



P16-0371 Panorama Project

Panorama Immunization Management User Manual

PNS MCF 101 - Managing Client Forecasts

Version 1.0

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1 PURPOSE

The purpose of this course is to provide detailed instructions on how to search for clients using pre-defined search criteria. This course is intended for all prospective Panorama users, with a focus on clerical staff. A general understanding of the client immunization profile is required for this course.

As a matter of daily business processes, users will most commonly employ the search functionality contained in the **Basic Client Records Management** and **Mass Immunization** courses. Functionality contained in this course will supplement that content as necessary to support the full spectrum of business needs.

After completing the course, users should be able to:

- Search for clients based on their immunization forecast status
- Create and manage search forecast queries

2 SEARCH CLIENT FORECAST

An important requirement in immunization management is the ability to identify and issue reminders or recall clients to attend either individual or mass immunization events.

The **Search Client Forecast** functionality of Panorama enables users to identify clients who are eligible, due, and/or overdue for selected immunizing agents based on their immunization forecast and additional user-defined demographic parameters for the purposes of creating a cohort (list of clients). This cohort can then be used in a mass immunization event.

The **Search Client Forecast** queries can be saved, so that they can be run multiple times, with the results of each run optionally being saved to a different result set of the cohort associated with the saved query. Some of the different purposes for using **Search Client Forecast** cohorts include:

- To identify clients in need of vaccines as part of regular immunization planning and follow-up
- To identify clients in need of vaccines as part of school immunization clinic preparation
- To identify clients in need during provincial or national campaigns
- To identify clients in need of vaccines as part of an outbreak

Tip: Search Client Forecast

Because **Search Client Forecast** relies on up-to-date information to create accurate client lists, it is important to regularly update information, including Organization and school. The **Search Client Forecast** also enables the following:

- 1 **Cohort Management** to store the lists of clients that meet the criteria whenever the query is run
- 2 **Mass Immunization Events** to allow clients that meet the Search Client Forecast criteria to be used as the client list on a mass immunization event

2.1 Search Client Forecast Components

Search Client Forecast consists of the following elements:

Search Client Forecast Query: To create a client list in Search Client Forecast, a user identifies specific characteristics (also may be referred to as “parameters” or “criteria”) for the report. These parameters include:

- the date clients become eligible/due/overdue for selected vaccines,
- date of birth range,
- immunization status (eligible/due/overdue),
- immunizing agents, and
- either the Jurisdictional Organization or a school/grade.

A user can save the search parameters used to define the client list in a Search Client Forecast Query. This query can be retrieved and re-applied in the future to generate new client lists. The ability to reuse a query allows users to save the time required to define a set of Search Client Forecast criteria, and supports comparison of client lists for the same immunization status criteria over time. Saved Search Client Forecast queries can be copied to a different query name and adjusted as required.

Search Client Forecast Result Set: A Search Client Forecast Result Set contains the clients from the client listing generated using the criteria for the specified Search Client Forecast parameters on a specific date (regardless of whether the query was saved). The Results Set displays a row for each query that meets the criteria, along with a list of all the criteria specified and each of the result sets that have been generated and saved from this query.

From the search results, the user may perform additional functions:

- Select a Search Client Forecast Query, generate, and save the result set against the query.
- Use an existing Search Client Forecast Query as a basis for creating another query
- View the details of the cohort or the Result Sets (client lists) generated from the queries
- Select a Result Set and use it as the client list in a previously created Mass Immunization event

Search Client Forecast Cohort: Panorama uses cohort functionality to store and organize Result Sets. A cohort may contain one or more result sets, each representing a client list created from a Search Client Forecast Query on a particular date.

