First Nations Health Authority
Health through wellness

Panorama Guide

Core Data Entry

Version 1.0

panorama@fnha.ca

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

Table of Contents

Common Terms and Acronyms

AOrg - Indigenous Organization

BCeID – The Provincial login to get into the Panorama webpage

Check Box Button ☑ – Also known as a tick box which is a square box usually found on the left hand column of a table used to select/deselect items.

Client ID/Investigation ID – Panorama generated number used to identify a specific client or investigation. These numbers are acceptable to use when emailing FNHA support (immunize@fnha.ca, FNHATB@fnha.ca, Panorama@fnha.ca) or other health colleagues in the client's circle of care.

Client/Subject - Are interchangeable within the Panorama program

Dashboard – The main 'home page' in Panorama

Determinate Clients – A minimum data set has been established for the client chart (ie. First Name, Last Name, DOB, Gender, and PHN or Address has been entered)

Encounters – This term is used when you interact with a client for either a clinic/home, telephone or hospital visit

FNHSO – First Nation Health Service Organization

Inactive Records – Where a client record/chart has been inactivated in Panorama due to a number of reasons (eg. Client deceased)

Indeterminate clients –Used for some clients during HIV/STI investigations.

JCR – Jurisdictional Client Registry

LHN – The main Left Hand Navigation Menu found throughout the Panorama program

Modal – Similar to a pop-up window, a modal will open on top of the current screen. The screen behind the modal is greyed out in the background. Modal windows reduce the amount of navigation from screen to screen for simple tasks such as, adding or updating a record.

Radio Button ◯ – a circular button, usually on the left hand column of a table that can be selected, (shows as a filled in dot ● if selected, or an empty dot O if unselected) used to select/choose a single option (eg. client/allergy/symptom) from a table.

Row Actions – These are actions you want to carry out for the client/item(s) you selected on a table. Eg. When you select a client, and select a row action of updating their chart

Save/Submit – These are interchangeable and can be found at the top or bottom of a page in Panorama so you can save your work

SDL – Service Delivery Location. The Physical location where services are delivered

Set In Context – When you select and open up a client chart you are 'setting it in context'. Now all the actions/charting you do will be associated with your client chart

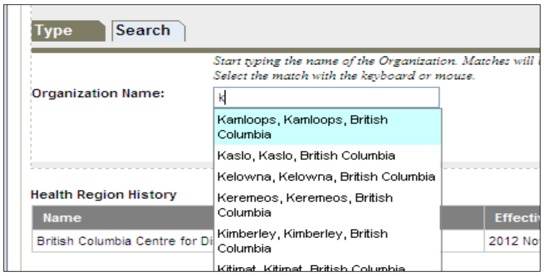
Type-Aheads – Within the Panorama program, there are fields that when you are entering something in an input field on a page, it is often possible for the program to make guesses about what that person is going to type, and thus complete the data entry for the user

VPN – Virtual Private Networks allow users to securely access a private network and share data remotely through public networks. Much like a firewall protects your data on your computer, VPNs protect it online.

How to Use This Guide

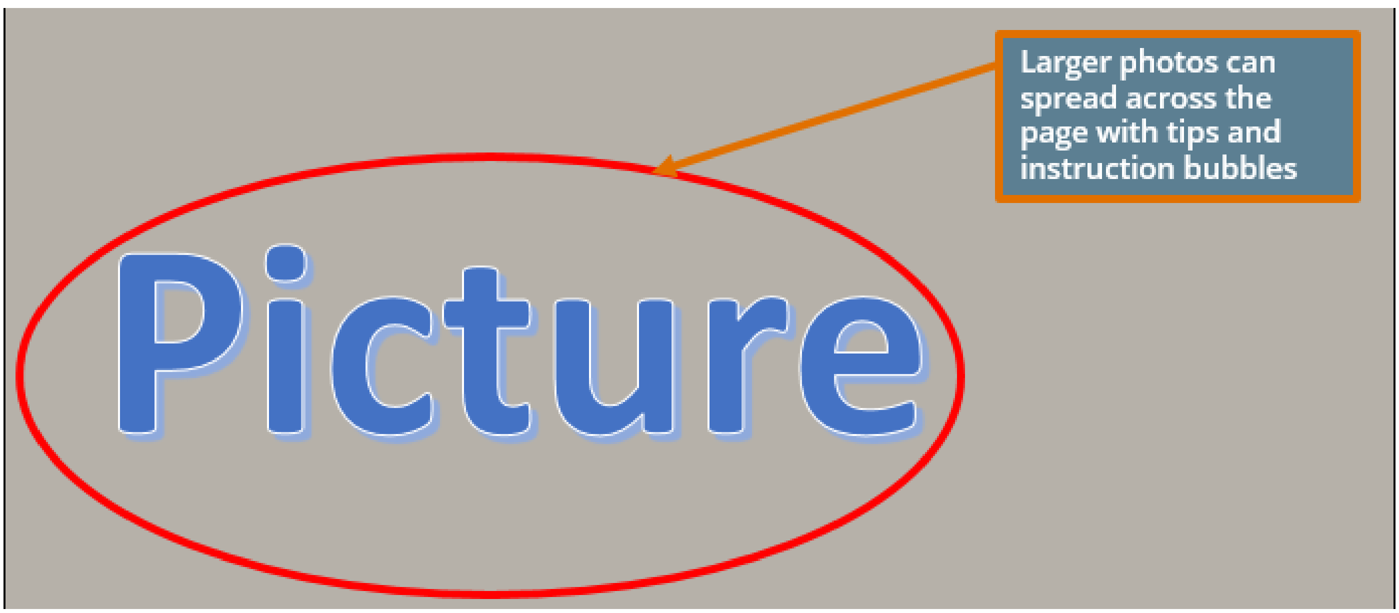
It is required for CHNs working in FN communities with Panorama access to have training with the FNHA Panorama team prior to use of the Panorama system. Panorama guides are to be used <u>in conjunction</u> with formal Panorama training. To arrange a training session, please contact **panorama@fnha.ca**

The left-hand column provides tips, notes, FYIs, and photos corresponding to the written instructions



The right-hand column houses the written instructions.

Hyperlinks can be selected to take you to corresponding website resources or to a different section of the guide



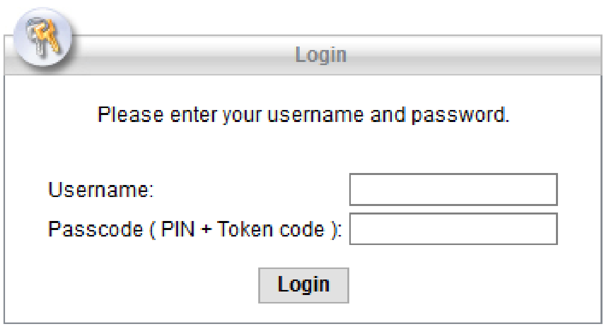
Tips:

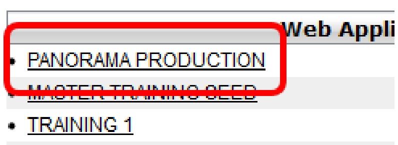
- Panorama is a web-based program. Use the mouse, click once. <u>Double-clicking</u> can stall or freeze the program
- Allow the page <u>to fully load</u> before entering more information, otherwise you run the risk of 'freezing up' the program.
- If you work with more than one charting system, it is recommended that you <u>directly</u> enter immunizations, family health (if using this module), and Tuberculosis screens into Panorama and note in your other system(s) to 'see Panorama chart'. Double charting is not recommended nor is it best practice.
- Type-Aheads – Within the Panorama program, there are fields that when you are entering something in an input field on a page, it is often possible for the program to make guesses about what that person is going to type, and thus complete the data entry for the user. When entering information with a dropdown, type slowly, and select the appropriate option from the list. You cannot type your own information, you must choose from the dropdown.
- Required fields that need to be completed is marked with a red asterisk **(*)**. Required fields are a minimum data entry requirement, but for better quality charting, any additional information that can be added to the client chart is encouraged.

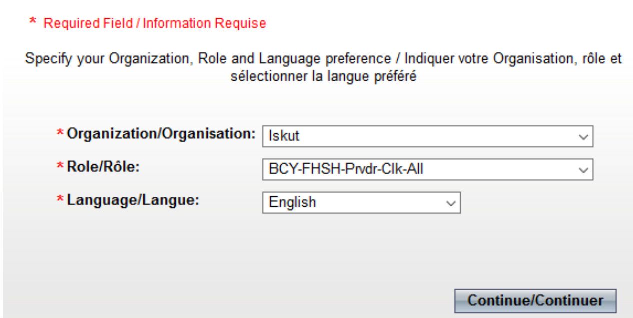
Logging on to Panorama

If you are unsure if you have all the proper programs and applications installed, or if you are running into issues with accessing Panorama, please connect with the FNHA Panorama team at **Panorama@FNHA.ca**

With Panorama, you are required to login twice, through the VPN network and then again with your BCeID







In order to access Panorama, you will need to ensure:

- That the correct Panorama Portable Firefox program is installed on your computer/laptop
- You have installed and activated the SafeNet MobilePASS application on your phone or smart device

Virtual Private Network (VPN) Login

1. When you first open the Panorama Firefox Portable icon, the Vancouver Coastal Health VPN login page will appear. Enter your assigned username and Passcode. The Passcode consists of your 4-digit PIN number + the automatic generated code from the *SafeNet MobilePASS* application
2. Select **LOGIN** on the screen, or hit **ENTER** on your keyboard
3. You will be directed to the *Remote Access Environment*. Select **WEB APPLICATIONS** link and then select the **Panorama Production** Web Application

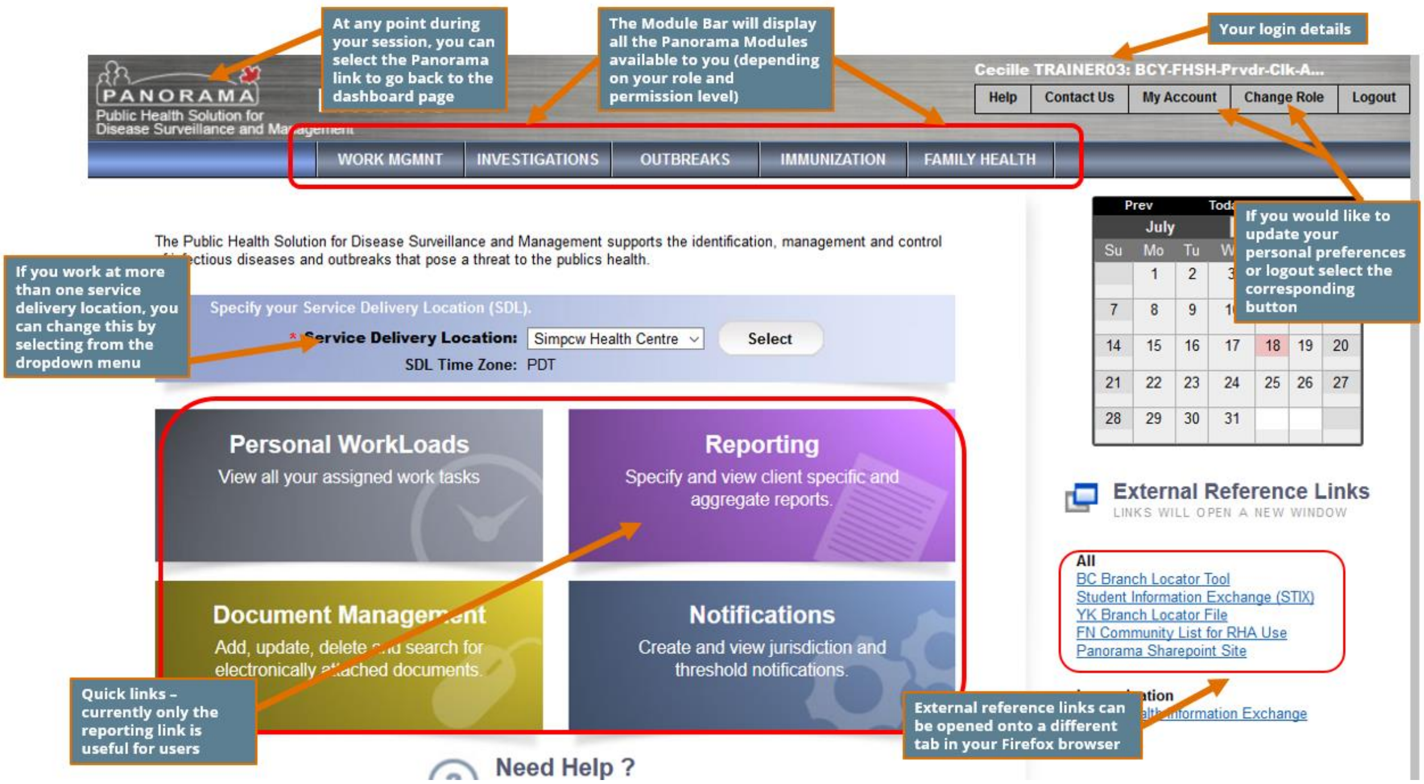
BCeID Login

1. Select **BCeID** icon to get to the login page
2. Enter your assigned User ID and password and select **CONTINUE** or hit **ENTER**
3. quiSelect **CONTINUE** again from the login account activity page
4. Select your **Organization** from the Panorama Login page (this may already be pre-populated) and select **CONTINUE**

