Type	Antigen	Active	Effective From	Effective To	
		Filter On	Filter		Filter	Filter On			
<input checked="" type="checkbox"/>		Confirmed	Refuse	Service: Immunization	Diphtheria (D)	Active	2017 Oct 24	2018 Oct 23	
<input type="checkbox"/>		Confirmed	Refuse	Service: Immunization	Pertussis (aP)	Active	2017 Oct 24	2018 Oct 23	
<input type="checkbox"/>		Confirmed	Refuse	Service: Immunization	Polio (IPV)	Active	2017 Oct 24	2018 Oct 23	
<input type="checkbox"/>		Confirmed	Refuse	Service: Immunization	Tetanus (T)	Active	2017 Oct 24	2018 Oct 23	
Total: 4									
<input type="button" value="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

Directive ID: 23

Directive Category: Service | Directive Sub Category: Immunization | Directive Type: Service: Immunization

Consent Applies To:

Antigen Select Option: All Antigens Selected Antigens | Number of Doses:

Select Antigens: Diphtheria (D)

Instruction: Grant Refuse | Reason for Refusal: Parent/Guardian/Cle... | Reason Description: (100 characters remaining.)

Status: Draft Confirmed

Confirmed By: Tester, Panorama | Confirmed On: 2017 Oct 24

Effective From: 2017/10/24 | **To: 2018/04/23** | Form of Consent: Written

Consent Given To: Not Specified | Current User: Tester, Panorama | Other:

Consent Given By: Not Specified | Related Client: | Other Relation: Relationship Type:

Comments To create a new record click Add.

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.

Consent Directives - Immunization Service Add to WQ Save Reset ?

Client ID: 21 | Name: Avocada, Isabelle / Female | Health Card No: 1400000000 | Date of Birth / Age: 2011 May 25 / 6 years 5 months

Phone Number: 1-(902)-989-5575 | Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority | Additional ID Type / Additional ID: Provincial health service provider identifier / -

Consent Directives Add

	Status	Instruction	Directive Type	Antigen	Active	Effective From	Effective To
<input type="checkbox"/>	Confirmed	Refuse	Service: Immunization	Diphtheria (D)	Active	2017 Oct 24	2018 Apr 23
<input type="checkbox"/>	Confirmed	Refuse	Service: Immunization	Pertussis (aP)	Active	2017 Oct 24	2018 Oct 23
<input type="checkbox"/>	Confirmed	Refuse	Service: Immunization	Polio (IPV)	Active	2017 Oct 24	2018 Oct 23
<input type="checkbox"/>	Confirmed	Refuse	Service: Immunization	Tetanus (T)	Active	2017 Oct 24	2018 Oct 23

