

Inventory Replenishment

Panorama: Add a Provider to Panorama

Purpose

This guide covers the steps required to add a new Provider to the Panorama system

Scenario

A new provider has been immunizing clients and needs to be added to Panorama for Provider recorded events

Steps

- Logon to Panorama
- Navigate to the Maintain Provider screen
- Search for the provider
- Create a new Provider

Before you begin

Have the following information:

- First and last name of the Provider
- Gender of the Provider

Related Policies

If exist

STEPS: Add a new provider to Panorama

Step	Description	Expected Outcome
1	Log into Panorama.	
	1.1 Open browser and enter URL: <ul style="list-style-type: none"> • Prod : https://services.ehealthsask.ca/panorama/SecurityWeb/Portal 1.2 Enter username and password: IDM credentials for Production 1.3 Click the Ok button 1.4 Select Role (if applicable) 1.5 Click the Continue button <i>Note: The role selection option is only available to users with multiple roles</i>	User is logged on and at the splash page.
2	Navigate to the ADMIN tab	
	2.1 Click the ADMIN tab at the top of the screen	User on ADMIN tab
3	Navigate to the Manage Providers screen	
	3.1 Click the Manage Providers link in the INDICES section	User on Search screen
4	Create a provider after searching and confirming they are not already in the system	
	4.1 Check the box Include Inactive Providers 4.2 Enter the Last and First name of the provider <ul style="list-style-type: none"> • Use wild cards to assist with searching to avoid duplicate enteries 4.3 Click the Search button 4.4 Click the Create Providers button <i>Note: for this scenario the provider we want to enter does not exist so the search returned nothing so we create one</i>	User on the Maintain Provider screen
5	Complete the Provider Information Section	
	5.1 Enter the providers First Name 5.2 Enter the providers Last Name 5.3 Select the providers Gender <i>Note: Additional fields in this section</i> <ul style="list-style-type: none"> • <i>Prefix</i> • <i>Date of birth</i> • <i>Middle name</i> • <i>Preferred language</i> • <i>Suffix</i> 	Provider data is entered

Step	Description	Expected Outcome
6	Add the Providers Role (Optional – if you do not want to add a role go to step 6)	
	6.1 Click the Add Role button 6.2 Select the Role 6.3 Select the Status 6.4 Select the Effective From date (date you are entering) 6.5 click the Apply button Note: The role is optional and you can save the record without entering the role if it is not known	Role is added
7	Save the Provider	
	7.1 Click the Submit button	Screen refreshes and a message is displayed at the top of the screen “Provider has been created successfully.”
END		