Panorama Layout and Overview

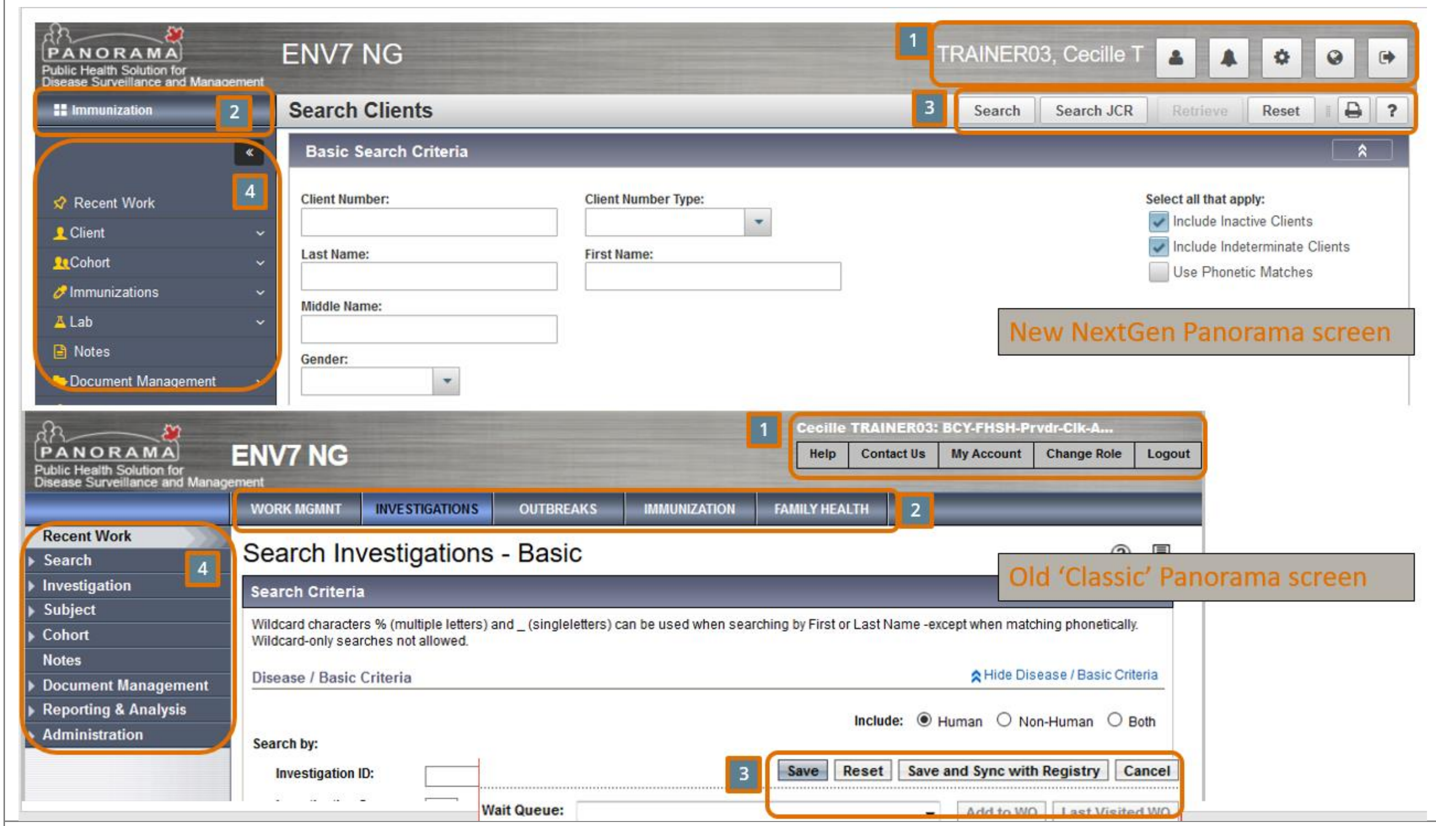
To zoom the Panorama window to increase the size of the font on your computer screen, press **CTRL** and **(+)**; to decrease the size of the font, press **CTRL** and **(-)**. To reset the font size to its original size, press CTRL **(0)**	When updating client information (such as allergies, risk factors, addresses, phone numbers). DO NOT DELETE old information. Instead, end date the old information

Panorama Homepage



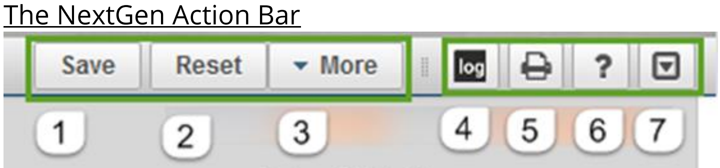
Panorama Headers (NextGen and Classic screens)

Panorama was upgraded to a 3.2 (NextGen) version on July 2, 2019. You will notice that some screens will have upgraded to the new format and look while some screens remain as the “classic” look. The functions remain the same.



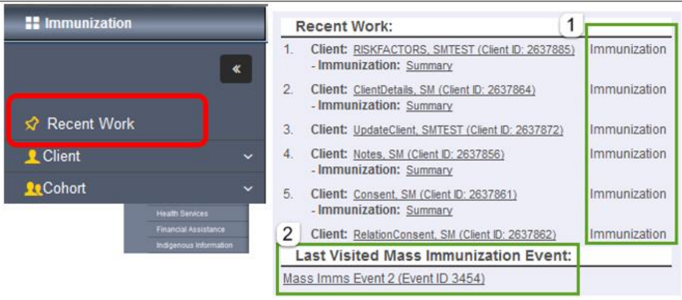
1. Main banner – Allows the logged in User to update their personal settings, change their role, and log out of Panorama
2. Panorama modules – The User can change the module they are working in (eg. Switching between the Immunization and Investigation modules
3. The Action Bar – houses screen level actions, help, print, and audit log view. The action bar and banner remain fixed at the top of the screen, allowing the 'Save' button to always be visible.
4. Left Hand Menu – Remain in the same order whether you are in the NextGen screen or a "Classic" screen.

The NextGen Action Bar



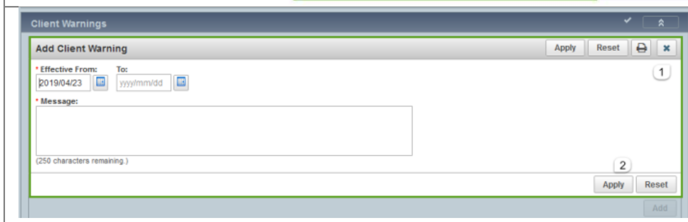
1. The Save Button - The Save button should be clicked after a user makes any change to a NextGen screen.
2. Reset Button - The Reset button can be used to clear any data entered on a screen since the last screen save.
3. More - The More button is displayed when the user is on a screen that allows for 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 Panorama 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 (Not shown) - 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.



<u>Recent Work</u>

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 as well.



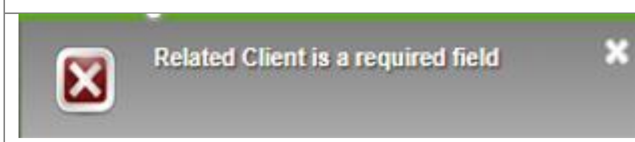
<u>Modal Data Entry</u>

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.

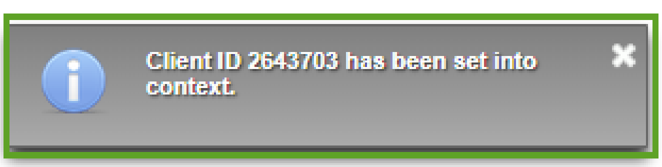
Users can close the modal in one of two ways

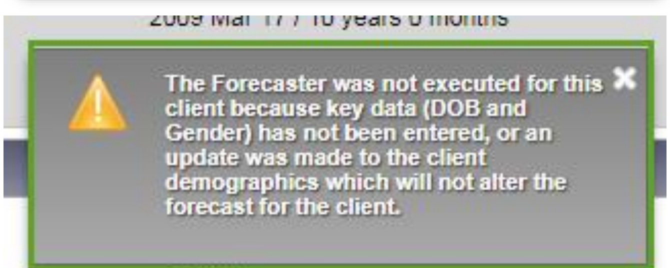
- The user can click the 'x'
- If the user is adding or updating information in the modal they should click the Apply to submit their changes



<u>Messages and Notifications</u>

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.

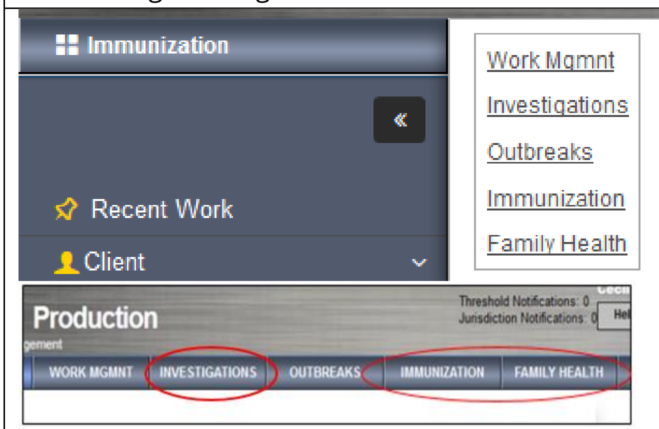




Informational messages provide users with additional information in regards to an action they may have taken. These messages remain on the screen for 10 seconds before disappearing. If the user prefers to close the message before the 10 seconds is up clicking the x will close the message.

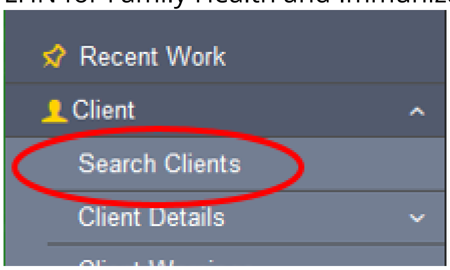
Search for Clients

A thorough search for your client in Panorama is important to prevent creating duplicate charts. There are several ways to search for a client chart and it is recommended that you try several search methods before considering creating a new client chart.

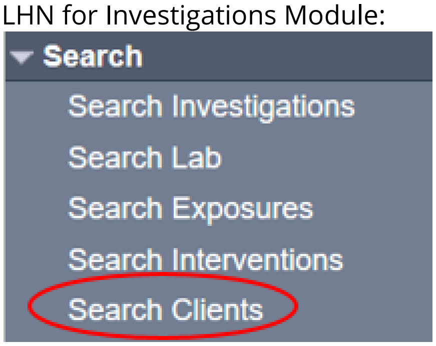


1. Login to Panorama
2. Select module you wish to use (**FAMILY HEALTH**, **IMMUNIZATION** OR **INVESTIGATIONS**)

LHN for Family Health and Immunization Module:



LHN for Investigations Module:

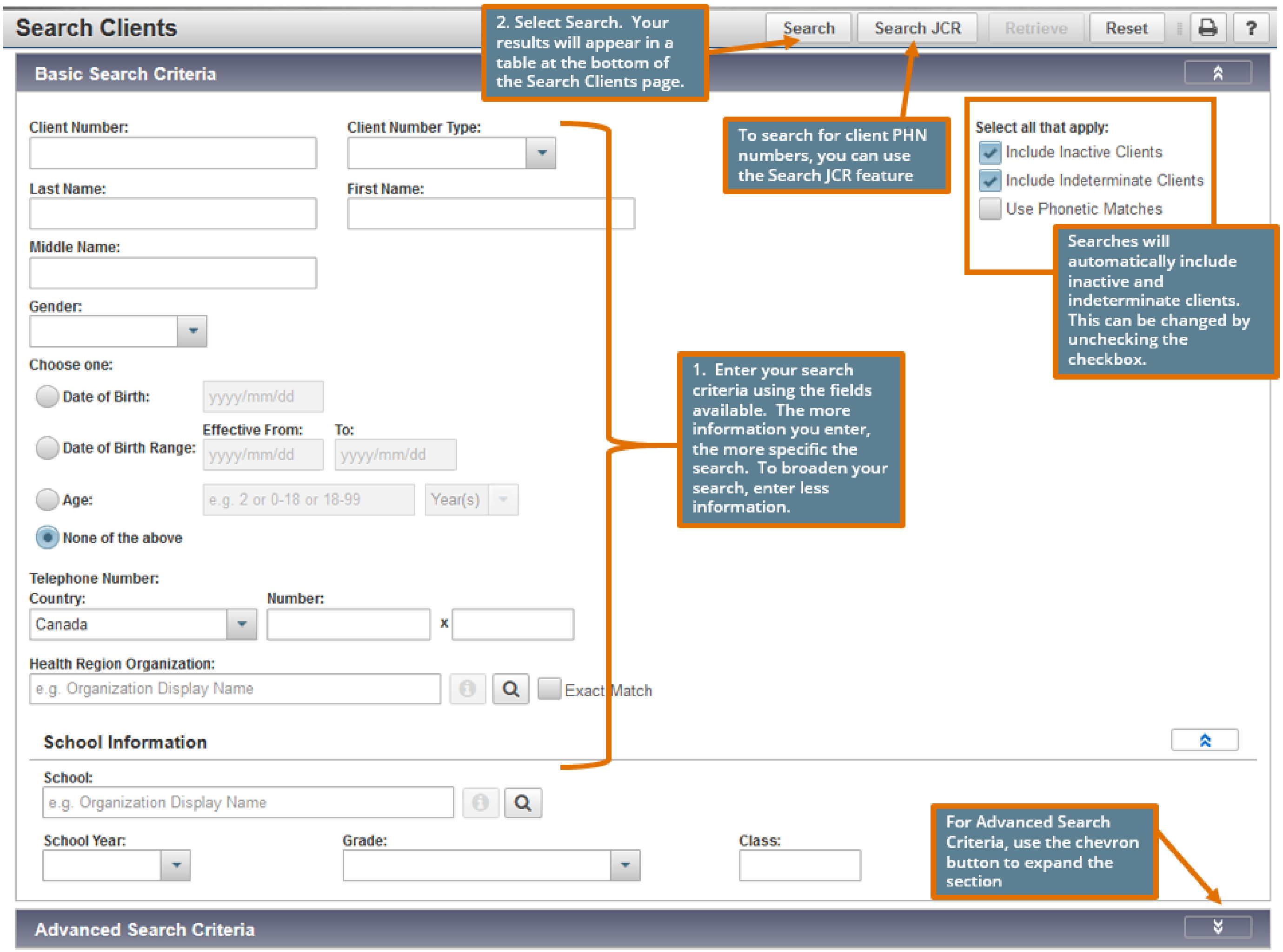


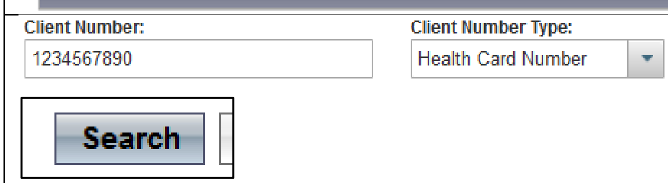
To access the *Search Clients* page:

LHN (Left Hand Navigation) > Client > **Search Clients**
OR
LHN> Client/Subject> **Search Clients**

There are several ways you can search for a client:

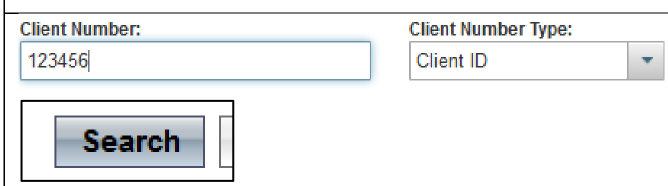
a. Search using PHN (Personal Health Number)
b. Search using Client ID
c. Search using other client identifiers (eg. Last name, first name, DOB
d. Search Using Wildcards (%)
e. Advanced Search
f. Phonetic Matches
g. Search using the Jurisdictional Client Registry (JCR)





Search Using PHN (Personal Health Number)

1. Under the *Client Number* field, enter clients PHN number
2. Choose ***Health Card Number*** under *Client Number Type* field
3. Press **SEARCH**



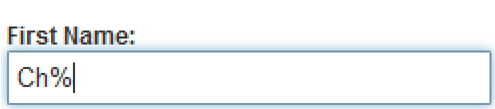
Search Using Client ID (Panorama Client Number)

1. Under the *Client Number* field, enter clients Client ID
2. Choose **Client ID** under *Client Number Type* field
3. Press **SEARCH**

Adding more client search information will narrow your search results. If you are finding that you are not getting any results, try removing one or more search fields

Search Using Client Identifiers

1. Using the available search fields, look for the client by entering client last name, first name, and date of birth and/or gender
2. Press **SEARCH**



Wildcard search (Search using **%**)

1. The percentage sign **(%)** is a wildcard, which can replace one or more letters at the front, middle or end of a word and can represent any number of characters.

