



First Nations Health Authority
Health through wellness

Panorama 3.2 Upgrade

Handbook of System (Core) 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 Core module upgrades that most CHNs will likely use.

Core Components

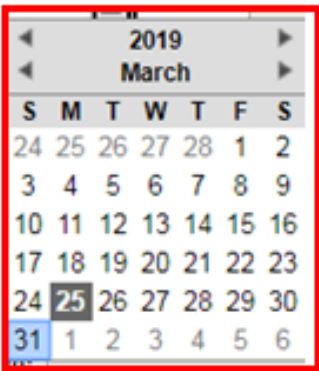
Common Panorama Components

Screens which have been upgraded to the NextGen Framework have been simplified, reducing navigation to other screens by providing add and update functions through modal windows within the screen. The Embedded Find Components on the NextGen screens has also been enhanced.

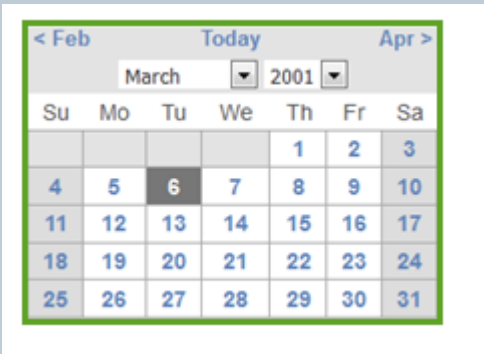
In NextGen, a Cancel button is used to cancel a transaction (meaning clear your entries and leave the screen or modal without saving). On a NextGen screen, Cancel will never be used to “return” to a previous screen. Cancel buttons on Panorama ‘Classic’ screens remain and function as before.”

Calendars:

R2.5.9



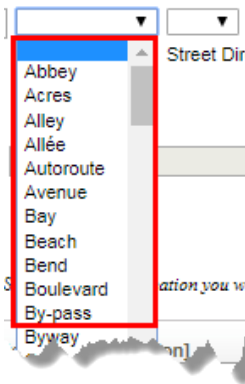
R3.2



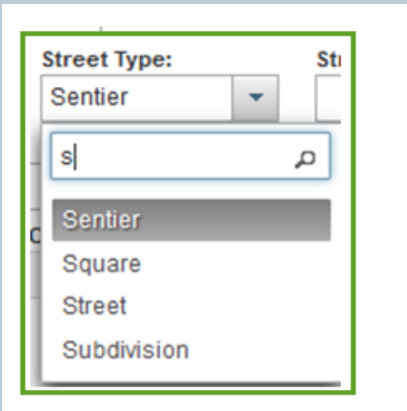
Drop Downs:

NextGen drop downs offer a search function – speedier data entry e.g. the ‘Street Type’ drop down list in the Address section. A user can type the word they are looking for into the free text search box in the drop-down list to quickly find what they are looking for.

R2.5.9



R3.2



Headers:

In R2.5.9 as the user scrolls the full length of the screen in order to complete data entry, the banner (#1), and action bar (#3) disappear along with the Module information (#2).

PANORAMA DEV2
Public Health Solution for Disease Surveillance and Management

1 Sarah Murphy CSTSUP: BCY-CST-System-Admin for Panorama
Threshold Notifications: 0
Jurisdiction Notifications: 0
Help Contact Us My Account Logout

2 WORK MGMT INVESTIGATIONS OUTBREAKS **IMMUNIZATION** FAMILY HEALTH INVENTORY ADMIN

Recent Work
Client
Search Clients
Client Details
Personal Information
Occupation/Language
Health Services
Financial Assistance
Aboriginal Information
Immigration Information
Client Warnings

Personal Information

4 **ACTIVE**

Client ID: 2579772 Name(First,Middle,Last)/Gender: Test Update Client / Unknown Health Card No: - Date of Birth / Age: 2005 Jan 1 / 14 yrs 2 months
Phone Number: -(-) Jurisdiction Info: Fraser South, Langley Additional ID Type / Additional ID: Yukon HCIP# / -

3 Save Reset Save and Sync with Registry Cancel

Wait Queue: Add to WQ Last Visited WQ

In R3.2 the following components float at the top of the screen at all times when the user is on a NextGen converted screen:

PANORAMA ENV2 NG
Public Health Solution for Disease Surveillance and Management

Murphy CSTSUP, Sar **1**

2 Immunization **Client Demographics** **3** Save Reset More

4 **Active**

BC Self-ID Missing

Client ID: 2637864 Name(Last, First Middle) / Gender: ClientDetails, SM / Female Health Card No: - Date of Birth / Age: 2001 Mar 01 / 18 years 0 months
Phone Number: - Address: Additional ID Type / Additional ID: Yukon HCIP# / -

5 **6**

7 **Personal Information**

Indeterminate
Last Name: First Name: Middle Name: Suffix: ClientDetails SM

1. The Banner has been simplified and grouped under icons. The functionality remains the same across 'Classic' and 'NextGen' screens, new functionality has been introduced to allow the user to easily change the role, if the user has more than one role available on their account
2. The Module the user is working within, the available Modules are no longer presented across the screen, the user can change the module by clicking on the current Module in context
3. The action bar holds the screen title, screen level actions, help, print and audit log view. The action bar and banner float at the top of the screen while the user scrolls the content, allowing for the 'Save' button to always be visible.

Other changes to this screen:

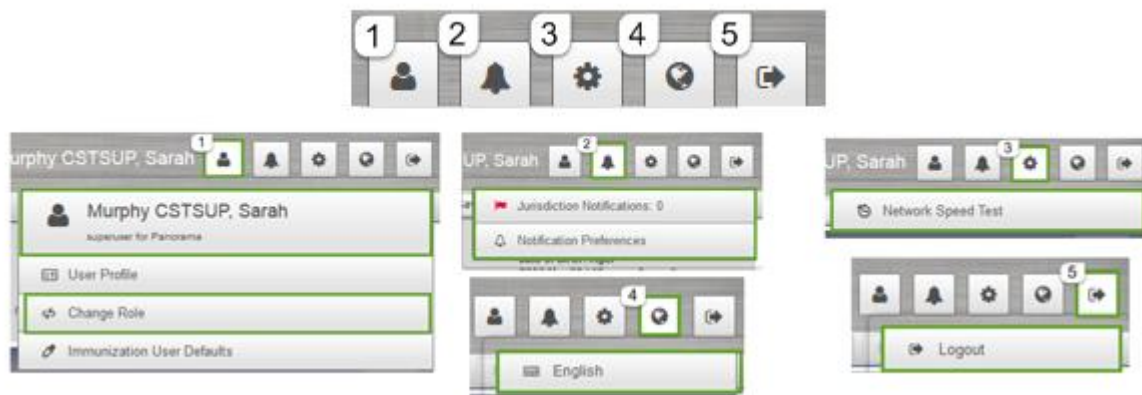
4. The Clients status of 'Active' remains available in the Context Header, however it is no longer highlighted and in red text
5. Information Icon – upon the user clicking this Information Icon, a 'Client Profile' modal is launched providing the user with all client level information e.g. Demographic Information, Ethnicity, Birth Information, Education Information, Indigenous Information etc.
6. Multi-person icon – this new functionality offers the user an efficient way to change the client in context. Upon the user selecting this icon, the Client Embedded Find Component is launched allowing the user to search via Name, Client ID or Health Card Number without leaving the screen
 - The particular screen the user is currently working within is highlighted with a white background. The LHN is defaulted to expanded – see Client Details 2.5 v 3.2
 - Renamed: Client Demographic to Personal Information and Occupation/Language to Occupation/Education

- Format of name is changed in order for all R3.2 screens the client name will be displayed Last Name, First Middle/ Gender.
- The LHN is collapsible by clicking on the chevron icon above Recent Work. When collapsed there are icons for the major screen areas (eg. Recent Work, Client, and Document Management) when the icon is hovered on the icon will expand with a list of screens below that section.

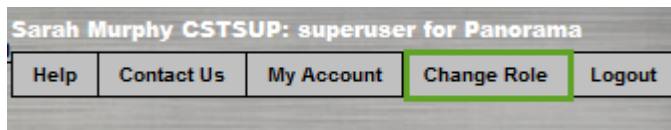
Banner in R2.5.9:



Banner in R3.2:

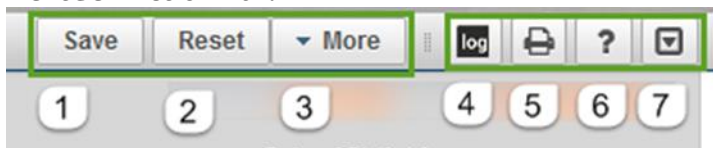


Banner on classic screen in R3.2:



1. My Account: this button allows the user to access self-serve functions and make changes to the user profile information, change role and manage immunizations defaults. User name, role and organization displayed here.
2. User Notifications: relocated and are available by clicking the 'Notifications' button
3. Settings Button: allows the user to perform Network Speed test, only accessible to system support roles
4. Language: provides options related to language
5. Log Out

NextGen Action Bar:



1. The Save Button
The Save button should be click after a user makes any change to a NextGen screen.
2. Reset Button
The Reset button can be used to clear any data entered on a screen since the last screen save.
3. More

The More button is displayed when the user is on a screen that allows for adding a client to a Wait Queue from, and launch a report from. If the user is not able to launch a report from their current screen an “Add to WQ” button is displayed instead of the More button.

4. The Transaction Log

A Transaction Log icon will be available to provide users with access to the relevant transaction log information, from within the screen. The Transaction Log icon is located within the Action Bar of the NextGen converted screens. When the log icon is selected, the transaction log modal will display.

5. Print Button

The Print button can be used anytime the user wishes to print the screen they are currently looking at.

6. Help Button

The Help button will open the Help screen.

7. Expand/Collapse All Panels

The arrow icon allows the user to expand or collapse all panels on the screen the user is currently working within.

8. Retrieve Button

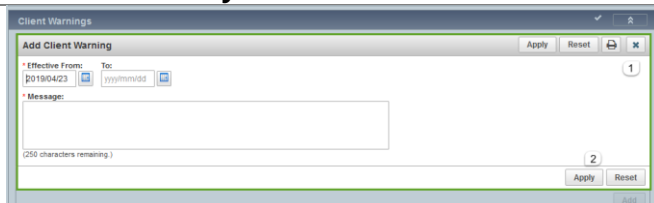
The button is displayed on Search screens, (eg. Search Mass Imms Event or the Search Clients screen). When clicked on, the last search criteria the user entered on the screen is displayed.

