



First Nations Health Authority
Health through wellness

Panorama 3.2 Upgrade

Family Health Changes

June 2019

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<http://www.fnha.ca/what-we-do/communicable-disease-control/panorama>

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PLEASE NOTE:

It is required for CHNs working in FN communities with Panorama access to have training with the FNHA Panorama team prior to use of the Panorama system. Panorama guides are to be used in conjunction with formal Panorama training. To arrange a training session, please contact panorama@fnha.ca

Panorama will be undergoing a major upgrade on **July 2, 2019**. It will be upgrading from **R2.5.9 to R3.2**. This handbook will provide an overview of the major changes users will see when using the new (NextGen) system. You will notice some modules and screens will have a new look and feel, while other screens remain as the “classic” Panorama screen.

The changes noted in this handbook are not complete and only show the basic 3.2 Family Health module upgrades that most CHNs will likely use.

FAMILY HEALTH HEADER

R 2.5.9

| | | | |
|--|--|---|---|
| Client ID: 2626530 | Name(First,Middle,Last)/Gender: Prematurebaby Donoluse / Male | Health Card No: - | Date of Birth / Age: 2016 Aug 5 / 5 months 23 days |
| Phone Number: (-) | Jurisdiction Info: South Vancouver Island, Victoria | Additional ID Type / Additional ID: Yukon HCP# / - | |
| Link to Parent: FHMother_Donoluse | Birth Weight: 3.0 kg | Discharge Weight: 3.3 kg | Care Plan Priority: Low/Moderate |
| | | | Immunizations: Queue |

R 3.2

The Family Health Header has the following changes in R3.2:

- a. Gestation at Birth and Current Adjusted Age are now showing on the *Family Health Header* for premature babies when their chronological Age is less than or equal to two years (730 days).
- b. Birth Weight and Discharge Weight are combined as Birth/Discharge Wt. The display of both weights for premature babies has not changed in R3.2. They will display in the header until baby's Adjusted Age is greater than two years.

NOTE: In the client summary page of the FAMILY HEALTH MODULE, the above changes will be apparent, however, the overall appearance will be similar to R.2.5.9

NOTE: *Family Health* header on the Next Gen pages has a new look and feel & will appear ONLY upon navigation to CLIENT DEMOGRAPHICS page from FAMILY HEALTH & IMMUNIZATIONS module from LHN in FAMILY HEALTH

FAMILY HEALTH CLIENT SUMMARY

Display of Encounter Reason

R 2.5.9

| Date | Encounter Group | Encounter Type | Service Delivery Location | Assessments(Summary) |
|-------------|-----------------|-----------------|---------------------------|----------------------|
| 2018 Dec 10 | Family Health | FH Clinic Visit | Kelowna | - |

R 3.2

In the *Encounter* section of the *Client Summary* screen, the column Encounter Reasons displays in R3.2.

If an encounter has more than one encounter reason, they will display in alphabetical order, separated by a semi-colon.

| Date | Encounter Group | Encounter Type | Encounter Reasons | Service Delivery Location | Assessments(Summary) |
|-------------|-----------------|-----------------|---|---------------------------|--------------------------|
| 2017 Jun 27 | Family Health | FH Clinic Visit | - | Administrator SDL | Child-Newborn Assessment |
| 2017 Apr 27 | Family Health | FH Clinic Visit | - | Administrator SDL | Child-Newborn Assessment |
| 2017 Mar 3 | Family Health | FH Clinic Visit | Bellies to Babies Program; Breastfeeding Clinic; Education and Counselling; Follow-Up; Preventative Treatment | Kelowna | Child-Newborn Assessment |

Historical Encounters Display in Encounter Section

R 2.5.9

| Date | Encounter Group | Encounter Type | Service Delivery Location | Assessments (Summary) |
|-------------|-----------------|----------------------|---------------------------|-----------------------|
| 2019 Feb 13 | Family Health | FH External Provider | BCCDC SDL | - |
| 2019 Jan 14 | Family Health | FH Clinic Visit | BCCDC SDL | - |

R 3.2

When a user inputs and saves a past encounter on the *Encounters Details* screen and then navigates to the *Client Summary* screen, the *Encounters* section now refreshes and displays the encounter. The User no longer has to put a different client in-context and then return to the previous client's chart for the *Encounter* section to refresh.