2.2 Search Client Forecast Outputs

Information from **Search Client Forecast Queries** can be presented in the form of

- a result set – a simple list of client names with basic demographic information; does not contain information about any report criteria (vaccine, name of organization, age group, immunizing agents); can be saved in Panorama (in a

cohort) or outside of Panorama in Excel (can be edited) or in pdf (cannot be edited) format

- a client listing – a list of client names with dates of birth and phone numbers, provides a breakdown of vaccines each client in the report is due/overdue for, can be printed, but cannot be saved in or outside of Panorama
- a report – a list of client names with basic demographic information and school information (if available) with the report criteria in the top of the report; does not provide a breakdown of what immunizing agents each client is due/overdue for; can be saved outside of Panorama in pdf format (cannot be edited)

2.3 Create a New Query Search

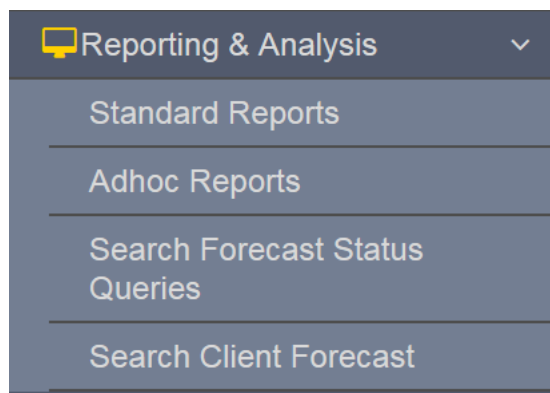
To generate a **Reminder Recall Client List** report, a user will need to:

1. Create a new **Search Client Forecast Query** or apply an existing **Search Client Forecast Query** (out of scope for this document)
2. Generate a client list based on the query
3. Save a new **Search Client Forecast Query** for future use
4. Save a **Cohort Client List** and run a report

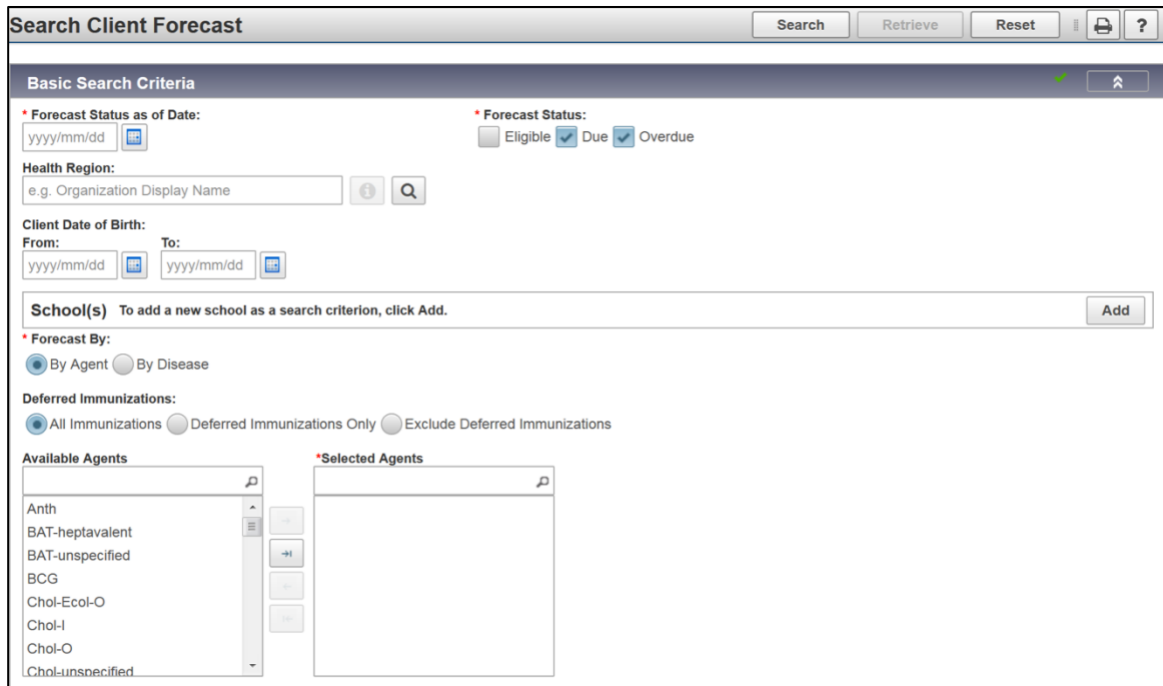
Creating a forecast query can be the start of the process to generate a client list for a mass immunization campaign.

The steps below detail the process for creating a new search:

1. Start at the **Left-Hand Navigation** menu and select **Search Client Forecast** from the **Reporting & Analytics** section.