Recent Work:



In R3.2 the Recent Work section provides the user with the clients the user had in context, as well as the Module the user was last working on. Clicking any client listed within the Recent Work section now brings the user to the specified Module also

Modal Data Entry:



Screens that have been upgraded to the NextGen style will use modal windows to reduce the amount of navigation from screen to screen for simple tasks such as, adding or updating a Client Warning record.

The modal is similar to a pop up and will open on top of the current screen. The screen behind the modal is greyed out in the background. The user is not able to interact with the background; however, the screen will still scroll up and down.

Users can close the modal in one of two ways

- The user can click the x
- If the user is adding or updating information in the modal they should click the Apply to submit their changes

Messages and Notifications:

Messages and Notifications are displayed along the right hand side of screens to inform users of errors, warnings, and provide information to the user.

Error Messages

Error messages are displayed to alert a user when there is a problem with data validation on the UI, most commonly error messages are caused by data not being entered in a required field, or when data is incorrectly entered in a field. An Error message will remain on the screen until the user clicks the x to close it, or fixes the data which caused the error and clicks the Apply button.

Informational

Informational messages provide users with additional information in regards to an action they may have taken. These messages remain on the screen for 10 seconds before disappearing. If the user prefers to close the message before the 10 seconds is up clicking the x will close the message.

Confirmation

Conformational messages are displays when a user must confirm an action before the system will do it. These messages are most commonly displayed when a user is deleting a record. Depending on the action that has triggered the confirmation message the user may be required to perform an additional step before confirming

Confirmation messages can only be closed by either clicking Confirm to confirm the action, or clicking the x to prevent the system from performing the action.

Basic Search Screen

Search Clients

[Search Jurisdictional Registry](#)

Basic Search Criteria

Hide Basic Search Criteria

Wildcard characters % (multiple letters) and _ (single letters) can be used on any text field - except on Client Number and on First and Last Name when matching phonetically. Wildcard-only searches will be treated as blank searches.

☐ Phonetic Matches

☐ Exclude Indeterminate Clients

☒ Include Inactive Clients

☐ Display Results on Single Page

Client Number:

(Client ID, Health Card Number, Additional IDs)

Client Number Type:

Last Name:

First Name:

Middle Name:

Gender:

Date of Birth or Age

Hide Date of Birth or Age

☒ Not Applicable

☐ Date of Birth

☐ Age

☐ Date of Birth

yyyy

mm

dd

Range ±

Year(s)

Units

From

yyyy

mm

dd

To

yyyy

mm

dd

Jurisdictional Organization:

Exact Match

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.

Clear

Find

Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization]

Search

Retrieve

Clear

Advanced Search

Page 9 of 39

Search Clients Search Search JCR Retrieve Reset ?

Basic Search Criteria

Client Number: Client Number Type:

Last Name: First Name: Middle Name:

Gender:

Choose one:

☐ Date of Birth:

☐ Date of Birth Range: Effective From: To:

☐ Age: e.g. 2 or 0-18 or 18-99 Year(s)

☒ None of the above

Telephone Number: Country: Number: x

Health Region Organization: e.g. Organization Display Name ☐ Exact Match

School Information

School: e.g. Organization Display Name

School Year: Grade: Class:

Select all that apply:

☒ Include Inactive Clients

☒ Include Indeterminate Clients

☐ Use Phonetic Matches

Search Results:

R2.5.9

Client Index: Search Results ✓ Contains Data Hide Search Results

2 results found. Click on Client ID to see full client information. Click on radio button to select.

Select All Client Quick Entry Create Client New Search

Row Actions: Preview Set in Context Family Health Client Summary Update Generate Map Create Cohort

	Client ID	Health Card Number	Last Name	First Name	Gender	Date Of Birth	Determinate/Indeterminate	Active
<input type="checkbox"/>	2068439		DONOTUSE PCST ONLY	DONOTUSE IOB MCK	Male	2010 May 01	Indeterminate	Inactive
<input type="checkbox"/>	2628916		PETERSON (DO NOT USE)	EDWARD	Male	1960 Jul 28	Determinate	Active

Total: 2 Page 1 of 1 Jump to page:

R3.2

Search Results									
								Client Quick Entry	Create Client
Preview	Update	Set In Context	Create Cohort	Family Health Client Summary					
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Client ID	Health Card Number	Last Name	First Name	Gender	Date of Birth	Health Region	Active
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2667802		SMTTest	HHKId	Male	2017 Apr 20	Abbotsford	Active
<input type="checkbox"/>	<input checked="" type="checkbox"/>	2667594		test	tests-SNC	Male	2019 Apr 03	Burnaby	Active
<input type="checkbox"/>	<input checked="" type="checkbox"/>	2667599		Test-DZ	Test-DZ	Male	2019 Apr 01	Kelowna	Active
<input type="checkbox"/>	<input checked="" type="checkbox"/>	2667595		test-SNC	test	Male	2002 Apr 17	Burnaby	Active
Total: 4									

In R3.2, the Select and Client ID columns have been updated; the Expand and Health Region columns have been added; and the Determinate/ Indeterminate column has been removed.

In R2.5.9, the Select All button was used to select all of the returned Client records

Client Index: Search Results				
2 results found.				
<div> <div>Select All</div> <div> <div>Row Actions:</div> <div> <div>Preview</div> <div>Set in Context</div> <div>Family Health Client Sum</div> <div>Update</div> <div>Generate Map</div> <div>Create Cohort</div> </div> </div> </div>				
Client ID	Health Card Number	Last Name	First Name	
<input type="checkbox"/> 2643903		StixTest	Test2	
<input type="checkbox"/> 2645915		StixTest	Test6	
Total: 2				

In R3.2, select the checkbox in the column header to select all of the returned Client records.

Search Results					
Preview	Update	Set In Context	Create Cohort	Family Health Client Summary	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Client ID	Health Card Number	Last Name	First Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2637856		test	client
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2638004		test	Idn
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2637951	9000007716	Test	Tim1
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2638041		Test	Tim28912
Total: 4					

In both versions, the Row Actions are enabled when a single Client record (row) is selected in the Search Results table. Clicking Select All will only enable the Create Cohort button.

In R3.2, the Row Actions are arranged in a single line, with Generate Map removed. The actions Preview, Update, Set in Context and Create Cohort and their functions are the same as in R2.5.9

Row Actions: Preview

In R2.5.9 clicking the Preview button opens a Client Preview section directly above the Search Results that displays some additional information about the selected Client.

- In R3.2, the Preview button has a similar functionality to clicking the Client ID hyperlink in R2.5.9; which opened the View Client screen.
- In R3.2, clicking Preview opens a full-screen Client Profile Modal that displays extensive information for the selected Client. This NextGen screen is visually more compact, giving you a better view with less scrolling than in R2.5.9.
- Click the 'x' on the top-right corner of the modal to return to the Search Results table.

Client Preview ✓ Contains Data

Client ID: 2646020 Additional ID Type Additional ID
 Health Card Number: -
 Last Name: Donotuse
 First Name: PLISTest
 Middle Name: -
 Gender: Male
 Date of Birth: 1950 Jun 04
 Age: 68year(s)
 Preferred Alternate Name: -
 Health Authority: Burnaby
 Preferred Address: -
 Preferred Phone Number: -

Client Index: Search Results ✓ Contains Data

3 results found. Click on Client

Select All

Row Actions: Preview Set in Context Family Health Client Summary
 Update Generate Map Create Cohort

	Client ID	Health Card Number	Last Name	First Name	Gender
<input checked="" type="checkbox"/>	2646020		Donotuse	PLISTest	Male
<input type="checkbox"/>	2068439		DONOTUSE PCST ONLY	DONOTUSE IOB MCK	Male
<input type="checkbox"/>	2628916		PETERSON (DO NOT USE)	EDWARD	Male

Total: 3 Page 1 of 1

Search Clients

Client Profile

Client File Status: Active

Client Information

Client ID: 2667603
 Client Name: Test1, Client2
 Preferred Alternate Name:
 Health Card Number:
 Date of Birth: 2015 Mar 16
 Age: 4 years
 Gender: Male
 Gender Identity:
 Other Identity:
 Preferred Address: 206-37 Agnes Street, Canada
 Preferred Telephone Number:
 Health Region: Burnaby
 Relationships:

Health Region History

Health Region Organization: Burnaby Effective From: 2019 Mar 14
 Total: 1

Alternate Names

Additional Identifiers

Ethnicity Information

Ethnicity: Ethnicity Reported by:

Birth Information

Province / Territory: City / Town: Part of Multiple Birth:

Row Actions: Update

In R2.5.9, the Update button took you to the Personal Information screen, where you would enter updates to the Client's personal information.

Personal Information ?

Client ID: 2646020 Name(First,Middle,Last)/Gender: PLISTest Donotuse / Male Health Card No: - Date of Birth / Age: 1950 Jun 4 / 68 yrs
 Phone Number: -(-) Jurisdiction Info: Fraser North, Burnaby Additional ID Type / Additional ID: Yukon HCP# / -
 Link to Children: - Care Plan Priority: - Immunizations: -
 Client ID 2646020 has been set into UI Context.
 Save Reset Save and Sync with Registry Cancel
 Wait Queue: Add to WQ Last Visited WQ

In R3.2, the Update button opens the Client Demographics Modal for updating the Client's personal information. Note that the NextGen design has the sections below Personal Information collapsed by default; improving full screen visibility and ease of scrolling. Click Return to close the modal and return to the Search Results.

A screenshot of the 'Client Demographics' form in the software. It includes fields for Client ID (2667613), Name (test, testCQE / Male), Health Card No., Date of Birth (2003 Apr 16 / 15 years), Phone Number, Address, Additional ID Type / Additional ID (Yukon HCP# / -), Link to Children, Care Plan Priority, Immunizations (Overview), Personal Information (Last Name, First Name, Middle Name, Suffix, Date of Birth, Age, Gender, Health Card Province, Health Card Number, Health Region Organization), Update/Delete buttons, Health Region Organization (Burnaby), Effective From (2019 Apr 02), Effective To, Total: 1, Preferred Communication Method, Inactive Reason, Date of Death, Ethnicity Information, Birth Information, Telephone Numbers, Addresses, Alternate Names, Additional Identifiers, Languages, Email Addresses, and Online Names.

Client Search with Embedded Find Component:

In R2.5.9, if you selected a screen without a Client in context, an error message would display with hyperlinks for you to return to the Search Clients and/or Search Cohort screen to search for and place a Client/Cohort in context
You also had to return to either of these screens to put a different Client/Cohort in context in R2.5.9.