| Date | Encounter Group | Encounter Type | Encounter Reasons | Service Delivery Location | Assessments (Summary) |
|-------------|-----------------|-----------------|-------------------|---------------------------|---|
| 2019 Feb 13 | Family Health | FH Clinic Visit | - | Administrator SDL | - |
| 2019 Jan 14 | Family Health | FH Clinic Visit | - | Administrator SDL | - |
| 2013 Feb 14 | Family Health | FH Clinic Visit | - | Administrator SDL | Mom-Prenatal Registration |

Renamed Focus Areas Section

R 2.5.9

| Care Category/Subcategory | Status | Last Updated | Last Assessment | Last Comment | Reason For Closing |
|--------------------------------|--------|--------------|---|-------------------------|---|
| Nutrition/Nutritional Status | Closed | 2019 Mar 20 | Mom-Postpartum Assessment | - | Lost to Follow-up |
| Physiological/Breast Condition | Closed | 2019 Mar 20 | - | Manually Closed By User | Other: No Further Public Health Followup. Closed on March 20 at 11:03 |

R 3.2

On the *Family Health Client Summary* screen, the *Focus Areas* section is renamed to *Focus Areas Summary* because of an improvement to the *Care Plan Details* screen.

| Care Category/Subcategory | Status | Last Updated | Last Assessment | Last Comment | Reason For Closing |
|------------------------------|-----------------------|--------------|--|-------------------------|--------------------------------|
| Psychosocial/General | Closed | 2019 Jan 4 | Mom-Prenatal Intake Assessment | Manually Closed By User | No Professional Care Available |
| Support/General | Open | 2019 Jan 4 | Mom-Prenatal Intake Assessment | - | - |
| Nutrition/Nutritional Status | Under Continuing Care | 2019 Jan 4 | Mom-Prenatal Intake Assessment | - | - |
| Lifestyle/Physical Activity | Open | 2019 Jan 4 | Mom-Prenatal Intake Assessment | - | - |

Last Assessment Hyperlink Displays for Manually Closed Focus Areas

R 2.5.9

R 3.2

| Care Category/Subcategory | Status | Last Updated | Last Assessment | Last Comment | Reason For Closing |
|--------------------------------|--------|--------------|---|-------------------------|---|
| Nutrition/Nutritional Status | Closed | 2019 Mar 20 | Mom-Postpartum Assessment | - | Lost to Follow-up |
| Physiological/Breast Condition | Closed | 2019 Mar 20 | - | Manually Closed By User | Other: No Further Public Health Followup. Closed on March 20 at 11:03 |

In the *Focus Area* section, the Last Assessment hyperlink now displays for focus areas that are manually closed from the *Client Summary* screen, rather than display a dash. The hyperlink will open the assessment that last updated the focus area. In R2.5.9, the hyperlink only displayed for focus areas that were closed from within a UDF.

Known Issue: The hyperlink opens the assessment that created the focus area, rather than display the last assessment that updated the focus area. The issue will be remediated after the Next Gen Upgrade go-live.

| Care Category/Subcategory | Status | Last Updated | Last Assessment | Last Comment | Reason For Closing |
|------------------------------|--------|--------------|---|-------------------------|--------------------|
| Psychosocial/Family Function | Closed | 2019 Mar 22 | Mom-Postpartum Assessment | Manually Closed By User | Resolved |
| Psychosocial/General | Open | 2019 Mar 22 | Mom-Postpartum Assessment | - | - |

Display All Appointment Types in Appointment Section

In R2.5.9, on the *Client Summary* screen, the *Appointments* section does not display CD/STI/TB appointments. In R3.2, all appointment types will display, including CD/STI/TB ones, if the user has the correct encounter group permissions

ENCOUNTERS

Encounter UDF Hyperlink Display as a Button

R 2.5.9

R 3.2

To increase visibility of the Encounter UDF hyperlink on the *Encounter Details* screen, it has been converted to a button in R3.2

Encounter Organization and Service Delivery Location Defaults

When a User enters a new encounter on the *Encounter Details* screen, the encounter Responsible Organization (Org) and Service Delivery Location (SDL) consistently default to the User's login Org and SDL. In R2.5.9, they defaulted to the Org and SDL of the encounter that the User previously viewed.

***Responsible Organization:** Panorama

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] Find

***Location:** Administrator SDL

To specify a Service Delivery Location first click on the 'Find' button. Then search, or type the name of the Service Delivery Location you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Service Delivery Location: Panorama > [Administrator SDL] Find

USER DEFINED FORMS

Display Created By and Created On Date for UDFs

R 2.5.9

Filled Out Forms [Hide Filled Out Forms](#)

1 forms found. Click on Instance ID to view Form. Click on radio button to select.