Total: 4 1 10

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



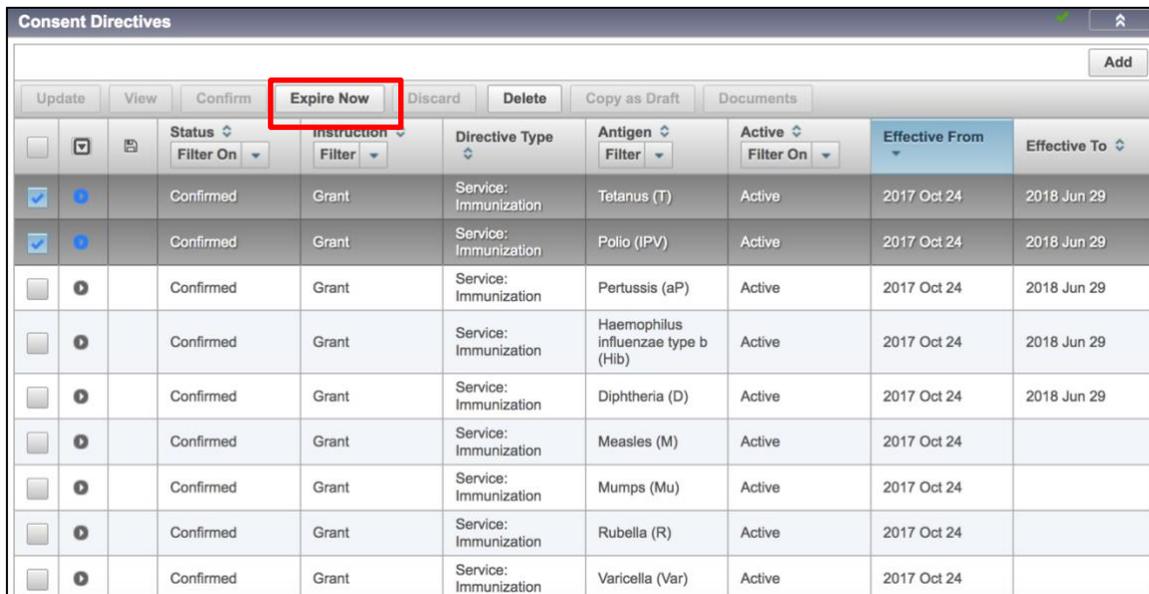
Tip: Consents on Antigen Level

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.



<input type="checkbox"/>	<input type="checkbox"/>	Status Filter On	Instruction Filter	Directive Type	Antigen Filter	Active Filter On	Effective From	Effective To
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Confirmed	Grant	Service: Immunization	Tetanus (T)	Active	2017 Oct 24	2018 Jun 29
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Confirmed	Grant	Service: Immunization	Polio (IPV)	Active	2017 Oct 24	2018 Jun 29
<input type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Pertussis (aP)	Active	2017 Oct 24	2018 Jun 29
<input type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Haemophilus influenzae type b (Hib)	Active	2017 Oct 24	2018 Jun 29
<input type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Diphtheria (D)	Active	2017 Oct 24	2018 Jun 29
<input type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Measles (M)	Active	2017 Oct 24	
<input type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Mumps (Mu)	Active	2017 Oct 24	
<input type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Rubella (R)	Active	2017 Oct 24	
<input type="checkbox"/>	<input type="checkbox"/>	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, do not select **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.

Consent Directives - Immunization Service

home) Authority / -

Consent Directives

Update View Confirm Expire Now Discard Delete Copy as Draft Documents

			Status Filter On	Instruction Filter	Directive Type	Antigen Filter	Active Filter On	Effective From	Effective To
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Tetanus (T)	Inactive	2017 Oct 24	2017 Oct 26
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Polio (IPV)	Inactive	2017 Oct 24	2017 Oct 26
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Pertussis (aP)	Active	2017 Oct 24	2018 Jun 29
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Haemophilus influenzae type b (Hib)	Active	2017 Oct 24	2018 Jun 29
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Diphtheria (D)	Active	2017 Oct 24	2018 Jun 29
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Measles (M)	Active	2017 Oct 24	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Mumps (Mu)	Active	2017 Oct 24	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Rubella (R)	Active	2017 Oct 24	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Varicella (Var)	Active	2017 Oct 24	

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

Consent Directives

Update View Confirm Expire Now Discard Delete Copy as Draft Documents

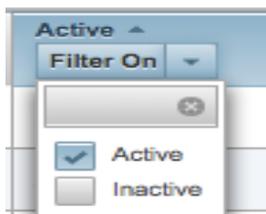
			Status Filter On	Instruction Filter	Directive Type	Antigen Filter	Active Filter On	Effective From	Effective To
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Pertussis (aP)	Active	2017 Oct 24	2018 Jun 29
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Haemophilus influenzae type b (Hib)	Active	2017 Oct 24	2018 Jun 29
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Diphtheria (D)	Active	2017 Oct 24	2018 Jun 29
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Measles (M)	Active	2017 Oct 24	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Mumps (Mu)	Active	2017 Oct 24	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Rubella (R)	Active	2017 Oct 24	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Varicella (Var)	Active	2017 Oct 24	

Total: 7 1 10



Tip: Filter Active Consents

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**.



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.
2. 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”.



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.





