eHealth Saskatchewan

PANORAMA

User Guide

IMMUNIZATIONS

View and Record Consent

- Viewing Consent Directives for a Client

- Recording Consent while Administering Immunization

- Recording Consent for TB Skin Test

Revision History

Document History

Date	Version	Author	Changes / Comments
August 18, 2014	0.1	Josie Salvail	Initial Draft
January 20, 2015	V1.0	Tracy Forbes	Removed date from footer
January 28, 2015	V1.1	Tracy Forbes	Updates from Policies Documentation of Consent Refusal and Do Not Use Functionality from Dr. Shauna Hudson

Table of contents

A. Introduction

Panorama's Consent Management component is designed to manage consent for services that can be applied to a client, such as an Immunization. This guide explains the steps to document Informed consent as part of the immunization administration process and the steps to record consent for TB Skin Test.

Assumptions: The user has successfully logged into Panorama. The user has the appropriate security permissions to perform the assigned tasks.

Pre-requisites: The user has successfully logged into Panorama. User is in the Immunization module (tab). Client is in context. User has obtained informed consent for the client.

Related User Guides: Panorama Administer Immunizations User Guide

Menu Access: To view Consent Directives for a client, select **Client > Consent Directives > Immunization Service from the left navigation.**

Recent Work
▼ **Client**
Search Clients
▸ Client Details
Client Warnings
Relationships
Households
▼ Consent Directives
Immunization Service
All Services
Allergies
Risk Factors
Travel History
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Upload Clients
Potential Client Matches

B. Steps to view and record consent

1.0 Viewing Consent Directives for a client

Pre-requisites: The user has successfully logged into Panorama. User is in the
Immunization module (tab). Client is in context.

1. Select **Client > Consent Directives > Immunization Services** from the left
navigation.

   Maintain Consent for Immunizations screen displays.

2. Scroll to the **Client Directives** section to view the status of consent directives
for the client listed in the table.

NOTE: The following values for the **Directives Type** filter in the Directives Summary Table determine what is displayed:

Show Relevant – Directives that are related to the agents in the "Current Consent Status by Immunizing Agent" section.

Show Active/Draft – Directives that are in confirmed status and their [Effective To] dates are greater than or equal to the current day, or Directives that are in 'Draft' status.

Show All – Display all Directives.

TIP: The following columns in the Directives Summary Table are sortable:

- **Directive Status**
- **Client Instruction**
- **Effective From-To**

A **Directive Status** of **Confirmed** indicates that consent has been confirmed for the particular antigen. Click on the **Directive Id** to see the details of the consent directive, or click on the Relevant Document hyperlink if the consent form was scanned and attached to the client file.

Alternatively, select the particular immunizing agent(s) that you are interested in and click **Add.** This will display the client's consent readiness for the selected agents. The consent directive has been completed for the client if **Consent Readiness** is marked as **Yes**.
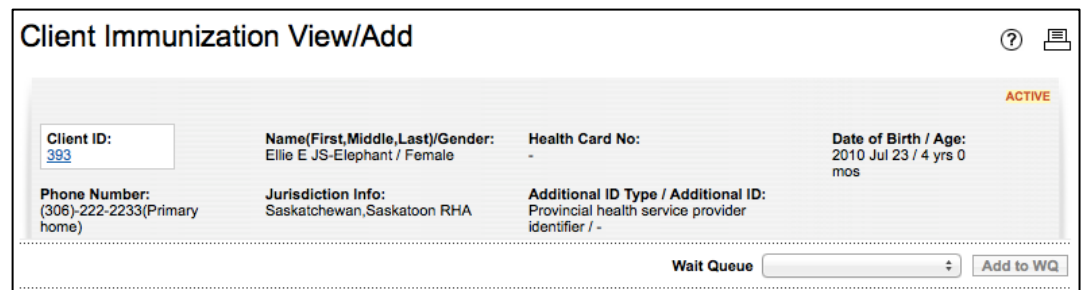
2.0 Recording consent while administering Immunization

Pre-requisites: The user has successfully logged into Panorama. User is in the **Immunization module** (tab). Client is in context.