2. The **Search Client Forecast** screen is displayed. Enter the basic search criteria to guide the search process.



3. The **Forecast Status as of Date** is a field where users can enter the current date or another specific date. This instructs Panorama to search for clients whose Forecast status matches the desired status on this specific date.

*** Forecast Status as of Date:**

4. The **Forecast Status** indicates the three possible types of Forecast Status. Ensure that **Due** and **Overdue** checkboxes are checked. Users will typically not search for clients with an Eligible Status.

*** Forecast Status:**

☐ Eligible ☒ Due ☒ Overdue

The three types of Forecast Status refer to:

- **Eligible:** A client will be included in a Search Client Forecast report if they are (or will become) eligible for an agent before or on the selected Reminder/Recall date.
- **Due:** A client will be included in a Search Client Forecast report if they are (or will become) due for an agent before or on the selected Reminder/Recall date.
- **Overdue:** A client will be included in a Search Client Forecast report if they are (or will become) overdue for an agent before or on the selected Reminder/Recall date.



Tip: Exempted and Contraindicated Clients

Clients with active exemptions or active contraindications will not be forecasted for antigens associated with the exemptions/contraindications, and therefore will not be included in the Reminder Recall Client List report.

5. Enter the range for the **Client Date of Birth** either manually or using the calendar icon.

Client Date of Birth:

From:  **To:** 



Tip: Birth Dates Range

When using the date of birth range to determine the age of a specific group, think of locating all clients born between today less the number of years corresponding to the age, and clients who will be moving to the next age group tomorrow, but are still your required client's age today. E.g., when creating a report for clients who are fourteen, you need to find all clients between fourteen years of age and fifteen years of age. This will include clients who are exactly fourteen today and will become fifteen tomorrow, but are still fourteen today, and in-between.

In the **From date** field, enter the date of birth that equals the current date less the number of years corresponding to the age one year older than your desired age and extend by one day. This will get all the clients who are one day younger than the maximum age threshold for this group, e.g., will become fifteen tomorrow, but are still fourteen today.

In the **To Date** field, enter the date of birth that equals the current date less the number of years corresponding to the age. This will get all the clients who are exactly the age you require.

The date of birth range fields cannot be set to a future date. This means if you want to find out what clients will be due for in the future, you will set the date of birth range to reflect their current age, and will set the **Forecast Status As Of Date** to the future.

6. If the Search Client Forecast is related to school age children, enter the School information by clicking **Add**.

School(s) To add a new school as a search criterion, click Add. Add

7. The **Add School Search Criteria** screen will appear. Slowly type the first few letters of the school, and Panorama will display matching options in the dropdown menu. Click on the desired school to select.

8. Enter the **School Year** and **Grade** from the dropdown menus. Enter the **Class** manually.



Tip: School Year Not Specified

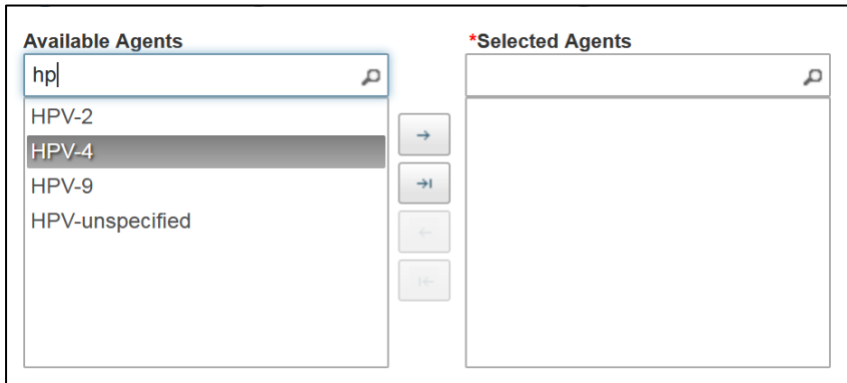
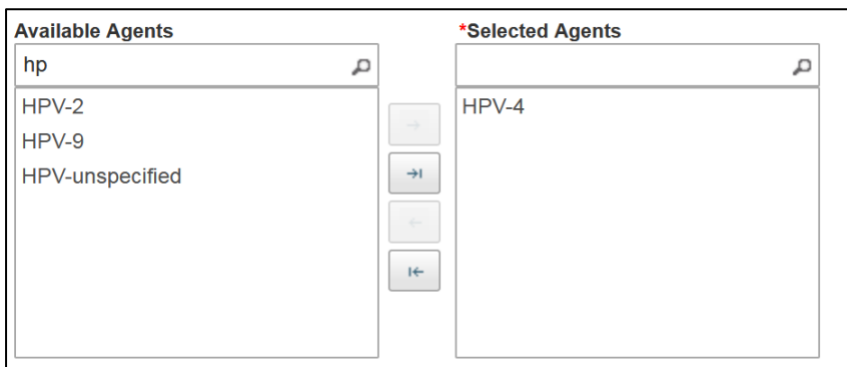
If a School Year wasn't selected, then you must specify the clients' date of birth range.