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

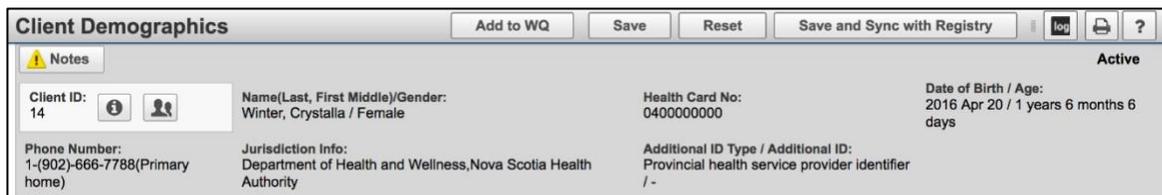
There are two ways to view Clinical Notes:

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.



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

Clinical Notes

? ☰

Notes
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: 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 / -	

Notes
Hide Notes

Display Notes For: Client: Winter, Crystalla Include Related Entities:

Subject Line: Status:

Workgroup for Author: Workgroup for Transcriber:

Author: Transcriber:

Note Type:

Note Date: From: / / To: / /

1 results found. To view a Note below, click on its Note Date. The list reflects the records you have access to.

Row Actions:

Move selected note to

Created Date/Time	Note Date/Time	Note Type	Subject Line	Author	Attached To	Status	Corrected
<input type="radio"/>	2017 Oct 26 13:10 ADT	2017 Oct 26 13:00 ADT	Clinician	Clinic Visit	Tester, Panorama	Client 14	Complete

- 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 Author: Tester, Panorama Role: superuser Note Type: Clinician Subject Line: Clinic Visit	Status: Complete Note Date: 2017 Oct 26 13:00 ADT Created Date/Time: 2017 Oct 26 13:10 ADT Completed Date: 2017 Oct 26
--	---

Client was brought to the clinic for an assessment of cold symptoms, prior to receiving a vaccine. She was seen by Dr. Greene.

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:

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Author Note ? 🖨️

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: 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 / -	

Note is being created for Client ID 14

Note ID: - Status: -

* Required Field

Author: Tester, Panorama **Role:** superuser

* **Subject:** Clinic Visit

* **Note Date:** 2017 / 10 / 26 * **Note Time:** 13 : 00 :ADT
yyyy mm dd hh mm

Note Type: Clinician

Common Phrases List:

Common Phrases: **Add to Note**

* **Note:**

Normal Arial 7pt **b i u**

Client was brought to the clinic for an assessment of cold symptoms, prior to receiving a vaccine. She was seen by Dr. Greene.

- 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

Notes
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: 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 / -	

The note was successfully saved.

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	Completed Date: 2017 Oct 26
Note Type: Clinician	
Subject: 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.

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 Note below, click on its Note Date. The list reflects the records you have access to.

Row Actions:

Move selected note to

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
Page 1 of 1
Jump to page:

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

Correct Note

*** Required Field**

*** Subject:**

*** Note Date:** / / : :AST
yyyy mm dd hh mm

Note Type:

Common Phrases List:

Common Phrases:

*** Note:**

Client saw Dr. Greene to investigate a cough.

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

1 results found. To view a Note below, click on its Note Date. The list reflects the records you have access to.

Row Actions:

Move selected note to

	Created Date/Time	Note Date/Time	Note Type	Subject Line	Author	Attached To	Status	Corrected
<input checked="" type="radio"/>	2017 Dec 19 13:38 AST	2017 Dec 19 13:36 AST	Immunization	Clinic Visit	ALL, parsoncm	Client 14	Complete	✓

Total: 1 Page 1 of 1

5. The corrections will display.

Note ID:	27	Status:	Complete
Author:	ALL, parsoncm	Role:	superuser
Completed Date:	2017 Dec 19		

Correction #1 (Current Note):

Corrector:	ALL, parsoncm	Correction Date:	2017 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 cough and elevated temperature.		

Original Note:

Note Date:	2017 Dec 19	Note Time:	13:36
Note Type:	Immunization		
Subject:	Clinic Visit		
Note:	Client saw Dr. Greene to investigate a cough and elevated temperature.		