Row actions: Update Migrate Answers to Newest Version

| Instance ID | Form Name | Form Description | Version | Needs Migration | Updates Allowed By | Status | Last Updated | Updated By |
|-------------------------|---------------------------|---------------------------|---------|-----------------|--------------------|-----------|--------------|-------------------|
| 4918752 | Mom-Prenatal Registration | Mom-Prenatal Registration | 5 | | All users | Published | 2019 Jan 4 | LI CSTSUP, Fengyi |

R 3.2

On the *Encounter UDF* screen, the *Filled Out Forms* section now displays the name of the person and the date when the UDF was entered under the Created By/On column. The Last Updated and Updated By columns are combined to display under the Last Updated By/On column.

Filled Out Forms [Hide Filled Out Forms](#)

There are forms that can only be updated by the author or an administrator

1 forms found. Click on Instance ID to view Form. Click on radio button to select.

Row actions: Update Migrate Answers to Newest Version

| Instance ID | Form Name | Form Description | Version | Needs Migration | Updates Allowed By | Status | Created By/On | Last Updated By/On |
|-------------------------|------------------------|------------------------|---------|-----------------|--------------------|-----------|---------------------------------|---------------------------------|
| 4881451 | Mom-Prenatal Follow-up | Mom-Prenatal Follow-up | 6 | | Author/Admin | Published | LI CSTSUP, Fengyi 2019 Jan 7 | LI CSTSUP, Fengyi 2019 Jan 7 |

Display of Age for Children Between the Age of 1 and 2 Years

In R 2.5.9, the Age field displayed in years and months for clients between the age of one and two years.

UDF Header

Early Childhood Assessment

ClientID: 2667594 Name(First,Middle,Last) / Gender: Fox Upgrade / Male Health Card No.: - Date of Birth / Age: 2017 Oct 13 / 1 yr 6 mos

Phone Number: - Jurisdiction Info: Kelowna Alternate ID Type / Alternate ID: - / -

Within UDF

Age: 1 yr 6 mos

In R3.2, these clients will have their age display in years, months and days. This change is applied to the Age field on the Family Health UDF Header and within UDFs. The display of Age on these screens is now consistent with the Age field on the Client Header.

For other age ranges, they continue to display as they are in R2.5.9:

- Age less than 1 year will continue to display in months and days (e.g. 11 months 25 days)
- Age equal to or greater than 2 years and less than 19 years continue to display in years and months (e.g. 3 years 4 months)
- Age equal to or greater than 19 years continue to display in years (e.g. 19 years)

UDF Header

Early Childhood Assessment

ClientID: 2667660 Name(First,Middle,Last) / Gender: Full term Baby Upgrade / Female Health Card No.: - Date of Birth / Age: 2017 Oct 13 / 1 years 6 months 2 days

Phone Number: - Jurisdiction Info: Dawson Creek Alternate ID Type / Alternate ID: Yukon RCMP / -

Within UDF

Age: 1 years 6 months 2 days

Age Calculated Correctly for Newborns

R 2.5.9

R 3.2

In R2.5.9, the Age field on the *Family Health UDF Header* is incorrect for newborns whose date of birth is January 30/31 and the current date is in February. The same issue is observed with the Age field within UDFs if the encounter date is in February. The Age field is calculated to be a few days older than the newborn's actual age

In R3.2, the Age field is calculating correctly for these newborns.

Display of UDF Dropdown Fields and Previous Assessment Answers

R 2.5.9

R 3.2

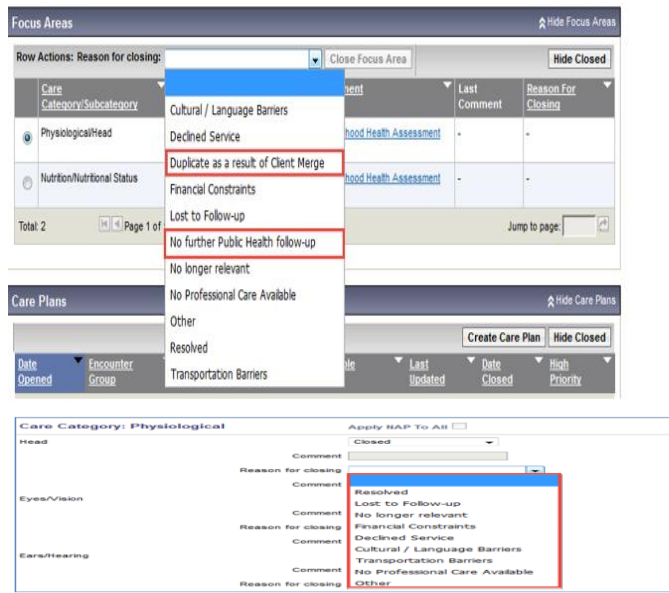
When a new assessment instance is opened, UDF dropdown fields with long answer options will no longer collide/overlap with previous assessment answers.