For more information about Wildcard searches, please refer to the Avoud Duplicates/Wildcard Search posters available on our **Panorama website**

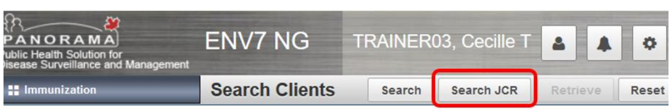
Example:
Ch% will return everything beginning with **Ch** (**Ch**elsea or **Ch**arlie); **%son** will return everything ending with -**son** (Peter**son** or Robin**son**).

Advanced Search
You can add other search parameters such as *Address*, by *Indigenous Organization*, Or *Address Located On Reserve Administered By* to find clients. The results will also include inactive clients.

1. Complete the *Basic Search* information (age range, date of birth range, etc) to limit results
2. Open the *Advanced Search* page, by selecting the chevrons to the right of the Advanced Search Criteria Header (just below the basic search fields). The advanced search fields section will appear below the Basic Search fields.
3. Complete the parameter(s) fields that apply to your search (eg. Indigenous Organization)
4. Press **SEARCH**

The JCR is the main client registry for the Ministry of Health for health care cards and is a good place to look for Personal Health Numbers (Care Card Numbers)

Using the Jurisdictional Registry Search is useful when all other searches in Panorama do not come up with any results.



Jurisdictional Registry Search
Search Jurisdictional Registry enables you to search for an existing client, if a client registry exists in the Provincial Jurisdictional Client Registry (JCR) Index.

1. To use the JCR, select the **SEARCH JCR** button, (top right corner) next to the **SEARCH** button in the *Search Clients* page. The *Search Jurisdictional Registry* screen page will display.

Searches in the JCR can be done by:

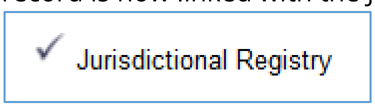
a. PHN
b. Last name and date of birth
c. Last name and address
d. Last name and postal code

The JCR search does not allow using wildcards (%)

1. Enter your search criteria in the fields using any combination of client identifiers above (a-d)
2. Select **SEARCH.** Results are returned onto a table at the bottom of the screen
3. You will see a list of clients that could possibly match. Look for the one with the same name, address and date of birth.

If you are not sure if this is the same client, consult with your FNHA Panorama Support team or do further

Notes:
* The Jurisdictional Registry symbol shown on the top of the *Create Client* screen implies the client record is now linked with the Jurisdictional Registry.

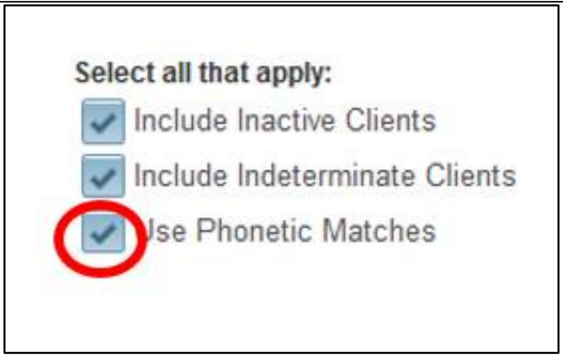


* The client's Health Region Information is not pulled over from the JCR and users need to re-enter this information in Panorama. In the Health Region Information section of the Create Client screen, users are required to select the bottom level Jurisdictional Organization.
Health Region Information will automatically default to your Indigenous Organization. This **MUST** be changed to the <u>closest Regional Health Authority branch (Public Health Branch)</u>
* The *Effective From* Date field is not auto-populated for client's address and phone number information pulled from the JCR. Users are reminded to manually set the Effective From Date for clients' address and phone numbers, if necessary.
* When creating a client to index, the preferred indicator is not set even though the client has only one address or one phone number on their client record. Users are reminded to manually set the 'Preferred' address or phone number for clients when pulling their record from the JCR.

investigations to ensure that you have chosen the correct client.

1. You can copy the PHN using copy and paste functions into the Panorama search page.
2. If the search shows no results, you can select **CREATE TO INDEX**. This will move the client information from your search fields, to create
3. If client exists, select the radio button corresponding to the client record desired. Select the **CREATE TO INDEX** button. (If this button is enabled, it implies that the Jurisdictional Client Registry (JCR) client has not been linked with any client in Panorama).
4. The *Create Client* screen displays with the client's demographic information pulled over from the JCR. *See Notes
5. Enter and update the rest of the client's personal information page and click **SAVE**. The *Personal Information* screen displays. The message, *"Client ID XXXXXX has been set into UI Context. The client has been saved successfully"* displays in the header section. Client ID XXXXXX is the Panorama system-generated client ID.

To update client's Personal Information, refer to the **Personal Information** section in this guide



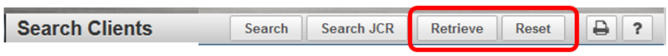
Other Search Tools

<u>Phonetic Matches</u>

When using the Search Clients page, you can add the option for Panorama to search using *Phonetic Matches*. On the to[right corner of the Search Clients page, select the checkbox ☑ on the top right hand corner of the page to include Phonetic Matches

When selected, wildcard (%) characters are not allowed. A phonetic search is performed on all name field criteria entered.

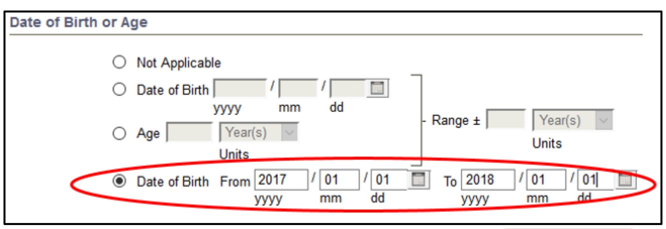
For example: When you search for “Stephen”, “Steven” is a valid match. When you search for “Dawn”, “Don” is a valid match.

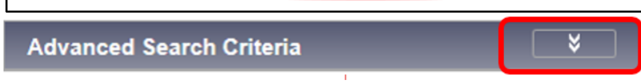


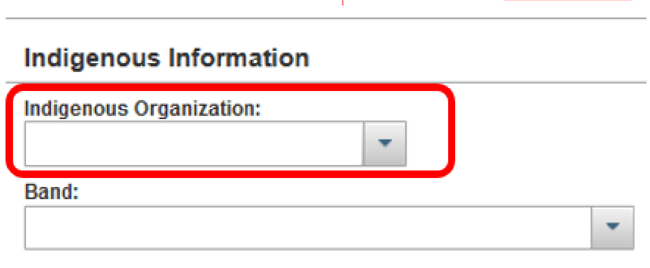
<u>Clearing and Retrieving Previous Searches</u>

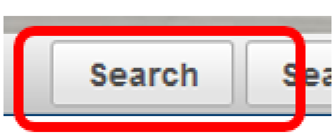
At any time while searching on the *Search Clients* screen, the User may clear the search criteria using the **RESET** button. By doing so, the system will set all search criteria to a blank or default value, whatever is applicable to the field.

At any time while searching on the *Search Clients* screen, the User may retrieve the last search criteria using the **RETRIEVE** button.









<u>Searching for Groups of People</u>

You can search for groups or ‘cohorts’ of people. This is useful when doing advanced Panorama functions such as creating a Mass Immunization or Mass TB screen for your community.

Searching by Date of Birth range and Indigenous Organization (AOrg)

1. Select the radio button **(◯)** beside the *Date of Birth from/to fields*. Enter the age range you wish to search (eg. Enter the range of DOB for all 2 year olds)
2. Select the **ADVANCED SEARCH** chevron button to open the advanced search criteria
3. Scroll down to the bottom of the page. You will see an *Indigenous Information* drop down section. Select your organization (The drop down will be limited to organizations your have access to)
4. Select **SEARCH**. Depending on the extent of your search, it may take a minute or two to generate the search results.

For more information about using advanced search, please refer to the **Mass Immunization and Mass TB guides**

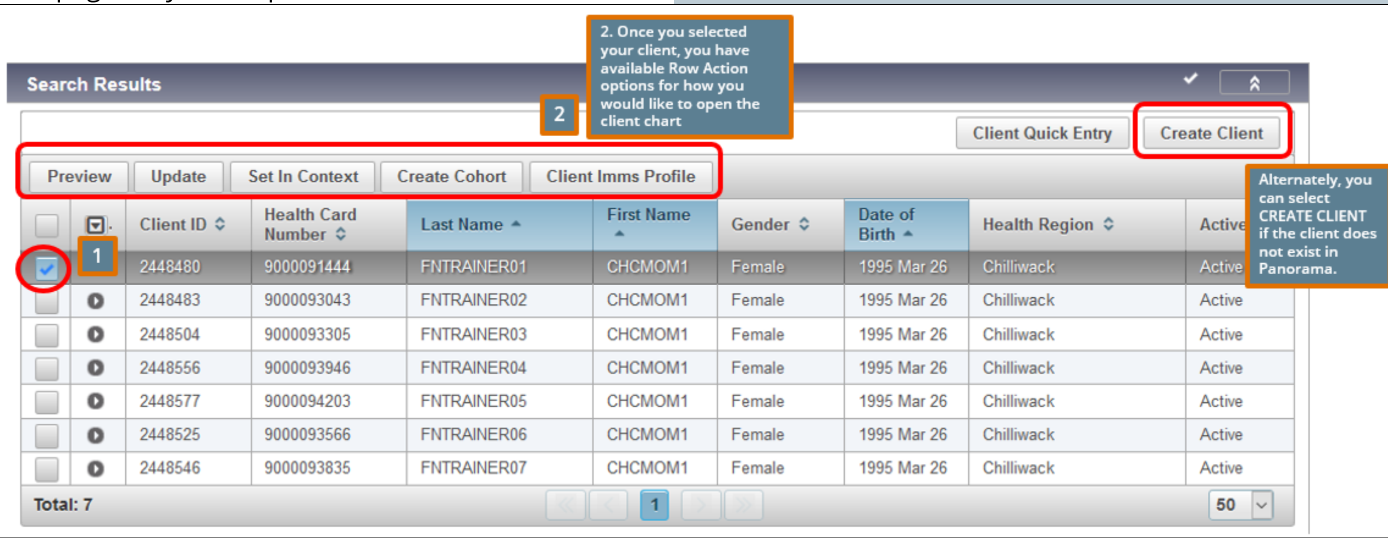
The Search Result Table and Selecting Clients

<u>What do these Row Actions do?</u>

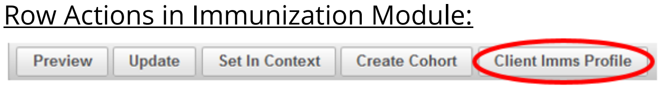
a) <u>Preview</u> – Selecting this will open a modal and allow you to see more client demographic information. This can help when you need more information to confirm this is the correct client chart you wish to open.
b) <u>Update</u> – Selecting this will open the client chart and take you to their Client Demographic page
c) Set in Context – will open up the client chart, but you will still need to manually navigate to the section of the client chart you wish to view
d) <u>Create Cohort</u> – for use when creating groups of people for Mass Immunization/Mass TB screening
e) <u>Client Imms Profile/Subject Summary/Family Health Client Summary</u> – This button will differ depending on which module you are conducting your search.
f) <u>Create Client</u> – Will create a new Panorama chart using the criteria you entered in the search fields. This will create a new file for the client, and take you to their Client Demographic page for you to update.

1. After searching for your client, you will see a table of results located at the bottom of the page. To choose a single client, select the checkbox ❒ next to the *Client ID* column.
2. Under *Row Actions*, you will have several choices depending upon which module you select. In the <u>Immunization Module</u> your choices are:
   a. Preview
   b. Update
   c. Set in Context
   d. Create Cohort
   e. Client Imms Profile (Imms module)/Subject Summary (Investigation module)/Family Health Client Summary (Family Health module)
   f. Create Client
   g. Client Quick Entry

Once you have found your client, it is suggested that you select from the *Row Actions* **UPDATE** as this opens the client's *Personal Information* page



<u>Row Actions in Immunization Module:</u>



<u>Row Actions in Family Health Module:</u>

<u>Row Actions in Investigations Module:</u>

<u>Module-Specific Row Actions:</u>

Depending on which module you are conducting your search, You will have an option to either open the client's:

- Immunization Profile page
- Family Health Client Summary Page or
- Investigation Subject Summary

For more information, Please refer to the **Immunization, Family Health or TB Panorama Guide**

Selecting Multiple Clients
You can select multiple clients in Panorama to create cohort groups when entering mass immunizations or mass TB screenings. Please see the **Mass Immunization Guide**

***If you notice multiple charts for the same client in Panorama:**
Contact Panorama@fnha.ca to notify us so we can merge the charts. Please include the client IDs of each chart in your email. Do not enter any client identifiers (name, PHN) in the email.

Create a New Client Record

As most clients will either be entered into Panorama at birth, or have been transferred from iPHIS, you will need to create a client **only when you get a new client from outside BC/Yukon** or under other rare circumstances.

1. To create a client, first do a thorough **SEARCH**
   a. Using last name/first name and date of birth
   b. Client ID or Health Card Number
   c. Wildcard (%) search
   d. Advanced Search
   e. Use the Jurisdictional Registry
2. If the client search results shows the message *0 clients identified*, or if the table of search results do not list your client, choose **CREATE CLIENT.** This will create a new file for the client, and take you to their *Client Demographic* page for you to update.

