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

Table of Contents

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

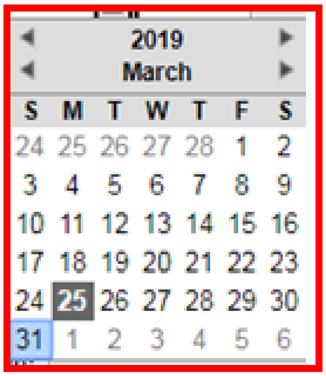
Common Panorama Components

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.

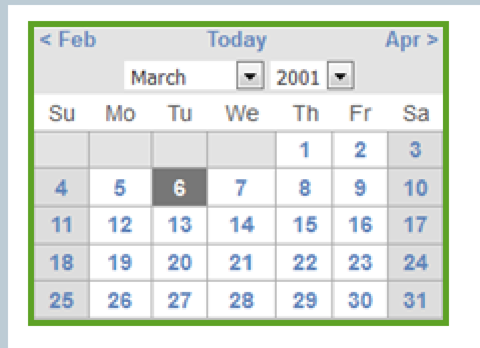
In NextGen, a Cancel button is used to cancel a transaction (meaning clear your entries and leave the screen or modal without saving). On a NextGen screen, Cancel will never be used to “return” to a previous screen. Cancel buttons on Panorama ‘Classic’ screens remain and function as before.”

Calendars:

R2.5.9



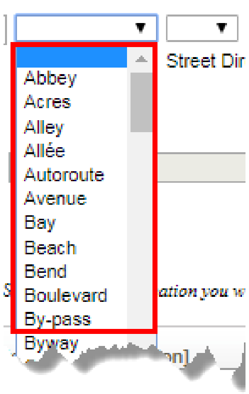
R3.2



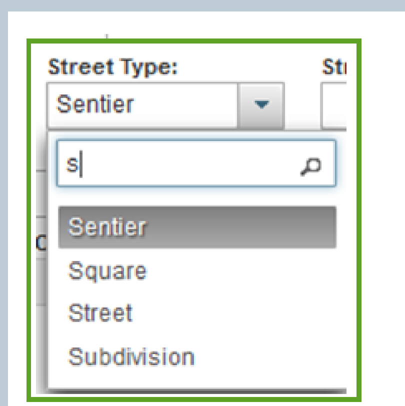
Drop Downs:

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

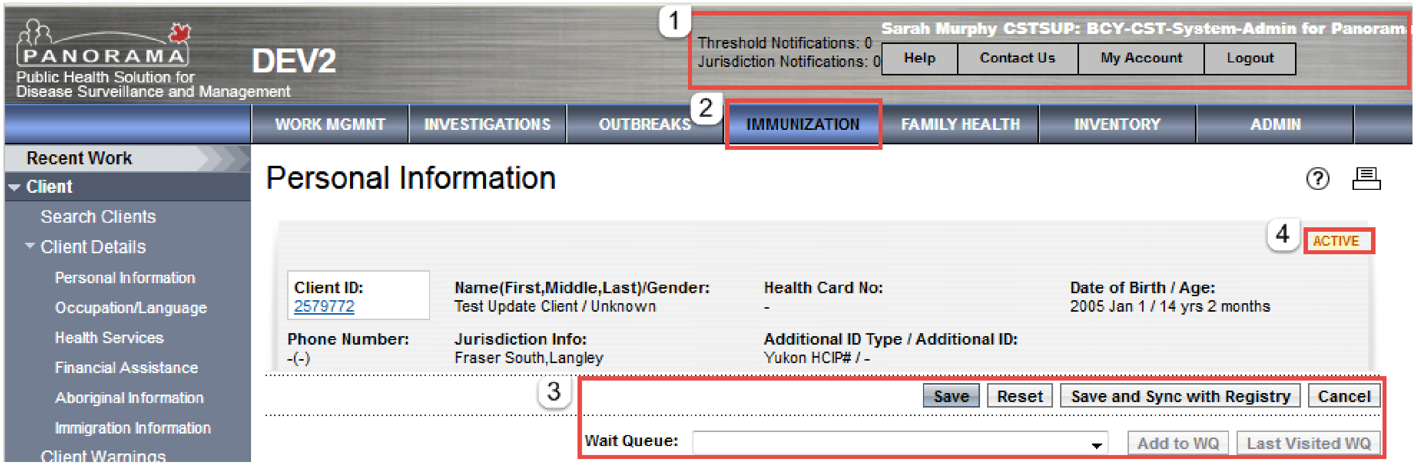


R3.2

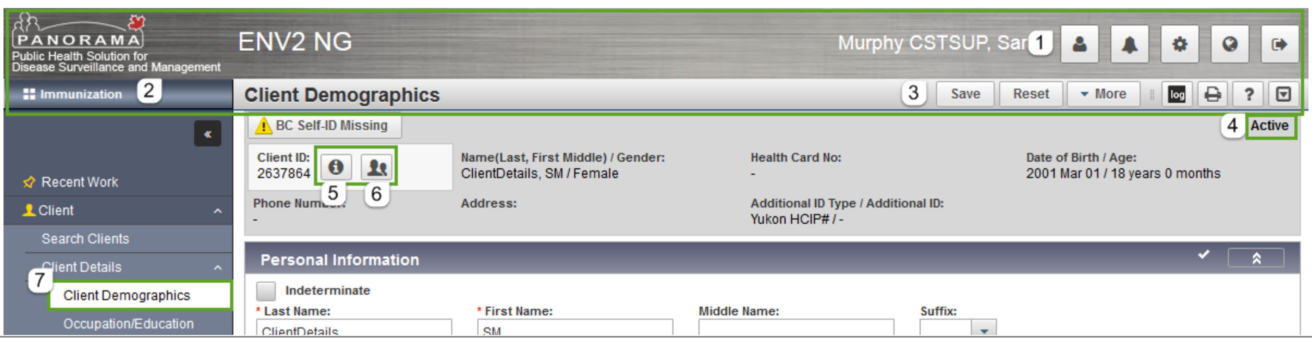


Headers:

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).



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:



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:

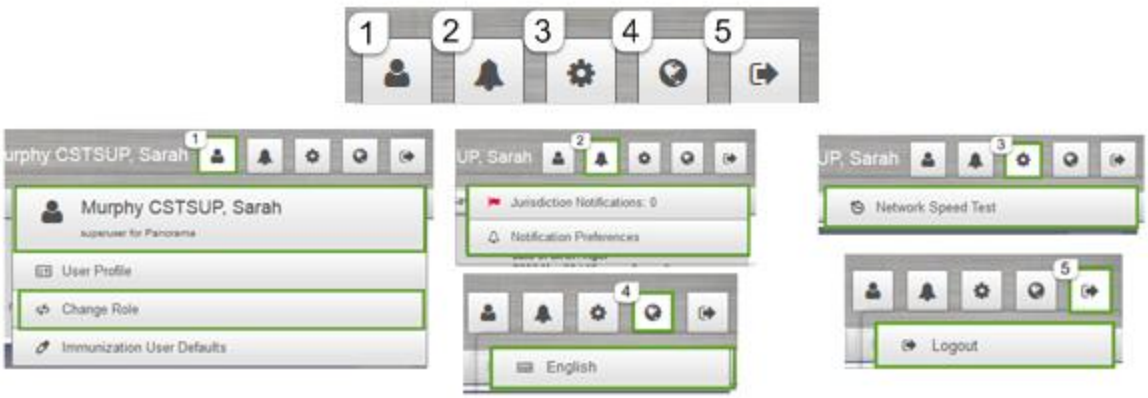
4. The Clients status of ‘Active’ remains available in the Context Header, however it is no longer highlighted and in red text
5. Information Icon – upon the user clicking this Information Icon, a ‘Client Profile’ modal is launched providing the user with all client level information e.g. Demographic 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

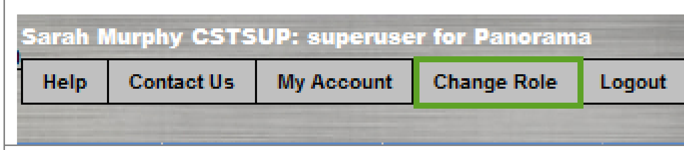
- Format of name is changed in order for all R3.2 screens the client name will be displayed Last Name, First Middle/ Gender.
- The LHN is collapsible by clicking on the chevron icon above Recent Work. When collapsed there are icons for the major screen areas (eg. Recent Work, Client, and Document Management)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

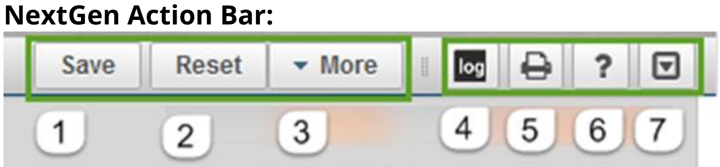


Banner on classic screen in R3.2:



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:

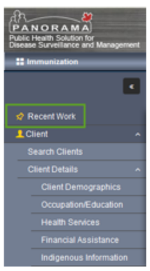


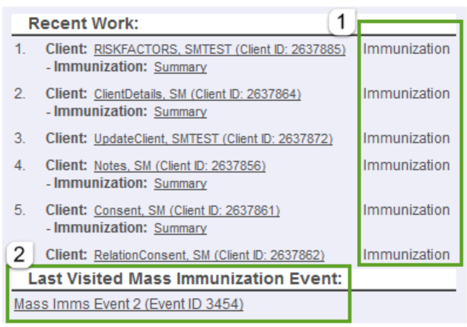
1. The Save Button
   The Save button should be click after a user makes any change to a NextGen screen.
2. Reset Button
   The Reset button can be used to clear any data entered on a screen since the last screen save.
3. More

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.

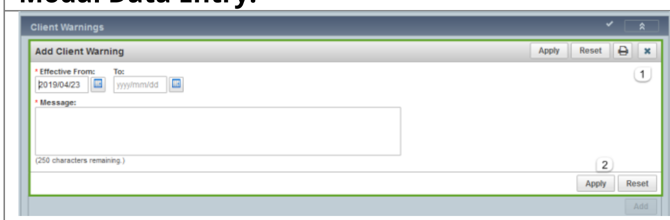
Recent Work:





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.

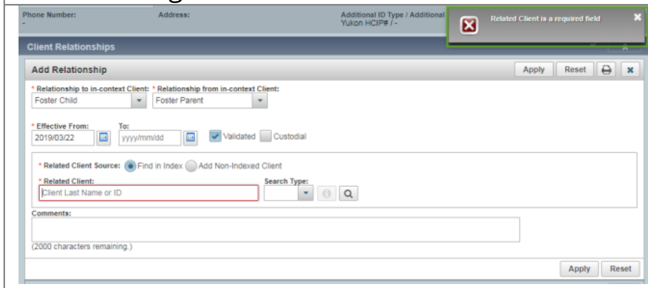
Users can close the modal in one of two ways

- 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:

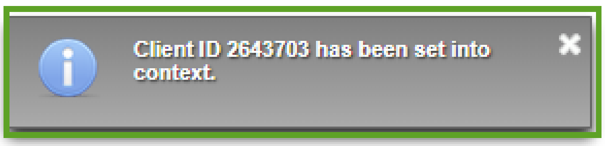
Messages and Notifications are displayed along the right hand side of screens to inform users of errors, warnings, and provide information to the user.

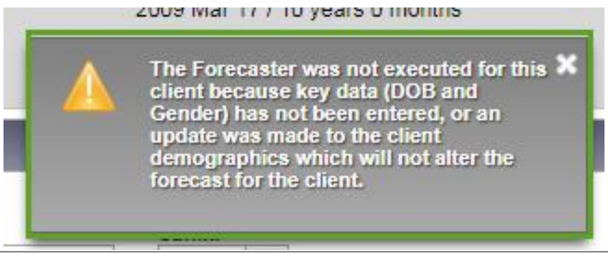
Error Messages



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.

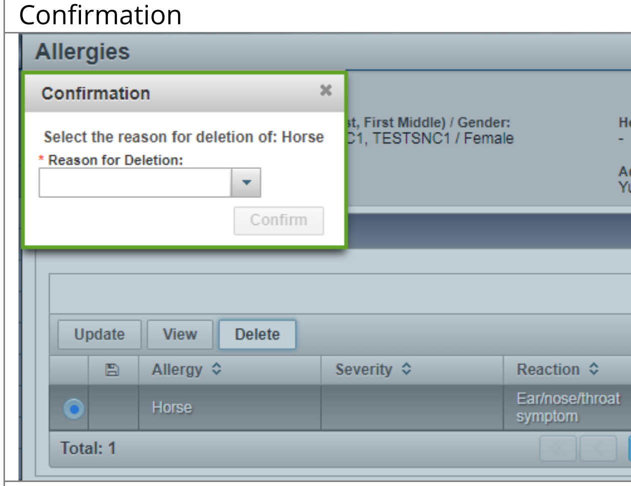
Informational





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.