[Close](#)

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: 21	 	Name (Last, First Middle)/Gender: Avocada, Isabelle / Female	Health Card No: 1400000000	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.

Client Warnings			
Add			
Update View Delete			
	Effective From	Effective To	Message
<input type="radio"/>	2017 Oct 26		Client has a significant fear of needles. Allow for extra time during immunizations.
Total: 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.



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

Update Client Warnings
Add to WQ Save Reset log ?

Alerts Active

Client ID: 21

Phone Number: 1-(902)-989-5575(Primary home)

Name(Last, First Middle)/Gender: Avocada, Isabelle / Female

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

Health Card No: 1400000000

Additional ID Type / Additional ID: Provincial health service provider identifier / -

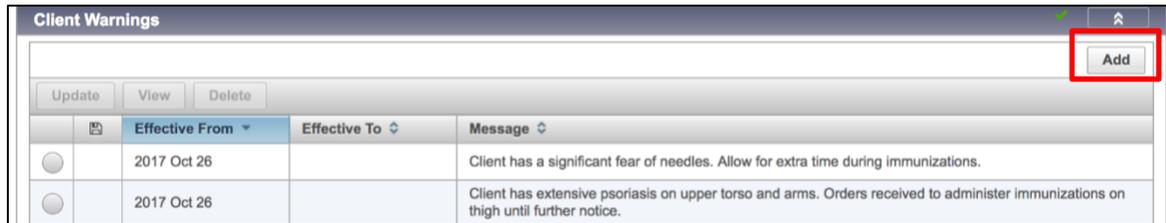
Date of Birth / Age: 2011 May 25 / 6 years 5 months

Client Warnings			
Add			
Update View Delete			
	Effective From	Effective To	Message
<input type="radio"/>	2017 Oct 26		Client has a significant fear of needles. Allow for extra time during immunizations.
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**.



Client Warnings			
	Effective From	Effective To	Message
<input type="radio"/>	2017 Oct 26		Client has a significant fear of needles. Allow for extra time during immunizations.
<input type="radio"/>	2017 Oct 26		Client has extensive psoriasis on upper torso and arms. Orders received to administer immunizations on thigh until further notice.

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**.



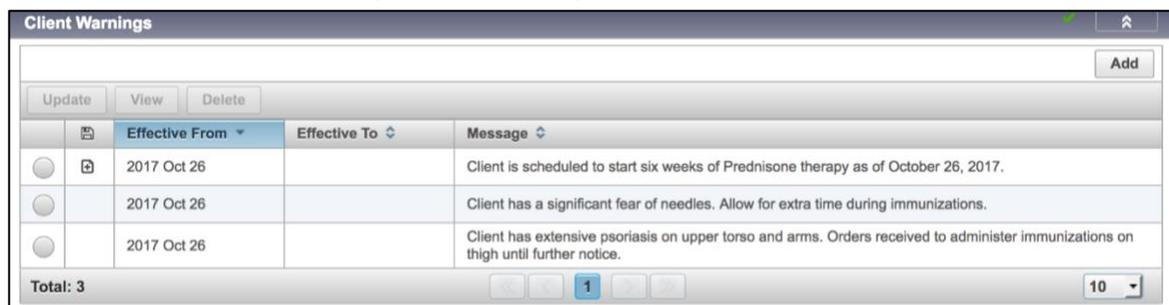
Add Client Warning [Apply] [Reset] [Print] [Close]

Effective From: 2017/10/26 To: yyyy/mm/dd

Message: Client is scheduled to start six weeks of Prednisone therapy as of October 26, 2017. | (165 characters remaining.)

[Apply] [Reset]

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



Client Warnings			
	Effective From	Effective To	Message
<input type="radio"/>	2017 Oct 26		Client is scheduled to start six weeks of Prednisone therapy as of October 26, 2017.
<input type="radio"/>	2017 Oct 26		Client has a significant fear of needles. Allow for extra time during immunizations.
<input type="radio"/>	2017 Oct 26		Client has extensive psoriasis on upper torso and arms. Orders received to administer immunizations on thigh until further notice.