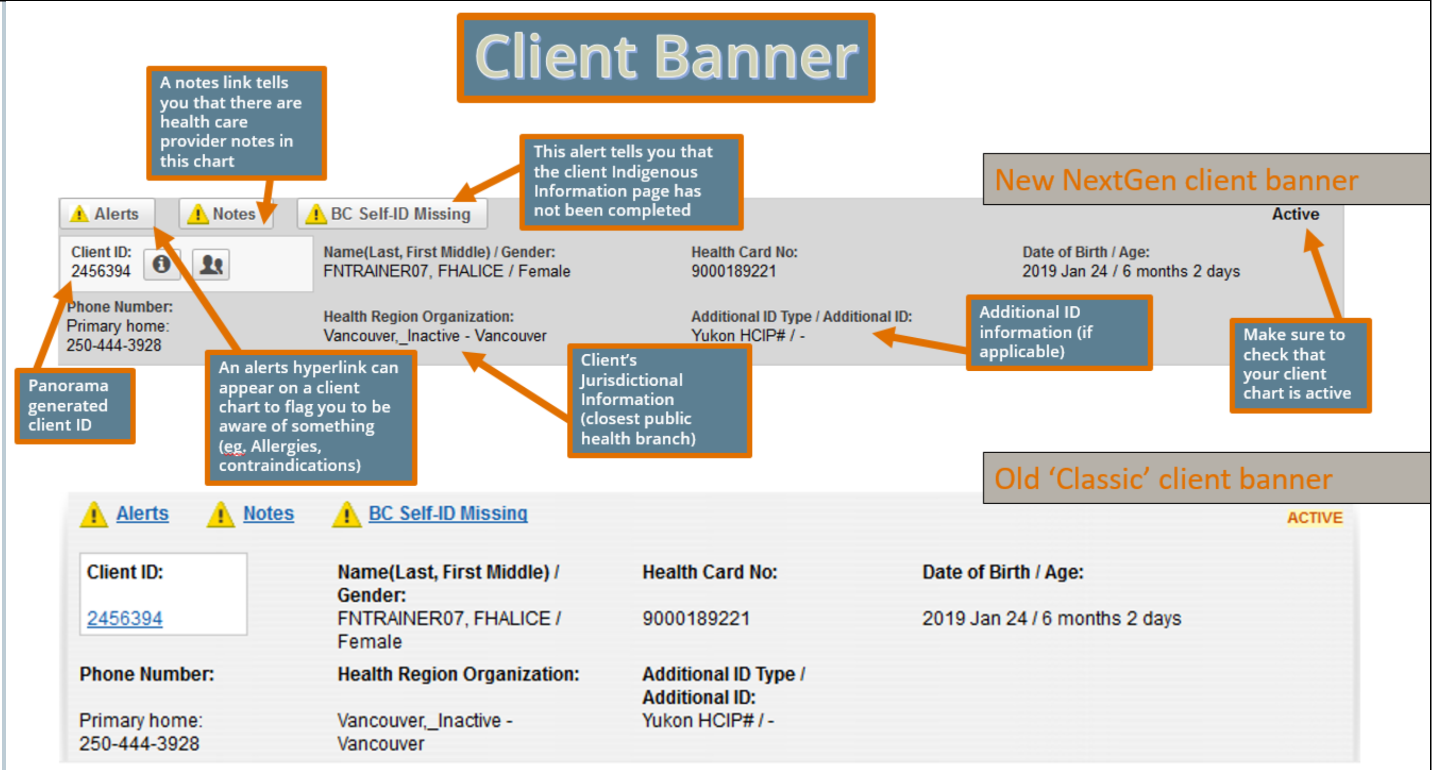
How do I know if my client chart is open?

Putting a record 'in context' is like opening out a physical client file folder. Anything that is done (creating an investigation, encounter, reviewing history, etc.) while a client is in context is then associated to that client.

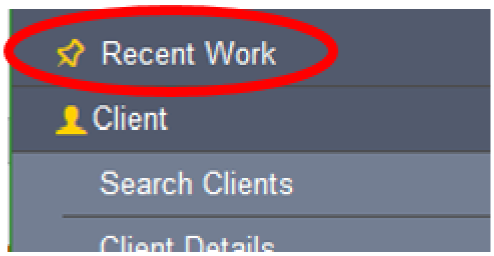
Note: If you notice on the client banner (top right corner) that their chart is *INACTVE*, and it should not be, please follow the instructions **Active and Inactive Charts** in this guide

After selecting and opening your client chart, or after creating a new client chart and saving their *Client Demographics* page, you will see a Client Banner or Context Header across the top of the screen. This is putting a client record "In Context" (see left)

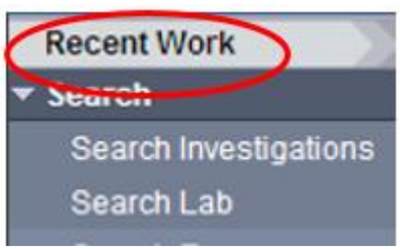
The client banner/header is the information in the grey box(es). It contains basic identification information about the record in context reminding you which client you are working on.



New NextGen Left Hand Menu (LHN):



Old 'Classic" Panorama LHN:



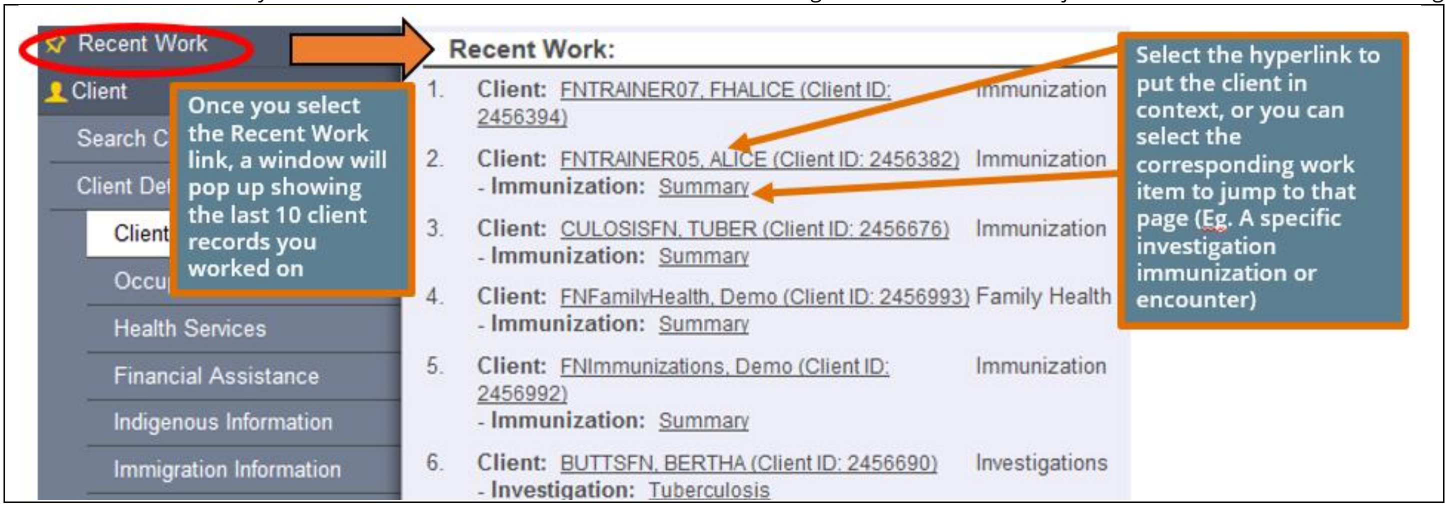
Note: The client or work item must have been 'in context' before it will show in the *Recent Work* pop-up menu

Recent Work

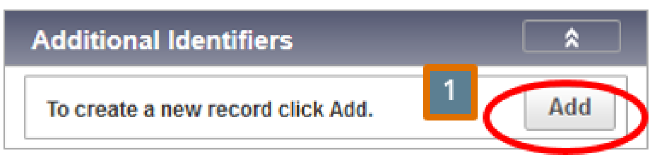
You may be interacting with the same client or group (cohort) over a period of time. You can use the **Recent Work** link at the top of the LHN to quickly access your most recent work items and put your client, investigation, cohort or outbreak in context without having to search for them.

LHN > **Recent Work**

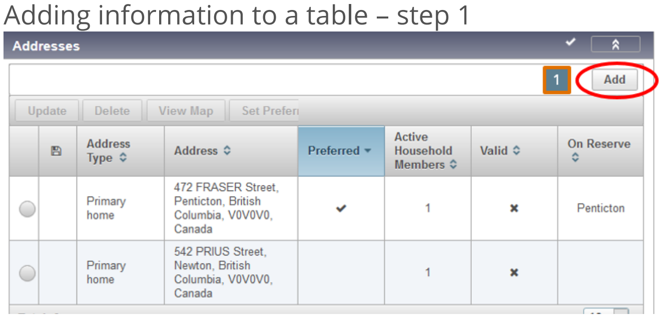
The *Recent Work* window will pop up with the last 10 clients you have worked on. You can then select the hyperlink to the client chart you wish to open.



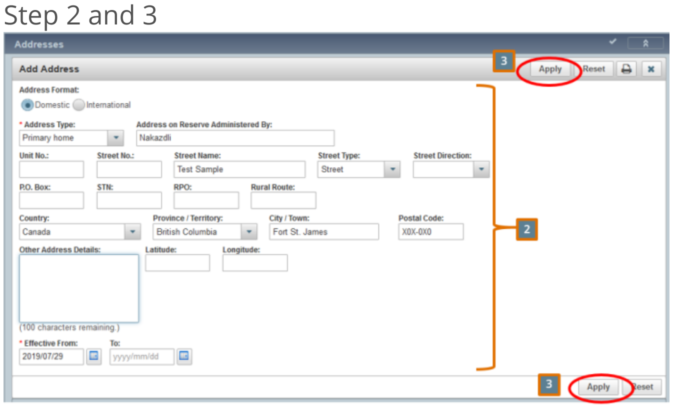
Adding and Updating information in Tables



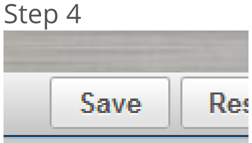
Adding information to a table – step 1



Step 2 and 3



Step 4



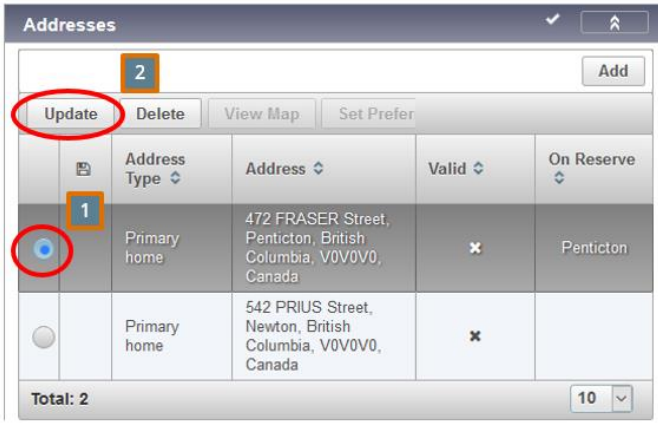
Throughout Panorama you will notice information is housed in tables. Information in tables are not updated directly in the table. In order to add, update or delete information, edits are performed in a modal, (a separate window pop-up).

Adding Information in a Table

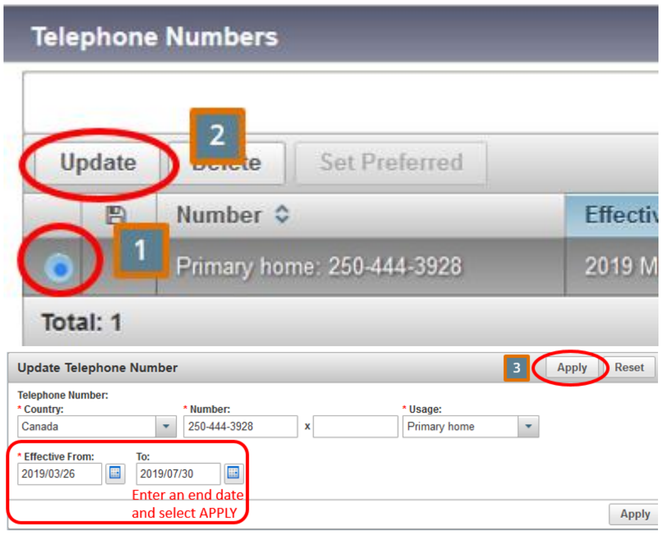
To add new information into a table:

1. Select the **ADD** button, usually located on the right side of the page, just below the dark grey-blue header.
2. A modal will appear where you can enter in the information in the fields available.
3. Select **APPLY** (found at the top or bottom of the modal window) to exit the modal and you will see the information populate in the modal
4. **SAVE** your work to save all the changes you have made on that page.

Editing/Updating information – Step 1 and 2



End Dating information

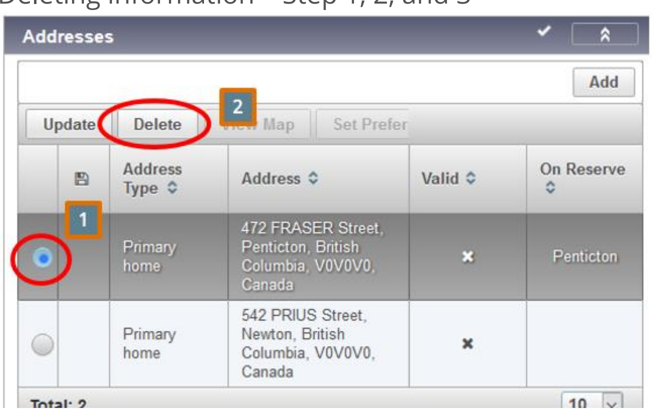


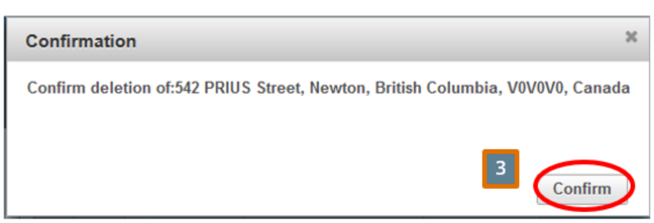
Editing/Updating information in a table or End Dating information in a table

1. Select the row by selecting the radio button (❍) located on the left column next to the information you wish to edit/update.
2. Select **UPDATE**
3. A modal will appear where you can edit/update the information. Select **APPLY** to exit the modal. Your updates will show in the table
4. **SAVE** your work to save all the changes you have made on that page.
5.

