**P16-0371 Panorama Project**

**Panorama Investigation Management
User Manual**

**PNS IOM 105 Communication Log &
Document Management**

Version 1.0

Dated: 2018-10-17

# TABLE OF CONTENTS

# 1  COMMUNICATIONS LOG

Panorama's Communication Log functionality will be used for standard intake calls (e.g. someone called about where to get a flu shot, is concerned over news item related to outbreak etc.). How this functionality will be used will be based on operational needs and the desire to collect statistics on the types of calls received.

The Communication Log is a permanent record of communications received and information provided at a point in time.

**Note**: Personal Health Information is **not** to be recorded through a Communication Event. Clinical notes should be used to document client specific information.

**Note**: Communication Log **should never** be used with an investigation in context.

**To view the Communications Log**

1.  Go to the Left Hand Navigation Bar.
2.  Select **Communications Log**.



The **Communication Log** screen is displayed. From this screen a user can search for existing communication log entries or create a new entry.

## 1.1 Search for a Communication Event

1. Enter criteria for the search.

2. Use the EFC to select a Jurisdictional Organization if desired. This field defaults to the user's organization.

3. Click **Search** button.

The system displays the results that match the selected criteria.

**Note**: A message will be displayed if too many or no matching events are found. Modify the search criteria and complete the search again.

💡 **Tip**: Click **Retrieve** button to populate search with the criteria selected the last time a search was performed during the current Panorama session.

💡 **Tip**: Click **Clear** button to clear search criteria and return any default values.

Click **Plus** icon next to an event to view the comments associated with the event.

To see all comments, click **Expand All** button.

To hide all comments, click **Collapse All** button

## 1.2   Create a Communication Event

A Communication Event may be created with a Client in context or without.

**Note**: Personal Health Information is **not** to be recorded through a Communication Event. Clinical notes should be used to document client specific information.

 **Tip**: Communication Events created **with** a Client in context can be viewed both in the Communication Log and in the Communications Log section below the Clinical Notes screen.

**Remove a Client from context**

1. Click Remove Client from Context hyperlink located in the Context Header section.



The Client will be removed from context and the Communications Log screen displayed.

**Create a Communications Event**

1. Click **Create** button.

The **Create Communication Event** screen is displayed.

**Date and Time fields** default to the current date/time.

**Organization** defaults to the user's organization.

2. Select **Direction** (refers to the direction of the communication).
3. Update **Organization** if necessary using the EFC.
4. Complete **Client Search** if a client is to be put into context; or
5. Complete **Client Information** section

**Note**: **First Name** is the only Panorama mandatory field in the Client Information section. Users could indicate a dummy value, or "Anonymous" or add "Physician – GO", "Pharmacist – NP.

6.  Select **Communication Type**, **Topic** and **Outcome(s)**
7.  Enter **Title**
8.  Enter **Comments** and click **Add** button.
9.  Click **Save** button.

**Communication Details**                                     ⌃ Hide Communications Details

\* **Communication Type:**   \* **Topic:**          **Outcome(s):**
Phone Call  ▾              Appointments  ▾      Assigned Task for Follow Up
                                               Client Appointment
                                               Follow Up Required
                                               No Follow Up Required

**Title (Description of communication):**
Appointment Reminder

**Comments:**
Called to remind client of counseling appointment. Left message on voice mail.

                                               (3922 characters)    **Add**

| Date/Time | Comments | Recorded By |
|-----------|----------|-------------|

                                               **Save**   **Clear**   **Cancel**

The system creates the communication event and displays the **Communication Event Details** screen.

## Communication Event Details                              ⓘ  🖨

**Communication Event Details**

Communication Event was successfully created.

Central Zone  ▾   **Assign Task**   **Save**         ▾   **Delete**   **Cancel**

**Event Details**                                            ⌃ Hide Event Details

| Event Date: | Event Time: | Direction: | Logged By: | Date / Time Created: |
|-------------|-------------|------------|------------|----------------------|
| 2018 Aug 15 | 10:38:00 ADT | Outbound | MacKirdy, Susan | 2018 Aug 15 10:58:12 ADT |

**Jurisdictional Organization:**
*To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.*

Organization: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > [Nova Scotia Health Authority]    **Find** 🔍

**Client Information**                                       ⌃ Hide Person Details

**Last Name:**                              **First Name:**
                                            Olivia

**Phone Number:**                           **Email Address:**

**Communication Details**                                    ⌃ Hide Communications Details

**Communication Type:**        **Topic:**           **Outcome(s):**
Phone Call                     Appointments         Client Appointment

**Title (Description of communication):**           **Assigned To:**
Appointment Reminder

**Comments:**

💡 **Tip:** Unsaved changes can be cancelled and the user returned to the previous screen by clicking the **Cancel** button.