Displaying New Reason for Closing for Variance Questions

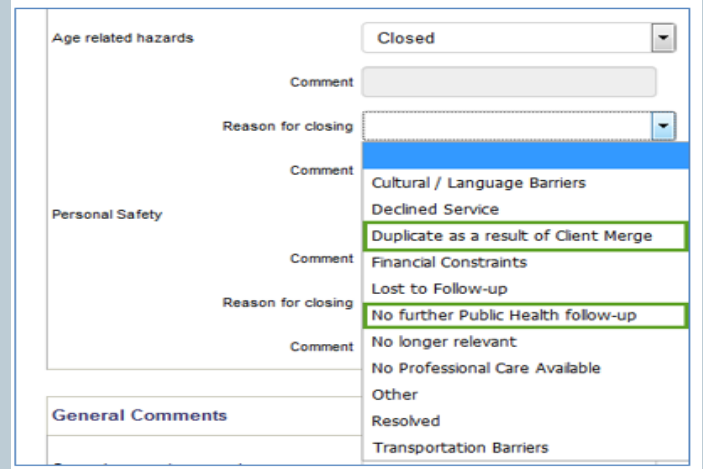
R 2.5.9

R 3.2

In R2.5.9, new values were added to the Reason for Closing dropdown display on the *Client Summary* screen but not in the Reason for Closing dropdown in *UDFs*.



In R3.2, this has been corrected and the new values added by BCY are displaying in the dropdown (i.e. Duplicate as a result of Client Merge, No further Public Health follow-up). Also, the dropdown in UDF is sorting in alphabetical order.



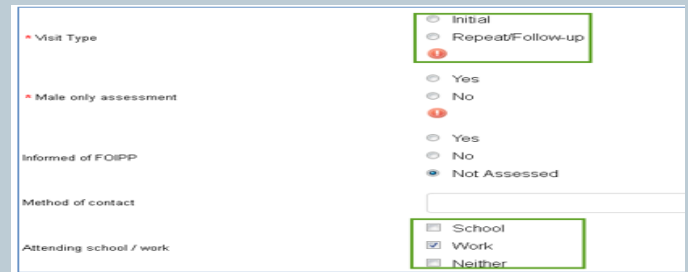
Display of Radio buttons and Check-boxes

R 2.5.9



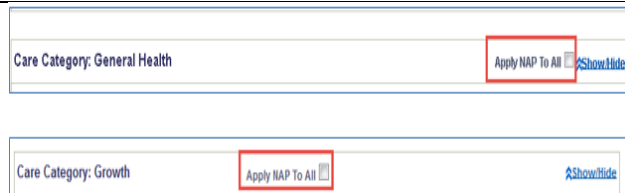
R 3.2

In R3.2, the answer options for radio buttons and check-boxes as well as the mandatory indicator display on separate lines.



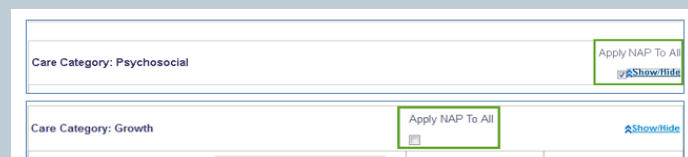
Display of Apply NAP to All

R 2.5.9



R 3.2

In R3.2, the checkbox for Apply NAP To All is displaying below the label, rather than to the right of the label. A defect ticket has been submitted.



Saving UDF: The submitted form contains 1 errors

In R2.5.9, the system triggers an error message *'The submitted form contains 1 errors. Please review the fields marked below and resubmit the assessment'* when the User attempts to submit an assessment that is filled out correctly and meets the question validation rules. The issue is only observed by health authorities and is not reproducible by the PPHIS Team within the PHSA network. The issue is reported to be fixed in R3.2. Solution Partners are requested to monitor and report if the issue is observed in R3.2.