A screenshot of the 'Client Warnings' message box. It contains the text: 'A Client is currently not selected. Please conduct the appropriate search: [Client Search](#)'. Below this is a red 'X' icon and the text: 'No client currently in context.'

In R3.2, when no Client is in context, you can search for and place a Client in context from any NextGen screen.

A screenshot of the 'Client Warnings' form in R3.2. It includes the text: 'A client must be in context to access this page. Please conduct the appropriate search:'. Below this is a 'Client:' field with 'Client Last Name or ID' and a 'Search Type:' dropdown menu. The dropdown menu is open, showing options: 'Name', 'Client ID', and 'Health Card Number'. There is also an 'Update' button.

If no Search Type is selected, you may use the EFC free-text field to search by Client Last Name or ID. Begin typing the first few letters/numbers and any matches will display below the field

Client Warnings

A client must be in context to access this page. Please conduct the appropriate search.

Client:

%test

Search Type:

PPHIS, TEST | 2667592 | - | Female | 2016 Apr 01
 RiskFactors, TESTSM | 2667593 | - | Female | 2002 Apr 01
 test, tests-SNC | 2667594 | - | Male | 2019 Apr 03
 test-SNC, test | 2667595 | - | Male | 2002 Apr 17
 TestCY, TestCY | 2667596 | - | Female | 2018 Dec 17

Search JCR:

In R2.5.9 the Search Jurisdictional Registry link is displayed above the Basic Search Criteria section header

Search Clients

[Search Jurisdictional Registry](#)

Basic Search Criteria

Wildcard characters % (multiple letters) and _ (single letters) can be used on any except on Client Number and on First and Last Name when matching phonetically. Searches will be treated as blank searches.

Client Number:

The Search Clients button in the page header is used to return to the Panorama Search Clients screen

Search Jurisdictional Registry

[Search Clients](#)

Search Criteria

Wildcard characters % (multiple letters) and _ (single letters) can be used on any text field when matching phonetically. Wildcard only searches will be treated as blank searches.

In R3.2 the link has been renamed and made into a button, Search JCR. This button is displayed in the page header next to the Search button.

Search Clients

In 3.2:

Search Jurisdictional Registry

Search Jurisdictional Registry

Client Number: Client Number Type:

Maintain Client

Create Client/Update Client:

In R2.5, the Create Client screen is long and requires excessive scrolling. In R3.2, the layout of this screen has been updated; all sections apart from the 'Personal Information' section are now collapsed by default and have been upgraded to the new modal format for data entry

- In R3.2 'Health Region Information' has been renamed to 'Health Region Organisation' (HRO) and the Embedded Find Component (EFC) has been upgraded to the new EFC functionality
- The user can now backdate the HRO as appropriate. Similar to R2.5, in R3.2 the HRO defaults to the organization the user selects upon log in, and the 'Effective From' date is also pre populated with today's date. In R3.2 the HRO field is now located directly underneath the Health Card Province field

R2.5.9

R3.2

Addresses:

- In R2.5, the Address Format is driven by the user selecting the relevant Country, which defaults to 'Canada', and domestic format. In R3.2, the defaults remain, however, a radio button is used to select either 'Domestic' or 'International' format.
- A warning is provided to the user when City is blank while Postal Code is present

R2.5.9

R3.2

Addresses

Address Type:

Country:

Address Located On Reserve Administered By:

Address:

Unit No. Street No. Street Name Street Type Street Direction

P.O. Box STN RPO Rural Route

Province / Territory: City: Postal Code:

Details

Address Detail:

(100 characters)

Add Address

Address Format: ☒ Domestic ☐ International

* Address Type: Address on Reserve Administered By:

Unit No.: Street No.: Street Name: Street Type: Street Direction:

P.O. Box: STN: RPO: Rural Route:

Country: Province / Territory: City / Town: Postal Code:

Other Address Details: Latitude: Longitude:

(100 characters remaining.)


* Effective From: To:

Edit column in Tables

In R3.2, there is an additional Edit column used to alert the user that they have unsaved changes. The icon disappears once the screen has been successfully saved


Client Warnings

Update View Delete

	Effective From	Effective To
	2019 Apr 11	

Client Warnings

Update View Delete

	Effective From	Effective To
	2019 Apr 11	

Total: 1

Indigenous Information

- Previously named 'Aboriginal Information' in R2.5.9, this screen has been simplified in R3.2 and upgraded to the NextGen framework.
- The Indigenous Organization is selected using the new and improved EFC, and the user now has the ability to manage the 'Effective From' and 'Effective To' dates.
- The 'Do Not Use' fields are no longer viewable in R3.2.
- Data can be entered to the modal window upon the user clicking 'Add'.

R2.5.9:

Aboriginal Information

Does Client wish to self identify as an Aboriginal Person:

Aboriginal Identity:

First Nations Status:

Do Not Use:

Do Not Use:

Do Not Use:

Aboriginal Information History

Client Self Identify	Aboriginal Identity	FN Status	Do Not Use	Do Not Use	Do Not Use	Effective From	Effective To

Aboriginal 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: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization]

Aboriginal Organization History

Name	Effective From	Effective To

R3.2:

Indigenous Information

To create a new record click Add.

Add Indigenous Information

Does Client wish to self identify as an Indigenous Person:

Indigenous Identity:

First Nations Status:

Indigenous Organization:

* Effective From: To:

Notes

Note Time is mandatory in 3.2:

R2.5.9

R3.2

Note is being created for Investigation ID 147527

Note ID: - Status: -

* Required Field

Author: Murphy CSTSUP, Sarah Role: BCY-CST-System-Admin

* Subject:

* Note Date: 2019 / 02 / 11
yyyy mm dd

Note Time: hh mm :PST

Note Type:

Note is being created for Client ID 2637856

Note ID: - Status: -

* Required Field

Author: Murphy CSTSUP, Sarah Role: superuser

* Subject:

* Note Date: 2019 / 03 / 06
yyyy mm dd

Note Time: 09 :18 :PST

Note Type:

Common Phrases List:

Risk Factors

Adding Risk Factors:

- The 'Category' is no longer a mandatory field in R3.2 and defaults to blank rather than 'All' as previously in R2.5.9, the Risk Factors in the drop down list remains identical between releases
- 'Start Date' and 'End Date' fields have been renamed to 'Effective From' and 'Effective To', supporting consistency across the system
- The 'Specify' field has been renamed to 'Reported By Details' in R3.2, more accurately describing the purpose of this data entry point
- Due to the upgrade to the NextGen framework, the workflow to add a Risk Factor has altered slightly, first the user must click 'Add' in order to open the 'Add Risk Factor' modal window, once the data has been entered, user must 'Apply' which will add the Risk Factor to the factory table, then 'Save' to record the information in the database.

R2.5.9

Risk Factors Hide Risk Factors

* Category: All

* Risk Factor:

* Additional Information:

* Response: Frequency:

Start Date: End Date:

Reported By: * Reported Date: 2019 / 04 / 16
yyyy mm dd

Specify:

Add Clear

Row Actions: Update

* Reason for Deletion: Delete Set Response to: Set

Risk Factor	Reported Date	Response	Frequency	Start Date	End Date	End Date Reason	Pertinent to Investigation

Save Reset

R3.2

Risk Factors Add to Wk 4 Save Reset

Alerts

Client ID: 2667593 Name (Last, First Middle) / Gender: SMTEST, RiskFactors / Female Health Card No: - Date of Birth / Age: 2002 Apr 01 / 17 years 0 months

Phone Number: - Address: - Additional ID Type / Additional ID: Yukon HCIP# / -

Risk Factor

To create a new record click Add.

1 Add

2 Add Risk Factor Apply Reset

Category: * Risk Factor:

Additional Information:

* Response: Frequency: Reported By:

Effective From: Effective To: End Date Reason: * Reported Date: 2019/04/16
yyyy/mm/dd yyyy/mm/dd

Reported by Details:

3 Apply Ro

Additional information is only mandatory when 'Response' = 'Yes'

R2.5.9

R3.2

Risk Factors

* Category: All

* Risk Factor: Immunocompromised - Other - Specify (*)

* Additional Information:

* Response: No Frequency:

Start Date: yyyy / mm / dd End Date: yyyy / mm /

End Date Reason:

Reported By: Reported Date: 2019 / 04 /

Specify:

Add Risk Factor

Category: Risk Factor: Immunocompromised - Other - Spe...

Additional Information:

* Response: No Frequency: Reported By:

Effective From: Effective To: End Date Reason: Reported Date: 2019/04/01

Reported by Details:

Updates to Risk Factor Factory Table

- The available actions on the Risk Factor screen have been standardized and are grouped on the top left hand side of the factory table
- Updates to available row actions;
 - The options displayed depend on what the user has put in context at the time of entering or updating Risk Factors
 - Users now have the ability to select single or multiple Risk Factor(s) and make these pertinent to the investigation in context – Risk Factors without a 'Response' recorded cannot be made pertinent
 - Users can now 'View' the Risk Factor, as well as 'Update', clicking either button will open the View or Update Risk Factor modal window
- The ability to 'Select All' of the Risk Factors in the factory table is available at all times in R3.2, this function is only available when an investigation is in context in R2.5.9
- Columns Updates;
 - The 'Risk Factor' column in R2.5.9 has been split in to three distinct columns in R3.2: 'Preset', 'Risk Factor' and 'Additional Information'
 - Each column is sortable by clicking on the column header
 - The 'Preset' flag having a distinct column allows the user to sort the Risk Factors based on this attribute, easily separating the preset Risk Factors from the individual Risk Factors, this column is infilled only when an Investigation with preset Risk Factors is also in context
 - In R2.5.9, preset Risk Factors are only displayed when the related Investigation is also in context, in R3.2 all Risk Factors for the client are listed, regardless of the investigation being in context, however the checkmark will only display in the preset column when the corresponding Investigation is also in context
 - A new column to signify when there are unsaved updates in the table has also been introduced with R3.2
 - The 'Start Date' and 'End Date' columns have been combined and relabelled to 'Date Range', when only one date has been entered, that date will display, when both 'Effective From' and 'Effective To' dates have been entered, then both dates will be displayed in this column
- When single or multiple Risk Factor(s) have been selected by the user for update or view, the row(s) are highlighted in grey in R3.2 to allow the user to easily identify which Risk Factor(s) have been selected for view or update
- The total number of Risk Factors on the Clients record is now displayed at the bottom left hand side of the table, at the other side the user can select the number of Risk Factors displayed on the screen

R2.5.9

R3.2

Row Actions:

Update

Select All

* Reason for Deletion:

Delete

* Set Response to:

Asked by

Set

	Risk Factor	Reported Date	Response	Frequency	Start Date	End Date	End Reason
<input type="checkbox"/>	✓ Chronic Medical Condition - Cardiac Disease (*)	2019 Apr 16	Yes	-	-	-	-
<input type="checkbox"/>	✓ Chronic Medical Condition - Diabetes Mellitus (*)	2019 Apr 16	Yes	-	-	-	-
<input type="checkbox"/>	✓ Chronic Medical Condition - Kidney Disease dialysis requirement unknown (*)	2019 Apr 16	Yes	-	-	-	-
<input checked="" type="checkbox"/>	✓ Chronic Medical Condition - Liver Disease - Hepatitis B (*)	2019 Apr 16	-	-	-	-	-
<input type="checkbox"/>	✓ Chronic Medical Condition - Liver Disease - Other - Specify (*)	2019 Apr 16	Yes	-	-	-	-
<input type="checkbox"/>	✓ Chronic Medical Condition - Malignancies/Cancer (*)	2019 Apr 16	-	-	-	-	-
<input type="checkbox"/>	✓ Immunocompromised - Other - Specify (*)	2019 Apr 16	-	-	-	-	-
<input type="checkbox"/>	Substance Use - Alcohol	2019 Apr 16	Yes	Continuous	2018 Apr 10	2019 Mar 03	No to apply change medication

Risk Factor

Update

View

Delete

Set Response

Set Pertinent

	Preset	Risk Factor	Additional Information	Reported Date	Response	Frequency	Date Range	End Reason
<input type="checkbox"/>	✓	Chronic Medical Condition - Cardiac Disease (*)		2019 Apr 16	Yes			
<input type="checkbox"/>	✓	Chronic Medical Condition - Diabetes Mellitus (*)		2019 Apr 16	Yes			
<input checked="" type="checkbox"/>	✓	Chronic Medical Condition - Kidney Disease dialysis requirement unknown (*)		2019 Apr 16	No			
<input type="checkbox"/>	✓	Chronic Medical Condition - Liver Disease - Hepatitis B (*)		2019 Apr 16	No			
<input type="checkbox"/>	✓	Chronic Medical Condition - Liver Disease - Other - Specify (*)		2019 Apr 16	No			
<input type="checkbox"/>	✓	Chronic Medical Condition - Malignancies/Cancer - Other, specify		2019 Apr 16	No	Frequent		
<input type="checkbox"/>	✓	Immunocompromised - Other - Specify (*)		2019 Apr 16	No			
<input type="checkbox"/>		Substance Use - Alcohol		2019 Apr 16	Yes	Continuous	2018 Apr 16 - 2019 Mar 04	No to apply change medication

Total: 8

1

Set Response and Make Risk Factor(s) Pertinent to Investigation en masse

- The workflow has changed in R3.2 when setting a response to a Risk Factor from the factory table, depicted below
- To set a response to one or more Risk Factor in R3.2, selecting the 'Set Response' button opens the 'Set Response' modal for data entry
- When an investigation is in context in R3.2, the added option to make the Risk Factor(s) pertinent, en masse, to the investigation is available to the user, if there is no investigation in context this option is not presented in the 'Set Response' modal window

R2.5.9

Row Actions: Update Select All

* Reason for Deletion: Delete * Set Response to: Asked but unknown

	Risk Factor	Reported Date	Response	Frequency	Start Date	End Date	End Date Reason
<input type="checkbox"/>	✓ Chronic Medical Condition - Cardiac Disease (*)	2019 Apr 16	Yes	-	-	-	-
<input type="checkbox"/>	✓ Chronic Medical Condition - Diabetes Mellitus (*)	2019 Apr 16	Yes	-	-	-	-
<input type="checkbox"/>	✓ Chronic Medical Condition - Kidney Disease dialysis requirement unknown (*)	2019 Apr 16	Yes	-	-	-	-
<input checked="" type="checkbox"/>	✓ Chronic Medical Condition - Liver Disease - Hepatitis B (*)	2019 Apr 16	-	-	-	-	-

R3.2

This screenshot shows the 'Set Response' dialog box. A green callout bubble points to the 'Risk Factor Pertinent to investigation in context' checkbox, which is checked. Another green callout bubble points to the 'Apply' button. A third green callout bubble points to the 'Response' dropdown menu, which has been set to 'Asked but unknown'. The background shows a table with columns like 'Additional Information', 'Reported Date', 'Response', etc.

Make Risk Factor(s) Pertinent to the Investigation in context

This new action available in R3.2 is only applicable when a response has already been recorded for the Risk Factor, and an Investigation with preset Risk Factors is in context.

R2.5.9	R3.2
--------	------

Risk Factors

* Category:

* Risk Factor:

* Additional Information:

☒ Risk Factor Pertinent to Investigation in context

* Response:

Frequency:

Start Date: / /

End Date:

End Date Reason:

Reported By:

* Reported Date:

Specify:

Risk Factors Add to WQ Save Reset

BC Self-ID Missing

Client ID: 2667603 Name (Last, First Middle) / Gender: SMTEST, RiskFactor Preset / Undifferentiated Health Card No: Date: 2000

Phone Number: Address: Additional ID Type / Additional ID: Yukon HCIP# / -

Investigation

Investigation ID: 171535 Status: OPEN Disposition: Complete Age at time of Investigation: 19 years

Disease: Tuberculosis PHAC Date/Type: 2019 Apr 11 / Date Reported Etiologic Agent: Authority/Classification: Territorial / Case - Clinical / 2019 Apr 1

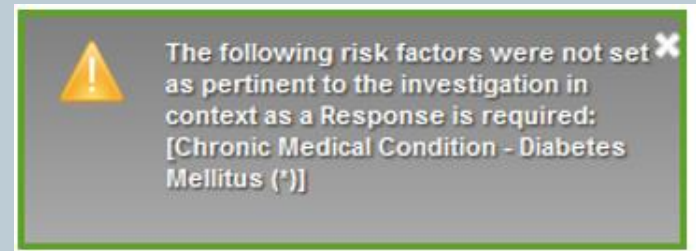
Risk Factor

Update View Delete Set Response Set Pertinent

Only available when an Investigation is also in context, and a 'Response' has already been recorded against the Risk Factor

	Preset	Risk Factor	Additional Information	Reported Date	Response	Frequency	Date Range	End Date Reason
<input checked="" type="checkbox"/>		Chronic Medical Condition - Diabetes Mellitus (*)		2019 Apr 12	No			

If the 'Set Pertinent' button is invoked for a Risk Factor that does not have a 'Response' recorded, then the following notification is provided to the user;



Update and Review Risk Factor

In R3.2 the user can opt to view the Risk Factor, or update the Risk Factor. First the Risk Factor is selected by checking the relevant checkbox in the Risk Factor factory table, and then either clicking the 'View' or 'Update' button. The updating capabilities remain unchanged. A Risk Factor may be removed from being pertinent to an Investigation by using the 'Update Risk Factor' modal and individually unchecking the 'Risk Factor pertinent to investigation in context' checkbox.

R2.5.9

Risk Factors Hide Risk Factors

* Category:

* Risk Factor:

* Additional Information:

* Response:

Frequency:

Start Date: / /

End Date: / /

End Date Reason:

Reported By:

* Reported Date: / /

Specify:

Created By: Murphy OSTUP, Sarah Created Date/Time: 2019 Apr 12 08:08 PDT Last Updated By: Last updated Date/Time:

R3.2

Risk Factor Update Risk Factor Apply Reset

* Risk Factor:

☒ Risk Factor Pertinent to Investigation in context

Additional Information:

* Response:

Frequency:

Reported By:

Effective From: Effective To:

End Date Reason:

* Reported Date:

Reported by Details:

View Risk Factor modal

All fields are greyed and no updates permitted.

Delete Risk Factor

The workflow for deleting a Risk Factor has changed in R3.2. A Modal will pop up for reason and confirmation of deletion of RF.

R2.5.9

R3.2

Preset Risk Factors

In R3.2 the 'Reported By' date is no longer automatically entered once the Investigation with preset Risk Factors has been created

R2.5.9

	Risk Factor	Reported Date	Response
<input checked="" type="checkbox"/>	Chronic Medical Condition - Cardiac Disease (*)	2019 Apr 16	-
<input checked="" type="checkbox"/>	Chronic Medical Condition - Diabetes Mellitus (*)	2019 Apr 16	-
<input checked="" type="checkbox"/>	Chronic Medical Condition - Liver Disease - Other - Specify (*)	2019 Apr 16	-
<input checked="" type="checkbox"/>	Chronic Medical Condition - Malignancies/Cancer (*)	2019 Apr 16	-
<input checked="" type="checkbox"/>	Chronic Medical Condition - Kidney Disease dialysis requirement unknown (*)	2019 Apr 16	-
<input checked="" type="checkbox"/>	Immunocompromised - Other - Specify (*)	2019 Apr 16	-
<input checked="" type="checkbox"/>	Chronic Medical Condition - Liver Disease - Hepatitis B (*)	2019 Apr 16	-
<input type="checkbox"/>	Substance Use - Alcohol	2019 Apr 16	Yes

R3.2

	Update	View	Delete	Set Response	Set Pertinent
	Preset	Risk Factor	Additional Information	Reported Date	Response
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chronic Medical Condition - Cardiac Disease (*)			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chronic Medical Condition - Diabetes Mellitus (*)			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chronic Medical Condition - Kidney Disease dialysis requirement unknown (*)			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chronic Medical Condition - Liver Disease - Hepatitis B (*)			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chronic Medical Condition - Liver Disease - Other - Specify (*)			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chronic Medical Condition - Malignancies/C... - Other, specify			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Immunocompro... - Other - Specify (*)			
<input type="checkbox"/>		Substance Use - Alcohol		2019 Apr 16	Yes

Client Warnings

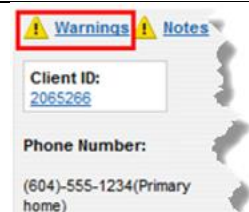
Warnings Icon Changes

In **R2.5.9** there are five types of Client Warnings: manually created Warnings, Adverse Drug Reactions, Adverse Events (AEFIs), Special Considerations and Allergies. If there are active records for one or more of these types of warnings a **Warnings** icon is displayed in the Client Context Header.

In R.3.2 the icon has been renamed to Alerts. Client warnings are limited to manual warnings only.

NOTE: The Adverse Reaction functionality is not be recommended for use, ADRs should be recorded as manually created Client Warnings on the *Client Warnings* screen in **R3.2**.