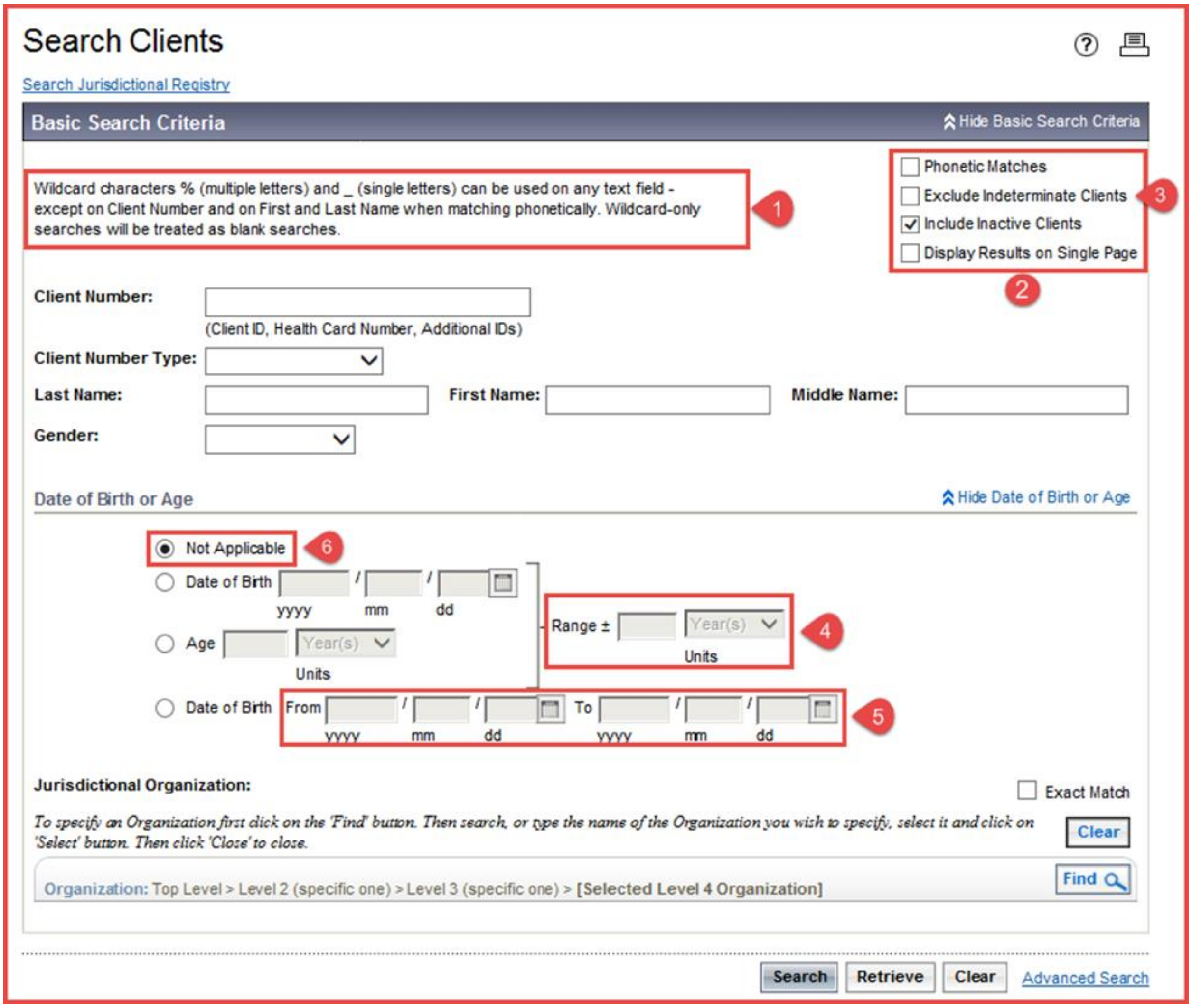
Confirmation

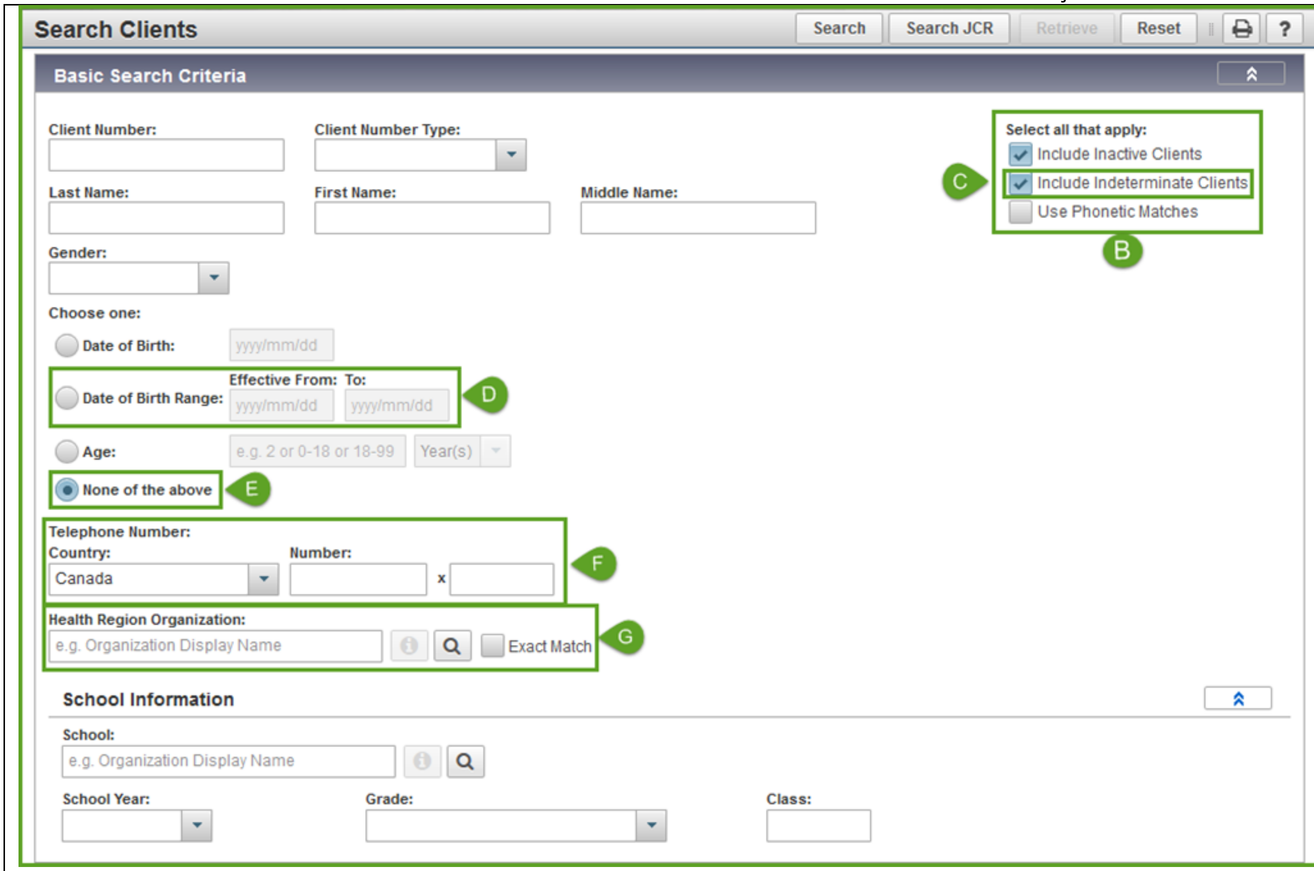


Conformational messages are displays when a user must confirm an action before the system will do it. These messages are most commonly displayed when a user is deleting a record. Depending on the action that has triggered the confirmation message the user may be required to perform an additional step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

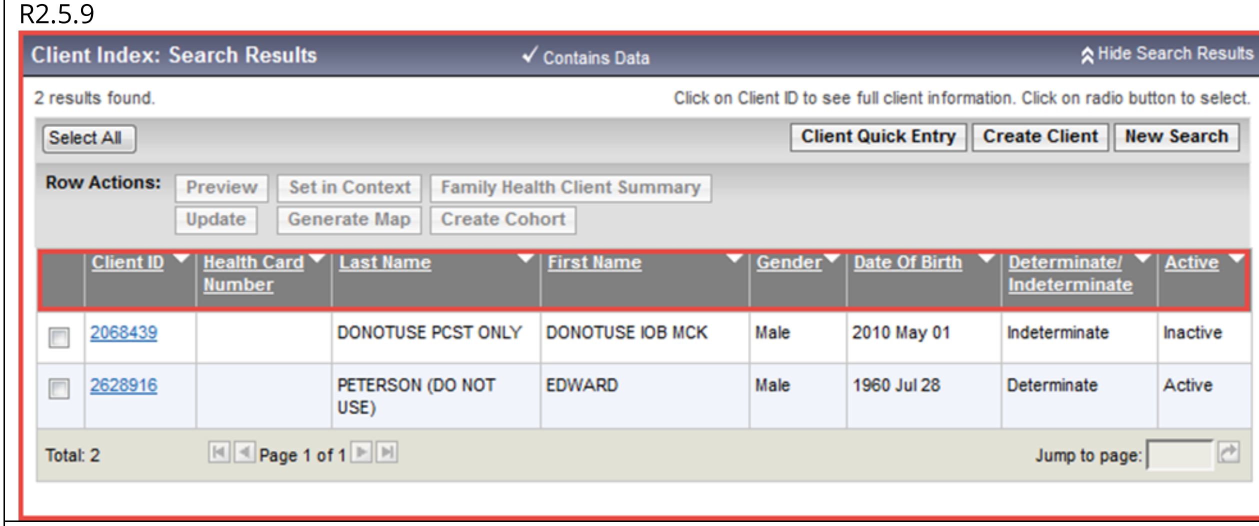
Search Clients

Basic Search Screen
R2.5.9

R3.2

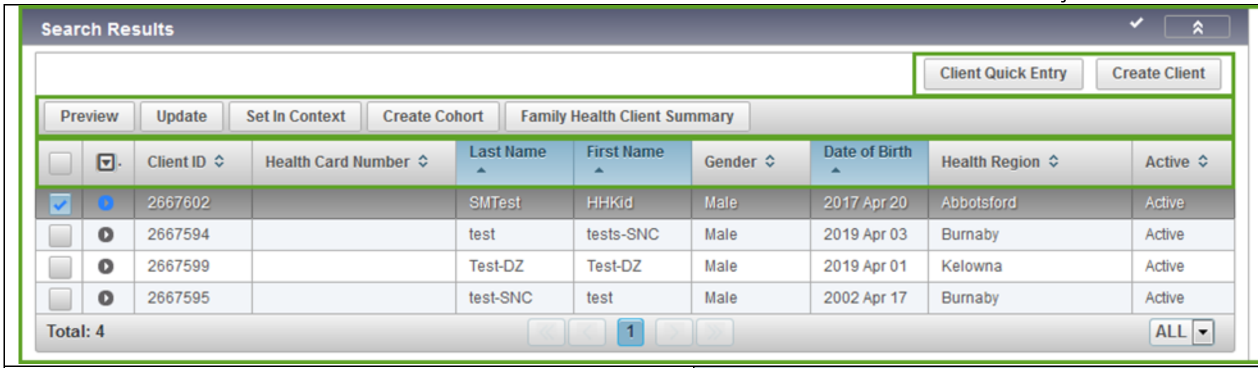


Search Results:

R2.5.9

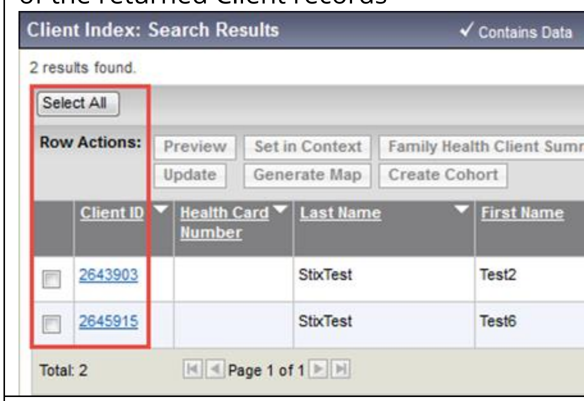


R3.2

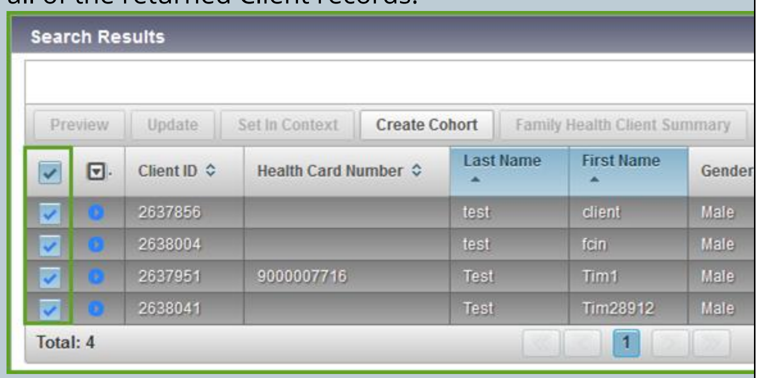


In R3.2, the Select and Client ID columns have been updated; the Expand and Health Region columns have been added; and the Determinate/ Indeterminate column has been removed.

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



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



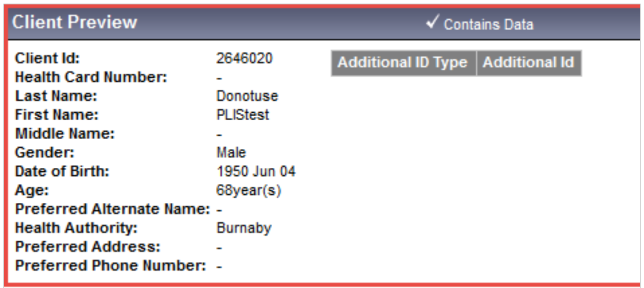
In both versions, the Row Actions are enabled when a single Client record (row) is selected in the Search Results table. Clicking Select All will only enable the Create Cohort button.

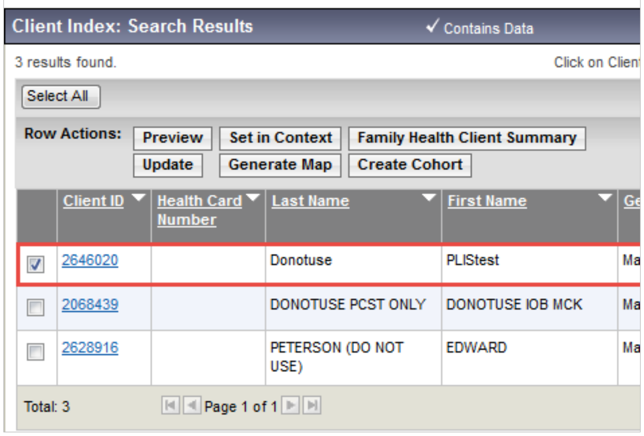
In R3.2, the Row Actions are arranged in a single line, with Generate Map removed. The actions Preview, Update, Set in Context and Create Cohort and their functions are the same as in R2.5.9

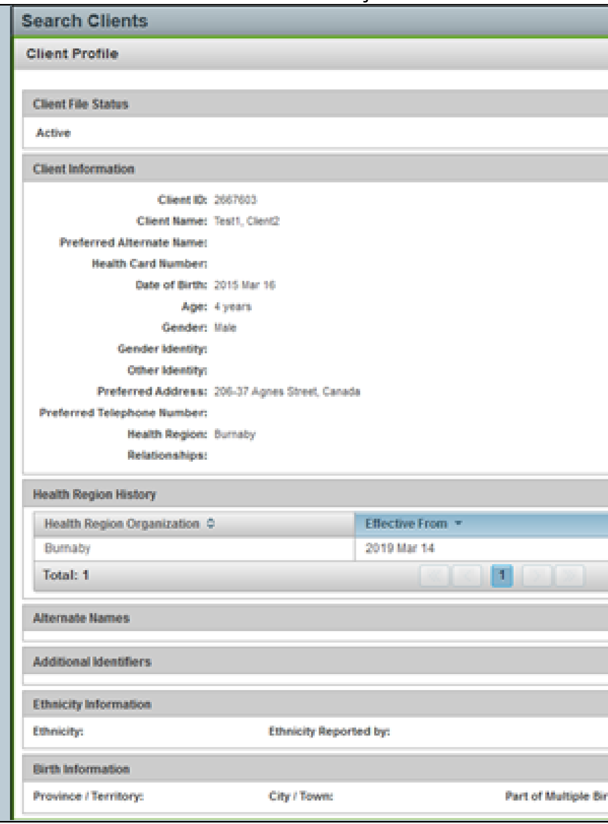
Row Actions: Preview

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.



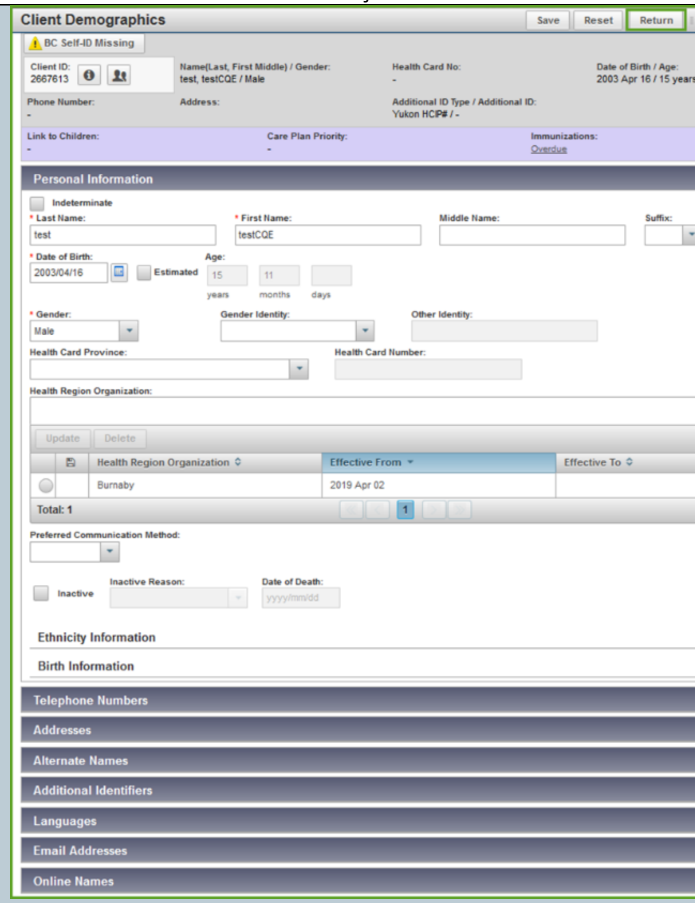




Row Actions: Update

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.