MATERNAL BIRTH EVENTS/BABY BIRTH EVENTS

Search Baby from the Maternal Birth Event

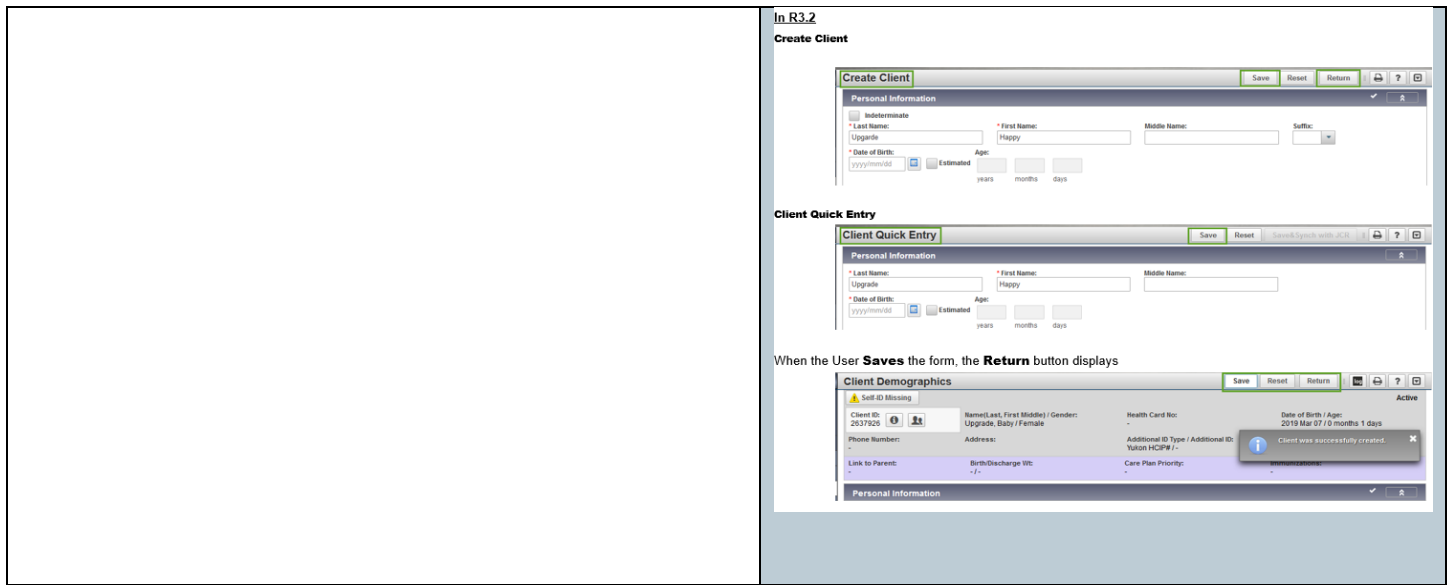
The Search Baby button on the *Maternal Birth Event* screen navigates the User to the Next Gen *Search Client* screen.

Creation of newborn/maternal records

R 2.5.9

R 3.2

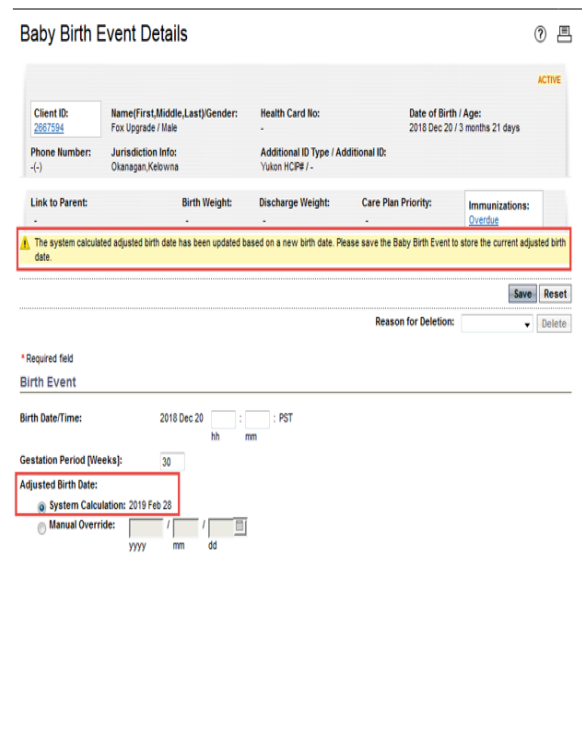
- a. When creating a newborn record on the Next Gen *Client Quick Entry* or *Create Client* screen, the Save and Return button are now two separate buttons. On the *Create Client* screen, the Save and Return buttons display at the time the new data is entered. However, on the *Client Quick Entry* screen, only the Save button displays. After the User saves the new data, the Return button is then visible.
- b. The *Create Client* and *Client Quick Entry* screens no longer have a Cancel button that lets the User leave the screen and return to the *Client Search* screen where they can perform another client search or click on the Cancel button to return to the *Maternal Birth Event* screen. In Next Gen, to navigate back to the *Maternal Birth Event* the user will use the LHN.