Note: Some items/fields can only be edited/updated by the original author.

Deleting information – Step 1, 2, and 3





Deleting information in a table

1. Select the row by selecting the radio button (❍) located on the left column next to the information you wish to delete
2. The table row actions (located just on the left and above the table) will become available. Select **DELETE**
3. A modal will appear where it will ask you to confirm the deletion. Select **CONFIRM**. The table will update.
4. **SAVE** your work to save all the changes you have made on that page.

Note: Unless indicated, **it is not recommended** to delete information such as addresses/phone numbers. Instead, update and end date the old address/phone number, after adding a new entry.

Note: Some confirmation modals require you to enter a reason for deletion.

Client Demographics

When updating or creating a client chart, you will need to use the client's legal first and last name (ie. The name on their care card)

Health Region Organization will automatically default to your Indigenous Organization. This **MUST** be changed to the closest Regional Health Authority branch (Public Health Branch).
If you are unsure which branch to select, you can use the **Branch Locator Tool** to locate the correct branch (open this link in the Panorama Portable Firefox browser)

After selecting and opening up your client chart, or when creating your client chart, Client Demographics needs to be reviewed and updated

With your client in context:

LHN > Client/Subject > Client Details > **Client Demographics**

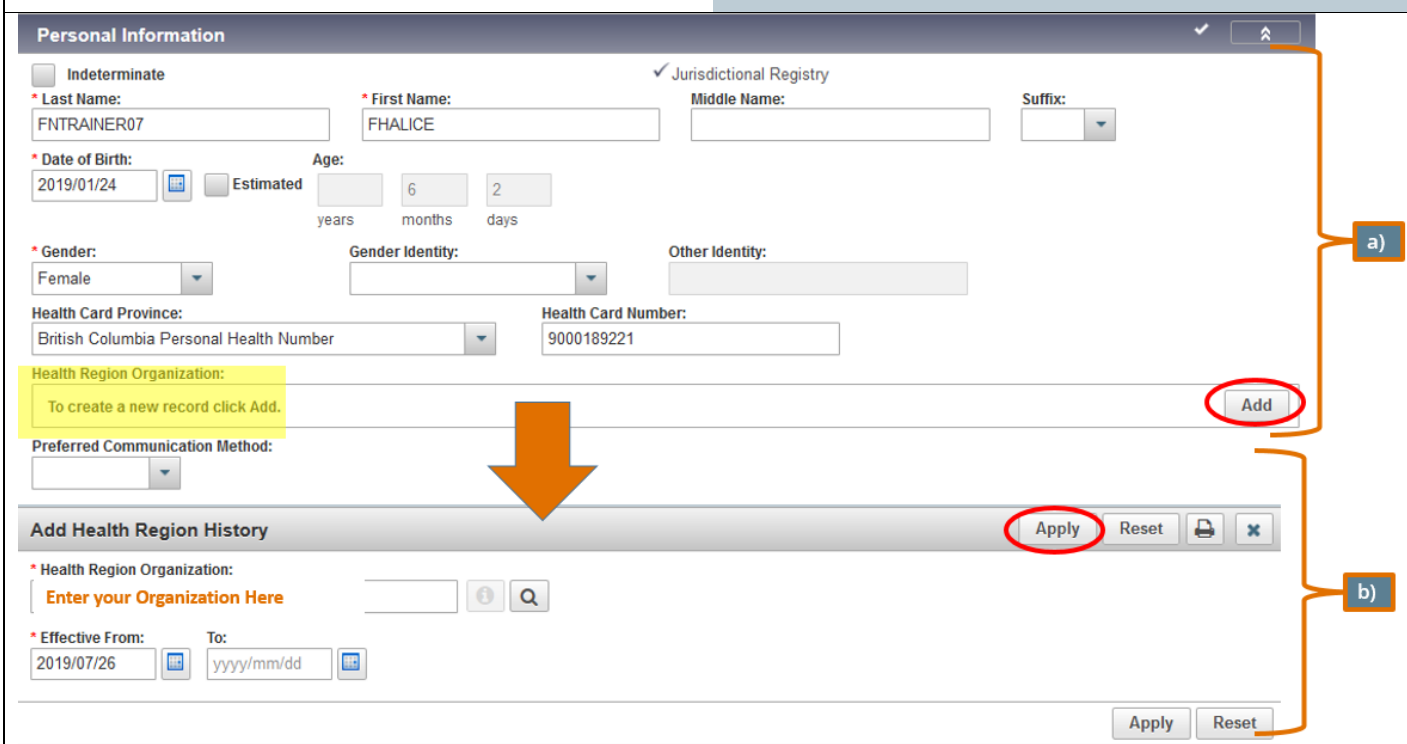
Complete all pertinent and required field on this page:

Personal Information:

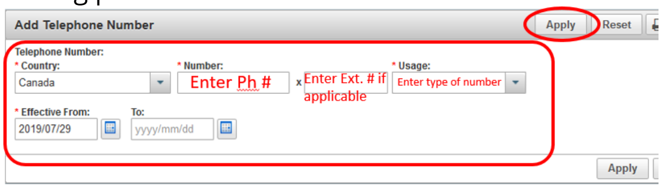
a. Enter a minimum of **First and Last Name**, **DOB**, **Gender** and either **PHN** or **address**. PHN is preferred, but not mandatory.

b. *Health Region Organization*: Select the **ADD** button and a modal will appear. Search for the client's Health Region Organization. The ***Effective From:*** date will populate to today's date (this can be backdated if needed).

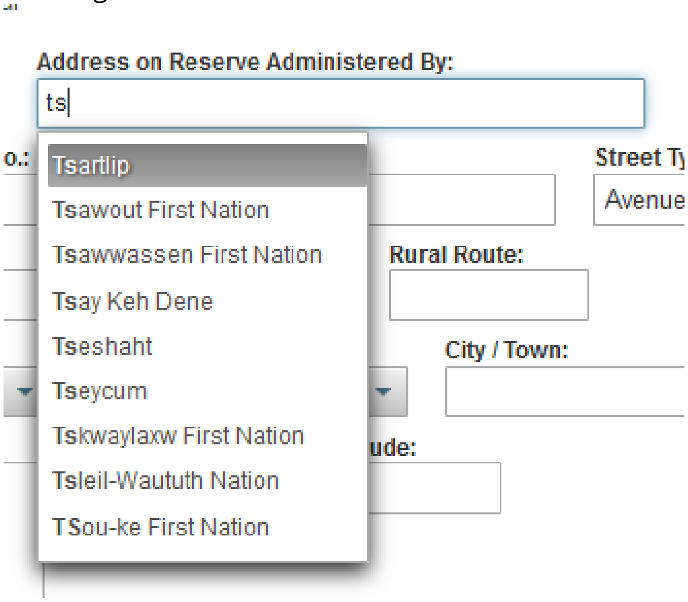
The client Health Region Organization will be the closest Regional Health Authority branch for their location of residence (ie. The associated Public Health Unit for their Health Centre/Nursing Station)



Adding phone numbers:



Entering Addresses:



c. *Ethnicity:* Not required to complete.

d. *Birth Information:* Not required to complete

Telephone Numbers

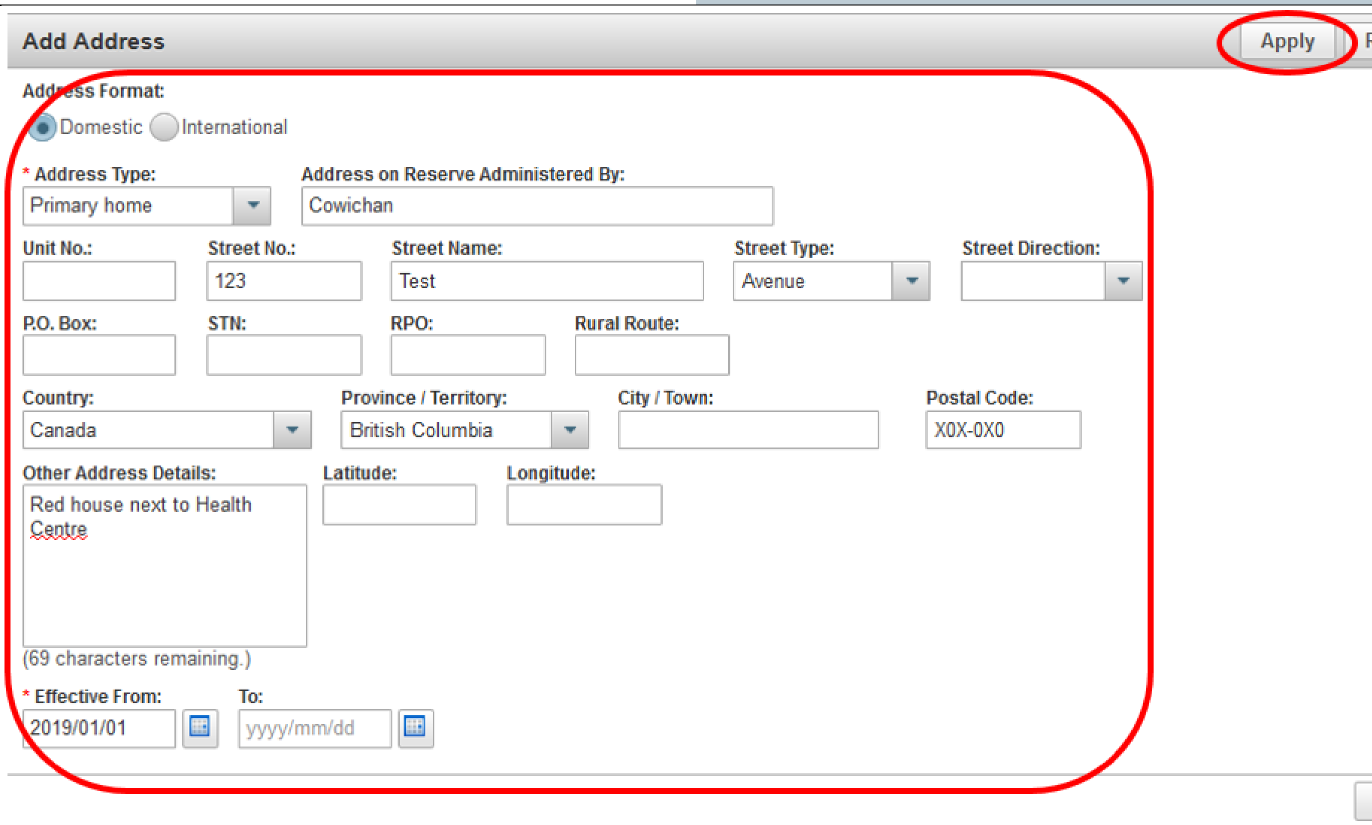
ADD any new phone numbers and end-date old phone numbers on the table using the instructions from the section **Adding and Updating Information in Tables**.

- Enter in all required fields (*Country, Number – 10 digits, Usage, and Effective From* date)

Addresses

Similar to Telephone Numbers, **ADD** any new address and end-date old address on the table using the instructions from the section **Adding and Updating Information in Tables**.

- If the client's address is on reserve, complete the *Address Located On Reserve Administered By:* section (Type-Ahead).
- Enter in all required fields (*Address Type, Street Name/PO Box, Province, City/Town, Postal Code, Effective From* date)



There are other sections within the *Personal Information* page that is not required, but you may add information if known (eg. Birth Information, Alternate Names, Additional IDs)

Adding alternate names helps to broaden Panorama's search capabilities when searching for clients who may go by different names.

Other sections in the Personal Information page:

Alternate Names: **ADD** any alternate names (eg. Aliases, Former/Previous legal name, Legal name on the table. Enter *Alternate name Type and Last Name/First Name/Middle Name*

Additional Identifiers: If a client has another ID number (eg. Other provincial health number) it can be entered here. **ADD** any new ID numbers on the table.

Languages: **ADD** if you would like to add client languages spoken.

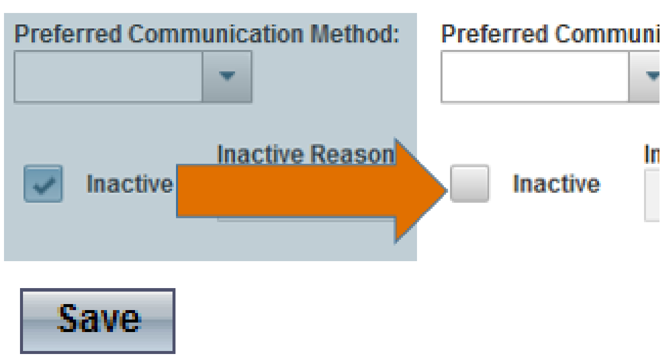
Email Addresses: **ADD** If you would like to add an email address as an alternate contact.

Online Names: If applicable, client online usernames can be added as well (eg. Facebook, Messenger)

Remember to **SAVE** your changes before leaving the *Client Demographics* page.

Some health authorities used to inactivate First Nation charts to remove them from their reporting records. This is no longer practiced.

All clients receiving service must be ACTIVE for the forecaster to work. Please make sure all your clients are ACTIVE.



Active and Inactive Charts

Client charts may be inactivated for different reasons (deceased, adopted, created in error, etc.). If you find that a client chart has been inactivated, but shouldn't have, you can reverse this.