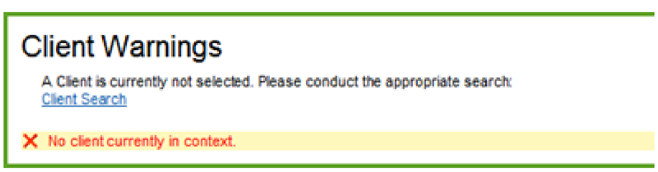
In R3.2, the Update button opens the Client Demographics Modal for updating the Client's personal information. Note that the NextGen design has the sections below Personal Information collapsed by default; improving full screen visibility and ease of scrolling. Click Return to close the modal and return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



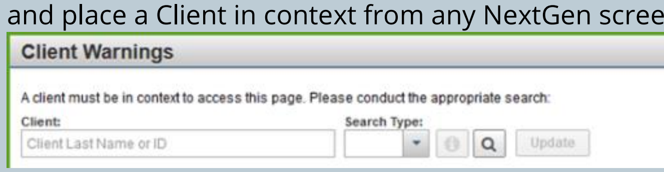
Client Search with Embedded Find Component:

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

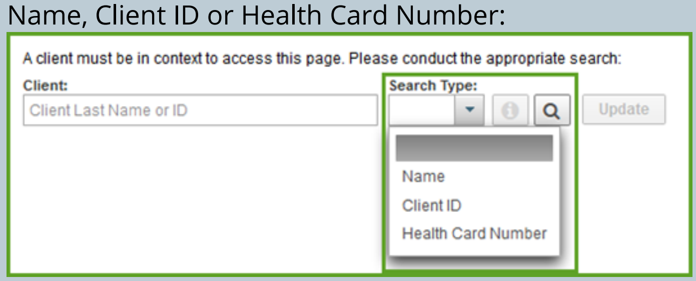
You also had to return to either of these screens to put a different Client/Cohort in context in R2.5.9.



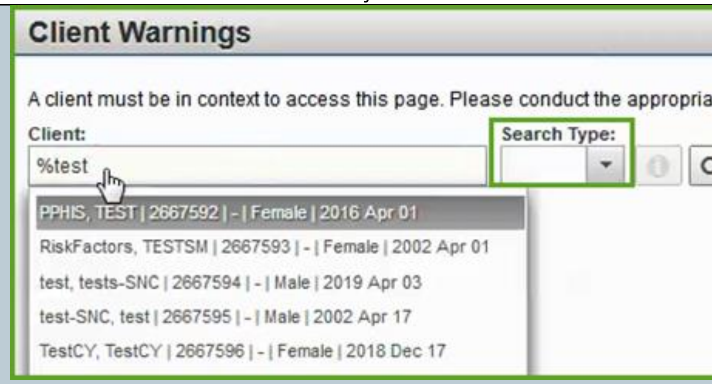
In R3.2, when no Client is in context, you can search for and place a Client in context from any NextGen screen.



You can click Search Type and select to search by Client Name, Client ID or Health Card Number:

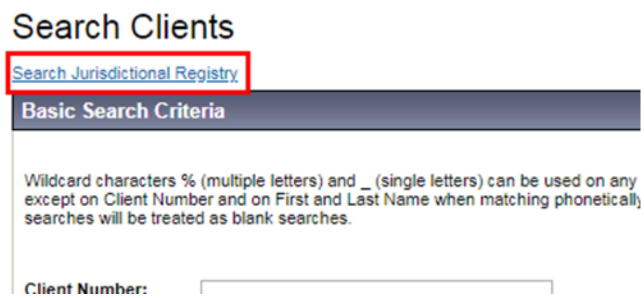


If no Search Type is selected, you may use the EFC free-text field to search by Client Last Name or ID. Begin typing the first few letters/numbers and any matches will display below the field

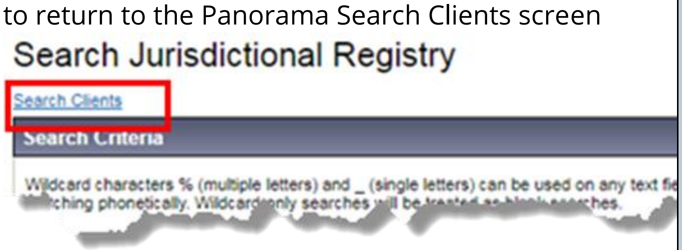


Search JCR:

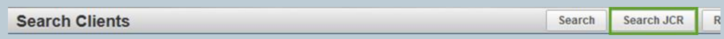
In R2.5.9 the Search Jurisdictional Registry link is displayed above the Basic Search Criteria section header



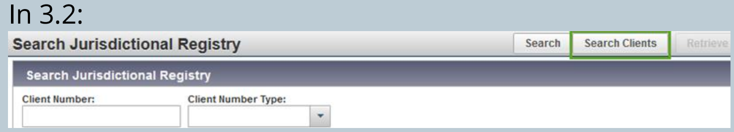
The Search Clients button in the page header is used to return to the Panorama Search Clients screen



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.



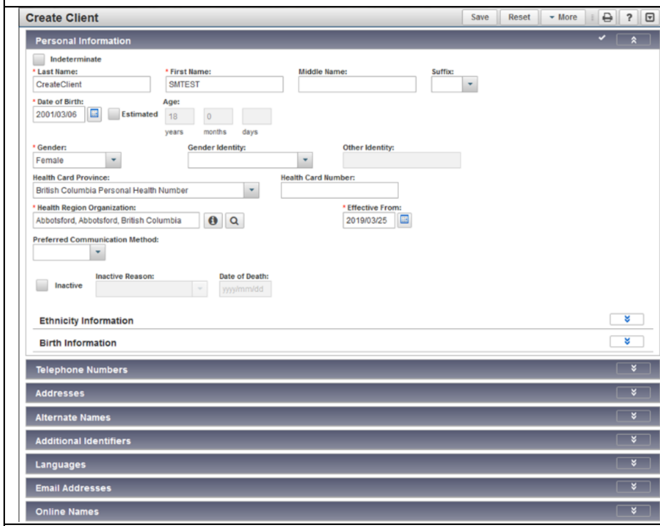
In 3.2:



Maintain Client

Create Client/Update Client:

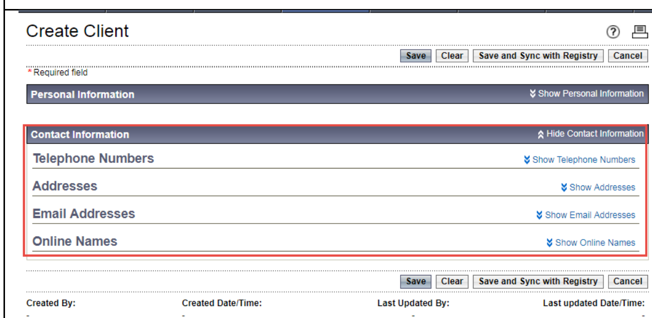
In R2.5, the Create Client screen is long and requires excessive scrolling. In R3.2, the layout of this screen has been updated; all sections apart from the 'Personal Information' section are now collapsed by default and have been upgraded to the new modal format for data entry

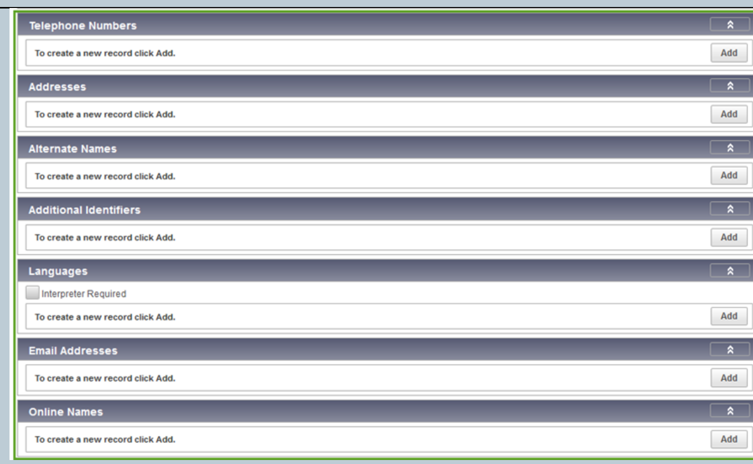


- In R3.2 'Health Region Information' has been renamed to 'Health Region Organisation' (HRO) and the Embedded Find Component (EFC) has been upgraded to the new EFC functionality
- The user can now backdate the HRO as appropriate. Similar to R2.5, in R3.2 the HRO defaults to the organization the user 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



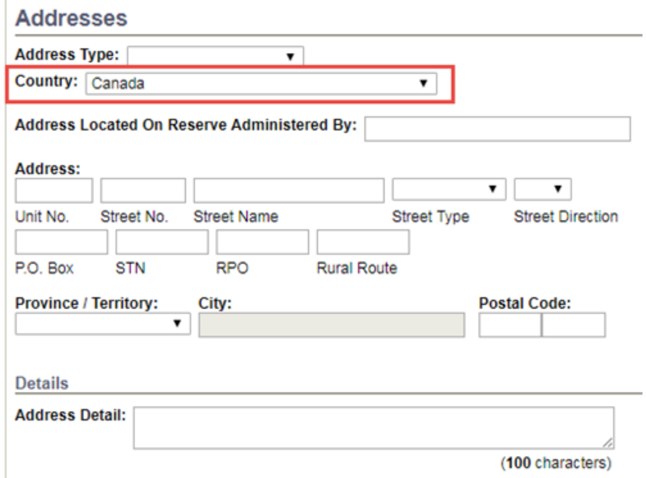


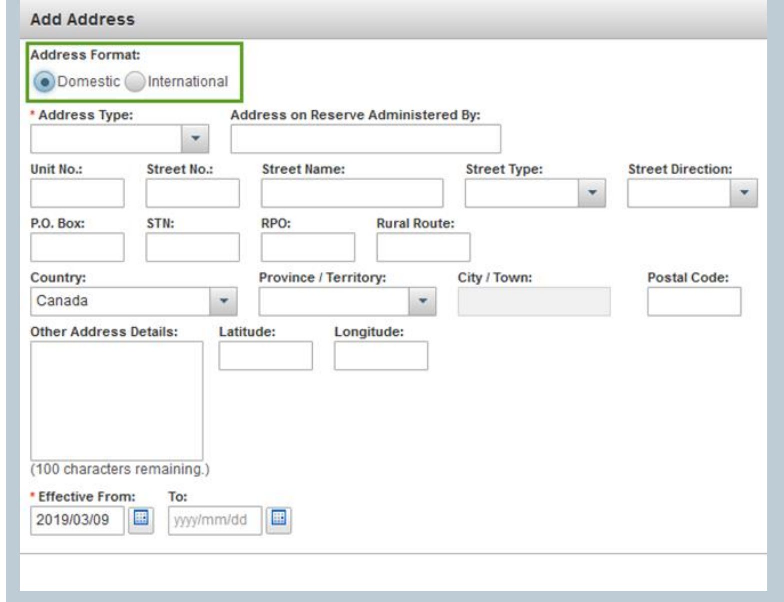
Addresses:

- 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

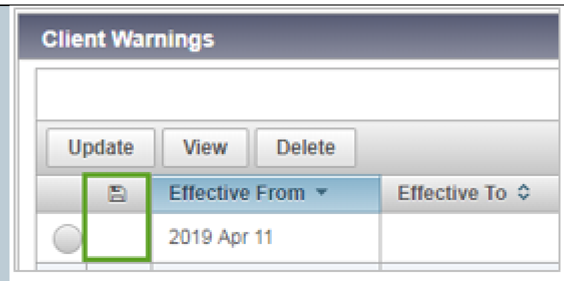
R3.2

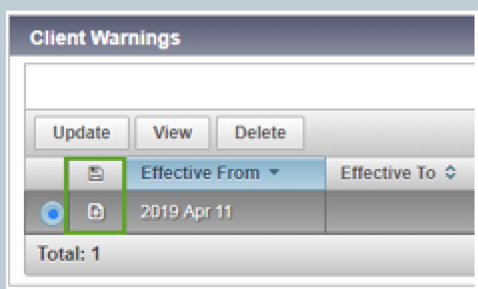




Edit column in Tables

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

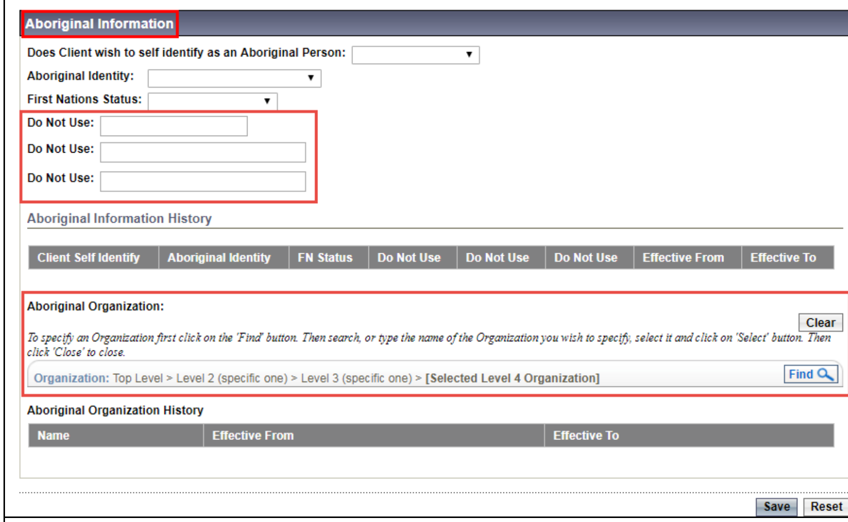




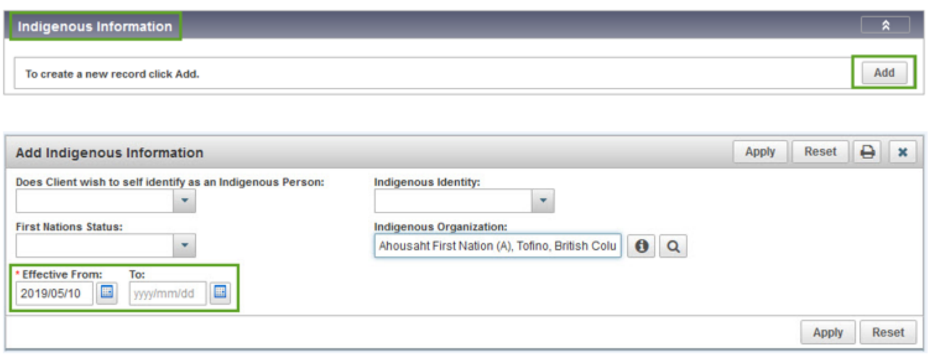
Indigenous Information

- 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:

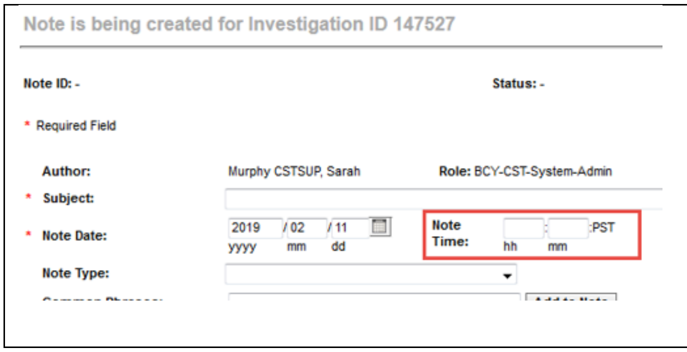


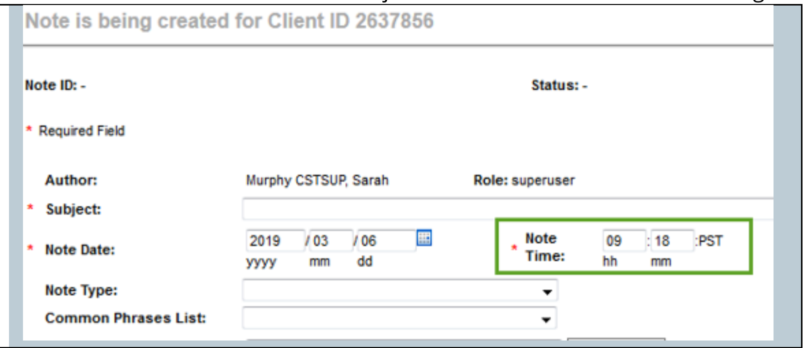
R3.2:



Notes

Note Time is mandatory in 3.2:	
R2.5.9	R3.2

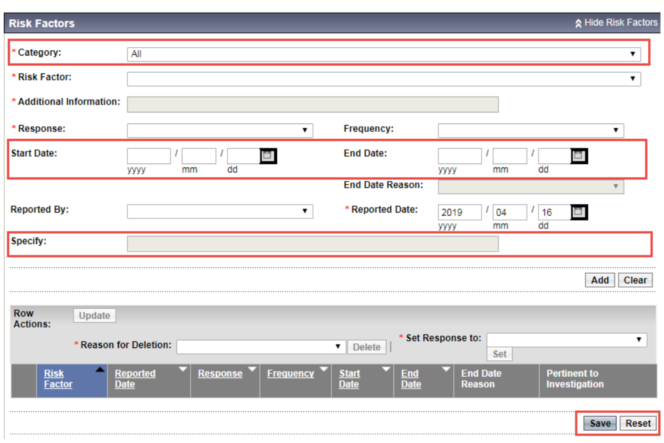
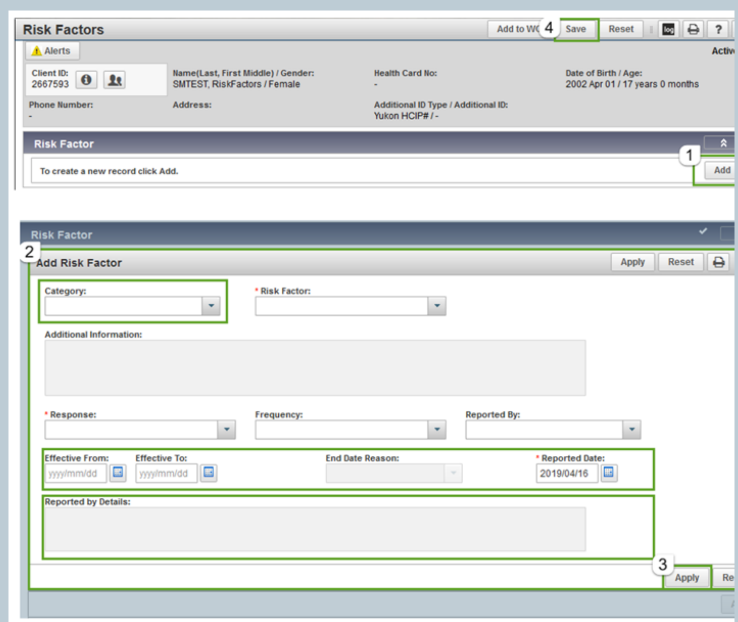




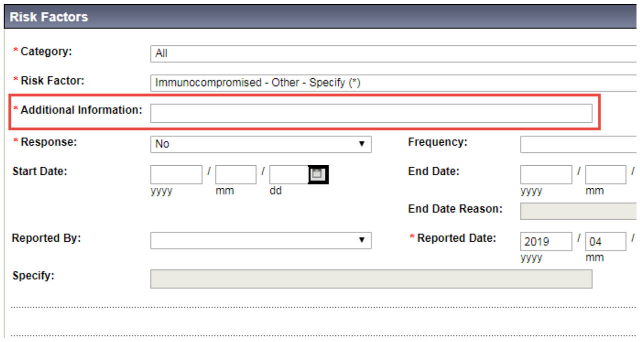
Risk Factors

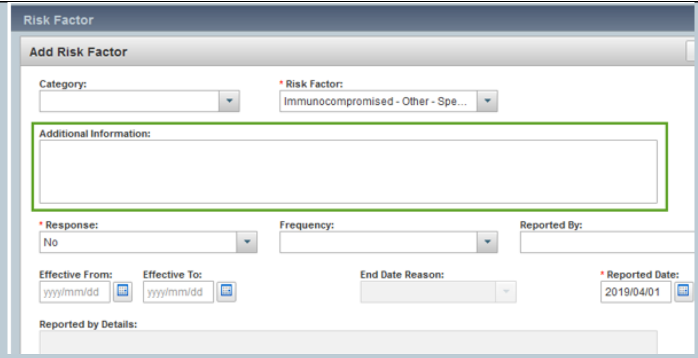
Adding Risk Factors:

- 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	R3.2
	

Additional information is only mandatory when 'Response' = 'Yes'	
R2.5.9	R3.2

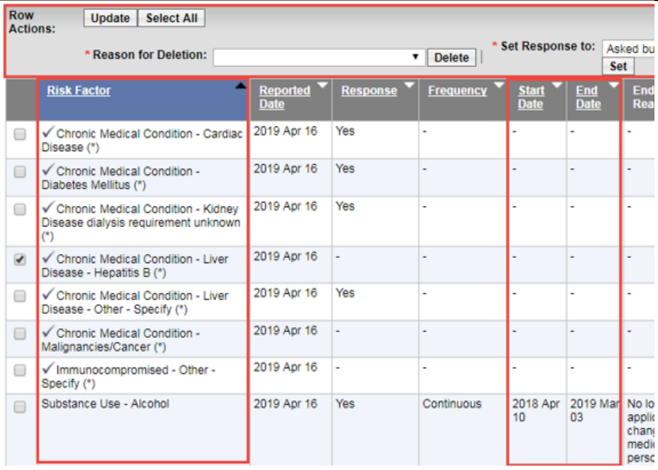


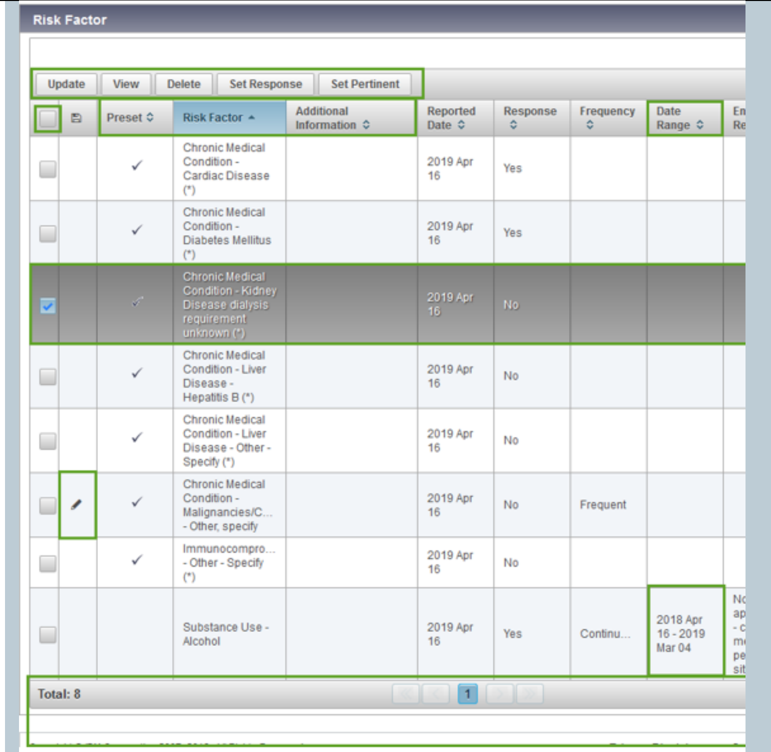


Updates to Risk Factor Factory Table

- 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

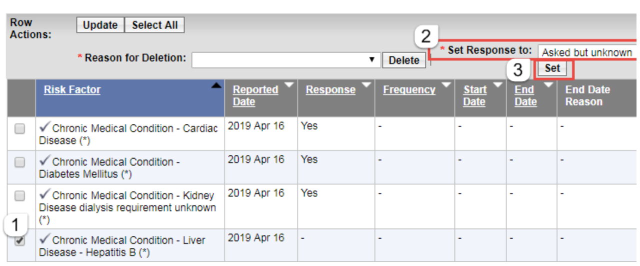




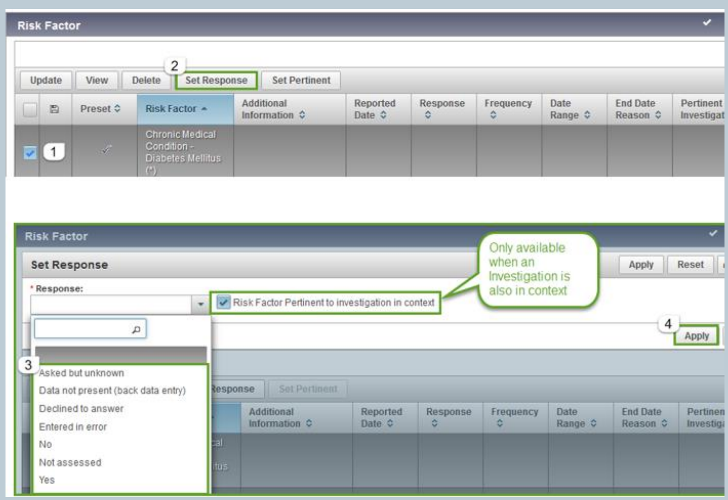
Set Response and Make Risk Factor(s) Pertinent to Investigtion en masse

- 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



R3.2

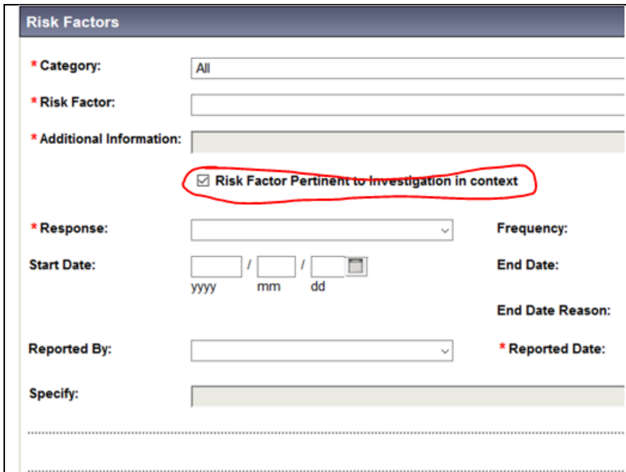


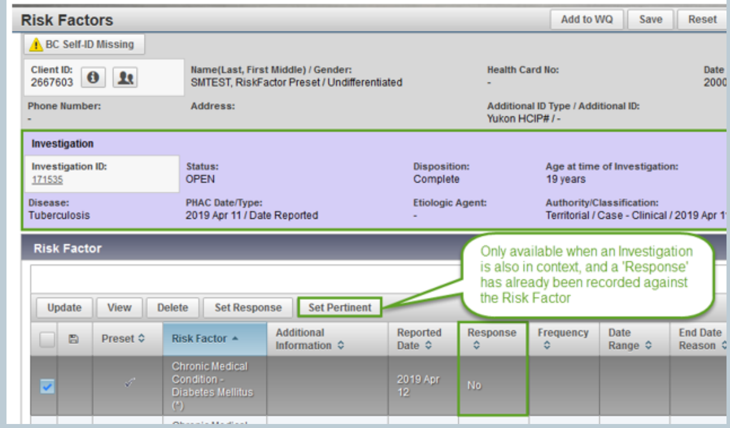
Make Risk Factor(s) Pertinent to the Investigation in context

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.

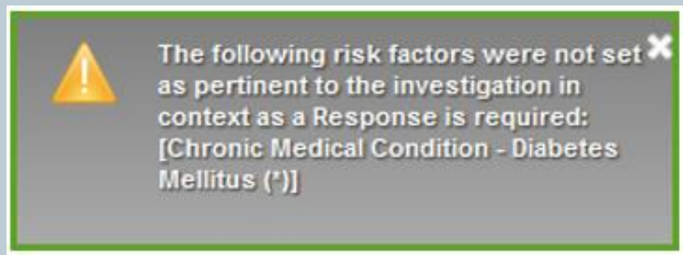
R2.5.9

R3.2



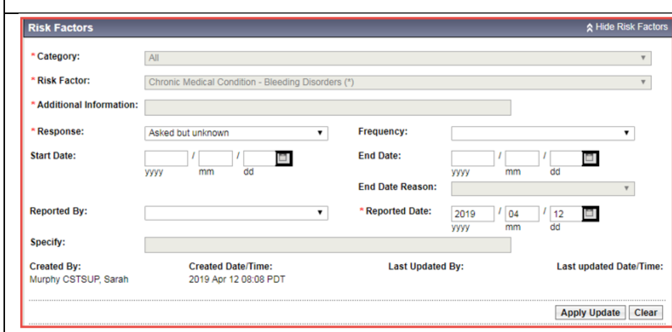
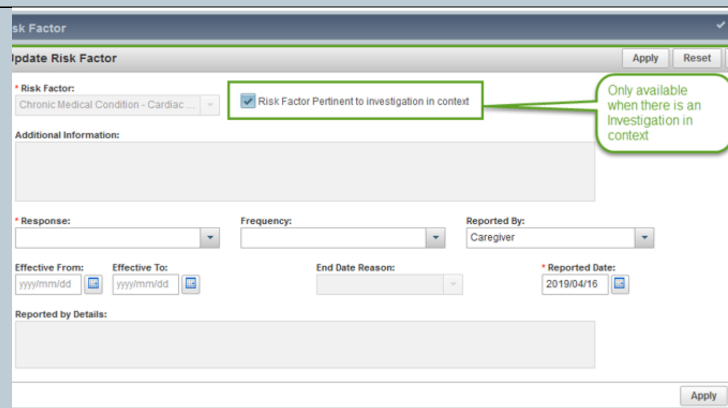


If the 'Set Pertinent' button is invoked for a Risk Factor that does not have a 'Response' recorded, then the following notification is provided to the user;



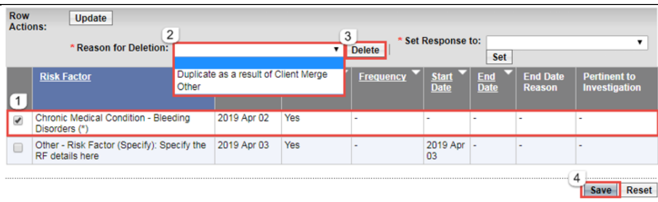
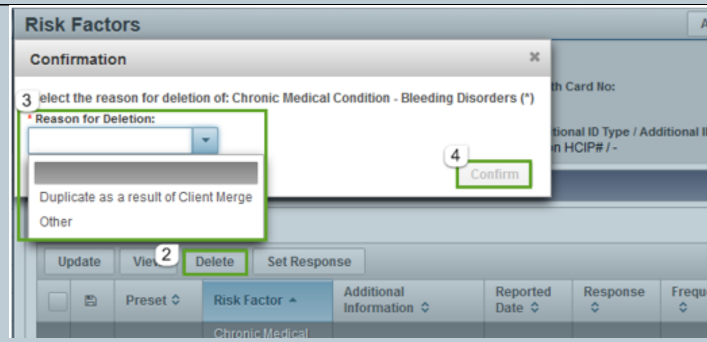
Update and Review Risk Factor

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	R3.2
	 View Risk Factor modal All fields are greyed and no updates permitted.