Adjusted Birth Date Updated when Baby's Date of Birth is Updated

R 2.5.9

In R2.5.9, when a baby's Date of Birth is updated, the User had to manually save the new system calculated Adjusted Birth Date on the *Baby Birth Event Details* screen



R 3.2

In R3.2, the baby's new Adjusted Birth Date will automatically save when a User updates the baby's Date of Birth on the *Client Demographics* screen. The User no longer needs to re-save the *Baby Birth Event* to save the new Adjusted Birth Date.

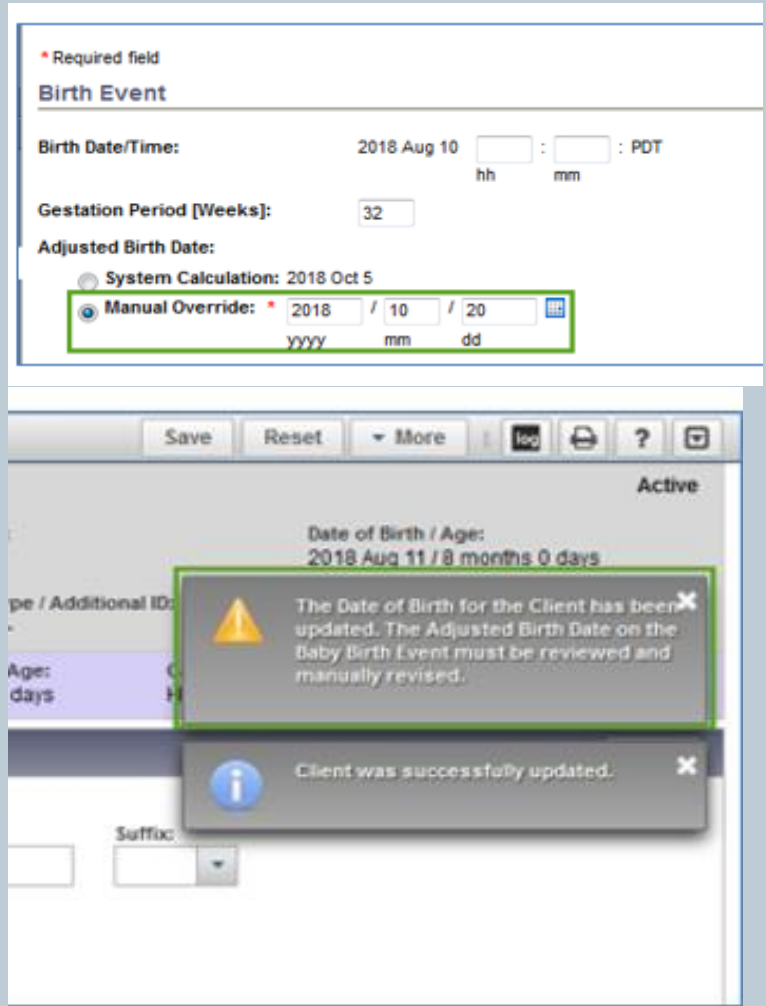
Known Issue: When updating the Date of Birth for a premature baby who has an Adjusted Birth and is linked to the mother's Maternal Birth Event, the system will display a warning message if the new Date of Birth is not equal to or within 5 days of mother's Delivery Date. Although a warning message displays, the system will save the new birth date. Note that the warning message currently does not display in R3.2 when a User updates the Date of Birth for full-term babies. An enhancement will be submitted to display a meaningful warning message and also to display the warning message for full-term babies.



New Warning Message for Manual Override Adjusted Age

In R2.5.9, when a baby has a Manual Override Adjusted Birth and their Date of Birth is updated on the *Client Demographics* screen, the system does not display a message advising the User to review the Adjusted Birth Date on the *Baby Birth Event* screen.

In R3.2, the system displays the warning message *'The Date of Birth for the Client has been updated. The Adjusted Birth Date on the Baby Birth Event must be reviewed and manually revised'* on the *Clients Demographic* screen.