R2.5.9



R3.2

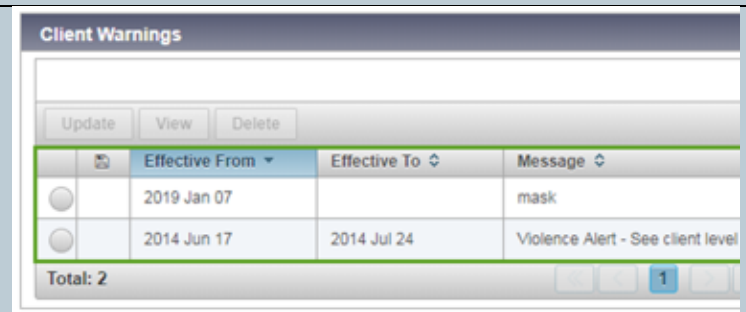
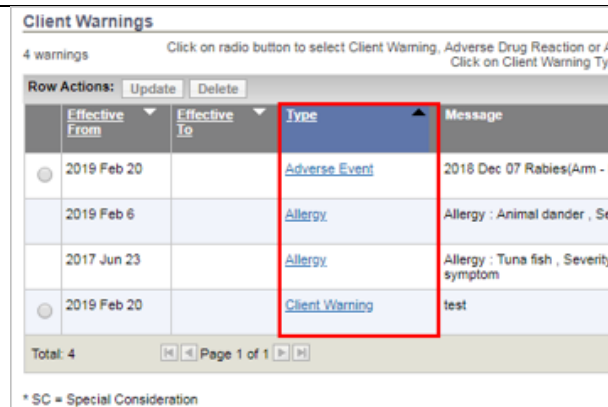


Client Warnings Screen Changes

The *Client Warnings* screen is accessed from the **Left Hand Navigation** bar from the Family Health, Immunizations, and Investigations modules.

In **R2.5.9** the *Client Warnings* screen displays all active Client Warnings on the Client's record, including Allergies, Special Considerations, Adverse Events (AEFIs), Adverse Drug Reactions, and manually created warnings.

In **R3.2** the *Client Warnings* screen will only display manually created Client Warnings. The *Client Alerts* screen, accessed by clicking on the **Alerts** icon, is the only place to see a Summary of all types of Client Alerts.



Allergy Record Changes

In **R2.5.9** when you created an Allergy record for a client with the **Show as Client Warning** checkbox selected, the Allergy record displayed in the *Allergies table*, the *Client Warnings* table and the *Client Warning Summary* pop-up.

In **R3.2** the checkbox has been renamed to **Show as Client Alert**. The *Client Warnings* screen does not display the Allergy record. The *Alerts* modal displays the allergy record.

R2.5.9

In the Allergies Screen, all allergies show on table

R3.2

Allergies screen show all listed allergies

Warnings **Notes**

Client ID: 2065266 Name(First,Middle,Last)/Gender: DONOTUSE IMMS DONOTUSE PCST ONLY / Male Health Card No: -

Phone Number: (604)-555-1234(Primary home) Jurisdiction Info: Thompson Cariboo Shuswap, Chase Additional ID Type / Additional ID: Yukon HCIP# / -

List of Allergies for Client

View/Update Delete Reason for Deletion:

Allergy	Severity	Reaction	Onset Date	Effective From
Bee/Wasp venom	Severe	Anaphylaxis	2017 Jan 31	2017 Jan 31
Paracetamol		Ear/nose/throat symptom	2017 May 27	2017 May 27
Tuna		Gastrointestinal symptom	2017 Jun 23	2017 Jun 23

When selecting the Warnings hyperlink, only active Allergies would show

Warnings **Notes**

Client ID: 2065266 Name(First,Middle,Last)/Gender: DONOTUSE IMMS DONOTUSE PCST ONLY / Male Health Card No: -

Phone Number: (604)-555-1234(Primary home) Jurisdiction Info: Thompson Cariboo Shuswap, Chase Additional ID Type / Additional ID: Yukon HCIP# / -

Client Warnings

2 warnings Click on radio button to select Client Warning, Adverse Drug Reaction or Adverse Event Type Click on Client Warning Type to view details

Row Actions: Update Delete

Effective From	Effective To	Type	Message
2017 Jun 23		Allergy	Allergy : Tuna fish , Severity: NA , Reaction: Ear/nose/throat symptom
2017 May 27		Allergy	Allergy : Paracetamol , Severity: NA , Reaction: Ear/nose/throat symptom

Total: 2 Page 1 of 1

Client Warnings

Adding and Updating Client Warnings

- R3.2 is a similar process from R2.5.9

View Client Warnings

R2.5.9

Warnings

Click on radio button to select Client Warning, Adverse Drug Reaction or Adverse Event Type. Only Client Warning Type can be deleted Click on Client Warning Type to view details or other Types to update source information

Actions: Update Delete Create Warning

Effective From	Effective To	Type	Message	Last Edited By
2019 Mar 14		Client Warning	This is a test for 3.2 documentation	Cowinden CSTSUP, Stephanie

Page 1 of 1

View Client Warning Details

Warnings **Notes**

Client ID: 2043092 Name(First,Middle,Last)/Gender: TESTSNC TESTSNC / Female Health Card No: - Date of Birth / Age: 2011 Feb 11 / 8 yrs 1 months

Phone Number: -(-) Jurisdiction Info: Fraser North Burnaby Additional ID Type / Additional ID: Yukon HCIP# / -

Warning is Effective From: 2019 Mar 14 To: -

Message: This is a test for 3.2 documentation

Reason for last update: -

Comments: -

Close

Allergies

Update View Delete

Allergy	Severity	Reaction	Effective From
Animal dander		Unknown	2019 Feb 11
Egg Products		Anaphylaxis	2019 Jan 07
Animal/Insect - Other: specify	Mild	Anaphylaxis	2014 Jul 24
Vancomycin	Moderate	Skin/integumentary symptom	2013 Jun 2
Antibiotic - Penicillin	Severe	Skin/integumentary symptom	2013 Jun 0

Total: 5

Allergy records are not shown on the Client Warnings screen

Client Warnings

Update View Delete

Effective From	Effective To	Message
2019 Jan 07		mask
2014 Jun 17	2014 Jul 24	Violence Alert - See client level note dated 17 June

Total: 2

Allergy records are displayed in the Client Alerts screen

Client Alerts

Client ID: 2437753 Client Name: DONOTUSE PCST ONLY, DONOTUSE SS Health Card Number: -

Effective From	Effective To	Type	Message
2019 Feb 11		Allergy	Allergy: Animal Reaction Desc
2019 Jan 07		Allergy	Allergy: Egg P Reaction Desc
2019 Apr 11		Client Warning	This is a test for 3.2
2019 Jan 07		Client Warning	mask
2014 Jun 17	2014 Jul 24	Client Warning	Violence Alert dated 17 June

Total: 5

R3.2

A View button has been added to the table actions

Client Warnings

Update View Delete

Effective From	Effective To	Message
2019 Apr 11		This is a test for 3.2
2019 Jan 07		mask
2014 Jun 17	2014 Jul 24	Violence Alert - See client level note dated 17 June

Total: 3

In View, the user is unable to add any text (ie. View only)

Client Warnings

View Client Warning

Effective From: 2019/04/11

To:

Reason for Update:

Comment:

Message: This is a test for 3.2

(228 characters remaining.)

Deleting client warnings
Process is similar in R3.2 but include a warning message to confirm the deletion. Ensure that you press Save to save your changes.

Client Alerts

Alerts Icon
In R2.5.9 the Warnings icon is displayed when there is at least one active client warning for the client in context. The icon was used to view the client in context’s warnings without having to navigate away from the screen the user is on. In R3.2 the Warnings icon has been replaced by the Alerts icon.

R2.5.9

Warnings

Notes

Client ID: 2065266

Phone Number: (604)-555-1234(Primary home)

R3.2

Alerts

Client ID: 2667595

Phone Number: -

Alerts

Notes

Client ID: 2437753

Phone Number: Primary home: 604-123-4567 x2345

Client Alert Pop-up

R2.5.9

When clicked on, the Warning icon opened the Client Warning Summary pop-up with a table of the Client in context’s warnings.

R3.2

The Alerts icon opens a Client Alerts pop-up window from a Classic screen, or Client Alerts modal from an upgraded screen, with a complete table of Client Alerts. This table will display the 5 types of Client Alerts previously displayed on the R2.5.9 Client Warning Summary pop-up: Client Warning, Allergies, Special Considerations (SC), Adverse Event AEFI, and ADR.

Warnings **Notes** **ACTIVE**

Client ID: 2665268
 Name(First,Middle,Last)/Gender: DONOTUSE MMS DONOTUSE PCST ONLY / Male
 Health Card No: -
 Date of Birth / Age: 2014 Jan 28 / 5 yrs 0 months
 Phone Number: (604)-555-1234(Primary home)
 Jurisdiction Info: Northern Interior/Prince George
 Additional ID Type / Additional ID: Yukon HCIP# / -

Client Warnings Summary -- Webpage Dialog

Client Warnings Summary

Client ID: 2643696
 Name(First,Middle,Last)/Gender: TESTSNC2018 TESTSNC2018 / Female
 Health Card No: -
 Date of Birth / Age: 2011 Feb 11 / 8 yrs 1 months

Effective From	Effective To	Type	Message	Last Edited By
2019 Mar 13		Client Warning	This is a test for 3.2 documentation	Cownden CSTSUP, Stephanie

Total: 1 Page 1 of 1 Jump to page: []

* SC = Special Consideration

Alerts

Client ID: 2667595

Client Alerts

Client ID: 2437753
 Client Name: DONOTUSE PCST ONLY, DONOTUSE SS
 Health Card Number: -
 Date of Birth / Age: 2010 Dec 31 / 10 yrs 0 months

Effective From	Effective To	Type	Message	Last Edited By
2019 Feb 11		Allergy	Allergy: Animal dander, Severity: , Reaction Desc: Unknown	Cownden CSTSUP, Stephanie
2019 Jan 07		Allergy	Allergy: Egg Products, Severity: , Reaction Desc: Anaphylaxis	Peroff CL, Stephanie
2019 Jan 07		Client Warning	mask	Peroff CL, Stephanie
2014 Jun 17	2014 Jul 24	Client Warning	Violence Alert - See client level note dated 17 June 2014	Lacoste RN, Stephanie

Total: 4

NOTE: The Client Alerts modal will display both active and inactive Alerts records; however, the icon is only displayed when there are one or more active Alert records.