Assumption: For the screenshots below, consent has been obtained "In person" for the client in context.

1   With the client in context, from the left-hand navigation, select **Record & Update Imms**.

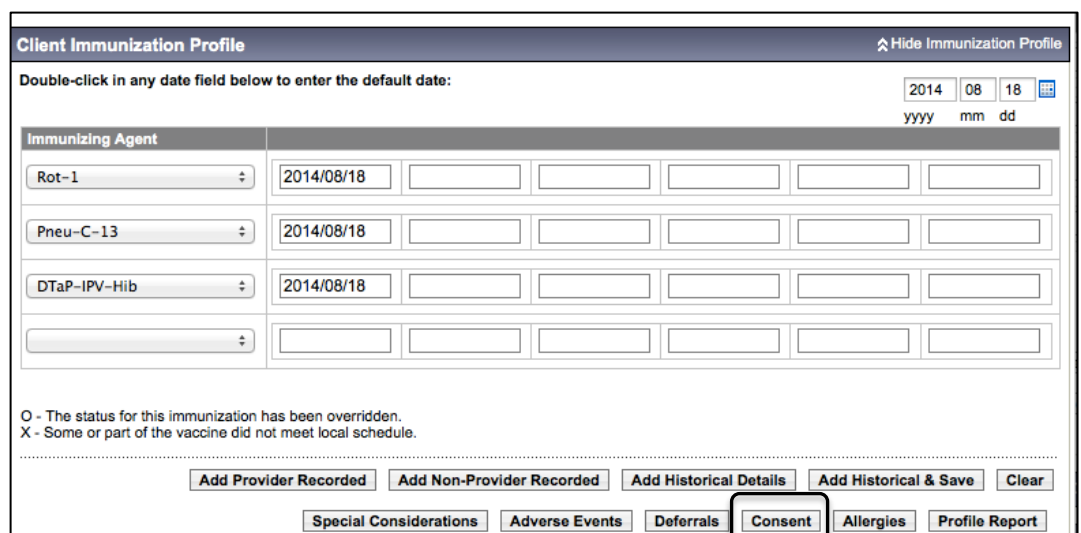Client **Immunization View/Add** screen displays.

Client Immunization View/Add

ACTIVE

Client ID: 393	**Name(First,Middle,Last)/Gender:** Ellie E JS-Elephant / Female	**Health Card No:** -	**Date of Birth / Age:** 2010 Jul 23 / 4 yrs 0 mos
Phone Number: (306)-222-2233(Primary home)	**Jurisdiction Info:** Saskatchewan,Saskatoon RHA	**Additional ID Type / Additional ID:** Provincial health service provider identifier / -	

Wait Queue [▼] [Add to WQ]

2   In the **Client Immunization Profile** section, select the **Immunizing Agents** from the drop-list provided and select an administration date. Double-click on the date field to enter the default date. Default date is today's date (current date).

Client Immunization Profile   ⋀ Hide Immunization Profile

Double-click in any date field below to enter the default date: 2014 08 18
                                                                                   yyyy mm dd

Immunizing Agent						
Rot-1 ▼	2014/08/18					
Pneu-C-13 ▼	2014/08/18					
DTaP-IPV-Hib ▼	2014/08/18					
▼						

O - The status for this immunization has been overridden.
X - Some or part of the vaccine did not meet local schedule.

[Add Provider Recorded] [Add Non-Provider Recorded] [Add Historical Details] [Add Historical & Save] [Clear]

[Special Considerations] [Adverse Events] [Deferrals] [Consent] [Allergies] [Profile Report]

3   Click **Consent**.

Maintain Consent for Immunizations screen displays.

TIP: Any vaccines that have been selected with the date will default here in the Current Consent Status by Immunizing Agent section for up to 4 agents. To add agents to the list, select the agent name from the drop-down list and click Add.