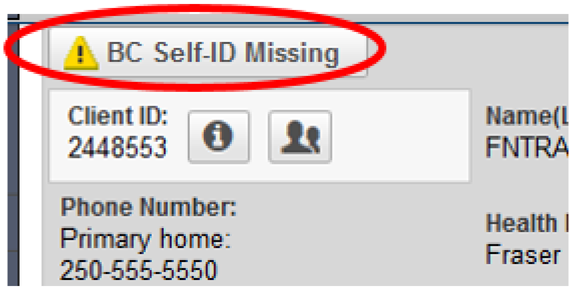
Reactiviating a client chart

In the *Personal Information* section of the Client Demographic page, scroll to the *Inactive* checkbox ☑, located under the *Preferred communication Method* field, ***uncheck*** ❐ the Inactive checkbox and **SAVE** your changes

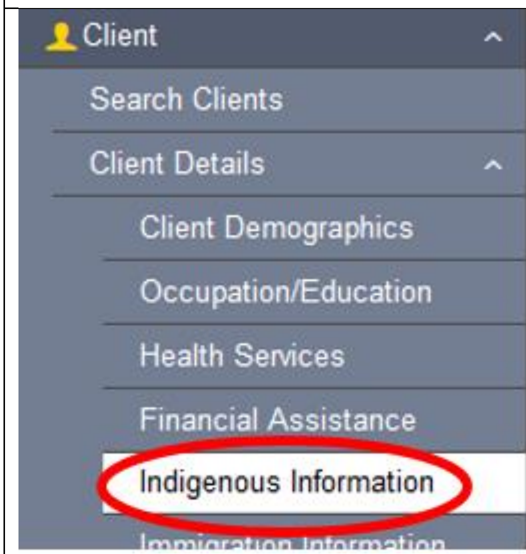
If you are unsure if a client chart should be inactive/active. Please contact panorama@fnha.ca

Indigenous Information

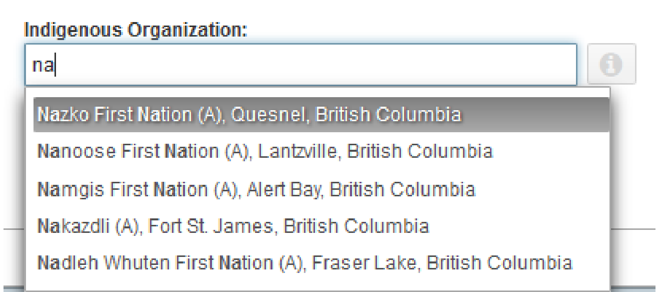
For more details, please see the **[Completing Indigenous Information]** Guide



A **BC SELF-ID MISSING** alert will appear on the top left hand corner of the client banner if the client's Indigenous Information page is not completed The alert will disappear once completed.



Completing this section is important as this is how clients are identified as being associated with your FNHSO for your reporting and search functions. All health care providers are required to complete this section for all clients (whether or not they are identifying as Indigenous). This identifies the client as receiving their primary public health services from your FNHSO.



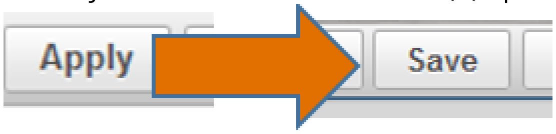
With your Client in context:

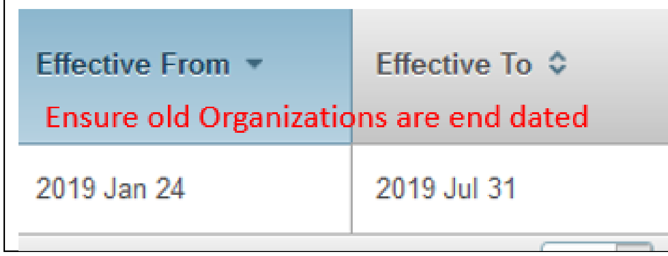
LHN > Client/Subject > Client Details > **Indigenous Information**

Adding Indigenous Information
On the Indigenous Information page, select **ADD**. A modal will appear where you can complete the following fields:

1. Complete the 3 questions using the dropdown fields beside each question
   a. ***Do client wish to self-identify as an Indigenous person?***
      i. *Asked and not provided*
      ii. *No*
      iii. *Not asked*
      iv. *Yes*
      v. *Yukon Resident*
   b. ***Indigenous Identity***
      i. *Asked, but unknown*
      ii. *Asked, not provided*
      iii. *First Nations*
      iv. *First Nations and Inuit*
      v. *First Nations and Metis*
      vi. *Inuit*
      vii. *Inuit and Metis*
      viii. *Metis*
   c. ***First Nation Status***
      i. *Asked, but unknown*
      ii. *Asked, not provided*
      iii. *Non-status Indian*
      iv. *Not asked*
      v. *Status Indian*
2. Search and add your Indigenous Organization
   a. Use the type-ahead function in the *Indigeous Organization* field by typing the first 3 letters of your organization **SLOWLY** (ie. Your First Nations Health Services Organization - FNHSO).
   b. This will populate a list of organizations

You will note that your organization will have an (A) after the name – This is the only place in Panorama where you should see or select this (A) option.





c. Select your <u>lowest level</u> Indigenous Organization (<u>community</u> you want the client to be associated to) from the drop-down list.

3. Select **APPLY** (top right corner of modal)
4. **SAVE** (top right corner of page) your work before navigating away from this page

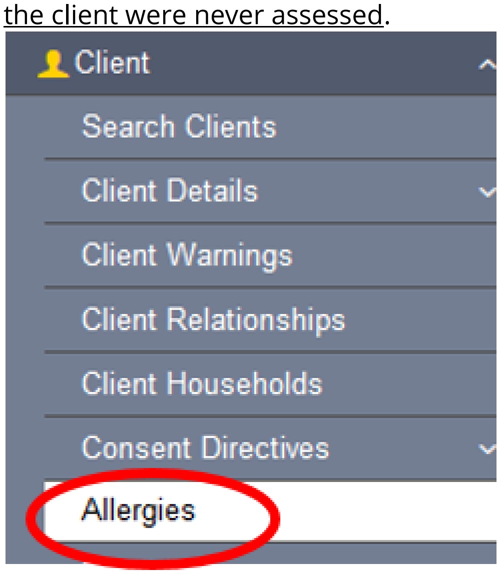
<u>End Dating Indigenous Information</u>

When adding a new Indigenous Organization for a client, make sure you end date any previous entries (DO NOT DELETE OLD ENTRIES).

End-date old Indigenous Organizations on the table using the instructions from the section **Adding and Updating Information in Tables**.

Allergies

In addition to adding allergies, please remember to update/end date them if they change (eg. No longer an allergy). <u>A blank response means that allergies for the client were never assessed</u>.

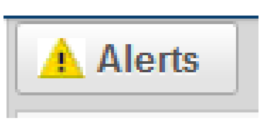


With your client in context:

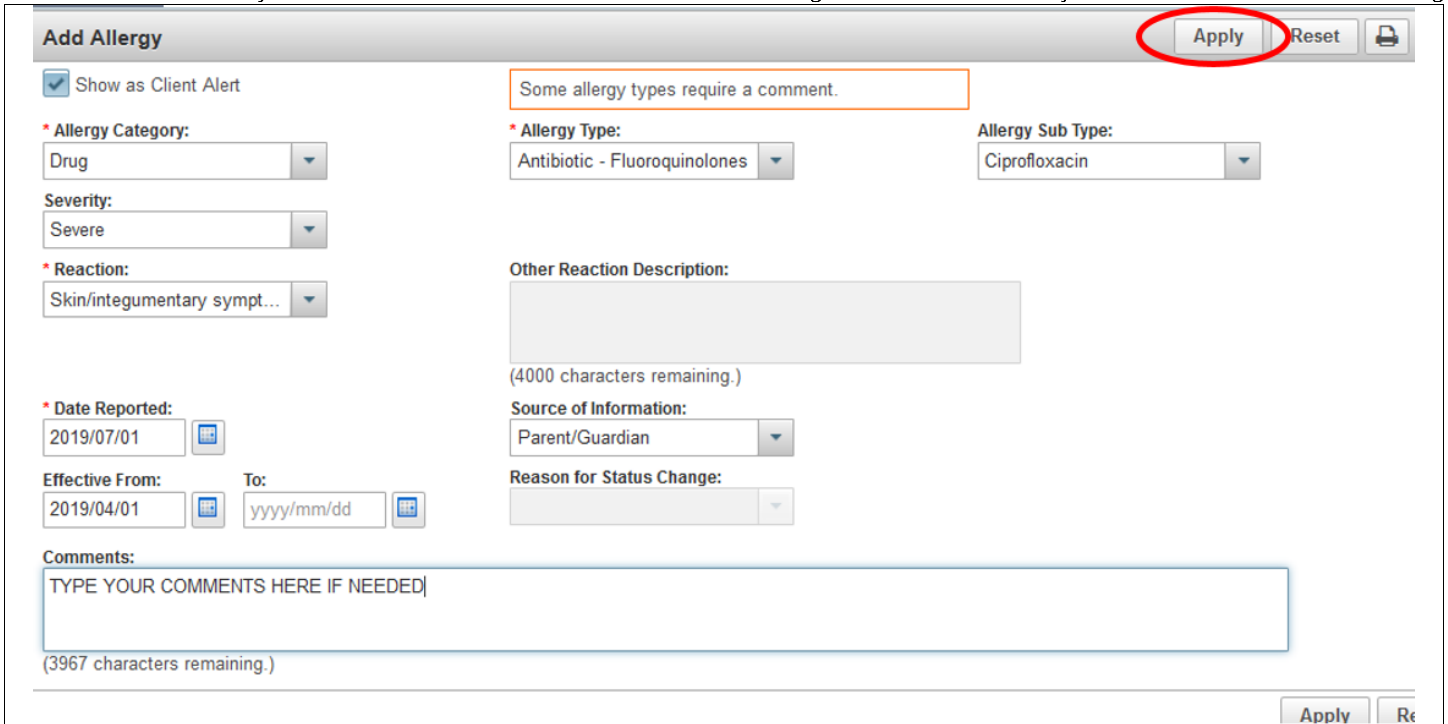
LHN > Client/Subject > **Allergies**

<u>Adding Client Allergies</u>

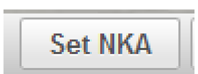
1. Select **ADD**
2. Complete at minimum, all of the mandatories (marked with red *) and any other relevant information.
   a. *Allergy Categories* include: Animal/Insect, Drug, Environmental, and Food
   b. *Allergy Types* include the most common types of each of the categories, such as bees under Animal/insect, Penicillin under Drug and eggs under Food
   c. *Allergy Subtype* provide further specifications.
   d. *Severity* is optional. The descriptions are subjective.
   e. *Reaction* - Select the appropriate reaction including Anaphylaxis
   f. *Date reported* and *Effective From/to date* (can be backdated).
   g. *Source of Information* - If known, should be entered for completeness (choices such as *client, observed, lab*)
   h. Add *Comments* – You can add additional comments as needed.
   i. Select **APPLY** to complete and **SAVE** your changes.

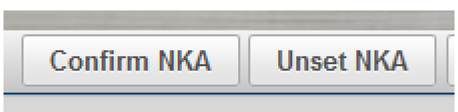


An Allergy List is created for the client as a table. Allergies that are created will generate an **ALERT** icon on the top left corner of the client banner



For clients it is important to document in the allergy section. If the Allergy section is undocumented and left blank, <u>it is assumed that the clinician did not ask the client about allergies</u>





<u>Set, Confirm and Unset No Known Allergies</u>
To document client as having no known allergies, select the **SET NKA** button found at the top of the Allergies page (just above the client banner). This option can be unset by selecting **UNSET NKA**, Which will blank out the allergies page (ie. Imply that Allergies were not assessed for client).
To document consistent assessment of client allergy status, Panorama users are to use the **CONFIRM NKA** button at <u>each client visit</u> when entering client information into Panorama.

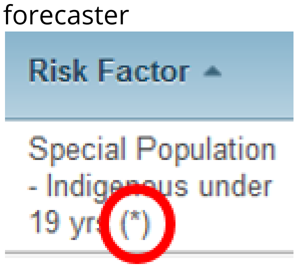
<u>View/Update/End Date Existing Allergies:</u>
You can update the Allergy table using the instructions from the section **Adding and Updating Information in Tables**.
Do not delete allergies – E*nd date* them instead. If you do delete and allergy, .

Risk Factors (IMMS, FH, and Investigation Modules)

Although not a Risk Factor, in order for Panorama to forecast for Hepatitis A for Indigenous clients, a 'risk factor' of *Special Population – Indigenous under 19 yrs (*)* must be entered for clients under 19 years.

For more details on Risk Factors within the Immunization, or TB Module, please see the **TB User Guides** or contact panorama@fnha.ca

If you see a **(*)** beside a risk factor selection, that indicates that the risk factor affects the client forecaster



When you respond "*yes*" to a Risk factor, this means that "yes, this client has this particular risk factor"

Family Health and Immunization Modules:
Significant client risk factors such as a chronic condition, immunocompromising condition, or if they are considered part of a special population need to be entered into Panorama

For children under the age of 19, a **RISK FACTOR** for *Special Population – Indigenous- under 19 yrs* needs to be entered into Panorama in order to get Hepatitis A added to the client forecast and immunization schedule.

Investigation (TB) Modules:
When you create a TB investigation for a client, a pre-populated table of risk factors are presented. All risk factors in the table needs to have a documented client response

Adding a Risk Factor:

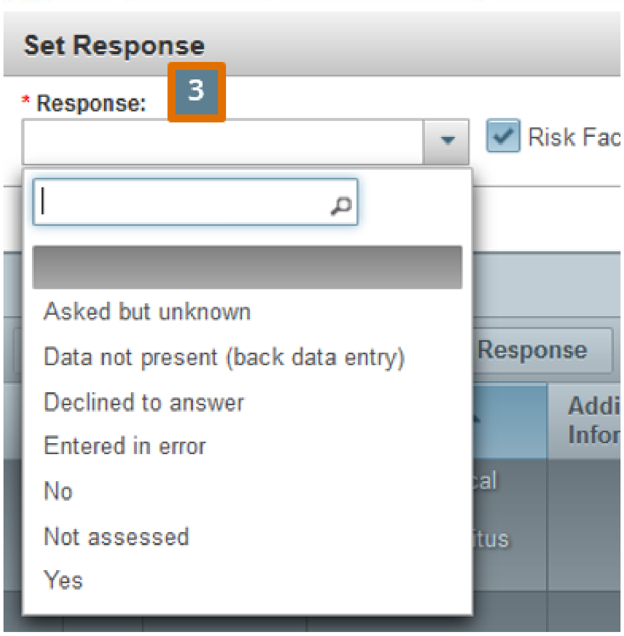
With your client is in context:

LHN > Client > **Risk Factors**

1. You are taken to the *Risk Factor* page. If there are current risk factors, they will be presented in a table on this page.
2. Select **ADD** to add a new risk factor. A modal will appear for you to enter information.
3. Under *Risk Factor* choose ***"Special Population – Indigenous under 19 yrs (*).*** This ensures Hepatitis A is put into their forecaster.
4. For *Response*, select ***Yes***
5. *Frequency, End Date* and *Reported By*, *Effective From/To* are not required fields. Complete if known/applicable
6. *Reported Date* populates to today's date. Can be changed as needed
7. Select **APPLY** to add the risk factor to the table.
8. Repeat steps **2-7** to add additional Risk Factors
9. Select **SAVE** to save the entered risk factors. The risk factor table will update with your entry(ies)

Updating a Risk Factor:

Updating Multiple Responses:



Updating Risk Factors

You can update the risk factor response individually or as a group. You can also update details to a client risk factor.