## 1.3 View/update a Communication Event

1. Click the communication **Event Date/Time** hyperlink.

The **Communication Event Details** screen is displayed.
The Communication Event Details screen allows a user to update details about an existing event. Because this is a permanent record, the user will only be able to add comments, attach documents, assign a task, or delete the Communication Event.

### Communication Event Details

ACTIVE

| Client ID: 204 | Name(Last, First Middle)/Gender: Grape, Green / Male | Health Card No: - | Date of Birth / Age: 1988 Jul 01 / 30 years |
| Phone Number: -(-) | Jurisdiction Info: Department of Health and Wellness,Nova Scotia Health Authority | Additional ID Type / Additional ID: Provincial health service provider identifier / - | |

**Communication Event Details**

[Central Zone ▾] [Assign Task] [Save] [ ▾] [Delete] [Cancel]

**Event Details**    ⌃ Hide Event Details

| Event Date: 2018 Aug 14 | Event Time: 10:42:00 ADT | Direction: Outbound | Logged By: MacKirdy, Susan | Date / Time Created: 2018 Aug 14 10:43:44 ADT |

**Jurisdictional Organization:**
*To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.*

Organization: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > [Nova Scotia Health Authority]    [Find 🔍]

**Client Information**    ⌃ Hide Person Details

| Last Name: Grape | First Name: Green |
| Phone Number: | Email Address: |

**Communication Details**                                          ⌃ Hide Communications Details

| Communication Type: | Topic: | Outcome(s): |
|---|---|---|
| Phone Call | Appointments | |

**Title (Description of communication):**                          **Assigned To:**
Appointment Reminder

**Comments:**

(4000 characters)   [Add]

| Date/Time | Comments | Recorded By |
|---|---|---|
| 2018 Aug 14 10:43:28 ADT | Called to remind of scheduled counseling session. Message left on voice mail | MacKirdy, Susan |

**Documents**                                                        ⌃ Hide Documents

Documents Attached                                    [Manage Documents]

| Document Title | Created Date |
|---|---|
| | |

[Central Zone ▼] [Assign Task] [Save] [▼] [Delete] [Cancel]

If an existing client record is linked to the event, the **First** name will be hyperlinked.

Click the **hyperlink** to view a read-only version of the View Client Screen.

**Client Information**                                               ⌃ Hide Person Details

| Last Name: | First Name: |
|---|---|
| Grape | Green |

| Phone Number: | Email Address: |
|---|---|
| | |

**To enter a new comment**

1. Enter a new comment in the **Comments** field.
2. Click **Add** button. The system records today's date and the user's name. The comment is displayed above the previously recorded comments.

## Communication Details

**Communication Type:**
Phone Call

**Topic:**
Appointments

**Outcome(s):**

**Title (Description of communication):**
Appointment Reminder

**Assigned To:**
Central Zone

**Comments:**

(4000 characters) | Add

| Date/Time | Comments | Recorded By |
|---|---|---|
| 2018 Aug 14 11:39:52 ADT | Client missed scheduled appointment | MacKirdy, Susan |
| 2018 Aug 14 10:43:28 ADT | Called to remind of scheduled counseling session. Message left on voice mail | MacKirdy, Susan |

3. Click **Save** button



## Communication Details

**Communication Type:**
Phone Call

**Topic:**
Appointments

**Outcome(s):**

**Title (Description of communication):**
Appointment Reminder

**Assigned To:**
Central Zone

**Comments:**

(4000 characters) | Add

| Date/Time | Comments | Recorded By |
|---|---|---|
| 2018 Aug 14 11:39:52 ADT | Client missed scheduled appointment | MacKirdy, Susan |
| 2018 Aug 14 10:43:28 ADT | Called to remind of scheduled counseling session. Message left on voice mail | MacKirdy, Susan |

## Documents

Documents Attached | Manage Documents

| Document Title | Created Date |
|---|---|
| | |

Central Zone ⌄ | Assign Task | Save | ⌄ | Delete | Cancel

The system responds with a message that the event was successfully updated.