Total: 3 [1] 10

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

Update Client Warnings Add to WQ Save Reset log ?

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) Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority Additional ID Type / A Provincial health serv

Client Warnings Add

Update View Delete

	Effective From	Effective To	Message
<input type="radio"/>	2017 Oct 26		Client is scheduled to start six weeks of Prednisone therapy as of October 26, 2017.
<input type="radio"/>	2017 Oct 26		Client has a significant fear of needles. Allow for extra time during immunizations.
<input type="radio"/>	2017 Oct 26		Client has extensive psoriasis on upper torso and arms. Orders received to administer immunizations on thigh until further notice.

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**.

Client Warnings Add

Update View Delete

	Effective From	Effective To	Message
<input checked="" type="radio"/>	2017 Oct 26		Client is scheduled to start six weeks of Prednisone therapy as of October 26, 2017.
<input type="radio"/>	2017 Oct 26		Client has a significant fear of needles. Allow for extra time during immunizations.
<input type="radio"/>	2017 Oct 26		Client has extensive psoriasis on upper torso and arms. Orders received to administer immunizations on thigh until further notice.

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

Update Client Warning Apply Reset ?

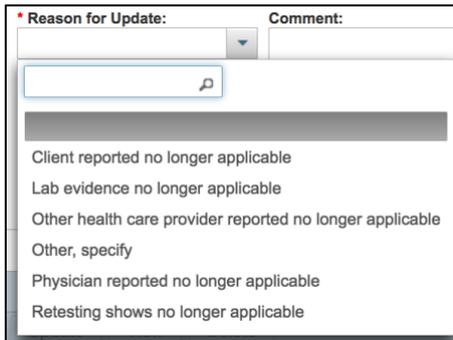
Effective From: 2017/10/26 **To:**

Reason for Update: **Comment:**

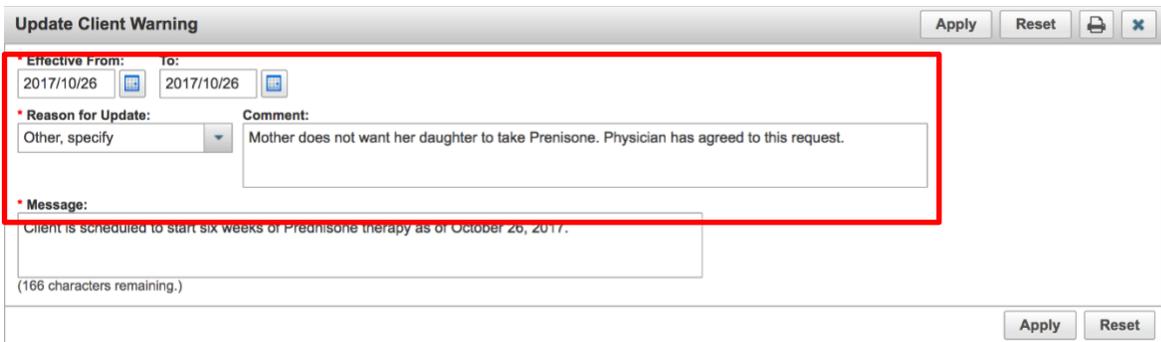
Message:
(166 characters remaining.)