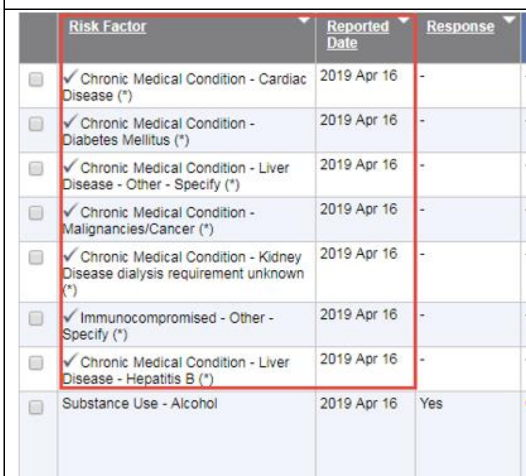
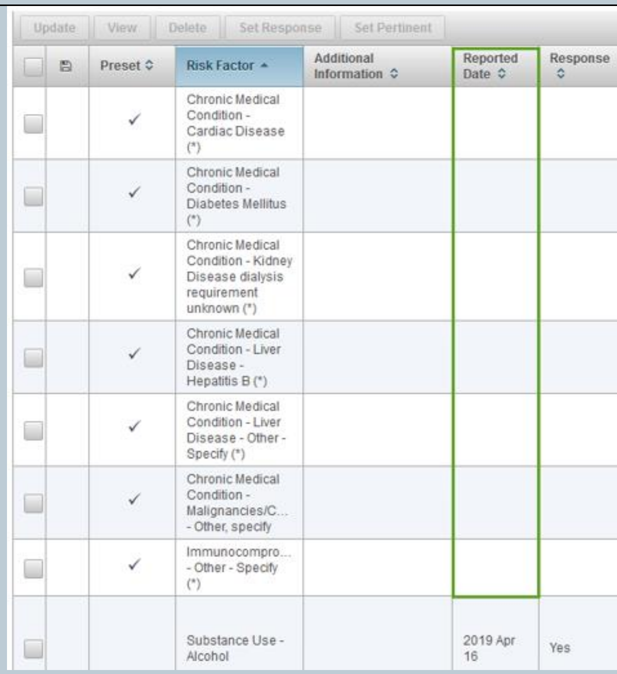
Delete Risk Factor

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	R3.2
	

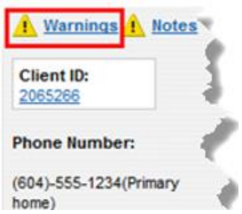
Client Warnings

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.

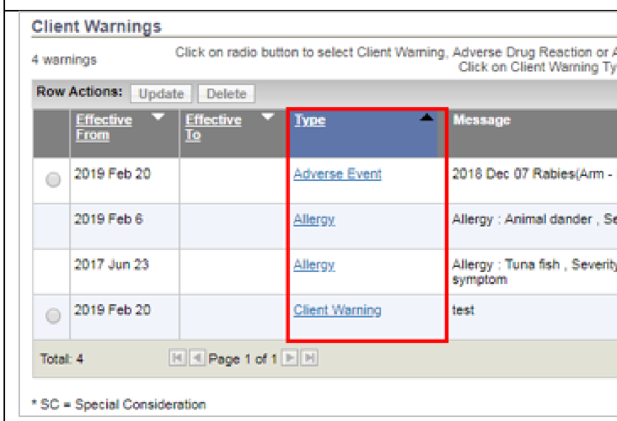
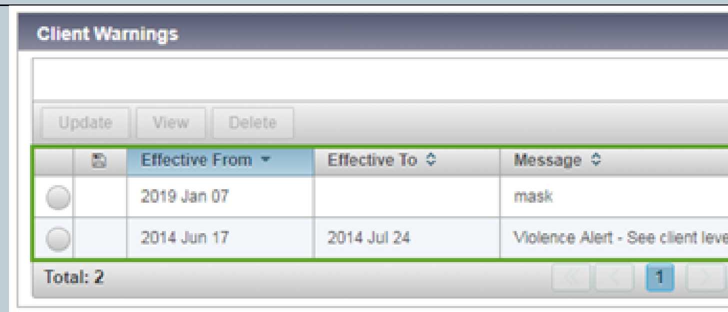
In R.3.2 the icon has been renamed to Alerts. Client warnings are limited to manual warnings only.

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
	

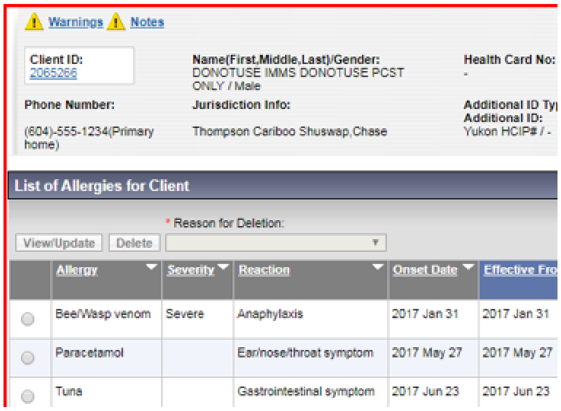
Client Warnings Screen Changes

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

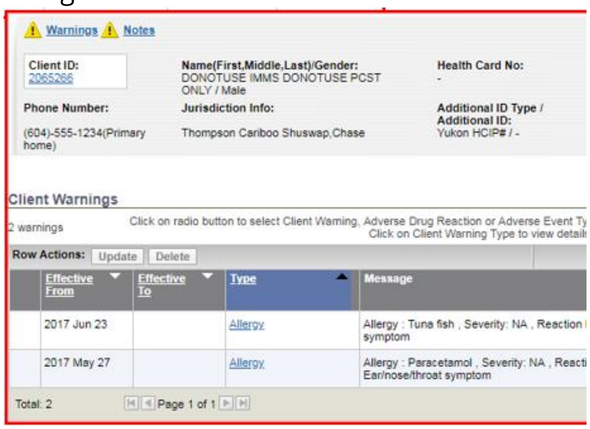
In **R2.5.9** the *Client Warnings* screen displays all active Client Warnings on the Client's record, including Allergies, Special Considerations, Adverse Events (AEFIs), Adverse Drug Reactions, and manually created warnings.	In **R3.2** the *Client Warnings* screen will only display manually created 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.
	

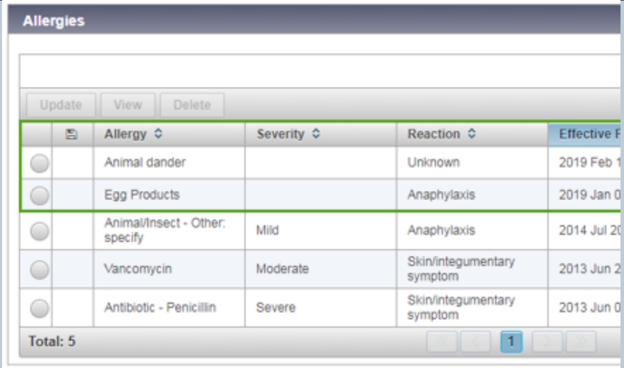
Allergy Record Changes

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	R3.2
In the Allergies Screen, all allergies show on table	Allergies screen show all listed allergies

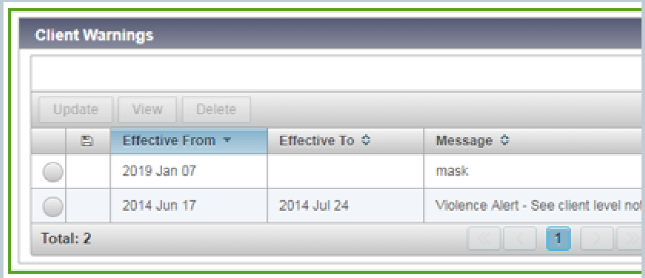


When selecting the Warnings hyperlink, only active Allergies would show

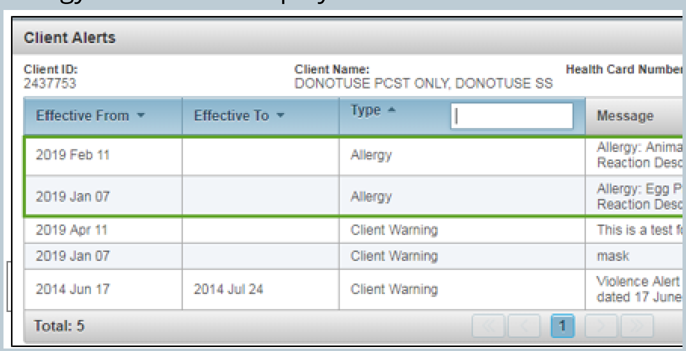




Allergy records are not shown on the Client Warnings screen



Allergy records are displayed in the Client Alerts screen

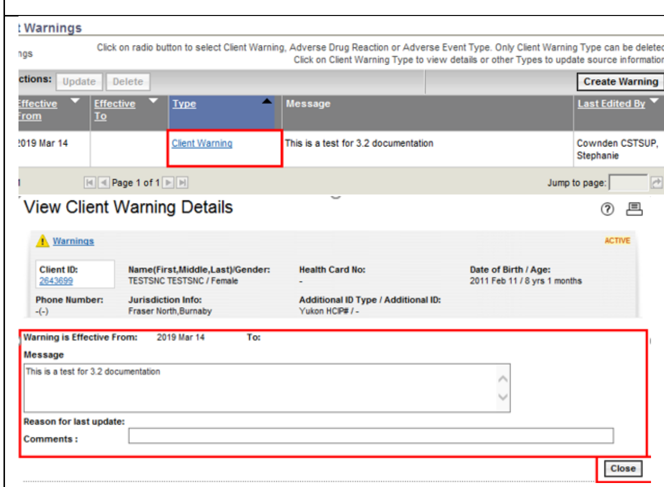
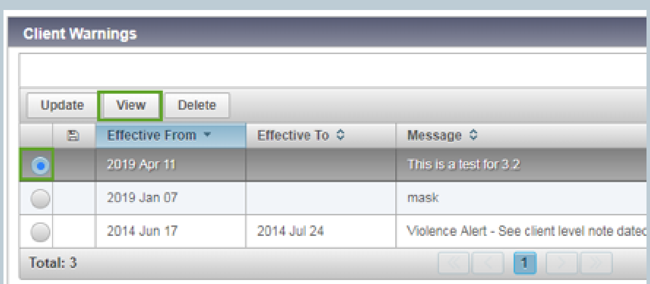


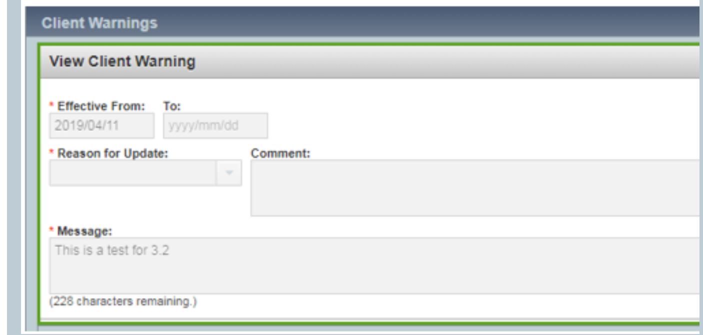
Client Warnings

Adding and Updating Client Warnings

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

View Client Warnings

R2.5.9	R3.2
	A View button has been added to the table actions  In View, the user is unable to add any text (ie. View only)



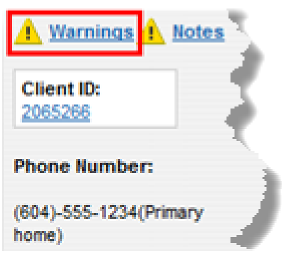
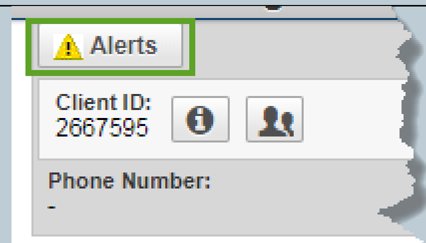
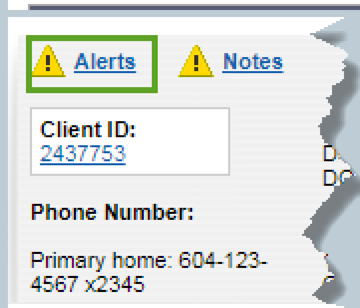
Deleting client warnings

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

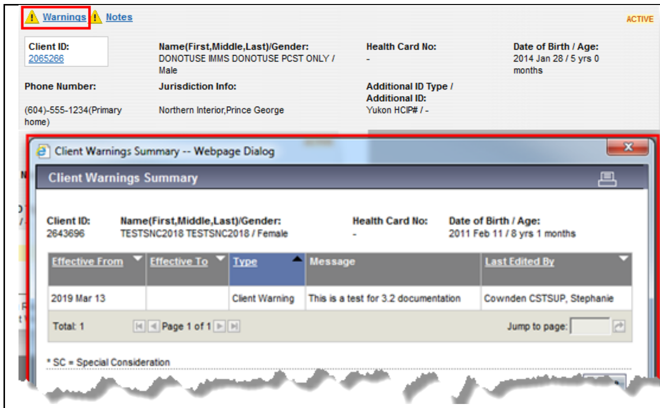
Alerts Icon

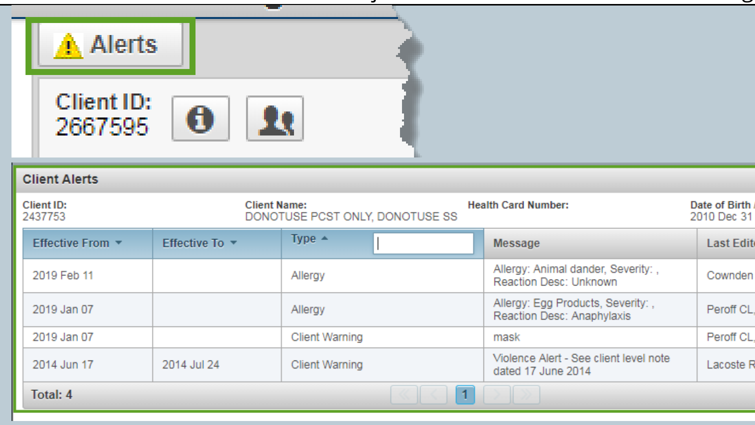
In R2.5.9 the Warnings icon is displayed when there is at least one active client warning for the client in context. The icon was used to view the client in context's warnings without having to navigate away from the screen the user is on. In R3.2 the Warnings icon has been replaced by the Alerts icon.