CARE PLANS

Added New Section to Display All Focus Areas for a Client

R 2.5.9

| Care Category | Date Opened | Date Closed |
|---------------|-------------|-------------|
| Nutrition | 2019 Jan 4 | - |

| Care Category/Subcategory | Status | Last Updated | Last Assessment | Last Comment | Reason For Closing |
|------------------------------|-----------------------|--------------|--|--------------|--------------------|
| Nutrition/Nutritional Status | Under Continuing Care | 2019 Jan 4 | Mom-Prenatal Intake Assessment | - | - |

Client Narrative History

R 3.2

- A User can now view all open and closed focus areas for a client from the *Care Plan Details* screen. It is now easier for users to link focus areas to a care plan as the *Focus Areas Summary* section (from *Client Summary*) is now available on the *Care Plan Details* screen. This new section is collapsed by default and displays 'Contains Data' if the section contains information.
- The existing *Focus Areas* section on the *Care Plan Details* screen is renamed to *Focus Areas Associated to Care Plan*

| Care Category/Subcategory | Status | Last Updated | Last Assessment | Last Comment | Reason For Closing |
|------------------------------|--------|--------------|---|--------------|--------------------|
| Psychosocial/Family Function | Open | 2019 Mar 22 | Mom-Postpartum Assessment | - | - |
| Psychosocial/General | Open | 2019 Mar 22 | Mom-Postpartum Assessment | - | - |

Care Categories Contains Data Show Care Categories

| Care Category/Subcategory | Status | Last Updated | Last Assessment | Last Comment | Reason For Closing |
|------------------------------|--------|--------------|---|--------------|--------------------|
| Psychosocial/Family Function | Open | 2019 Mar 22 | Mom-Postpartum Assessment | - | - |
| Psychosocial/General | Open | 2019 Mar 22 | Mom-Postpartum Assessment | - | - |

Last Assessment Hyperlink Displays for Manually Closed Focus

R 2.5.9

In R2.5.9, the Last Assessment hyperlink only displays for focus areas that are closed from within a UDF and not when the focus areas are manually closed from the *Care Plan Details* screen.

R 3.2

In R3.2, the Last Assessment hyperlink displays for manually closed focus areas and opens the last assessment that updated the focus area.

Known Issue: The hyperlink opens the assessment that created the focus area, rather than display the last assessment that updated the focus area.

| Row Actions: Reason for closing: | Close Focus Area | Hide Closed | | | |
|----------------------------------|------------------|--------------|---------------------------|-------------------------|---|
| Care Category/Subcategory | Status | Last Updated | Last Assessment | Last Comment | Reason For Closing |
| Nutrition/Nutritional Status | Closed | 2019 Mar 20 | Mom-Postpartum Assessment | - | Lost to Follow-up |
| Physiological/Breast Condition | Closed | 2019 Mar 20 | - | Manually Closed By User | Other: No Further Public Health Followup. Closed on March 20 at 11:03 |

Total: 2 Page 1 of 1 Jump to page:

| Row Actions: Reason for closing: | Close Focus Area | Hide Closed | | | |
|----------------------------------|------------------|--------------|---------------------------|-------------------------|---|
| Care Category/Subcategory | Status | Last Updated | Last Assessment | Last Comment | Reason For Closing |
| Support/General | Closed | 2019 Mar 16 | Mom-Postpartum Assessment | Manually Closed By User | Other: Closed from Care Plan (from Focus Areas Associated to Care Plan) |
| Nutrition/Nutritional Status | Closed | 2019 Mar 15 | Mom-Postpartum Assessment | Manually Closed By User | No further Public Health follow-up |
| Physiological/Breast Condition | Closed | 2019 Mar 15 | Mom-Postpartum Assessment | Manually Closed By User | Other: Closed focus area from Care Plan. March 21 |
| Physiological/Lochia | Closed | 2019 Mar 15 | Mom-Postpartum Assessment | Manually Closed By User | Other: Resolved: Closed from Care Plan on March 21 |

Total: 4 Page 1 of 1 Jump to page:

IMMUNIZATION PROFILE

R 2.5.9

In R2.5.9, the *View Client Imms Profile* on the LHN navigates the User to the view only *Client Immunization Profile* screen

Client Immunization Profile

Client ID: 2645918 Name(First,Middle,Last)/Gender: Joy Upgrade / Female Health Card No: - Date of Birth / Age: 2018 Oct 1 / 5 months 21 days

Phone Number: (-) Jurisdiction Info: Northern Interior/Fort St James Additional ID Type / Additional ID: Yukon HCIP# / -

Link to Parent: Birth Weight: Discharge Weight: Care Plan Priority: Immunizations: Overdue

Client Immunization Profile Hide Client Immunization Profile

View by Agent View by Date

| Immunizing Agent | Date | Status |
|------------------|-------------|-------------|
| DTaP-IPV/Hib-HB | 2019 Jan 02 | 2019 Mar 22 |

E - The date is estimated for this historical immunization.
O - The status for this immunization has been overridden.
R - The dose number for this immunization has been revised.
X - Some or part of the vaccine did not meet local schedule.