9. Users can decide to search for **Deferred Immunizations** or **All Immunizations**. Most times, users will search for All Immunizations. Click on the round radio button to select the desired option.

Deferred Immunizations:

☒ All Immunizations
 ☐ Deferred Immunizations Only
 ☐ Exclude Deferred Immunizations

10. Select the agents/antigens that will be administered from the **Available Agents**. Click on the desired agent and click the right pointing arrow to select it as one of the search vaccines. To remove an agent, simply select the specific agent in the Selected Agents column and click on the left pointing arrow.

11. Click **Search**. The Search Results will be displayed in a summary table.

Search Results				
Preview View Imms Profile Generate Letters Save Cohort and Client List				
<input type="checkbox"/>	Client Name ▲	Date of Birth ⇅	Preferred Phone Number ⇅	Agents ⇅
<input type="checkbox"/>	Charming, Prince	2005 Apr 01		HPV-4
<input type="checkbox"/>	White, Snow	2005 May 14		HPV-4

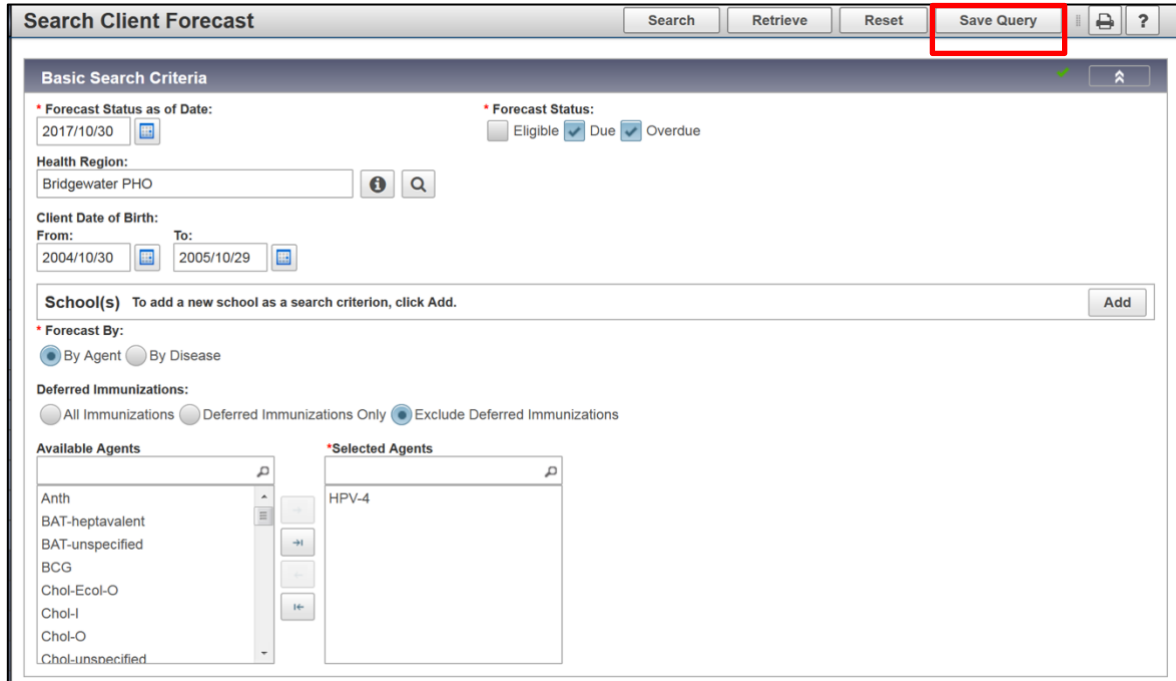
Total: 2

1 25

2.4 Save and Reuse Query Searches

When the user has completed creating a Search Client Forecast Query, it may be reused in the future to generate client lists. This is also required for report generation.