R2.5.9	R3.2
	 

Client Alert Pop-up

R2.5.9	R3.2
When clicked on, the Warning icon opened the Client Warning Summary pop-up with a table of the Client in context's warnings.	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.

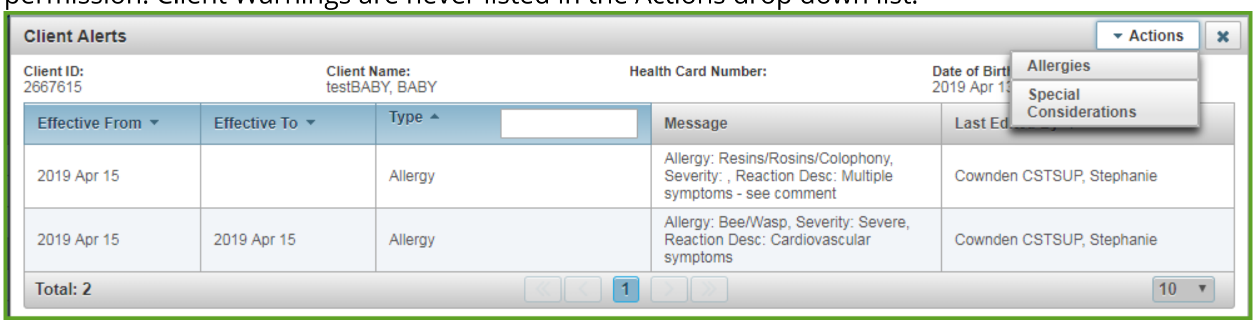




NOTE: The Client Alerts modal will display both active and inactive Alerts records; however, the icon is only displayed when there are one or more active Alert records.

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.

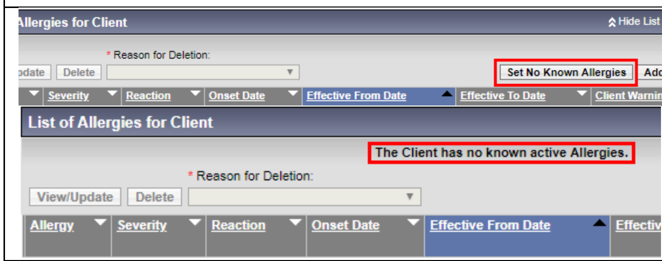


NOTE: In R3.2 the Allergy record the will not be displayed on the Client Warnings screen.

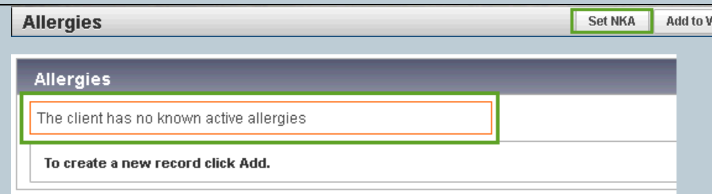
Allergies

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.



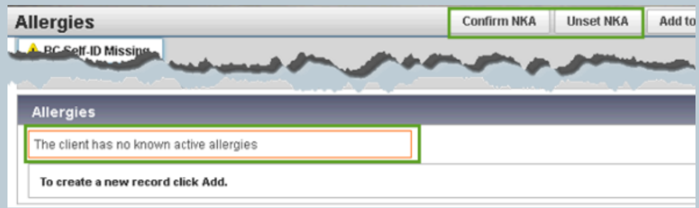
In R3.2 when the Set NKA has been set a message to note the client has no known active allergies is displayed above the section for creating a new record section.



Unsetting NKA:

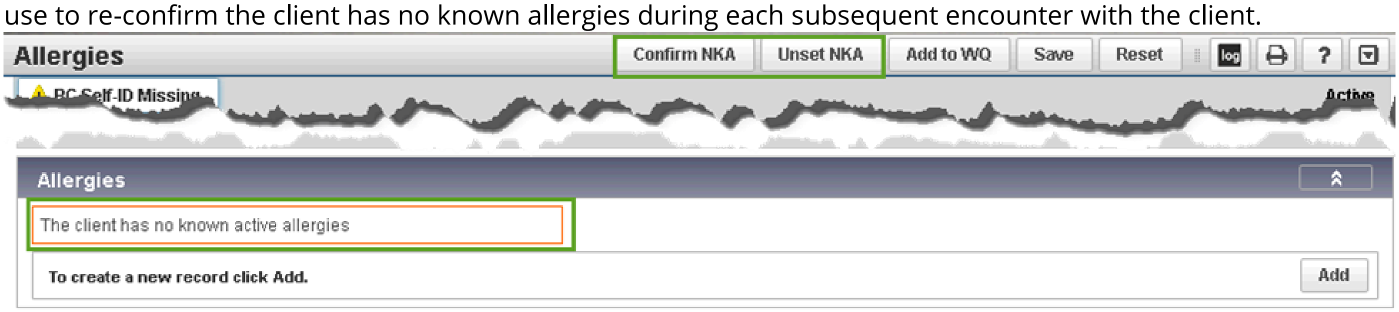
In R2.5.9 when the Set No Known Allergies button has been selected by the user the button is removed from the table, there is no way of un-doing the setting except to add an allergy record.

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



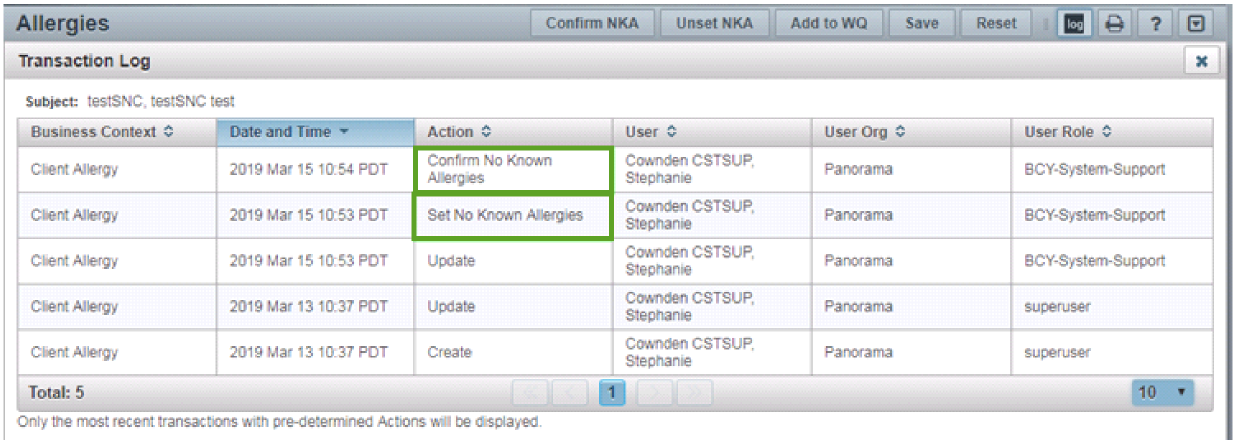
Confirming NKA:

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.

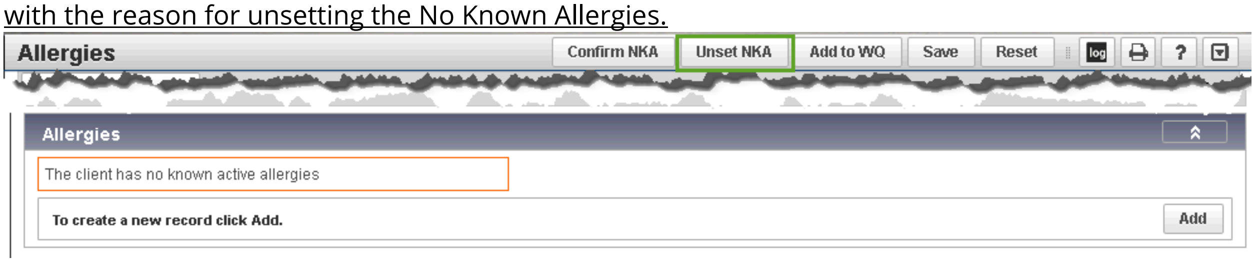


Business Context	Date and Time	Action	User	User Org	User Role
Client Allergy	2019 Mar 15 10:54 PDT	Confirm No Known Allergies	Cownden CSTSUP, Stephanie	Panorama	BCY-System-Support
Client Allergy	2019 Mar 15 10:53 PDT	Set No Known Allergies	Cownden CSTSUP, Stephanie	Panorama	BCY-System-Support
Client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

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.



Add, Update, View, Allergies

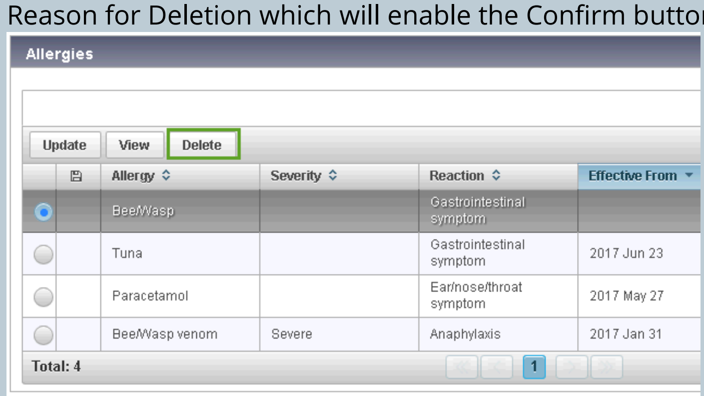
Process is similar between R2.5.9 and R3.2

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

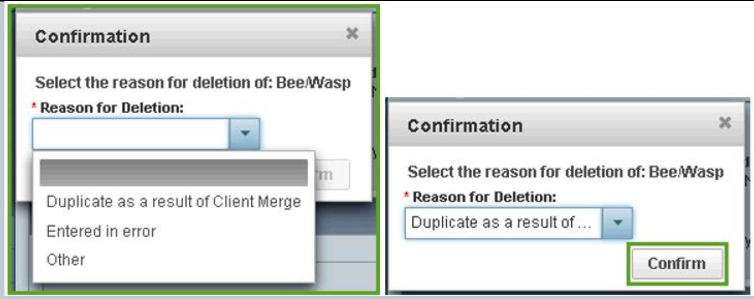
Delete Allergies:

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.



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

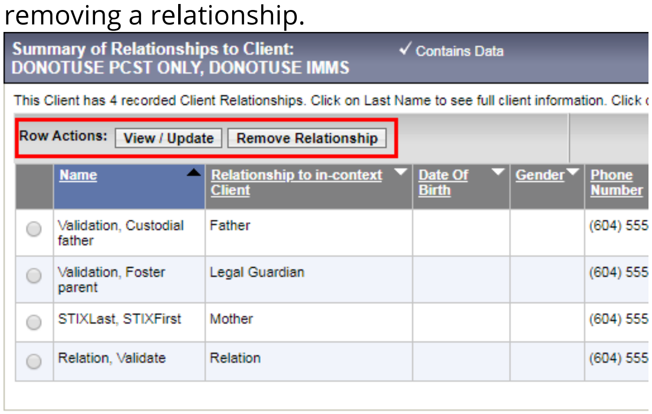


When the user has finished making changes to their clients Allergy record the user will click Save in the screen header.

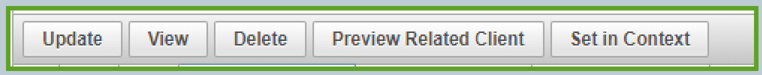
Relationships

Row Action Changes in Table:

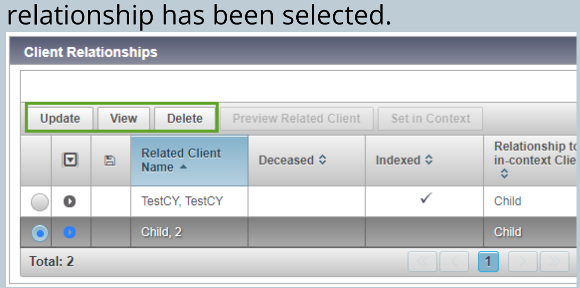
In R2.5.9 the available row actions for the user to take were limited to viewing/ updating, and removing a relationship.



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.



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



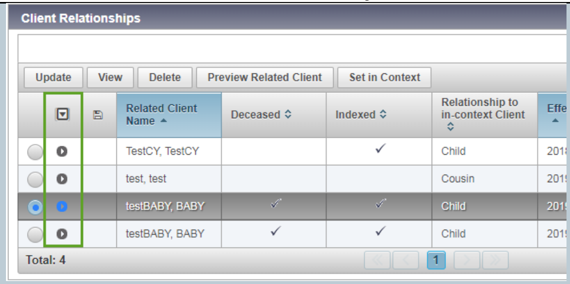
Also note that if the selected related client is a non-indexed client, the Preview Related Client and Set in Context buttons are not enabled.

New Column: Expand

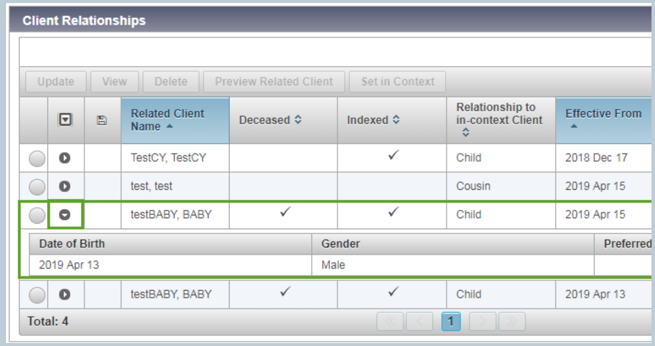
In R3.2 an Expand column has been added. Users can expand the Client Relationship Records by clicking on the Expand icon for a specific record, or expand all records by clicking the column header. When expanded, the record will display Date of Birth, Gender, and Preferred Phone #.

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



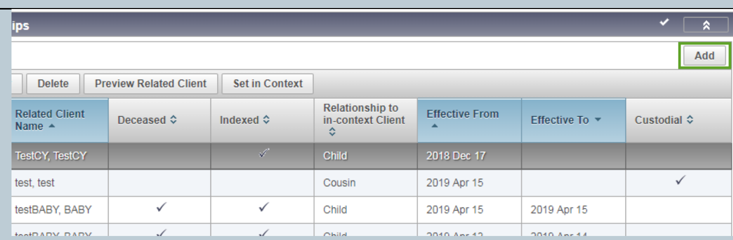
NOTE: Date of Birth, Gender, and Preferred Phone # columns have been removed from the table.



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.