Apply Reset

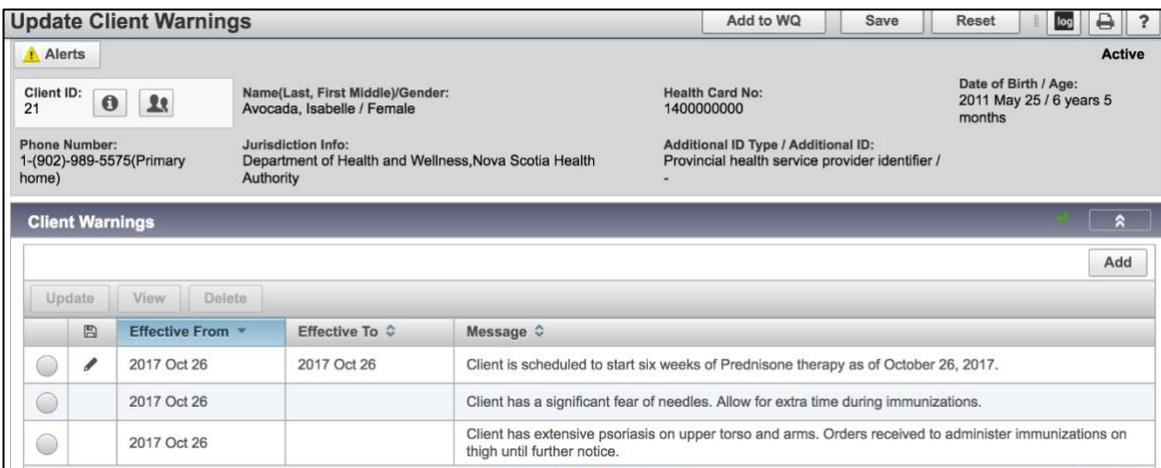
4. Select the Reason for Update from the dropdown menu.



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



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



	Effective From	Effective To	Message
	2017 Oct 26	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.

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

Update Client Warnings [Add to WQ] [Save] [Reset] [log] [Print] [?]

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) Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority Additional ID Type / A Provincial health serv

Client Warnings was successfully updated.

Client Warnings [Add]

	Effective From	Effective To	Message
<input type="checkbox"/>	2017 Oct 26	2017 Oct 26	Client is scheduled to start six weeks of Prednisone therapy as of October 26, 2017.
<input type="checkbox"/>	2017 Oct 26		Client has a significant fear of needles. Allow for extra time during immunizations.
<input type="checkbox"/>	2017 Oct 26		Client has extensive psoriasis on upper torso and arms. Orders received to administer immunizations on thigh until further notice.

Total: 3 [1] [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**.

Client Warnings [Add]

	Effective From	Effective To	Message
<input checked="" type="checkbox"/>	2017 Oct 26		Client is scheduled to start six weeks of Prednisone therapy as of October 26, 2017.
<input type="checkbox"/>	2017 Oct 26		Client has a significant fear of needles. Allow for extra time during immunizations.
<input type="checkbox"/>	2017 Oct 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 [X]

Confirm deletion of: Client is scheduled to start six weeks of Prednisone therapy as of October 26, 2017.

[Confirm]

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

Update Client Warnings Add to WQ **Save** Reset log ?

Alerts Active

Client ID: 21 Name(Last, First Middle)/Gender: Avocada, Isabelle / Female Health Card No: 1400000000 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 / -

Client Warnings Add

Update View Delete

	Effective From	Effective To	Message
<input type="radio"/>	2017 Oct 26	2017 Oct 26	Client is scheduled to start six weeks of Prednisone therapy as of October 26, 2017.
<input type="radio"/>	2017 Oct 26		Client has a significant fear of needles. Allow for extra time during immunizations.
<input type="radio"/>	2017 Oct 26		Client has extensive psoriasis on upper torso and arms. Orders received to administer immunizations on thigh until further notice.

Total: 3 1 10

- 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).

Update Client Warnings Add to WQ Save Reset log ?

Alerts Active

Client ID: 21 Name(Last, First Middle)/Gender: Avocada, Isabelle / Female Health Card No: 1400000000 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 / A: Provincial health serv

Client Warnings was successfully updated.

Client Warnings Add

Update View Delete

	Effective From	Effective To	Message
<input type="radio"/>	2017 Oct 26		Client has a significant fear of needles. Allow for extra time during immunizations.
<input type="radio"/>	2017 Oct 26		Client has extensive psoriasis on upper torso and arms. Orders received to administer immunizations on thigh until further notice.

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.