**Tip:** Unsaved changes can be cancelled and the user returned to the previous screen by clicking the **Cancel** button.

# Communication Event Details

ⓘ 🖨

**ACTIVE**

| Client ID:<br>204 | Name(Last, First Middle)/Gender:<br>Grape, Green / Male | Health Card No:<br>- | Date of Birth / Age:<br>1988 Jul 01 / 30 years |
|---|---|---|---|
| Phone<br>Number:<br>-(-) | Jurisdiction Info:<br>Department of Health and Wellness,Nova<br>Scotia Health Authority | Additional ID Type /<br>Additional ID:<br>Provincial health service<br>provider identifier / - | |

**Communication Event Details**

Communication Event was successfully updated.

---

**Attach a Document**

1. Click **Manage Documents** button.

---

**Documents**                                                              ⌃ Hide Documents

| Documents Attached | Manage Documents |
|---|---|
| **Document Title** | **Created Date** |
| | |

[ Central Zone ▾ ] [ Assign Task ] [ Save ] [              ▾ ] [ Delete ] [ Cancel ]

---

The Context Document screen is displayed.

2. Search for an existing document by entering a **Keyword** and clicking the **Search** button; or

3. Click **Add New** button to add a new document.

## Context Documents



The **Document Management** Screen is displayed.

4. Browse for the applicable document.
5. Click **Upload File** button.
6. Enter **Document Title**.

## Document Management

### Add New Document

✗ Upload file before submitting changes

\* File name: \\Fs30\usr-home\mackirds    Browse...    **Upload File**
File uploaded:

Selected Document:

\* Document Title:

Test Document                                    ×

\* Effective Date:    2018 / 08 / 14        Expiration Date:    ___ / ___ / ___
                     yyyy  mm  dd                                yyyy  mm  dd

Status: \* active ▾

                                                    Use CTRL key for multiple selections.

Enter Keyword:    _____    Add
                                Remove        Selected Keywords:

Description:
_____

Document Added by :   MacKirdy, Susan      on :   2018 Aug 14

Submit    Clear    Cancel

7.  Click **Submit** button.

**Document Management**

**Add New Document**

* File name: _____ Browse... **Upload File**
File uploaded: **Test File.docx**

Selected Document:
* Document Title:

Test Document

* Effective Date: | 2018 | / | 08 | / | 14 |     Expiration Date: | ____ | / | ____ | / | ____ |
yyyy     mm     dd                                              yyyy     mm     dd

Status: * | active          v |

                                          Use CTRL key for multiple selections.

Enter Keyword: _____  **Add**      Selected Keywords:
                            **Remove**

Description:
_____

Document Added by : MacKirdy, Susan    on : 2018 Aug 14

**Submit** | Clear | Cancel

The document is added to the Document List.

8.  Select the document.
9.  Click **Select and Return** button.

**Document List**                                          ⌃ Hide Document List

Row Actions: | Delete | **Select and Return** |                          **Add New**

| ☑ | Document Title ▲ | Size [KB] ▼ | Type | Posted By ▼ | Posted On ▼ | Description ▼ | Status |
|---|---|---|---|---|---|---|---|
| ☑ | Test Document | 11.61 | VND.OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT | MacKirdy, Susan | 2018 Aug 14 | | active |

Total: 1 | ⏮ ◄ Page 1 of 1 ► ⏭ | Jump to page: ____ ➡

The document is added to the Communication Event.

## Assigning a Task

1. Select the workgroup from the drop down at the **top** or **bottom** of the screen and click the **Assign Task** button.



The system creates a task using the Communication Event Title for the Task Description. The task is assigned to the selected workgroup as "Pending" and is linked directly to this communication event.