Alert Pop-up Modal actions

R3.2 users are able to easily navigate to one of four Alert Summary screens from the Client Alerts Pop-up/ modal by clicking on the Actions dropdown, and selecting the Adverse Events (AEFI), Special Considerations, Adverse Drug Reaction, Allergies of their choice. The Alert types that are listed in the Actions drop down are based on the user's permission. Client Warnings are never listed in the Actions drop down list.

Client Alerts

Client ID: 2667615
 Client Name: testBABY, BABY
 Health Card Number: -
 Date of Birth / Age: 2019 Apr 13 / 0 yrs 0 months

Effective From	Effective To	Type	Message	Last Edited By
2019 Apr 15		Allergy	Allergy: Resins/Rosins/Colophony, Severity: , Reaction Desc: Multiple symptoms - see comment	Cownden CSTSUP, Stephanie
2019 Apr 15	2019 Apr 15	Allergy	Allergy: Bee/Wasp, Severity: Severe, Reaction Desc: Cardiovascular symptoms	Cownden CSTSUP, Stephanie

Total: 2

Actions

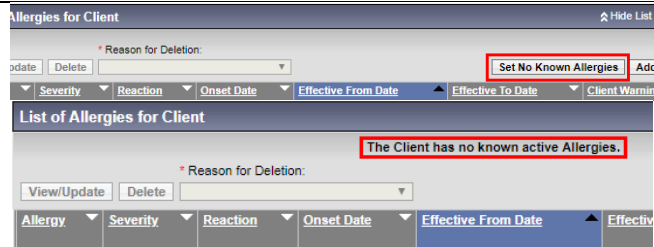
- Allergies
- Special Considerations

NOTE: In R3.2 the Allergy record the will not be displayed on the Client Warnings screen.

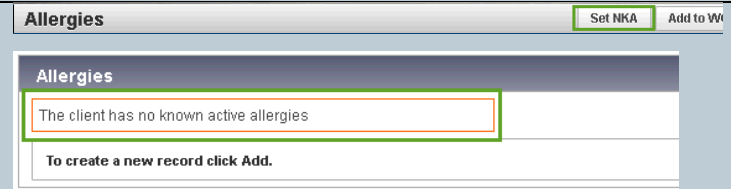
Allergies

Setting No Known Allergies:

In R2.5.9 the Set No Known Allergies button is next to the Add Allergy button within the List of Allergies for Client table. In R3.2 the button has been relabeled Set NKA, and moved to the Allergies screen header.



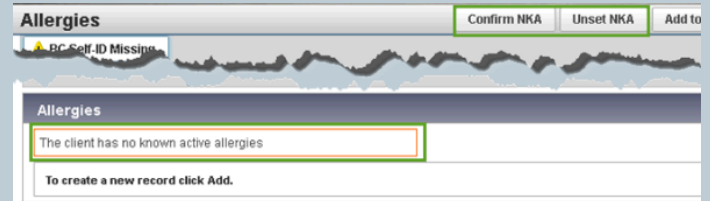
In R3.2 when the Set NKA has been set a message to note the client has no known active allergies is displayed above the section for creating a new record section.



Unsetting NKA:

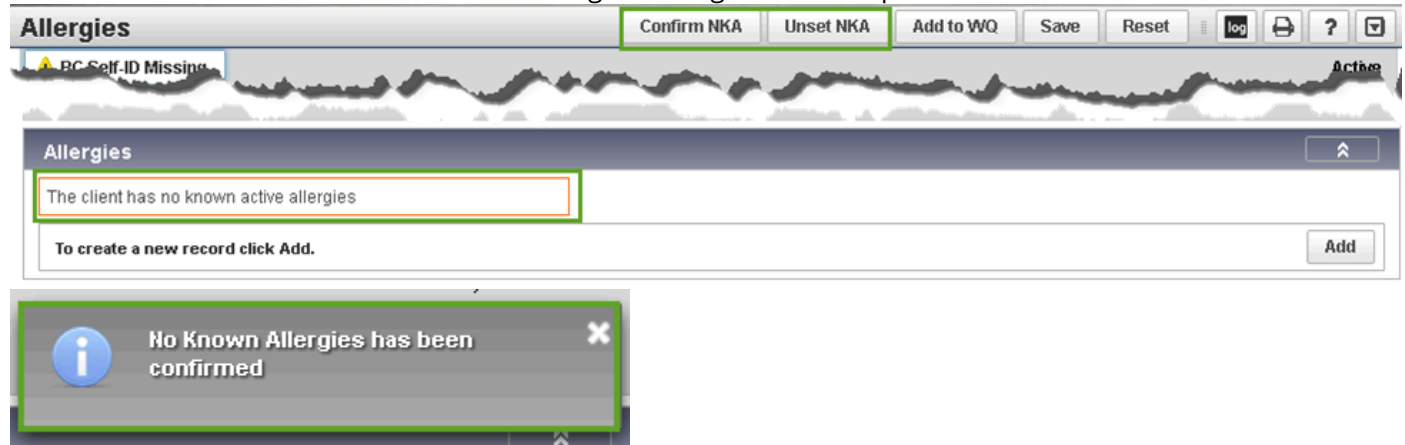
In R2.5.9 when the Set No Known Allergies button has been selected by the user the button is removed from the table, there is no way of un-doing the setting except to add an allergy record.

In R3.2 when the Set NKA button is clicked, the button is removed and replaced by Confirm NKA and Unset NKA.

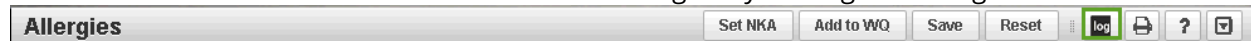


Confirming NKA:

In R3.2 after No Known Allergies has been selected, the Confirm NKA button is permanently displayed on the Clients Allergies screen, until an allergy record is created or a user selects the Unset NKA button. This is for future users to use to re-confirm the client has no known allergies during each subsequent encounter with the client.



You can see who has set or confirmed no known allergies by clicking on the log button.



The Action column will display which action a user performed on the Allergy record including Set NKA, and Confirm NKA.

Allergies

Confirm NKA

Unset NKA

Add to WQ

Save

Reset

log

?

Transaction Log

Subject: testSNC, testSNC test

Business Context	Date and Time	Action	User	User Org	User Role
Client Allergy	2019 Mar 15 10:54 PDT	Confirm No Known Allergies	Cownden CSTSUP, Stephanie	Panorama	BCY-System-Support
Client Allergy	2019 Mar 15 10:53 PDT	Set No Known Allergies	Cownden CSTSUP, Stephanie	Panorama	BCY-System-Support
Client Allergy	2019 Mar 15 10:53 PDT	Update	Cownden CSTSUP, Stephanie	Panorama	BCY-System-Support
Client Allergy	2019 Mar 13 10:37 PDT	Update	Cownden CSTSUP, Stephanie	Panorama	superuser
Client Allergy	2019 Mar 13 10:37 PDT	Create	Cownden CSTSUP, Stephanie	Panorama	superuser

Total: 5

1

10

Only the most recent transactions with pre-determined Actions will be displayed.

Removing NKA:

In R2.5.9 users needed to contact the PPHIS team in order to have the Set No Known Allergies setting removed due to it being entered in error. In R3.2 an Unset NKA button has been added in the event that Set No Known Allergies has been set in error or if a client presents with a new allergy.

NOTE: If the Set NKA button has been clicked in error, the user should click the Unset NKA button, and create a note with the reason for unsetting the No Known Allergies.

Allergies					
<div> <div>Confirm NKA</div> <div>Unset NKA</div> <div>Add to WQ</div> <div>Save</div> <div>Reset</div> <div>log</div> <div></div> <div>?</div> <div></div> </div>					
<div> <div>Allergies</div> <div> <div>The client has no known active allergies</div> <div>To create a new record click Add.</div> <div>Add</div> </div> </div>					

Add, Update, View, Allergies

Process is similar between R2.5.9 and R3.2

The View option is new in R3.2. Fields are greyed out and users are unable to edit information

Delete Allergies:

R2.5.9 To delete an allergy record the user must select the radio button for the record they want to delete, select a Reason for Deletion from the drop down list, and click the Delete button. When the Delete button is clicked a Confirmation message pops up asking the user to Confirm or Cancel their deletion. When the user confirms the deletion the record is removed.

In R3.2 to delete an allergy record the user selects the radio button for the allergy record to be deleted. The Row Action buttons are enabled. The user clicks the Delete button, and a confirmation pop-up opens asking the user to select a Reason for Deletion which will enable the Confirm button.

Allergies				
<div> <div>Update</div> <div>View</div> <div>Delete</div> </div>				
	Allergy	Severity	Reaction	Effective From
<input checked="" type="radio"/>	Bee/Wasp		Gastrointestinal symptom	
<input type="radio"/>	Tuna		Gastrointestinal symptom	2017 Jun 23
<input type="radio"/>	Paracetamol		Ear/nose/throat symptom	2017 May 27
<input type="radio"/>	Bee/Wasp venom	Severe	Anaphylaxis	2017 Jan 31
Total: 4		1		

Confirmation

Select the reason for deletion of: Bee/Wasp

* Reason for Deletion:

Duplicate as a result of Client Merge

Entered in error

Other

Confirmation

Select the reason for deletion of: Bee/Wasp

* Reason for Deletion:

Duplicate as a result of ...

Confirm

When the user has finished making changes to their clients Allergy record the user will click Save in the screen header.

Add to WQ

Save

Reset

log

?

Relationships

Row Action Changes in Table:

In R2.5.9 the available row actions for the user to take were limited to viewing/ updating, and removing a relationship.

Summary of Relationships to Client: ✓ Contains Data

DONOTUSE PCST ONLY, DONOTUSE IMMS

This Client has 4 recorded Client Relationships. Click on Last Name to see full client information. Click on

Row Actions:

View / Update

Remove Relationship

	Name	Relationship to in-context Client	Date Of Birth	Gender	Phone Number
<input type="radio"/>	Validation, Custodial father	Father			(604) 555
<input type="radio"/>	Validation, Foster parent	Legal Guardian			(604) 555
<input type="radio"/>	STIXLast, STIXFirst	Mother			(604) 555
<input type="radio"/>	Relation, Validate	Relation			(604) 555

In R3.2 the user is able to update a relationship, view relationship details, delete a relationship, preview a selected related client, as well as set a related indexed client in context.

Update

View

Delete

Preview Related Client

Set in Context

NOTE: that the row action buttons are enabled once a relationship has been selected.