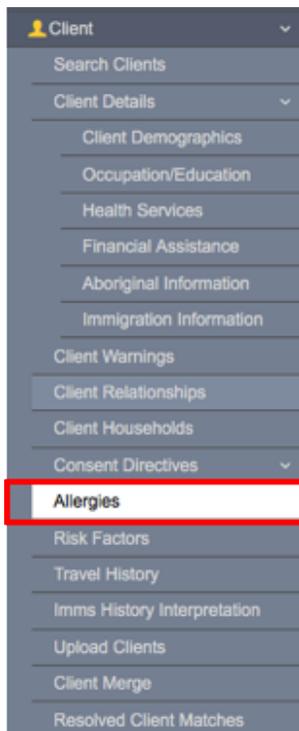
The section includes the following sections:

- 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.

Allergies Add to WQ Set No Known Allergies Save Reset log ?

Alerts Active

Client ID: 33 Name(Last, First Middle)/Gender: Ella, Cinder / Female - Female Health Card No: 1111111104 Date of Birth / Age: 2005 Dec 31 / 11 years 9 months

Phone Number: (-) Jurisdiction Info: Western Zone, Bridgewater Public Health Office Additional ID Type / Additional ID: Provincial health service provider identifier / -

Allergies

Add

Update View Delete

	Allergy	Severity	Reaction	Effective From	Effective To	Client Warnings
	Menjugate (Men-C-C)	Severe (prevents daily activities)	Anaphylaxis	2007 Jan 08		✓

Total: 1 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.

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

Client Alerts Actions X

Client ID: 50 Client Name: Avocada, Allen Health Card Number: 4500000000 Date of Birth / Age: 2012 Jul 17 / 5 years 3 months

Effective From	Effective To	Type	Message	Last Edited By
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

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 log ?

Active

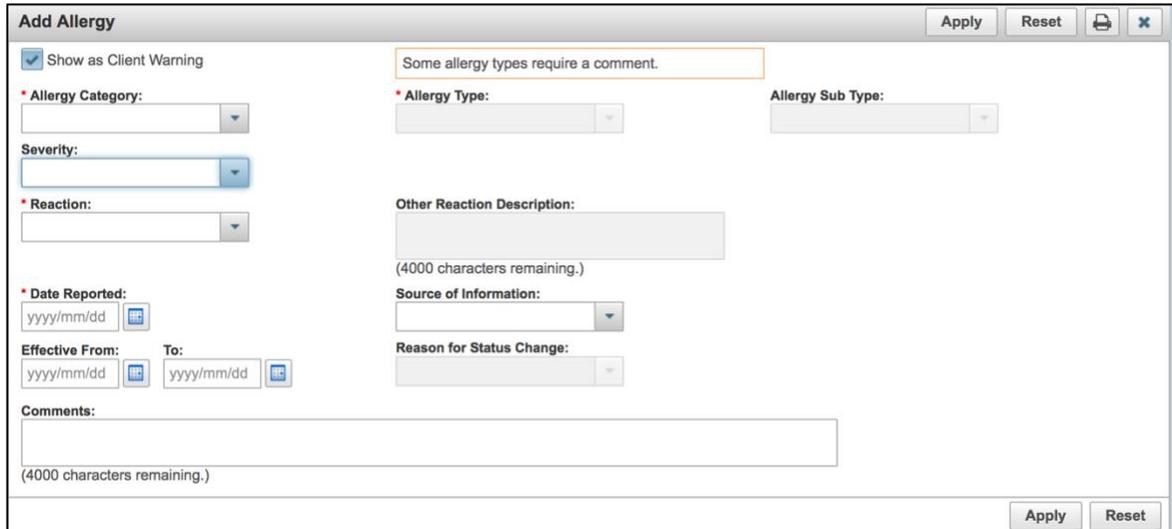
Client ID: 50 Name(Last, First Middle)/Gender: Avocada, Allen / Male Health Card No: 4500000000 Date of Birth / Age: 2012 Jul 17 / 5 years 3 months

Phone Number: 1-(902)-444-5566(Primary home) Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority Additional ID Type / Additional ID: Provincial health service provider identifier / -

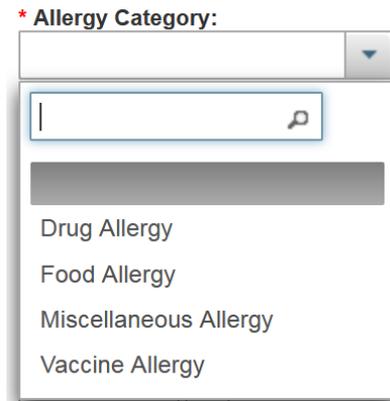
Allergies

There is no data to display Add

- 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.