## 1.4 Delete a Communication Event

1. Select/open the Communication Event to be deleted by clicking the **Event Date/Time** hyperlink.

| | Event Date/Time ▼ | Direction ▼ | Logged By ▼ | Client Information ▼ | Comm Type ▼ | Topic ▼ | Title ▼ | Documents |
|---|---|---|---|---|---|---|---|---|
| ⊕ | 2018 Aug 14 13:17 ADT | Inbound | McClarty, Erin | ekmtest, client 2 | Phone Call | Enteric Symptoms | Sam has a bad tummy | |
| ⊕ | 2018 Aug 14 13:15 ADT | Inbound | McClarty, Erin | Sam | Phone Call | Enteric Symptoms | Enteric Symtoms - maybe something | |
| ⊕ | 2018 Aug 14 12:58 ADT | Inbound | McClarty, Erin | ekmtest, test | Phone Call | Appointments | Looking for this | |
| ⊕ | 2018 Aug 14 10:42 ADT | Outbound | MacKirdy, Susan | Grape, Green | Phone Call | Appointments | Appointment Reminder | Test Document |
| ⊕ | 2018 Aug 14 10:29 ADT | Inbound | MacKirdy, Susan | Sam | Phone Call | Enteric Symptoms | General question regarding stomach | |

Total: 5    |◄ ◄ Page 1 of 1 ► ►|        Jump to page: [ ] →

2. Select the **Reason for Deletion** from the drop down.
3. Click the **Delete** button.

---

**Documents**                 ⌃ Hide Documents

Documents Attached                 [ Manage Documents ]

| Document Title | Created Date |
|---|---|
| | |

Central Zone [▼]   [ Assign Task ]   [ Save ]    [ ▼ ]   [ Delete ]   [ Cancel ]

---

The system prompts the user to confirm.

The communication event is deleted and the **Communication Log** screen is displayed.
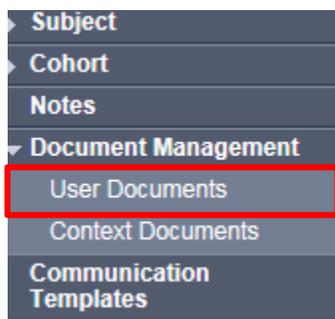
# 2  USER DOCUMENTS

The User Documents screen supports the management of documents not directly associated to system records (i.e. context documents). The screen displays a user's personal folder and a user can add, view or delete documents in their personal folder, any folders created by the user, and some workgroup folders.

Files located in the user's folder are displayed in the document list at the bottom of the screen.

## 2.1  User Documents Screen

To access the User Documents screen

1. Go to the Left-Hand Navigation menu.

2. Under the Document Management section, select **User Documents**.



The **User Documents** screen is displayed..

## 2.2 Documents Folder - Tree View

### 2.2.1 Create New Folder

1. Select the Folder under which the new folder will be created.

The system **bolds** the folder name.

2. Click **Create New Folder** button.

3. The **Create New Folder** modal is displayed.

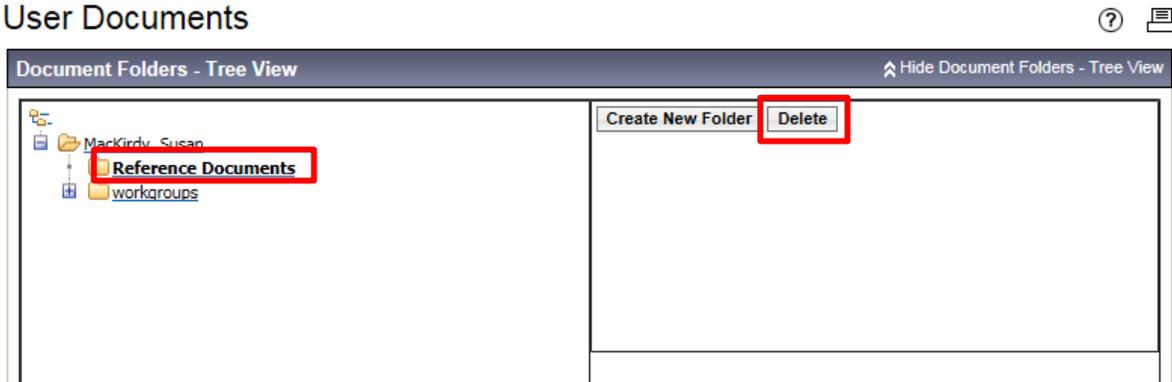4. Enter **New Folder Name**

5. Click **Create** button.



The system creates the new folder.

### *2.2.2 Delete Folder*

1. Select the Folder to be deleted.

The system **bolds** the folder name.

2. Click **Delete** button.



The system deletes the selected folder.