Updating Risk Factor Responses and details (Individually):

With your client in context:

LHN > Client/Subject > **Risk Factors**

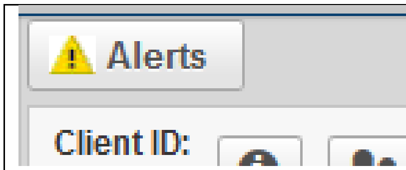
1. From the risk factor table, use the checkbox ❐ to select the risk factor you wish to update (*Start/End Date, Frequency, Reported by, Reported Date*)
2. From *Row Actions* select **UPDATE**. A modal will appear where you can update the Risk Factor information.
3. Select **APPLY** and your response will update in the table below
4. Once you completed your updates select **SAVE**

Adding or updating risk factor details can only be done individually, not as a group

Changing Responses for Multiple Risk Factors:

1. From the Risk Factor Table, use the checkbox ❐ to select the risk factors you wish to update.
2. Select **SET RESPONSE**. A modal will pop up for you to set the response for the Risk Factors you selected.
3. Select **APPLY** to update your changes. **SAVE** your changes.

Client Alerts and Manual Warnings



- Warnings page on LHN – only displays manually created client warnings
  - It previously listed all warnings

Client warnings can be manually created or automatically created by Panorama, such as when a contraindication is entered.

Alerts

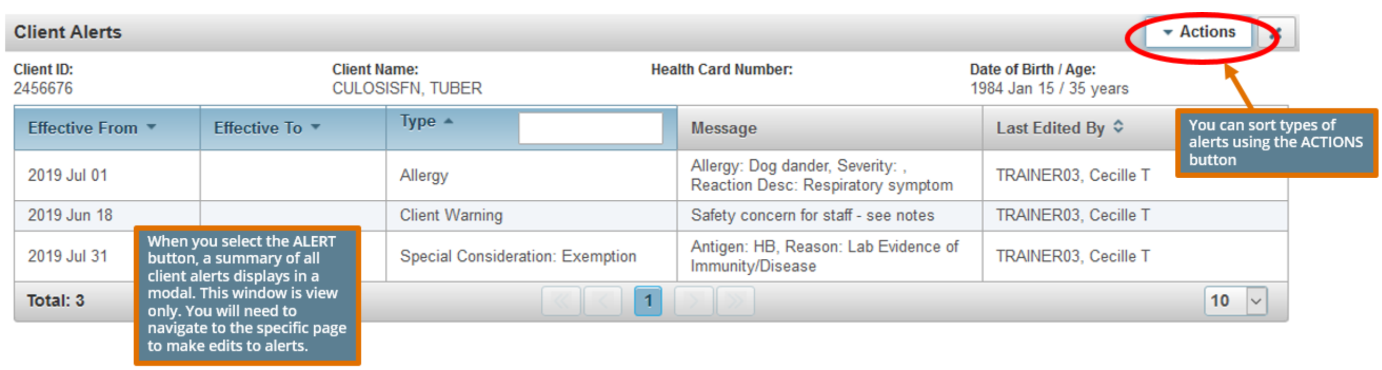
If client has any Alerts, they will appear as a hyperlink with a yellow triangle on the top left hand corner of the client banner. Alerts are there to notify the user of any client:

- Allergies
- Special Considerations (Contraindications, Exemptions, Precautions)
- Manual Warnings
- AEFI
- Adverse Drug Reactions

The Alerts button automatically populates when any of the above is indicated in the client chart.
Viewing Alerts:

With the Client record in context:

1. Review the warning by selecting the yellow triangle **ALERT** button in the client banner/header located at the top left hand corner.
2. A modal will appear which will show a summary of the warnings entered for the client



Manual Warnings

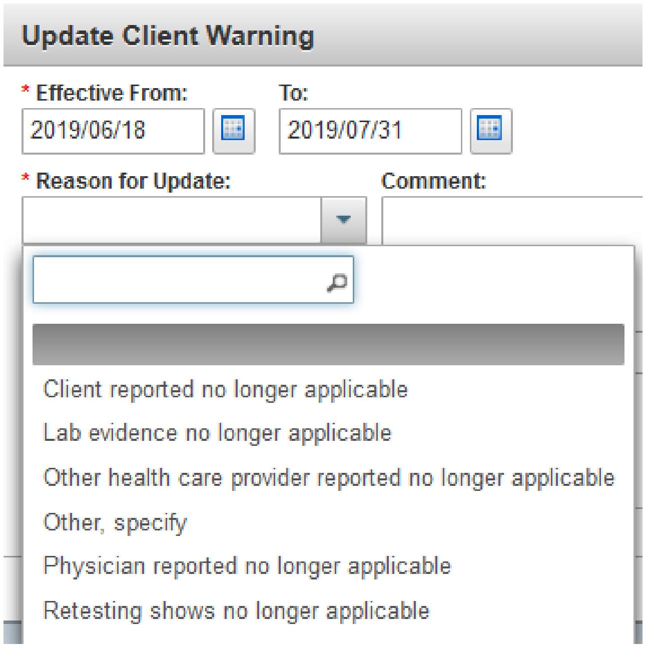
There are only certain instances where you can manually create a warning for a client. Below are the only accepted manual warning types:

- *Sensitive Record*
- *Safety Concern for Client*
- *Safety Concern for Staff*
- *Potential Duplicate Record*
- *Communicable Disease Alert: Hep B*
- *Communicable Disease Alert: Potential Vertical Transmission*

Note: When you go to the client warnings page, it only lists manual warnings created for the client. It does not list any possible Allergies, Special Considerations, AEFI on this page. Message box examples: • Sensitive Record – Please see notes • Safety Concern for Staff – Please see notes • Safety Concern for Client – Please see notes	• *Communicable Disease Alert: Post Exposure Prophylaxis Serology Recommended* <u>Creating a Manual Client Warning:</u> When creating a client warning, you will need to ensure that an associated client-level note is associated with the warning (except for Duplicate Client Management) With your client in context: LHN > Client/Subject > **Client Warnings** 1. Select **ADD** to create a new manual warning. 2. The *Effective From* date automatically defaults to today's date, but can be backdated. 3. In the message box, enter one of the acceptable messages using the ***Warning Messaging*** table below. 4. Select **APPLY**. You will now see a yellow **ALERT** triangle and hyperlink in the Client banner/header area. 5. You must now create a client-level note related to this warning (please see **NOTES** section for instructions) using the table below as a guide for how to structure your note.

Warning Messaging		
Manual Warning Type	**What to write in warning message box**:	**What to write in client level note:**
Sensitive Record (may be used where one parent is not permitted access to a child's record)	"Sensitive Record – see notes"	*Subject Line* = "Sensitive Record" *Note Type* = Role (who is entering) *Note* = explanation for client warning.
Safety Concern for Client	"Safety Concern for Client – see notes"	*Subject Line* = "Safety Concern for Client" *Note Type* = Role (who is entering) *Note* = explanation for client warning.
Safety Concern for Staff	"Safety Concern for Staff – see notes"	*Subject Line* = "Safety Concern for Staff" *Note Type* = Role (who is entering) *Note* = explanation for client warning.
Potential Duplicate Record	**Client Warning on Duplicate Record:** *Please notify Panorama@fnha.ca if you encounter duplicates charts for your client.	No Client level notes needed .
Communicable Disease Alert: Hep B	**For the Client (Baby's) Chart** "Communicable Disease Alert Neonatal Hep B Program - see notes"	*Subject Line* = Communicable Disease Alert Neonatal Hep B Programme *Note Type* = Role (who is entering) *Note* = explanation for client warning
Communicable Disease Alert: Potential Vertical Transmission-to address Postnatal Acquisition Event Follow Up	**For the Client (Mother's) chart** "Communicable Disease Alert Potential Vertical Transmission – see notes" **Note:** Alert would be closed out on Mother's record once the information documented on Baby record.	*Subject Line*= "Communicable Disease Alert Potential Vertical Transmission - Post Natal Follow Up" *Note Type* = Role (who is entering) *Note* = "Initiate post-natal CD follow up for baby."
Communicable Disease Alert: *Post Exposure Prophylaxis Serology Recommended – See Notes*	"Communicable Disease Alert: Post Exposure Prophylaxis Serology Recommended – See Notes" **Note:** Once post-series serology is received and entered into Panorama indicating immunity, the Client Warning would be expired.	*Subject Line* = "Communicable Disease Alert: Post Exposure Prophylaxis" *Note Type:* Role (who is entering) *Note:* "Serology to be completed (x) month(s) post (xxx) series completion"
Communicable Disease Alert: *Airborne Precautions*	"Communicable Disease Alert: Airborne Precautions – See Notes"	Subject Line = "Communicable Disease Alert: Airborne Precautions" Note Type: Role (who is entering) Note: Explanation of client warning

Note: For automatic warnings such as allergies, or special considerations, you will need to go directly to that page to update the record.



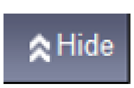
Updating/End Dating Client Warnings:
With your client in context:
LHN > Client/Subject > **Client Warnings**

1. From the warning table use the radio button (O) to select the warning you wish to update
2. Select **UPDATE**. The *Update Client Warning* modal screen pops up
3. On this page, you can end date client warnings, and select reason for the update.
4. Select **APPLY** to save your changes

Client/Subject Summary

A client's subject summary page is a great way to get a quick overview of client encounters and investigations

Tip: To "hide" and show" components of the screen, click the *hide* or *show* hyperlinks along the encounter headers to view/hide more details



The Subject Summary screen lists all Encounters and Investigations that have been recorded for a client under the various Encounter Groups (Communicable Disease, Sexually Transmitted Investigations, and Tuberculosis Disease Investigation, Immunization). Depending on which Module you are in, the subject summary page may vary slightly.

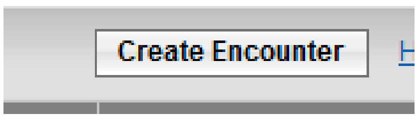
For more detailed information please see the **Family Health Guide, Immunization Guide or TB Guide**

Encounters

Encounters can be automatically, or manually created.

An encounter represents a point of service between a client and healthcare provider for any type of service (eg. Clinic visit, home visit, telephone consult, etc).

Eg. You can create an encounter to document a phone call or visit regarding immunization that did not include administration of an immunization.



Automatic Encounters

Panorama automatically creates an encounter for:

- Administered Immunizations
- AEFI (Adverse Event Following Immunization)
- Special Considerations (eg. Refusals, contraindications)
- Entry of Lab Results/Diagnostic Imaging Results
- Entry of TST
- Interventions

Manual Encounters

Users can manually create encounters for the following:

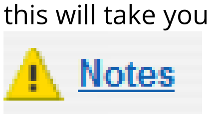
- Clinic/ Home/ Outreach/ Street/ Workplace visits
- Telephone assessments with the client/guardian
- Case conferences – Contact between multiple healthcare providers about a specific client
- Counselling/education, provision of care, medication administration/ management, screening, etc.

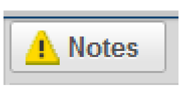
Viewing and Creating a Encounters

Please see the **Family Health, Immunization or TB manual** for more information.

Notes

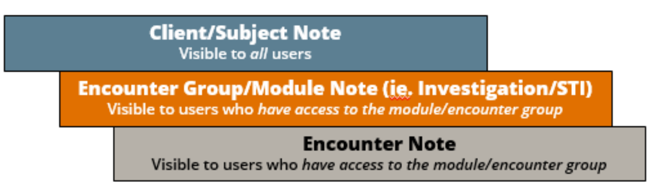
You can quickly see and access client notes by checking if a *Notes* hyperlink exists on the top left hand corner of the client banner. When selected, this will take you to the *Clinical Notes* screen



OR


It is very important users are aware which 'level' is in context when a note is created to ensure encounter group protection is maintained. Diligence in attaching Clinical Notes to the appropriate level will help facilitate having the clinical data available to the clinician in a consistent way.

Note Levels



Notes can be created at the **Client/Subject, Encounter Care Plan or Investigation** level (eg. A Note needs to be created with both the Client and Investigation in context to associate (ie. Attach) that note with the investigation rather than at the general client level). Notes are visible to users based on their roles and permissions (eg. A user who does not have access to Investigations module will not see any notes associated to Investigations or Outbreaks).