- Select the **Allergy Category**, from the dropdown menu.



- Select the specific **Allergy Type** from the dropdown menu. The selections will depend on the **Category** selected.
- 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.
- Select the **Severity** from the drop-down menu.

Severity:

- 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

* Reaction:

- Anaphylaxis
- Cardio-vascular reaction
- Gastrointestinal reaction
- Oculo-Respiratory Syndrome (ORS)
- Other
- Respiratory reaction
- Skin/mucosal reaction

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

* Reaction:

* Other Reaction Description:

(4000 characters remaining.)

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

Source of Information:

Parent/guardian

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.

Allergies Add to WQ Set No Known Allergies Save Reset

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 Number: 1-(902)-444-5566(Primary home) Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority Additional ID Type / Additional ID: Provincial health service provider identifier / -

Allergies Add

Update	View	Delete	Allergy	Severity	Reaction	Effective From	Effective To	Client Warnings
			Egg protein	Moderate (interferes with but does not prevent daily activities)	Skin/mucosal reaction	2015 Mar 15		✓

Total: 1

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**.



	Allergy	Severity	Reaction	Effective From	Effective To	Client Warnings
<input checked="" type="radio"/>	Egg protein	Moderate (interferes with but does not prevent daily activities)	Skin/mucosal reaction	2015 Mar 15		✓

Total: 1

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.



	Allergy	Severity	Reaction	Effective From	Effective To	Client Warnings
<input type="radio"/>	Egg protein	Mild (does not interfere with daily activities)	Skin/mucosal reaction	2015 Mar 15		✓



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**.

Alerts **Active**

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: 1-(902)-444-5566 (Primary home) Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority Additional ID Type / Additional ID: Provincial health service provider identifier / -

Allergies Add

Update	View	Delete	Allergy	Severity	Reaction	Effective From	Effective To	Client Warnings
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Acetaminophen (Tylenol)	Mild (does not interfere with daily activities)	Gastrointestinal reaction	2017 May 23		<input checked="" type="checkbox"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Egg protein	Mild (does not interfere with daily activities)	Skin/mucosal reaction	2015 Mar 15		<input checked="" type="checkbox"/>

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 ✕

Select the reason for deletion of: Acetaminophen (Tylenol)

* Reason for Deletion:

Altered decision

Entered in error. Deletion witnessed by (type full name)

Confirmation ✕

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 log print ?

Alerts **Active**

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: 1-(902)-444-5566 (Primary home) Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority Additional ID Type / Additional ID: Provincial health service provider identifier / -

Allergies Add

Update	View	Delete	Allergy	Severity	Reaction	Effective From	Effective To	Client Warnings
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Acetaminophen (Tylenol)	Mild (does not interfere with daily activities)	Gastrointestinal reaction	2017 May 23		<input checked="" type="checkbox"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Egg protein	Mild (does not interfere with daily activities)	Skin/mucosal reaction	2015 Mar 15		<input checked="" type="checkbox"/>

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
log
?

Alerts
Active

Client ID: 50

Phone Number: 1-(902)-444-5566(Primary home)

Name(Last, First Middle)/Gender: Avocada, Allen / Male

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

Health Card No: 4500000000

Additional ID Type / Provincial health ser

Date of Birth / Age: 2012 Jul 17 / 5 years 3 months

Allegies was successfully updated.

Allergies
↑

Add

Update
View
Delete

	Allergy	Severity	Reaction	Effective From	Effective To	Client Warnings
<input type="radio"/>	Egg protein	Mild (does not interfere with daily activities)	Skin/mucosal reaction	2015 Mar 15		✓

Total: 1
1
10