## 2.3   Search User Documents

1. In the **Document Folders - Tree View section**, click the **+ icon** beside each folder to expand the folder structure.

2. Select a folder.

The Selected Folder field name is shown in the Search Documents Folders - Basic section. All documents within the selected folder are displayed in the Document List section.

3. To narrow the search, enter keyword(s) in the **Search Documents by Keyword** field.

💡 **Tip**: Using the **Search Document by Keyword** field is dependent on keywords being identified by the user when adding a new document.

4. Click **Search** button.

   Documents matching the keyword search are shown in the Document List section.

💡 **Tip**: Enter single words separated by a space. For example, 'dog cat' will retrieve all documents that contain the word 'dog' or 'cat'.

5. Optionally check the **Include Histor**y checkbox to include previous versions of the document in the search.
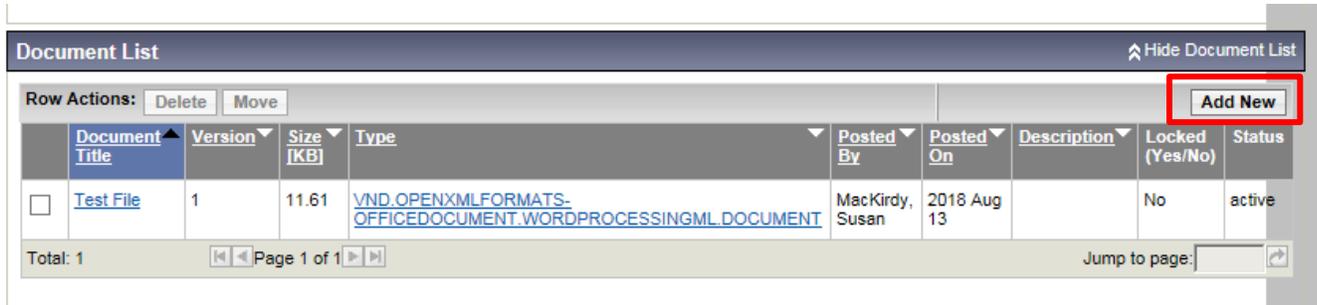
💡 **Tip**: To retrieve search criteria, click **Retrieve** button. The screen is updated with the search criteria last entered/selected the last time the user performed a search for the current Panorama session.

💡 **Tip**: To clear search criteria, click **Clear** button.

## 2.4 Add User Document

To add a new user document

1. Click **Add New** button



The Document Management screen is displayed.

2. Click **Browse** button to search for the applicable document.
3. Click **Upload File** button.
4. Enter **Document Title**.
5. Update **Effective Date** if required. Default is current date.
6. Add **Expiration Date** if required.
7. Change **Status** if necessary. Default is "active".
8. If desired, enter **Keyword**(s) to assist with searches. Click **Add** button.
9. Add **Description**
10. Enter **Comments** if desired.
11. Click **Submit** button.

The document is added to the **Document List**.

### 2.4.1 Open User Document

1. Click **Document Title** hyperlink.

### *2.4.2   Move User Document*

1.  Select document from **Document List**.

2.  Click **Move** button.
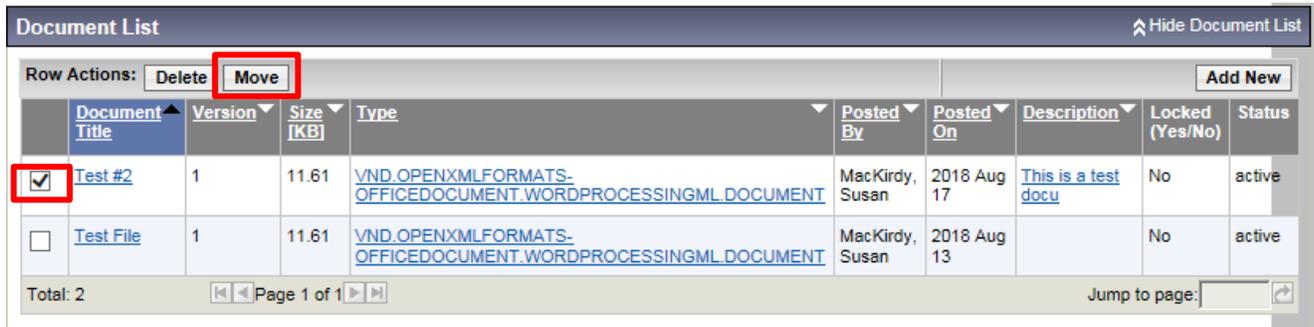
| Document List | | | | | | | | | ☆ Hide Document List |
|---|---|---|---|---|---|---|---|---|---|
| Row Actions: | Delete | Move | | | | | | | Add New |