1. Follow the steps outlined above to create a new Search Client Forecast Query.
2. Click on **Save Query**. This will allow the user to reuse this query in future to generate lists for participation in immunization events.



Search Client Forecast

Search Retrieve Reset **Save Query** [Print] [Help]

Basic Search Criteria

* Forecast Status as of Date: 2017/10/30 [Calendar]

* Forecast Status: ☐ Eligible ☒ Due ☒ Overdue

Health Region: Bridgewater PHO [Info] [Search]

Client Date of Birth: From: 2004/10/30 [Calendar] To: 2005/10/29 [Calendar]

School(s) To add a new school as a search criterion, click Add. [Add]

* Forecast By: ☒ By Agent ☐ By Disease

Deferred Immunizations: ☐ All Immunizations ☐ Deferred Immunizations Only ☒ Exclude Deferred Immunizations

Available Agents

- Anth
- BAT-heptavalent
- BAT-unspecified
- BCG
- Chol-Ecol-O
- Chol-I
- Chol-O
- Chol-unspecified

***Selected Agents**

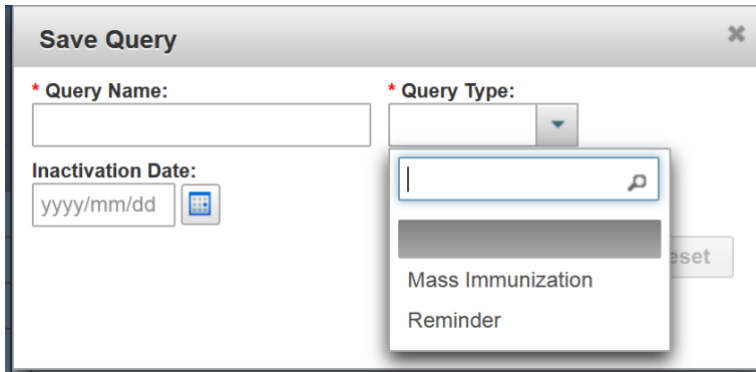
- HPV-4



Tip: Save Query

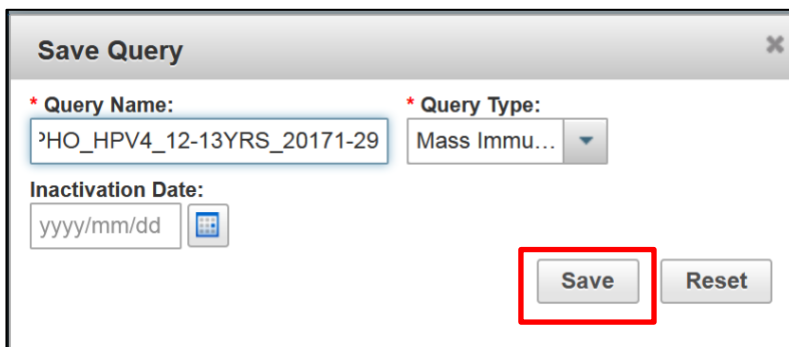
Save Query will only appear after search results are retrieved.

3. Type in a **Query Name**. It is highly recommended to use consistent naming conventions when creating queries to enable easy search and retrieval. Follow recommended NS SOP guidelines to name the Search Client Forecast Queries.
 - a. The first element of the query name should equal the health facility name – e.g., ABC School Board or Bridgewater PHO.
 - b. The second element of the query should equal the name of the immunizing agent/agents used to define a query – e.g., DTaP-IPV-Hib, HB, HPV-4-, etc.
 - c. The third element should indicate the age group – e.g., 1 YR, 10-12 YRS, 18 MOS, etc.
 - d. The fourth element should be equal to the date of the query generation in YYYYMMDD format – e.g., 20170220.