Client Relationships

Update

View

Delete

Preview Related Client

Set in Context

	Related Client Name	Deceased	Indexed	Relationship to in-context Client
<input type="radio"/>	TestCY, TestCY		✓	Child
<input checked="" type="radio"/>	Child, 2			Child

Total: 2

Also note that if the selected related client is a non-indexed client, the Preview Related Client and Set in Context buttons are not enabled.

New Column: Expand

In R3.2 an Expand column has been added. Users can expand the Client Relationship Records by clicking on the Expand icon for a specific record, or expand all records by clicking the column header. When expanded, the record will display Date of Birth, Gender, and Preferred Phone #.

To expand a record the user clicks the arrow icon associated with the desired record to expand. When expanded, Date of Birth, Gender, and Preferred Phone # information is displayed in the expanded row.

R2.5.9










R3.2

June 2019

panorama@fnha.ca

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Row Actions: <div><div>View / Update</div><div>Remove Relationship</div></div>					<div>Find Client</div>	
	<div>Name</div>	<div>Relationship to in-context Client</div>	<div>Date Of Birth</div>	<div>Gender</div>	<div>Phone Number</div>	<div>Effective From</div>
<div></div>	Non-Indexed, Relationship	Friend			-	2017 Feb 03
<div></div>	<div>TESTSNC2018A</div> <div>TESTSNC2018</div>	Father	2001 May 06	Female	(604) 111-1254	2019 Apr 15
<div></div>	<div>TESTSNC2018A</div> <div>TESTSNC2018</div>	Mother	2001 May 06	Female	(604) 111-1254	2019 Apr 13

Client Relationships					
<div> <div>Update</div> <div>View</div> <div>Delete</div> <div>Preview Related Client</div> <div>Set in Context</div> </div>					
<input checked="" type="checkbox"/>		Related Client Name ▲	Deceased ⇅	Indexed ⇅	Relationship to in-context Client ⇅
		TestCY, TestCY		✓	Child
		test, test			Cousin
		testBABY, BABY	✓	✓	Child
		testBASY, BABY	✓	✓	Child

NOTE: Date of Birth, Gender, and Preferred Phone # columns have been removed from the table.

Client Relationships						
<input type="button" value="Update"/> <input type="button" value="View"/> <input type="button" value="Delete"/> <input type="button" value="Preview Related Client"/> <input type="button" value="Set in Context"/>						
		Related Client Name ▲	Deceased ▼	Indexed ▼	Relationship to in-context Client ▼	Effective From ▲
<input type="radio"/>	<input type="checkbox"/>	TestCY, TestCY		✓	Child	2018 Dec 17
<input type="radio"/>	<input type="checkbox"/>	test, test			Cousin	2019 Apr 15
<input type="radio"/>	<input checked="" type="checkbox"/>	testBABY, BABY	✓	✓	Child	2019 Apr 15
Date of Birth			Gender			Preferred
2019 Apr 13			Male			
<input type="radio"/>	<input checked="" type="checkbox"/>	testBABY, BABY	✓	✓	Child	2019 Apr 13
Total: 4				<input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="1"/> <input type="button" value="Previous"/> <input type="button" value="Next"/>		

Adding a Client Relationship:

R2.5.9 there are two options for adding a relationship, adding a client that has a client record in Panorama already, or adding a non-indexed client.

In R3.2 these options have been compressed into one Add button.

Relationships to Client: **T ONLY, DONOTUSE IMMS**

Contains Data

Hide Relationship Details

Order Client Relationships. Click on Last Name to see full client information. Click on radio button to select.

☐ w/ Update
 ☐ Remove Relationship

☐ Find Client and Add as a Relationship
 ☐ Create Non-Indexed Client

	Relationship to in-context Client	Date Of Birth	Gender	Phone Number	Effective From	Effective To	Custodial
stodisl	Father			(604) 555-1234	2004 Jan 26		✓
ster	Legal Guardian			(604) 555-8888	2016 Jan 01		✓
XFirst	Mother			(604) 555-5556	2016 Aug 20		

ips ✓						
<div> <div> Delete Preview Related Client Set in Context </div> <div>Add</div> </div>						
Related Client Name	Deceased	Indexed	Relationship to in-context Client	Effective From	Effective To	Custodial
TestCY, TestCY			Child	2018 Dec 17		
test, test			Cousin	2019 Apr 15		
testBABY, BABY			Child	2019 Apr 15	2019 Apr 15	

Adding a Relationship to an Indexed/Non Indexed Client

In 3.2 you can use the EFC to find and select a client to add as a relationship. The user selects the correct related client from the list of potential search matches.

Client Relationships

Add Relationship

* Relationship to in-context Client: Aunt
 * Relationship from in-context Client: Niece

* Effective From: yyyy/mm/dd To: yyyy/mm/dd
☒ Validated ☐ Custodial

* Related Client Source: ☒ Find in Index ☐ Add Non-Indexed Client

* Related Client: 2643721 Search Type:

LH, TEST9 | 2643721 | - | Male | 1970 Jan 01

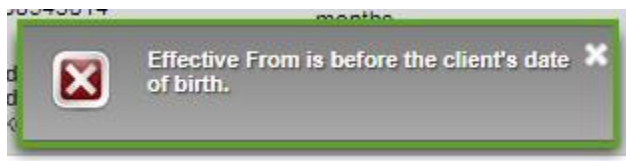
(2000 characters remaining.)

If the EFC does not return the correct related Client, there is an option to use the Client Search functionality similar to R2.5.9. The Client Search functionality is accessible by clicking on the microscope icon. The microscope icon will open a Find Client modal.

Users can use this screen to search for their desired client as they would search for any client in Panorama. In R3.2 the user clicks the correct related client row from the Search Results table, and is returned to the Add Relationships modal to continue creating the Client Relationship.

Client ID	Health Card Number	Last Name	First Name	Gender	Date of Birth	Health Region	Active
2667595		Test	PPHIS	Female	2015 Mar 27	Tricities	Active
2667592		Test1	Client1	Female	1990 Jan 01	Burnaby	Active
2667594		Test1	ClientFather	Male	1945 May 03	Burnaby	Active
2667601		TESTS	Child	Female	2006 Mar 21	Burnaby	Inactive
2667600		TESTS	Mother	Female	1974 Mar 11	Burnaby	Active
Total: 5						1	50

NOTE: if the client in context has an Effective from Date on their Phone History or Address History that is prior to their DOB an error message will display when the user attempts to add a relationship to the clients record.



If this error message displays there are three places to check for improper Effective From Dates:

- Check the Effective From Date for the new relationship
- Check the Effective From Date of all the related Client records
- Check the in-context client's Phone Number History and Address History on their Client Demographics screen.

Consent Directives

All Directives Screen:

In R3.2 the Consent Directive component of Panorama has been restructured and upgraded to Next Gen look and feel.

1. On the LHN, 'All Services' is renamed to 'All Directives'. The screen is renamed from Consent Directive Summary to Consent Directive-All Directives
2. Add button replaces the Create New button and opens the Add Consent Directive modal window
3. New row action buttons display above the main table, allowing Users to complete an action with fewer mouse clicks.
 - Update opens the Update Consent Directive modal window. The button is enabled if the consent directive is in:
 - Confirmed status and Active/Inactive
 - Draft status and Active

In R3.2 a User cannot update an inactive consent directive in Draft status, but in R2.5.9 a User is allowed.

- View opens the new View Consent Directive modal window in read-only mode.
- Confirm updates the status of the selected consent directive from Draft to Confirmed. The button is enabled if the selected consent directive record is in Draft status and is Active (Effective To date is greater or equal to today's date). More than one consent directive record can be updated to Confirmed status at one time.
- Expire EOD updates the Effective To to today's date for the selected consent directive. The consent directive's Status does not change to 'Inactive' until midnight. In R2.5.9 the Expire Now button expired the consent directive effective immediately.
- Discard is now a button rather than a dropdown value under Directive Status. The button is enabled only if the selected consent directive record is Active and in Draft status.
- Delete displays if a User has the permission to delete, otherwise it is hidden. This action is a soft delete.
- Copy as Draft button displays as a row action above the table rather than on the consent data entry screen.

The button creates a new consent record with the same details as the selected consent directive, with Status set to Draft.

The button is enabled if the selected consent directive record is in Confirmed status. In R2.5.9 a new consent can be copied from a consent in Draft or Confirmed status.

- Documents button navigates the User to the Context Document screen to attach a document to an existing consent directive record. The button is enabled if the selected consent directive has a status of Draft or Confirmed. In R2.5.9 a document can be attached at the time a new consent is created or when updating a consent in Draft status.
4. Expand/collapse is a new column. Displays the embedded sub-table containing more consent information.
 - Directive ID displays in the sub-table rather than in the main table.
 - Refuse Reason can be viewed at the table level
 - Consent Given By, Consent Given How, and Consent Given To now display in the sub-table in separate columns.
 - Created By Organization displays the organization of the logged in User who created the consent directive. System generated.
 - Comments? column displays a checkmark ✓ if there are comments saved.
 - Documents column displays hyperlinks to documents that are attached to this consent directive record.

- Unsaved transaction column added to display an indicator if new information has not been saved.
- Status displays separate from Directive ID and no longer displays 'Expired'. Status now includes only Confirmed, Draft, and Discarded
- Column filters added to Status, Instruction, Directive Type, Antigen, and Active. The column filters replace the filter section that is in R2.5.9.
- Antigen is a new column that can be filtered or sorted.
- Active is a new column that can be filtered or sorted. Users can filter to display Active and Inactive/Expired consents.
- Effective From and Effective To dates display in separate columns.

R2.5.9

R3.2

Record Consent Directive for Immunization

In R3.2 the workflow for recording immunization consents is streamlined. The Add Consent Directive modal window allows a User to record a consent for a single antigen or a vaccine agent that has more than one component antigen (e.g. MMR) in one step. On this window, the User can choose to create a consent record for all selected antigens or select/unselect specific antigen(s). When the Apply button is clicked, the system generates individual consent record for each selected antigen. In R2.5.9 the User manually enters a consent record for each component antigen.

- Directive Sub Category** is a mandatory field and defaults to 'Immunization'.
- Directive Type** is now a read only field. The field is still pre-populated based on the value selected in the **Directive Sub Category** field.
- Consent Applies To
 - Select Agents** displays a list of immunization agents. When a User selects an agent and clicks on the arrow, the system displays the component antigens. The component antigens are selected by default. The User has the option to select/unselect specific antigen(s).
 - Number of Doses** for which consent is being provided.
 - Consent Readiness. Displays 'Grant' if the client has an Active consent in Confirmed status for the antigen, otherwise 'Missing' is displayed.
- Instructions** field converted to radio buttons
- Reason for Refusal** text box is labelled **Reason Description**
- Status** defaults to 'Confirmed' rather than 'Draft'
- Consent Given By** includes more options to record who gave the consent.
 - Not Specified** is a new option
 - Related Client** is a new option and is enabled when the client in-context has relationship records with active indexed clients. The dropdown displays the names of these related clients.