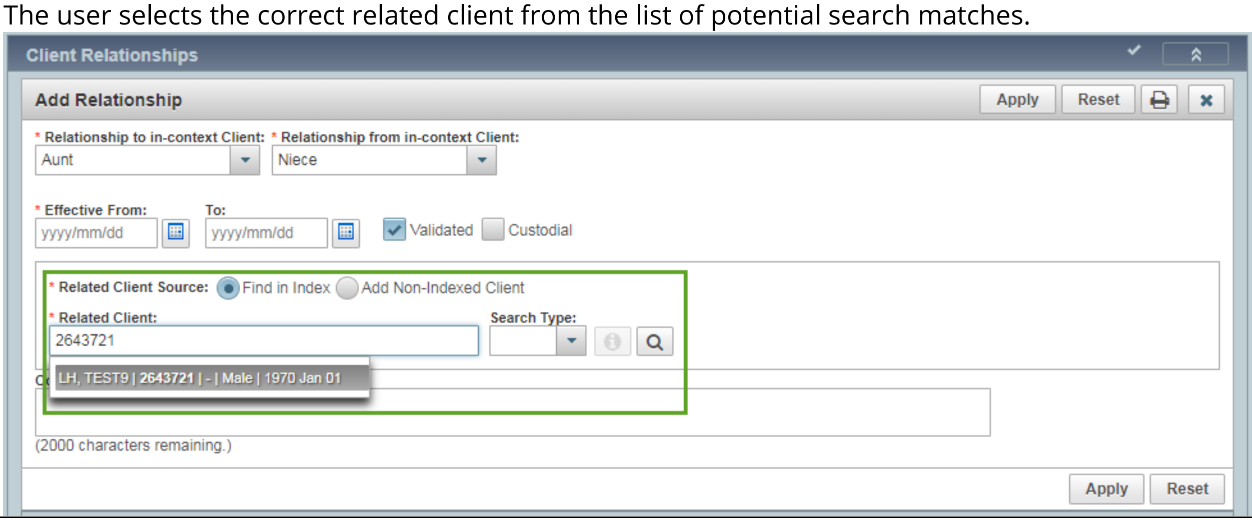
In R3.2 these options have been compressed into one Add button.



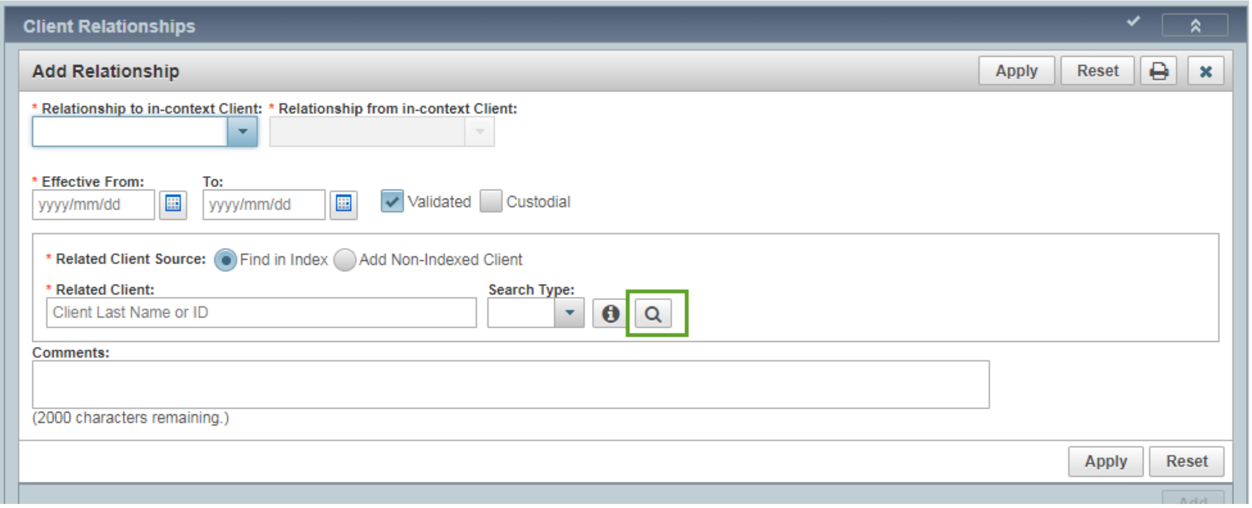
Adding a Relationship to an Indexed/Non Indexed Client

In 3.2 you can use the EFC to find and select a client to add as a relationship

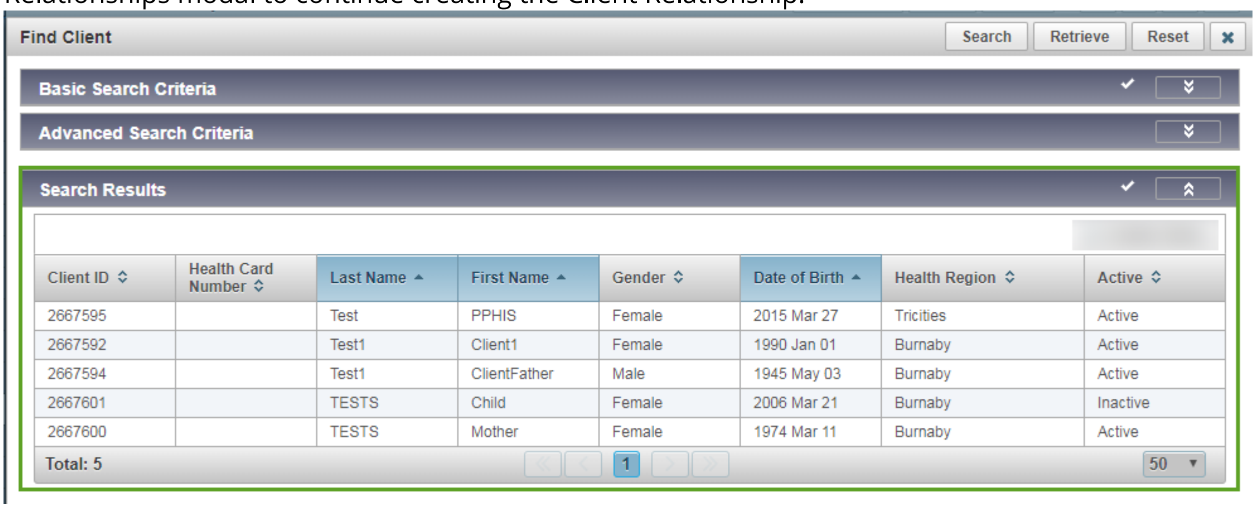
The user selects the correct related client from the list of potential search matches.



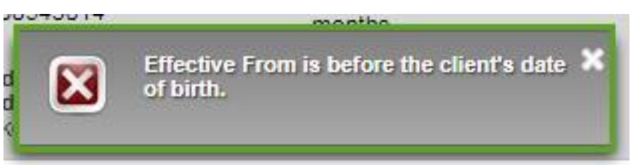
If the EFC does not return the correct related Client, there is an option to use the Client Search functionality similar to R2.5.9. The Client Search functionality is accessible by clicking on the microscope icon. The microscope icon will open a Find Client modal.



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 Resutls table, and is returned to the Add Relationships modal to continue creating the Client Relationship.



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 thrre 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

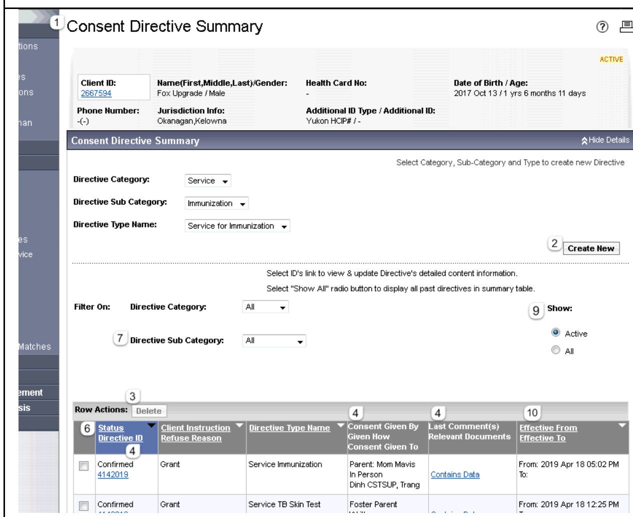
      In R3.2 a User cannot update an inactive consent directive in Draft status, but in R2.5.9 a User is allowed.
    - View opens the new View Consent Directive modal window in read-only mode.
    - Confirm updates the status of the selected consent directive from Draft to Confirmed. The button is enabled 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.

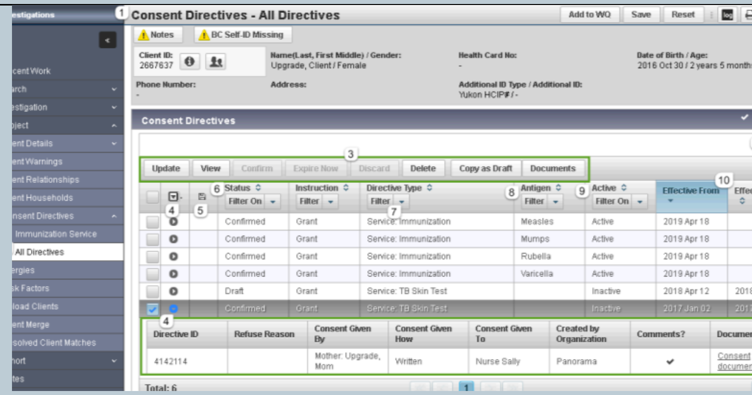
      The button is enabled if the selected consent directive record is in Confirmed status. In R2.5.9 a new consent can be copied from a consent in Draft or Confirmed status.
    - Documents button navigates the User to the Context Document screen to attach a document to an existing consent directive record. 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.

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

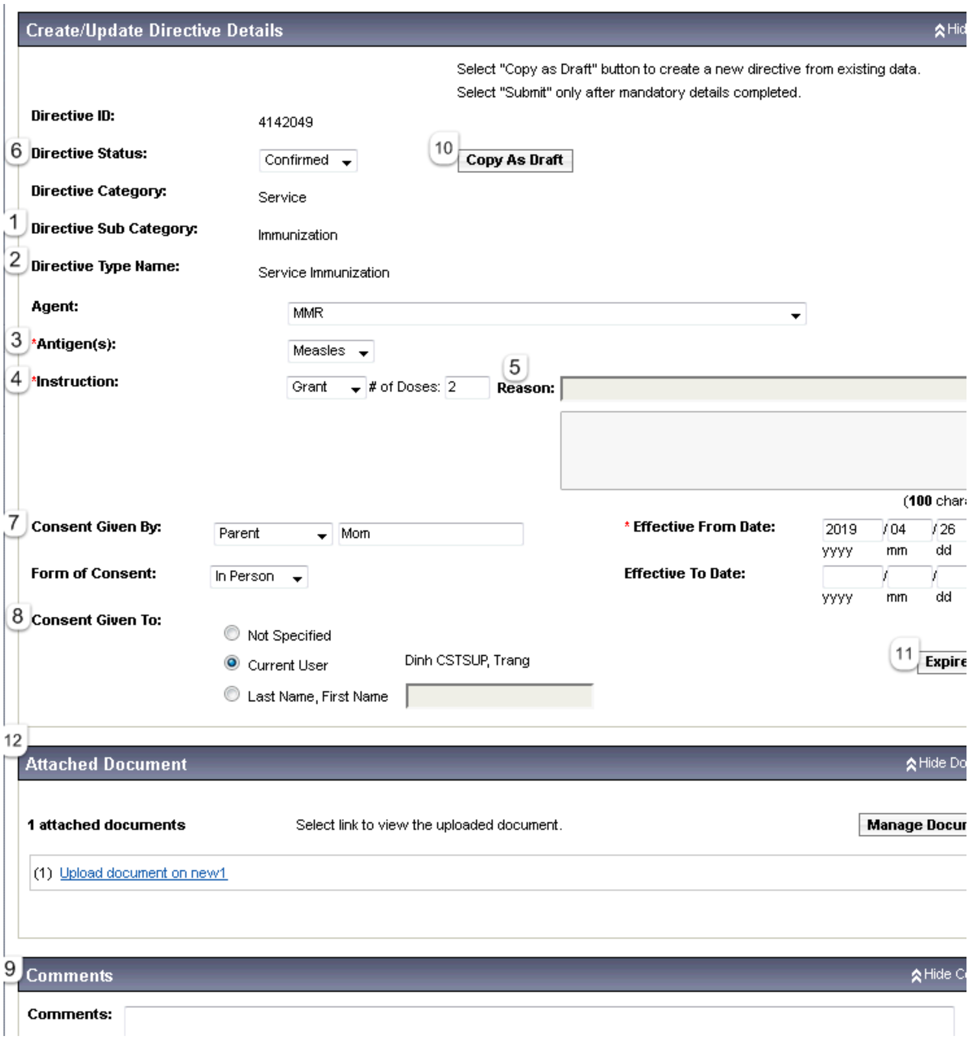
1. **Directive Sub Category** *is a mandatory field and defaults to 'Immunization'.*
2. **Directive Type** *is now a read only field. The field is still pre-populated based on the value selected in the* **Directive Sub Category** *field.*
3. Consent Applies To
   - **Select Agents** displays a list of 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' if the client has an Active consent in Confirmed status for the antigen, otherwise 'Missing is displayed.
4. **Instructions** *field converted to radio buttons*
5. **Reason for Refusal** *text box is labelled* **Reason Description**
6. **Status** *defaults to 'Confirmed' rather than 'Draft'*
7. **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'.*