R 3.2

In R3.2, it is renamed to *Immunization Profile* and navigates the User to the Next Gen *Immunization* screen where they can update a client's Immunization history if they have the permission to add, update, or delete. If the User has view only privileges, the screen will be read-only.

Immunizations Save Reset More

Client ID: 2667633 Name(Last, First Middle) / Gender: SIT ONE, Baby 1 / Female Health Card No: - Date of Birth / Age: 2018 Apr 08 / 1 years 0 months 7 days

Phone Number: - Address: 1 Moms House, British Columbia, Canada Additional ID Type / Additional ID: Yukon HCIP# / -

Link to Parent: Birth/Discharge Wt: 3.25 kg / 3.45 kg Gestation at Birth: 35 weeks Adjusted Age: 11 mos 2 days Care Plan Priority: High Immunizations: Out

Immunization Details

Immunization History - Summary Grid

| Agent | Date Administered | Date Administered | Date Administered | Date Administered | Date Administered |
|-----------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| DTaP-IPV/Hib-HB | 2018 Jun 08 | 2019 Apr 08 | | | |
| HA | 2019 Apr 08 | | | | |
| Men-C-C | 2018 Jun 08 | | | | |
| Pneumo-C-13 | 2018 Jun 08 | 2019 Apr 08 | | | |
| Rotavirus | 2018 Jun 08 | 2019 Apr 08 | | | |

Immunization History - Detailed Data Table

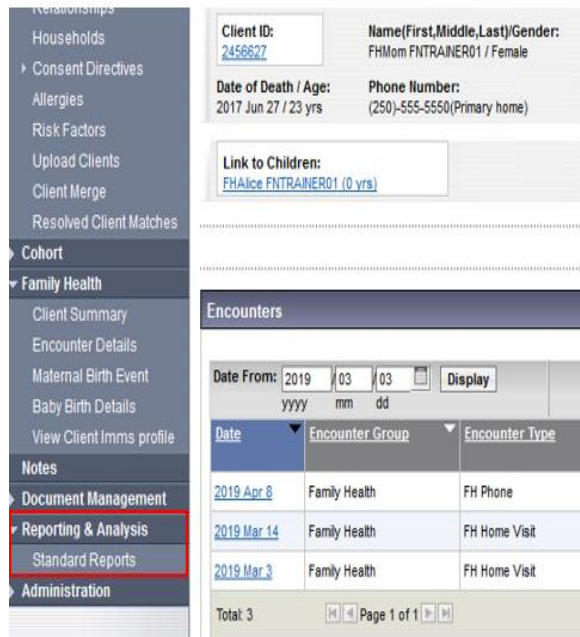
Immunization History - Detailed Data Table Add Single Immunization Add One or More Immunizations

| Update | Do Not Use | View | Delete | Agent | Date Administered | Age at Administration | Status | Revised Dose | Trade Name | Body Site | Volume |
|--------|------------|------|--------|-----------------|-------------------|-----------------------|--------|--------------|---------------|-------------|--------|
| | | | | DTaP-IPV/Hib-HB | 2018 Jun 08 | 2m 0d | Valid | | Infanrix-HEXA | Leg - Right | 0.5 mL |

REPORTS: QUICK REPORT LAUNCH DROPDOWN

R 2.5.9

In R2.5.9, Users access all Family Health reports from *Reports & Analysis* on the LHN.



R 3.2

In R3.2, Users will be able to launch client-facing reports from several pages in Family Health. When the User launches a report, they may be prompted to fill in the report filters if the feature has been configured for the specific report. The User will be navigated to the Next Gen *Report Filters* screen. The Quick Report Launch dropdown is available on the following Family Health screens:

- Family Health Client Summary screen
- Encounter Details
- Encounter UDF screens

The following Family Health client-facing reports are available in the dropdown:

- RBCY_CLNT003-Client Clinical Summary
- RBCY_FH033 – Client Profile
- Growth Charts (RBCY_FH058 to RBCY_FH061)