| | Document Title | Version | Size [KB] | Type | Posted By | Posted On | Description | Locked (Yes/No) | Status |
|---|---|---|---|---|---|---|---|---|---|
| ☑ | Test #2 | 1 | 11.61 | VND.OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT | MacKirdy, Susan | 2018 Aug 17 | This is a test docu | No | active |
| ☐ | Test File | 1 | 11.61 | VND.OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT | MacKirdy, Susan | 2018 Aug 13 | | No | active |
| Total: 2 | | |◀ Page 1 of 1 ▶|▶| | | | | Jump to page: | |

The Move Document modal is displayed,

3.  Click **Folder** name to which the document will be moved.

4.  Click **Move** button.

## Document Management
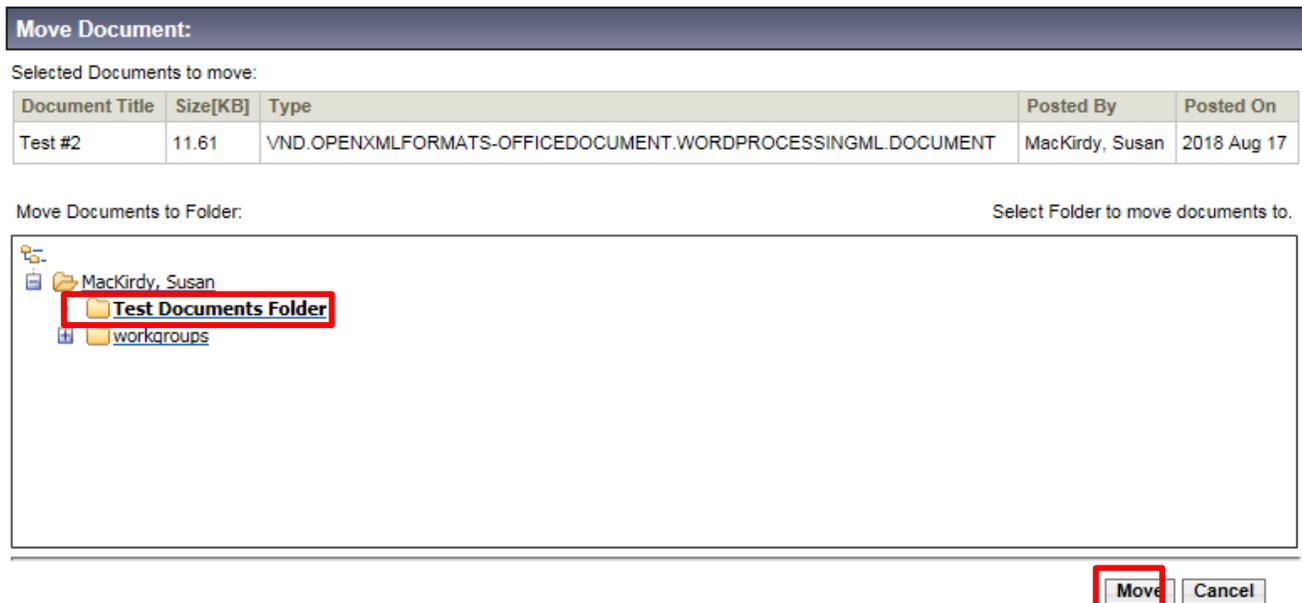
**Move Document:**

Selected Documents to move:

| Document Title | Size[KB] | Type | Posted By | Posted On |
|---|---|---|---|---|
| Test #2 | 11.61 | VND.OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT | MacKirdy, Susan | 2018 Aug 17 |

Move Documents to Folder:                                    Select Folder to move documents to.

- MacKirdy, Susan
  - **Test Documents Folder**
  - workgroups

Move    Cancel

The system will prompt the user to confirm.

5.  Click **OK** to continue.

## 2.5 Delete User Document

1. Select folder in **Documents Folder – Tree View**.

Documents will be displayed in the **Document List**.