The 'Save Query' dialog box is shown with the 'Query Type' dropdown menu open. The menu lists 'Mass Immunization' and 'Reminder'. The 'Query Name' field is empty, and the 'Inactivation Date' field shows 'yyyy/mm/dd' with a calendar icon.

4. Select a **Query Type** from the dropdown menu.
 - Mass Immunization may reflect a school campaign, a national campaign, or any other type of mass immunization event (such as occupational health campaigns).
 - Reminder reflects a distinct but related process of reminding clients generated in the query process of an appointment.
5. The **Inactivation Date** field is optional and is the date on which the query should be inactivated. Click **Save**.



The 'Save Query' dialog box is shown with the 'Query Name' field filled with 'HO_HP4_12-13YRS_20171-29' and the 'Query Type' dropdown set to 'Mass Immu...'. The 'Inactivation Date' field shows 'yyyy/mm/dd' with a calendar icon. The 'Save' button is highlighted with a red rectangle.

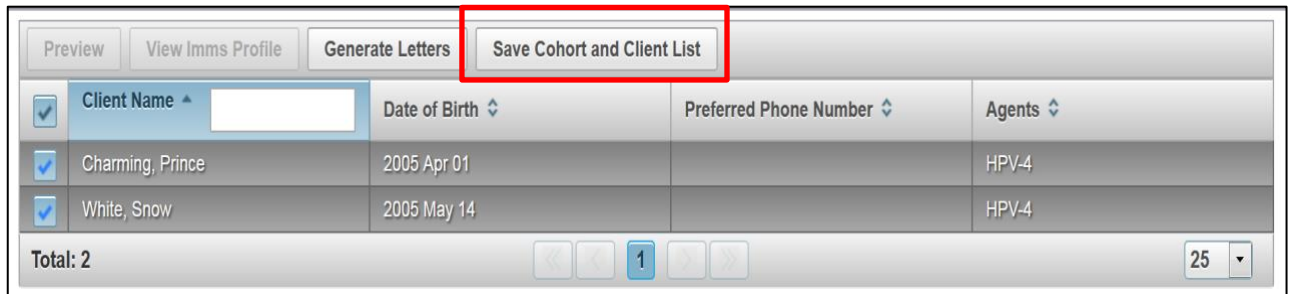
6. Panorama will display a confirmation message indicating the query was successfully saved.



2.5 Save Cohort and Client List

To run reports and perform other functions (such as link to Mass Immunizations), the list of clients generated in the Query process must be saved.

1. At the bottom of the Search Client Forecast Query, the Search Results are displayed.
2. Click on the checkbox next to the appropriate clients.
3. Click on **Save Cohort and Client List**.



<input checked="" type="checkbox"/>	Client Name	Date of Birth	Preferred Phone Number	Agents
<input checked="" type="checkbox"/>	Charming, Prince	2005 Apr 01		HPV-4
<input checked="" type="checkbox"/>	White, Snow	2005 May 14		HPV-4

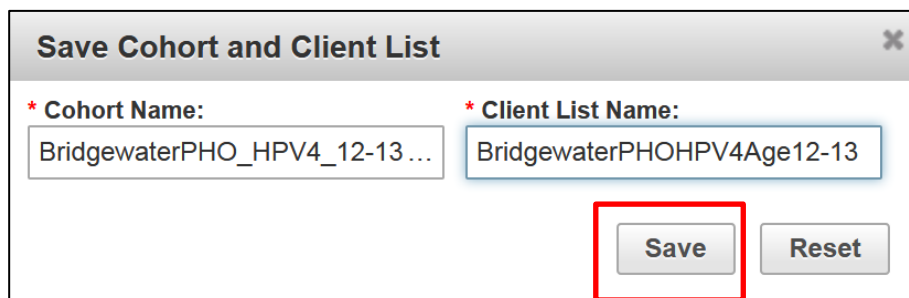
Total: 2



Tip: Select All

Click on the checkbox beside the top of the Client Name column to select all clients, and several options will become active. Click on the checkbox beside any individual name to deselect a client and exclude them from the saved list and reports. Such exclusions can be based on professional judgement or personal knowledge (such as knowing that a client has moved from Nova Scotia and is residing in another province or country).