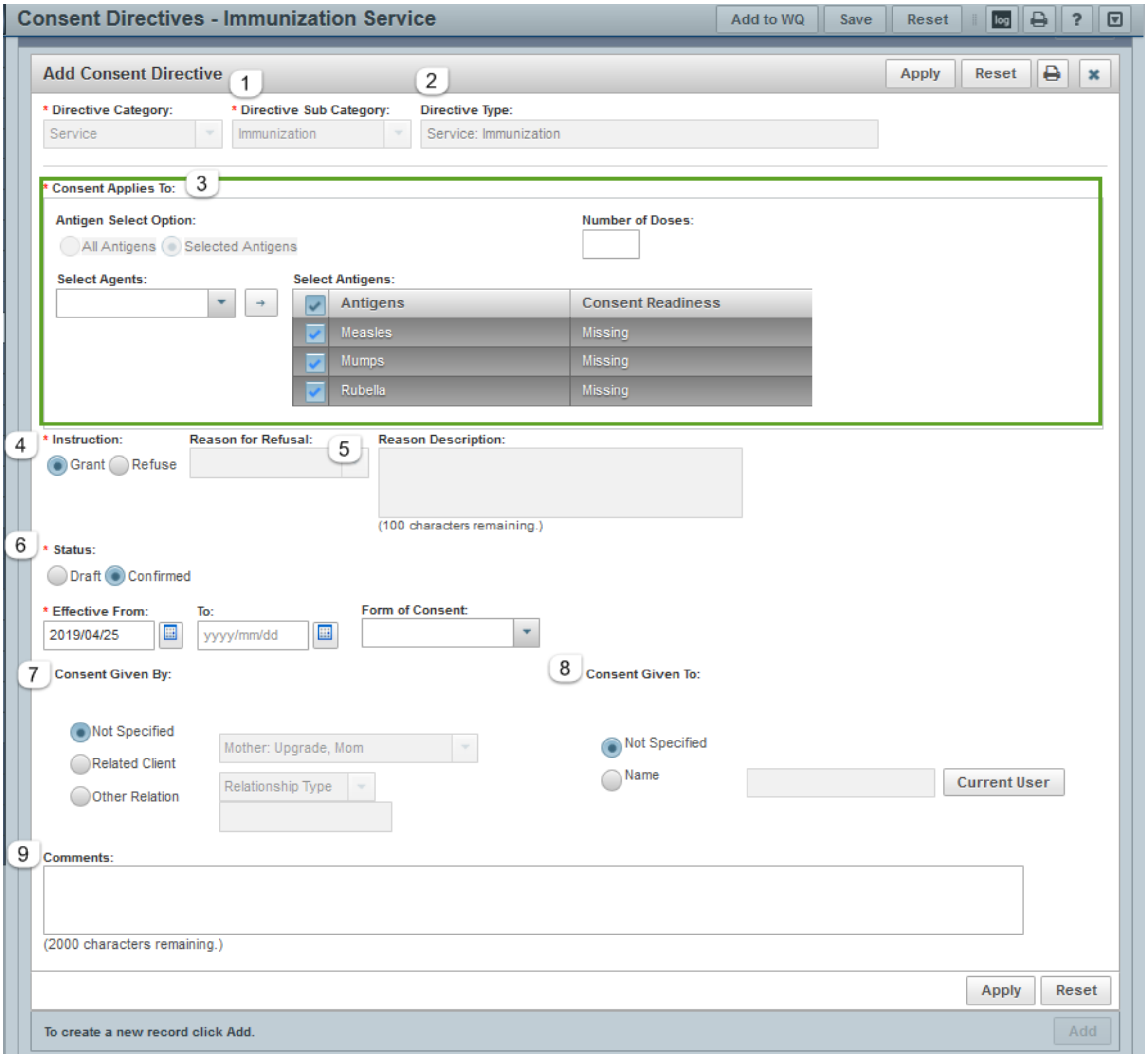
8. **Consent Given To**
   - **Name** replaces the 'Last Name, First Name' radio button and *free text box that are in R2.5.9.*
   - **Current User** button replaces the 'Current User' radio button that is in R2.5.9. The button must be clicked to populate the name of the current user in the **Name** 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



3.2


Consent Directives - Immunization Service
Add to WQ
Save
Reset
Add Consent Directive
1
2
Apply
Reset
* 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
Measles
Missing
Mumps
Missing
Rubella
Missing
4
* Instruction:
Grant
Refuse
Reason for Refusal:
5
Reason Description:
(100 characters remaining.)
6
* Status:
Draft
Confirmed
* Effective From:
2019/04/25
To:
yyyy/mm/dd
Form of Consent:
7
Consent Given By:
8
Consent Given To:
Not Specified
Related Client
Other Relation
Mother: Upgrade, Mom
Relationship Type
Not Specified
Name
Current User
9
Comments:
(2000 characters remaining.)
Apply
Reset
To create a new record click Add.
Add

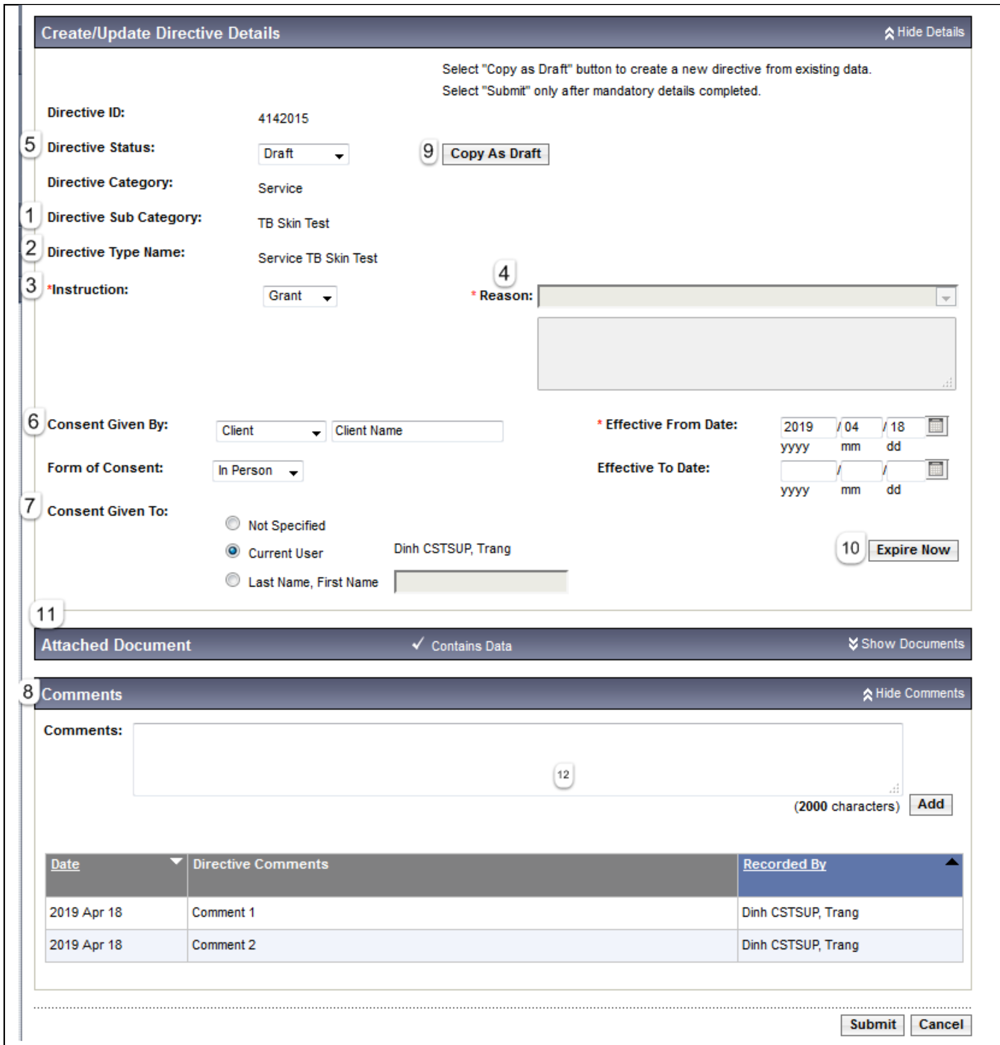
Record a Consent Directive for TB Skin Test

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.

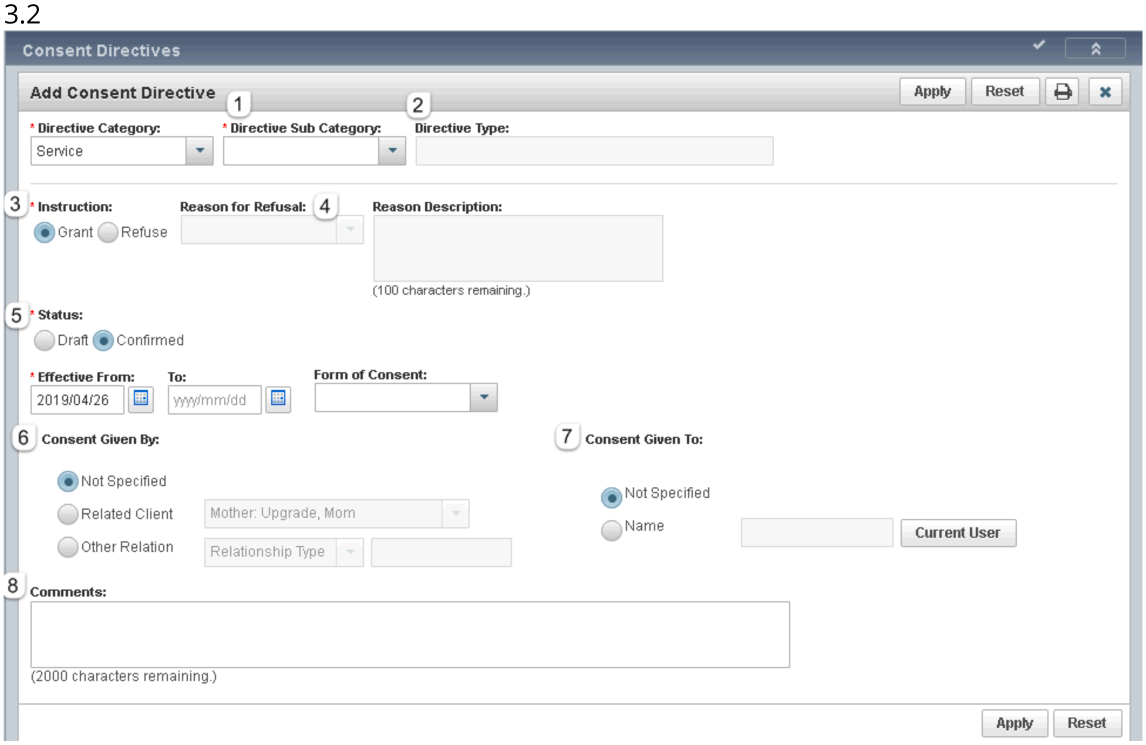
The layout of the Add Consent Directive screen has been updated to the Next Gen look & feel with the modal window for data entry.

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
Last Name, First Name
10 Expire Now
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
Apply
Reset
1
2
* 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:

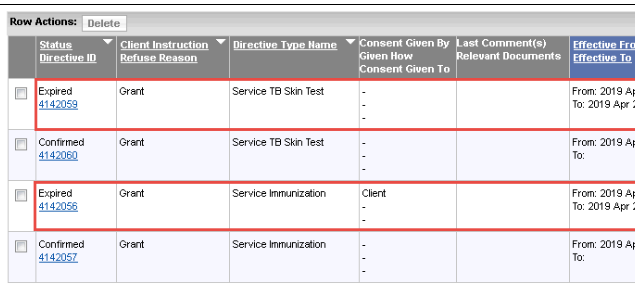
- *the same Directive Sub Category, and*
- *the consent directive is in Confirmed status, and*
- *the directive Effective From/Effective To date overlap with each other*

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*

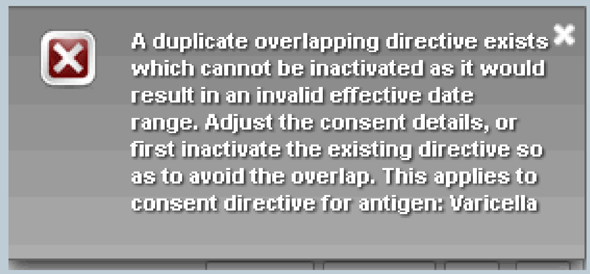
the directive Effective From/Effective To date overlap with each other

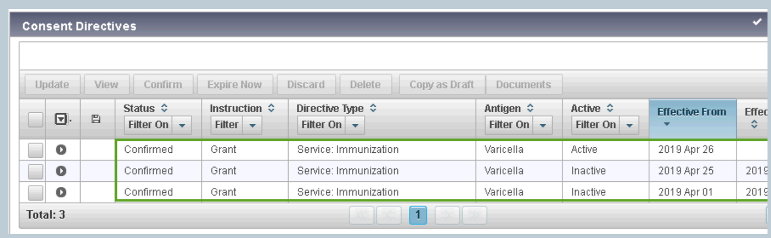


Row Actions: Delete

	Status Directive ID	Client Instruction Refuse Reason	Directive Type Name	Consent Given By Given How Consent Given To	Last Comment(s) Relevant Documents	Effective Fro Effective To
	Expired 4142059	Grant	Service TB Skin Test	- - -		From: 2019 Ap To: 2019 Apr 2
	Confirmed 4142060	Grant	Service TB Skin Test	- - -		From: 2019 Ap To:
	Expired 4142056	Grant	Service Immunization	Client - -		From: 2019 Ap To: 2019 Apr 2
	Confirmed 4142057	Grant	Service Immunization	- - -		From: 2019 Ap To:

Immunization





Consent Directives

Update | View | Confirm | Expire Now | Discard | Delete | Copy as Draft | Documents

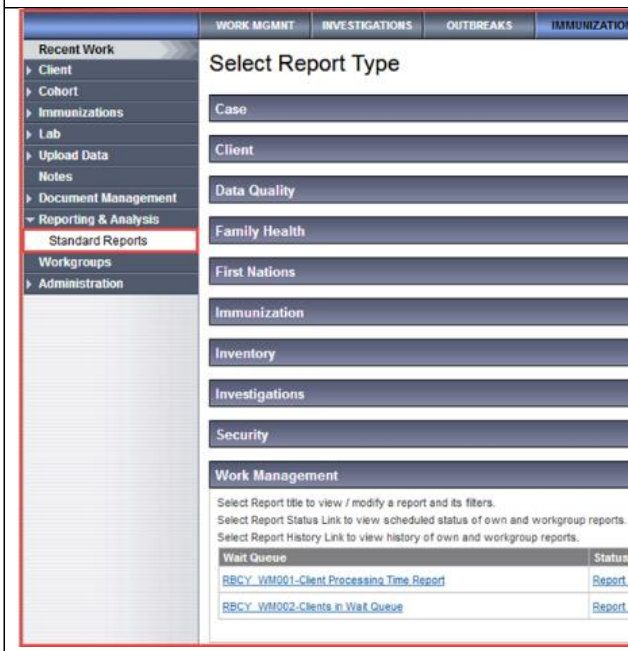
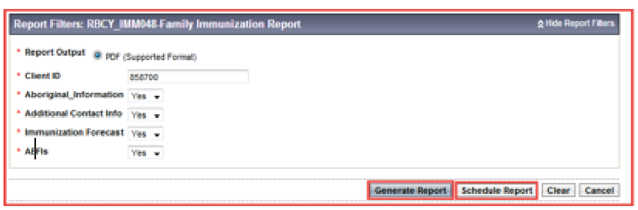
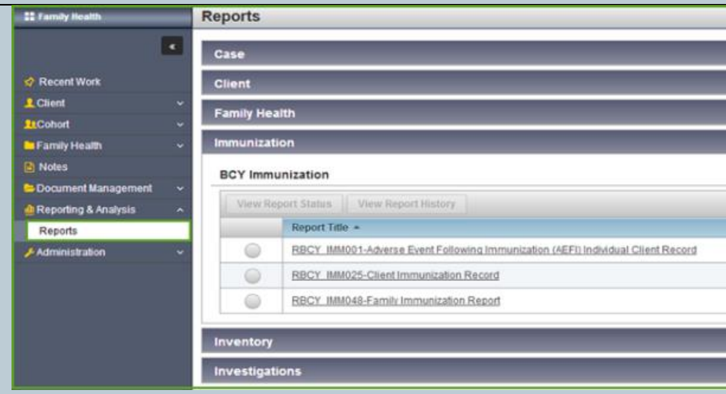
			Status	Instruction	Directive Type	Antigen	Active	Effective From	Effec
			Confirmed	Grant	Service: Immunization	Varicella	Active	2019 Apr 26	
			Confirmed	Grant	Service: Immunization	Varicella	Inactive	2019 Apr 25	2019
			Confirmed	Grant	Service: Immunization	Varicella	Inactive	2019 Apr 01	2019

Total: 3

Standard Reports

Generate Report Now

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

R2.5.9	R3.2
 The buttons were at the bottom of the screen 	 Buttons are now at the top of the screen