2. Select document to be deleted.

3. Click **Delete** button.



The system will prompt the user to confirm.

4. Click **OK** to continue.

# 3 CONTEXT DOCUMENTS

The Context Documents screen allows a user to store and view documents that have been attached to system records. Documents can be attached directly to system records such as client, non-human subject, investigations, cohorts, mass immunization events, outbreaks, etc.

When a user navigates from the side navigation menu to the Context Documents screen, documents attached to the record in context are displayed.

**Note**: Documents associated to an investigation **should always** be added with the investigation in context. This will restrict access to the document to those users with the appropriate permissions.

## 3.1 Context Documents Screen

To access the Context Documents screen

1. Go to the Left-Hand Navigation menu.

2. Under the Document Management section, select **Context Documents**.

The **Context Documents** screen is displayed.

## 3.2 Search Context Documents

1. Complete a **Client or Subject Search**. If the document was added with an investigation in context, the investigation must be in context to search for the document.

The Context Documents screen is displayed.

In this example, the client and investigation are in context and the documents attached to this investigation record are displayed in the Document List.

## Context Documents

**Client ID:** 204
**Name(Last, First Middle)/Gender:** Grape, Green / Male
**Health Card No:** -
**Date of Birth / Age:** 1988 Jul 01 / 30 years

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

Investigation

**Investigation ID:** 151
**Status:** OPEN
**Disposition:** Investigation in progress
**Investigator:** -

**Disease:** Mumps
**PHAC Date/Type:** 2018 Jun 25 / Most Recent Exposure
**Etiologic Agent:** -
**Authority/Classification:** National / Contact - Person Under Investigation / 2018 Jul 16

**Search Document Folders - Basic** ⌃ Hide Search

Enter Keywords to search. Leave search box empty to view all documents. Search will be performed on selected folder and its subfolders if applicable. Search results will appear in 'Document List' below.

**Search Documents by keyword:**

[ Search ] [ Retrieve ] [ Clear ]

**Document List** ⌃ Hide Document List

Row Actions: [ Delete ]                                                     [ Add New ]

| | Document Title | Size [KB] | Type | Posted By | Posted On | Description | Status |
|---|---|---|---|---|---|---|---|
| ☐ | Test File 2 | 11.61 | VND.OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT | MacKirdy, Susan | 2018 Aug 20 | | active |

## 3.3   Add Context Document

With the client and/or investigation in context

1.   Click **Add New** button



**Document List** ⌃ Hide Document List

Row Actions: [ Delete ]                                                     [ Add New ]

| | Document Title | Size [KB] | Type | Posted By | Posted On | Description | Status |
|---|---|---|---|---|---|---|---|
| ☐ | Test File 2 | 11.61 | VND.OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT | MacKirdy, Susan | 2018 Aug 20 | | active |

Total: 1    |◄ ◄ Page 1 of 1 ► ►|                                         Jump to page: [        ] ↱

The Document Management screen is displayed.

2. Click **Browse** button to search for the applicable document.

3. Click **Upload File** button.

4. Enter **Document Title**.

5. Update **Effective Date** if required. Default is current date.

6. Add **Expiration Date** if required.

7. Change **Status** if necessary. Default is "active".

8. If desired, enter **Keyword**(s) to assist with searches. Click **Add** button.

9. Add **Description** and enter **Comments** if required.

10. Click **Submit** button.



The document is added to the **Document List**.

### 3.3.1 Open Context Document

11. Click **Document Title** hyperlink.

| Document List | | | | | | | ⌃ Hide Document List |
|---|---|---|---|---|---|---|---|

| Row Actions: Delete | | | | | | | Add New |
|---|---|---|---|---|---|---|---|
| **Document Title** ▲ | **Size [KB]** ▼ | **Type** ▼ | | **Posted By** ▼ | **Posted On** ▼ | **Description** ▼ | **Status** |
| ☑ Test File 2 | 11.61 | VND.OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT | | MacKirdy, Susan | 2018 Aug 20 | | active |
| Total: 1 | | ⏮ ◀ Page 1 of 1 ▶ ⏭ | | | | Jump to page: | ➦ |

## 3.4 Delete Context Document

With the client and investigation in context

1. Select document to be deleted.

2. Click **Delete** button.

The system will prompt the user to confirm.

3. Click **OK** to continue.