Viewing Clinical Notes

1. If clinical notes exist for your client and with your client in context:

LHN > **Notes**

Or

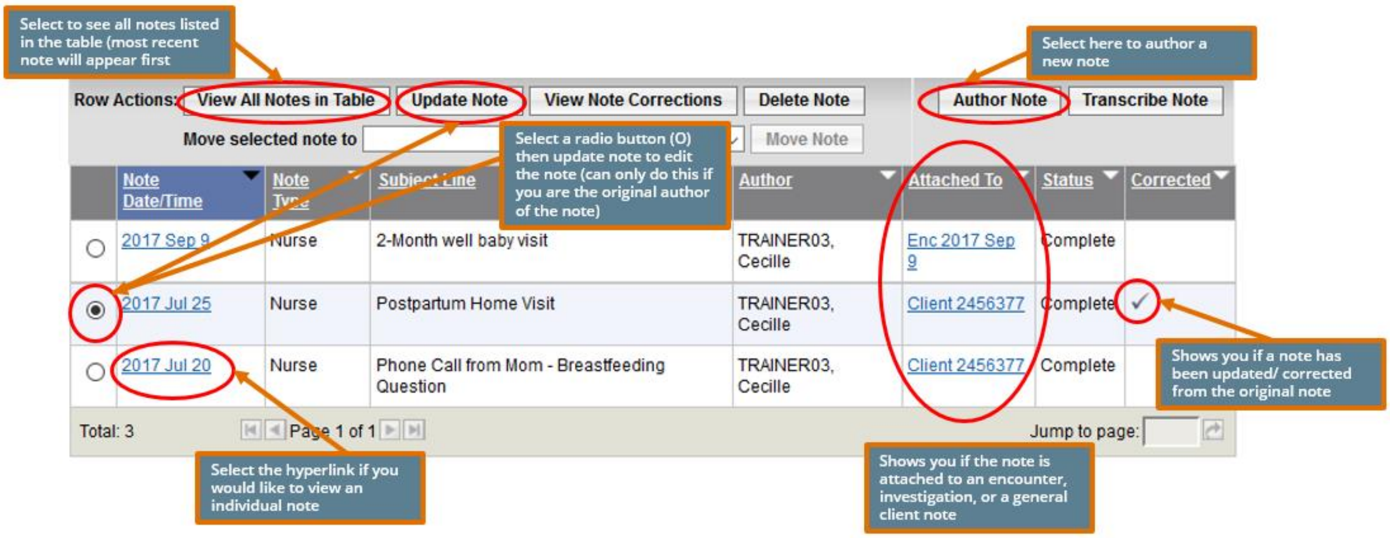
Select the ***Notes*** hyperlink on the top left corner of the client banner

2. The Clinical Notes Page will load and show a table of all clinical notes for the client

You can select the **VIEW ALL NOTES IN TABLE** button in the *Row Actions*. All notes will appear starting with the most recent notes first

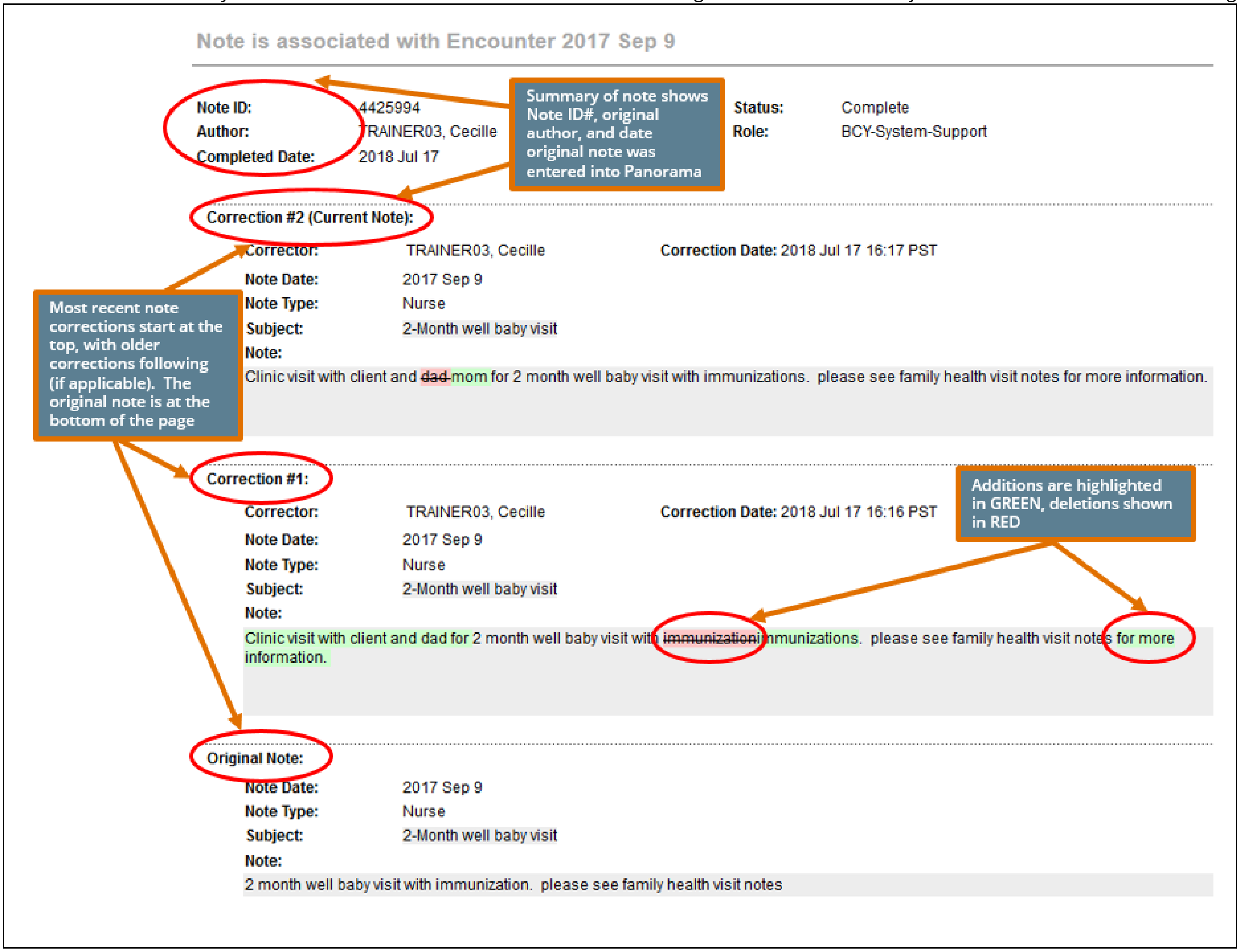
Or

To open a specific note, select the hyperlink with the note date/time. The note will appear below the table



Viewing Note Corrections

If you notice that a note has been corrected since it was originally posted (Corrected column shows a checkmark (☑ on the notes table) and would like to see the note corrections, you can select the radio button of the note you wish to see then VIEW NOTE CORRECTIONS. You will see the note in it's entirety with deletions highlighted in red and additions highlighted in green. If a note has been corrected more than once, It will show the most recent corrections first.


Note is associated with Encounter 2017 Sep 9
Note ID: 4425994
Author: TRAINER03, Cecille
Completed Date: 2018 Jul 17
Summary of note shows Note ID#, original author, and date original note was entered into Panorama
Status: Complete
Role: BCY-System-Support
Correction #2 (Current Note):
Corrector: TRAINER03, Cecille
Correction Date: 2018 Jul 17 16:17 PST
Note Date: 2017 Sep 9
Note Type: Nurse
Subject: 2-Month well baby visit
Note:
Clinic visit with client and ~~dad~~ mom for 2 month well baby visit with immunizations. please see family health visit notes for more information.
Most recent note corrections start at the top, with older corrections following (if applicable). The original note is at the bottom of the page
Correction #1:
Corrector: TRAINER03, Cecille
Correction Date: 2018 Jul 17 16:16 PST
Additions are highlighted in GREEN, deletions shown in RED
Note Date: 2017 Sep 9
Note Type: Nurse
Subject: 2-Month well baby visit
Note:
Clinic visit with client and dad for 2 month well baby visit with ~~immunization~~ immunizations. please see family health visit notes for more information.
Original Note:
Note Date: 2017 Sep 9
Note Type: Nurse
Subject: 2-Month well baby visit
Note:
2 month well baby visit with immunization. please see family health visit notes

A client level note are general notes that are not asscociated with an encounter (clinic/home visit, phone calls, etc.) or an investigation

Creating a Client Level Note

Please see **How to Structure your Notes** section in the guide for more information on how Notes should be written in Panorama

In the Family Health, Immunization, or Investigations module and with your client in context:

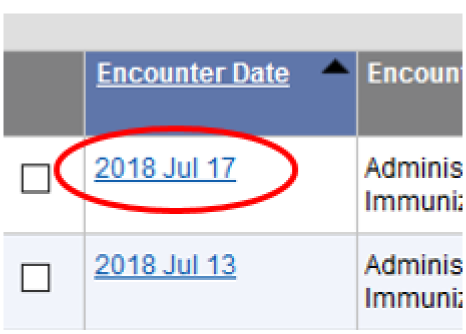
LHN > **Notes**

1. In the Clinical Notes page, select **AUTHOR NOTE**
2. The *Author Note* page will load. Fill in all required and pertinent fields for your note.
3. *Subject:* The subject line standard should read **[Encounter Group] – [Note Description]** eg. IMM – Contact Attempt
4. *Note Date:* defaults to today's date. Can be back-dated. *Note Time:* is optional
5. *Note Type:* use the drop-down list to select
6. *Common Phrases List:* and *Common Phrases:* is optional. Also known as Structured Notes, select from the drop down list if applicable. Select **ADD TO NOTE** if using this field to bring the structured note to the *Note* field area
7. *Note:* This is a free text field where you can enter your note.
8. Select **NOTE COMPLETE** to save your note.

Adding a Note to an Encounter

To add a note to an existing encounter, you will need to ensure that you are at the encounter level of the client chart. Panorama shows you that you are at the encounter level by the banners that are displayed at the top of the page.

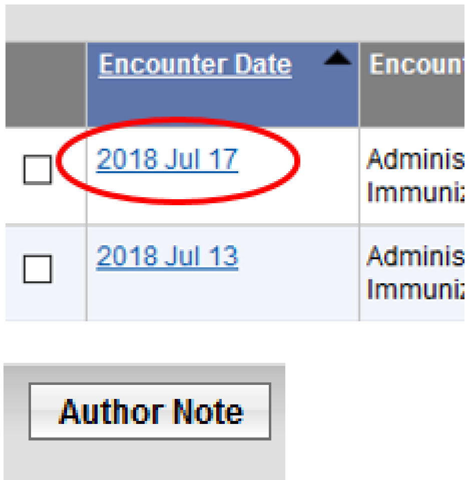
With your client in context:



In the Family Health and Immunization Module

LHN > Family Health > **Client Summary**

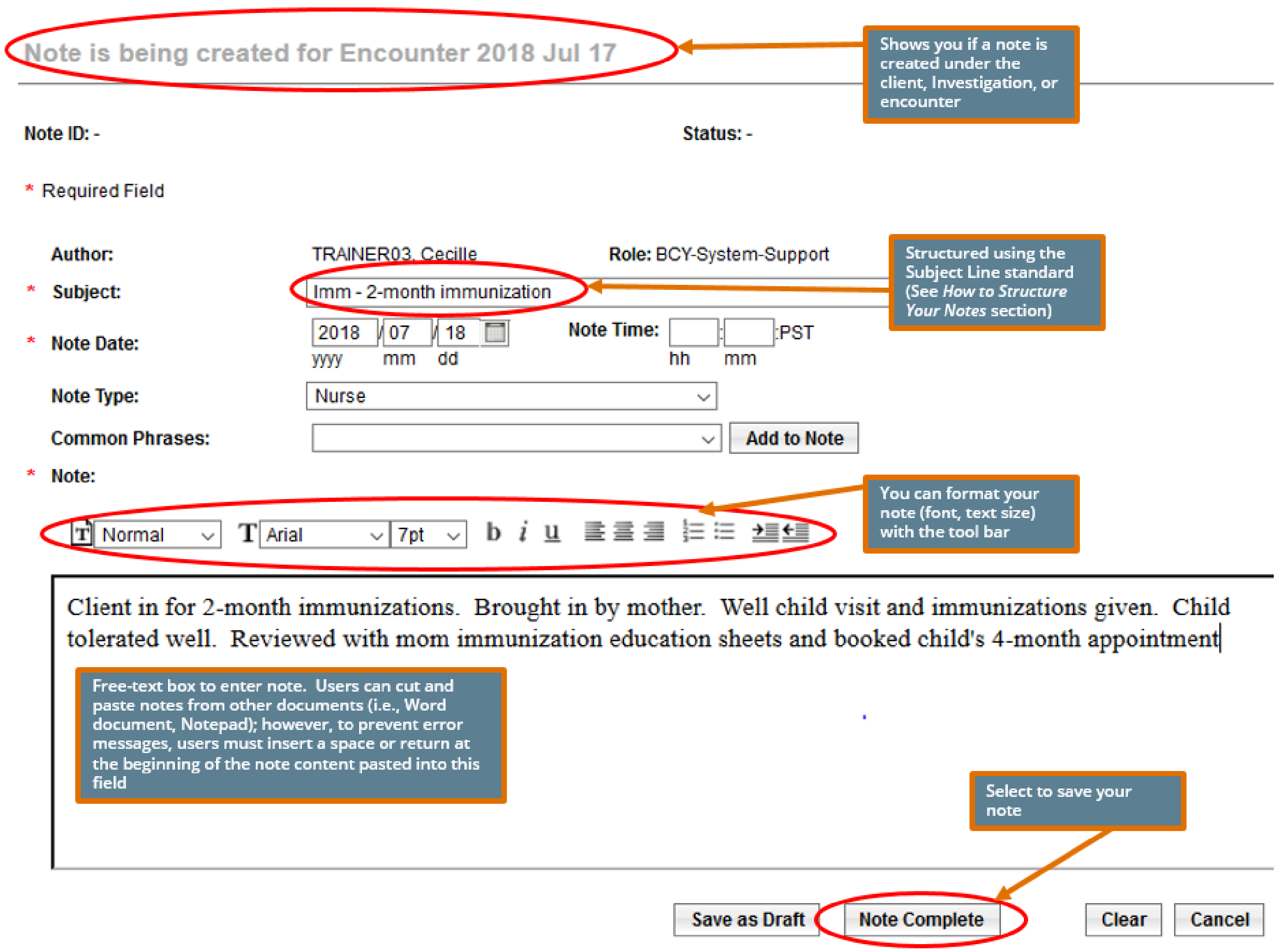
1. Encounters will be listed in a table.
2. Choose the hyperlink date of the encounter you wish to add a note to. You will be taken to *the Encounter Details* page.
3. Scroll down to the Notes section of the page. Select, **AUTHOR NOTE**
4. Enter your note and select **NOTE COMPLETE** to save



In the Investigation Module

LHN > Investigation > **Subject Summary**

1. Search for the Investigation you wish to write a note on, below the Investigation, a table of encounters will be listed.
2. Choose the hyperlink date of the encounter you wish to add a note to. You will be taken to *the Encounter Details* page.
3. Scroll down to the Notes section of the page. Select, **AUTHOR NOTE**
4. Enter your note and select **NOTE COMPLETE** to save



Attaching Clinical Notes to the appropriate level will help facilitate having the clinical data available to the

Uploading a document into client notes

** Please see Advanced Checklist-*Uploading a document into Panorama*

How to Structure Your Notes:

Note Subject Line

clinician in a consistent way. Standard note structures will also organize notes that will allow clinicians across all authorities to communicate consistently.

Panorama Module	Available Encounter Groups	Subject Line's Required Prefix
IMMUNIZATION	Immunization	IMM
FAMILY HEALTH	Family Health	FH
INVESTIGATIONS	Tuberculosis Disease Investigation	TB
	Communicable Disease Investigation, excluding TB and STI	CD

Enter the note subject line in the following standard:
[Encounter Group Prefix] – [Note Description]
Eg. FH – Breastfeeding visit with mom and baby
Eg. IMM – 6-Month Immunization

Warnings
If entering a warning, the associated note should use the same wording. See **Warnings** section in the guide
Eg. Safety Concern for Staff as the subject line

Late Entries
Start the body of the note with "Late Entry" and the actual date and time the service/visit was provided