4. Panorama will display a prompt, requiring the user to enter a **Cohort Name** and **Client List Name**. It is highly recommended to use consistent naming conventions according to NS SOP guidelines when naming cohorts to enable easy search and retrieval. Click **Save**.



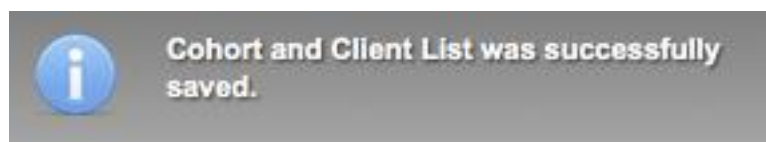
Save Cohort and Client List

* Cohort Name: BridgewaterPHO_HP4_12-13...

* Client List Name: BridgewaterPHOHPV4Age12-13

Save **Reset**

5. Panorama will display a confirmation message indicating the cohort and Client List was successfully saved.



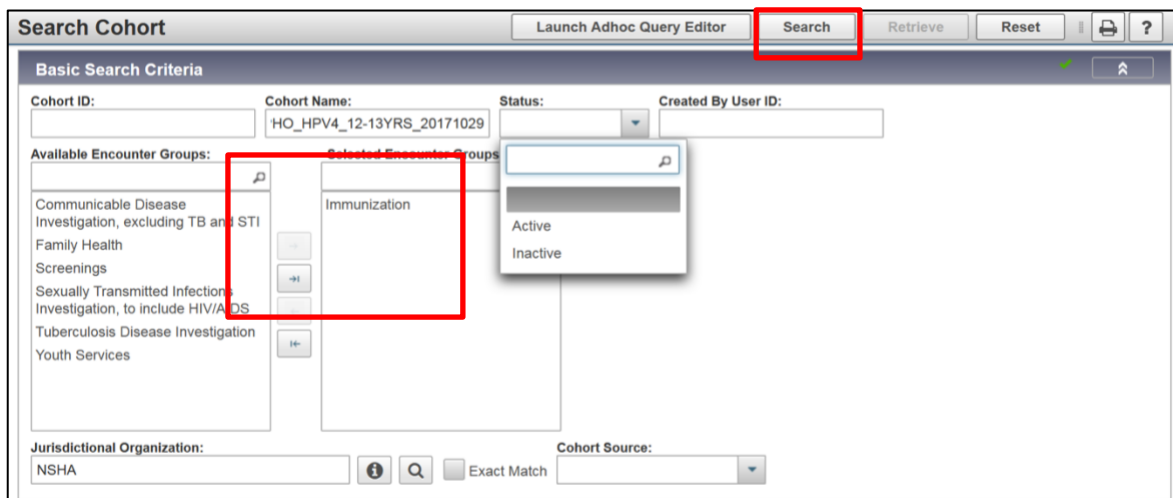
2.6 View and Print Cohort and List Name

Once the list of clients has been saved as a Cohort, as outlined above, users can access the Cohort for various purposes.


1. Start at the **Left-Hand Navigation** and open the section on Cohorts. Select **Search Cohorts**.




2. The **Search Cohort** screen will appear. Enter the **Cohort Name** and **Status**. Status should be Active.
3. Select Immunization in the **Available Encounter Groups** and click on the right pointing arrow to add Immunization to the Selected Encounter Groups. Click **Search**.



4. The Search Results will be displayed at the bottom of the page. Click on the triangular button beside the desired Cohort and then select **View**.



	Cohort ID	Cohort Name	Created On	Created By	Cohort Type	Status	Effective From	Effective To	Client Lists
	16	Bridgewater...	2017 Oct 29	Panorama, Tester	Static	Active	2017 Oct 29		1

Total: 1

5. Panorama will display the Client list in a summary table. Click the radio button and View Client List. The Client List will appear presenting the clients contained therein.

Client Lists ✓ [↑](#)

Update Client List

View Client List

Upload Client Data File

Upload Client ID List

	Client List ID ▲	Client List Name ▲	Number of Clients ▲	Created On ▲	Created By ▲
<input type="radio"/>	15	BridgewaterPHOHPV4Age...	2	2017 Oct 29	Panorama, Tester

Total: 1

◀

◁

1

▷

▶

10 ▼

6. Once the Client List is displayed, users can simply click on the printer icon at the top of the page to print the list.