- **Other** option replaces the **Consent Given By** dropdown in R2.5.9. The dropdown displays the same options as in R2.5.9 and the User can still enter a free text name. The free text box accepts up to 100 characters (R2.5.9 allows up to 50 characters). The **Consent Given By** defaults to 'Other'.

8. Consent Given To

- **Name** replaces the 'Last Name, First Name' radio button and *free text box that are in R2.5.9.*
 - **Current User** button replaces the 'Current User' radio button that is in R2.5.9. The button must be clicked to populate the name of the current user in the **Name** text box.
9. **Comments.** Only one comment can be entered at the time a new consent directive is recorded. More than one comment can be entered when updating the consent.
 10. **Copy as Draft** is not available on the *Add Consent Directive* screen. It now displays on the *Consent Directives-All Directives* screen above the summary table.
 11. **Expire EOD** is hidden on the *Add Consent Directive* screen. The button now displays on the *Consent Directives-All Directives* screen above the summary table.
 12. **Document** section is hidden at the time a new consent directive is created. It becomes available only when the new consent directive is saved. In R2.5.9 documents can be attached at the time a new consent directive is created or when updating a consent directive that is in Draft status (a document cannot be attached to a consent in Confirmed status).

NOTE: Immunization refusals are not to be documented in the Consent form. Refusals need to be documented as a Special Consideration

R2.5.9

Create/Update Directive Details

Select "Copy as Draft" button to create a new directive from existing data.
Select "Submit" only after mandatory details completed.

Directive ID:

4142049

6 Directive Status:

Confirmed

10 Copy As Draft

Directive Category:

Service

1 Directive Sub Category:

Immunization

2 Directive Type Name:

Service Immunization

Agent:

MMR

3 *Antigen(s):

Measles

4 *Instruction:

Grant

of Doses: 2

5 Reason:

(100 char)

7 Consent Given By:

Parent

Mom

Form of Consent:

In Person

8 Consent Given To:

Not Specified

Current User

Last Name, First Name

Dinh CSTSUP, Trang

11 Expire

* Effective From Date:

2019 / 04 / 26

yyyy mm dd

Effective To Date:

/ /

yyyy mm dd

12 Attached Document

1 attached documents

Select link to view the uploaded document.

Manage Docu

(1) [Upload document on new1](#)

9 Comments

Comments:

3.2

Consent Directives - Immunization Service

Add to WQSaveResetlog?x

Add Consent Directive

12ApplyResetx

*** Directive Category:**Service

*** Directive Sub Category:**Immunization

Directive Type:Service: Immunization

*** Consent Applies To:**3

Antigen Select Option:
☐ All Antigens ☒ Selected Antigens

Number of Doses:

Select Agents:

Select Antigens:

Antigens	Consent Readiness
<input checked="" type="checkbox"/> Measles	Missing
<input checked="" type="checkbox"/> Mumps	Missing
<input checked="" type="checkbox"/> Rubella	Missing

4 * Instruction:
☒ Grant ☐ Refuse

Reason for Refusal:5

(100 characters remaining.)

Reason Description:

6 * Status:
☐ Draft ☒ Confirmed

*** Effective From:**2019/04/25
To:yyyy/mm/dd
Form of Consent:

7 Consent Given By:
☒ Not Specified
☐ Related Client
☐ Other Relation
Mother: Upgrade, Mom
Relationship Type

8 Consent Given To:
☒ Not Specified
☐ Name
Current User

9 Comments:

(2000 characters remaining.)

ApplyReset

To create a new record click Add.

Add

Record a Consent Directive for TB Skin Test

In R3.2 the **Add** button on the Consent Directive – All Directive screen replaces the **Create New** button. When saving a new consent two steps must be completed. First, the User must click the **Apply** button to add the consent to the table and then click **Save** to save the new record. In R2.5.9 the User only needs to click the **Submit** button to save the consent.

The layout of the Add Consent Directive screen has been updated to the Next Gen look & feel with the modal window for data entry.

1. **Directive Sub Category** is a mandatory field and defaults to blank. Select 'TB Skin Test'.
2. **Directive Type** is now a read only field. The field is still pre-populated based on the value selected in the **Directive Sub Category** field.
3. **Instructions** field converted to radio buttons
4. **Reason for Refusal** text box is labelled **Reason Description**
5. **Status** defaults to 'Confirmed' rather than 'Draft'
6. **Consent Given By** includes more options to record who gave the consent.
 - **Not Specified** is a new option
 - **Related Client** is a new option and is enabled when the client in-context has relationship records with active indexed clients. The dropdown displays the names of these related clients.
 - **Other** option replaces the **Consent Given By** dropdown in R2.5.9. The dropdown displays the same options as in R2.5.9 plus the addition of 'Parent/Guardian'. A User can still enter a free text name in the text box, which now allows up to 100 characters (R2.5.9 allowed up to 50 characters). The **Consent Given By** defaults to 'Other'.
7. **Consent Given To**
 - **Current User** and **Last Name, First Name** are combined into a single radio button
 - **Name** replaces the 'Last Name, First Name' label. A User can enter any name in the **Name** field.
 - **Current User** button replaces the 'Current User' radio button. When the button is clicked, the system replaces whatever is in the **Name** field with the name of the currently logged in user.
8. **Comments.** Only one comment can be entered at the time a consent directive is added. More than one comment can be entered when the new consent directive is saved.
9. **Copy as Draft** is hidden on the Add Consent Directive screen in R3.2. It now displays on the *Consent Directives-All Directives* screen above the summary table.
10. **Expire EOD** is hidden on the Add Consent Directive screen. The button now displays on the *Consent Directives-All Directives* screen above the summary table.
11. **Document** section is hidden when recording a new consent directive. The section displays after the new consent directive is saved. In R2.5.9 documents can be attached at the time a new consent directive is created or when updating a consent directive that is in Draft status (a document cannot be attached to a consent in Confirmed status).

R2.5.9

Create/Update Directive Details Hide Details

Select "Copy as Draft" button to create a new directive from existing data.
Select "Submit" only after mandatory details completed.

Directive ID: 4142015

5 Directive Status: Draft 9 Copy As Draft

Directive Category: Service

1 Directive Sub Category: TB Skin Test

2 Directive Type Name: Service TB Skin Test

3 *Instruction: Grant 4 * Reason:

6 Consent Given By: Client Client Name * Effective From Date: 2019 / 04 / 18
yyyy mm dd

Form of Consent: In Person Effective To Date: / /
yyyy mm dd

7 Consent Given To: Not Specified Current User Dinh CSTSUP, Trang 10 Expire Now
Last Name, First Name

11

Attached Document Contains Data Show Documents

8 **Comments** Hide Comments

Comments: 12 (2000 characters) Add

Date	Directive Comments	Recorded By
2019 Apr 18	Comment 1	Dinh CSTSUP, Trang
2019 Apr 18	Comment 2	Dinh CSTSUP, Trang

Submit Cancel

3.2

Consent Directives ✓ ↑

Add Consent Directive 1 2 Apply Reset Print Close

* Directive Category: Service * Directive Sub Category: Directive Type:

3 * Instruction: Grant Refuse Reason for Refusal: 4 Reason Description:
(100 characters remaining.)

5 * Status: Draft Confirmed

* Effective From: 2019/04/26 To: yyyy/mm/dd Form of Consent:

6 Consent Given By: Not Specified Related Client Mother: Upgrade, Mom Other Relation Relationship Type

7 Consent Given To: Not Specified Name Current User

8 Comments: (2000 characters remaining.)

Apply Reset

Saving Duplicate Consent Directive

When saving a new consent directive for a client, the system will display an error message if there is an existing consent directive that has:

- the same Directive Sub Category, and
- the consent directive is in Confirmed status, and
- the directive Effective From/Effective To date overlap with each other

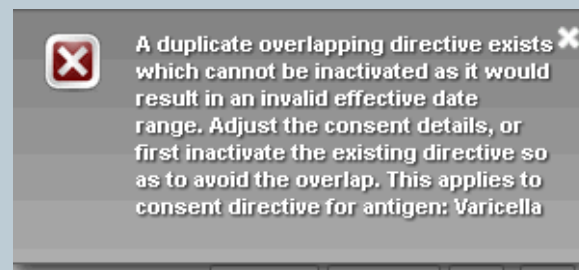
R2.5.9 the system allows only one active consent directive in Confirmed status for a service or antigen. When a new consent directive in Confirmed status is saved, the system automatically expires the existing one with yesterday's date.

R3.2 , the system will display an error message if there is an existing consent directive that has:

- the same Directive Sub Category, and
- the consent directive is in Confirmed status, and
- the directive Effective From/Effective To date overlap with each other

Row Actions: Delete					
Status Directive ID	Client Instruction Refuse Reason	Directive Type Name	Consent Given By Given How Consent Given To	Last Comment(s) Relevant Documents	Effective From Effective To
<input type="checkbox"/> Expired 4142059	Grant	Service TB Skin Test	- - -		From: 2019 Apr To: 2019 Apr 2
<input type="checkbox"/> Confirmed 4142060	Grant	Service TB Skin Test	- - -		From: 2019 Apr To: 2019 Apr 2
<input type="checkbox"/> Expired 4142056	Grant	Service Immunization	Client - -		From: 2019 Apr To: 2019 Apr 2
<input type="checkbox"/> Confirmed 4142057	Grant	Service Immunization	- - -		From: 2019 Apr To: 2019 Apr 2

Immunization



Consent Directives									
Update View Confirm Expire Now Discard Delete Copy as Draft Documents									
<input type="checkbox"/>	Status Filter On	Instruction Filter	Directive Type Filter On	Antigen Filter On	Active Filter On	Effective From	Effective To		
<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Varicella	Active	2019 Apr 26			
<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Varicella	Inactive	2019 Apr 25	2019 Apr 26		
<input type="checkbox"/>	Confirmed	Grant	Service: Immunization	Varicella	Inactive	2019 Apr 01	2019 Apr 25		
Total: 3									

Standard Reports

Generate Report Now

Click **Left Hand Navigation (LHN) > Reporting & Analysis > Reports**. The *Reports* screen displays.

R2.5.9

The buttons were at the bottom of the screen

R3.2

Buttons are now at the top of the screen