TIP: If the Client wishes to refuse all immunizations, selecting the **All** checkbox in the Current Consent Status by Immunizing Agent section, causes **All Antigens** in the system to be selected and a Refuse directive (and Refuse Reason) can then be applied. A Refuse Reason is mandatory in order to apply a Refuse Directive.

Refusing all immunizations will not exclude individuals from the vaccine forecaster and future vaccines will appear in the Immunization Forecast.

In the **rare instance** that a client **insists** they do not want to receive any reminders for any vaccine(s) in the future (e.g. philosophic objection), an Exemption ("Refusal") can be documented in Special Considerations. This will ensure the vaccine forecaster no longer forecasts the refused vaccine(s).

Maintain Consent for Immunizations

ACTIVE

Client ID:
393

Name(First,Middle,Last)/Gender:
Ellie E JS-Elephant / Female

Health Card No:
-

Date of Birth / Age:
2010 Jul 23 / 4 yrs 0 mos

Phone Number:
(306)-222-2233(Primary home)

Jurisdiction Info:
Saskatchewan,Saskatoon RHA

Additional ID Type / Additional ID:
Provincial health service provider identifier / -

Serving Client   ✓ Contains Data   ⌃ Hide Details

Working with: Ellie JS-Elephant

4   Scroll to the **Current Consent Status by Immunizing Agent** section. By default, all of the agents and antigen s will be selected.

Current Consent Status by Immunizing Agent   ⌃ Hide Details

Row Actions: ap   ▲▼   Add

	Agent	Antigens					Consent Readiness
☑	DTaP-IPV-Hib	☑ Diphtheria (D)	☑ Haemophilus influenzae type b (Hib)	☑ Pertussis (aP)	☑ Polio (IPV)	☑ Tetanus (T)	No
☑	Pneu-C-13	☑ Pneumonia (Pneu-C-u)					No
☑	Rot-1	☑ Rot-1					No
☐		☐ All (selects all Antigens in the system)					

Client Directives   ⌃ Hide Details

Create New Client Directive:

Status: Draft ◯ Confirmed ◉

Instruction: Grant ▼   # of Doses: [   ]   * Reason: [▼]
[   ]
(100 characters)

Consent Given By: [▼] [   ]   * Effective From Date: [2014] / [08] / [18]
                                                       yyyy   mm   dd

Form of Consent: Implied ▼   Effective To Date: [   ] / [ ] / [ ]
                                                       yyyy   mm   dd

Consent Given To: ◉ Not Specified

                     ◯ Last Name, First Name   [   ]

Comments: [   ]
                     [   ]
   (2000 characters)

                                                          Apply

5   Update the relevant fields in the **Client Directives** section as required.

- Select **Instruction**. If '**Refused**' enter the **Reason**.

- Enter **Consent Given By**. **Note:** If **Consent By** is selected as '**Parent**', enter name of the parent in the text box next to Consent By.

- Select **Form of Consent**.

- Enter **Consent Given To**, with name. Last Name, First Name.

- Enter any **Comments**. Ensure that if Consent By was selected as 'Parent' in Step 9, the name of the parent from the text box next to Consent By is copied and pasted in the Comments box here.

6   Click **Apply**.

Once the Apply button is clicked, the consent information for each of the immunizations is recorded on the client's record. Apply works like the SAVE button and therefore, the following pop-up message is displayed.
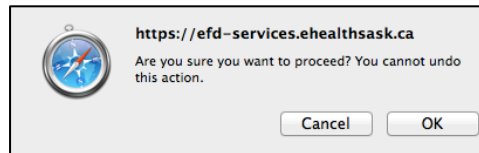
7   Click **OK** to proceed.

NOTE: The default list in the **Directive Types** is "Show Relevant". These are the directives that were just added to the client's record (after clicking **Apply**).

The table at the bottom of the page lists all the drafts just confirmed granted.

The **Effective From** date is defaulted to current date (today's date).

Select [Show All] menu item to display all past directives to table.
Select ID(s) link to view and update Directive(s) detailed content information.

| Row Actions: | Confirm | Discard | Expire Now | | | Directive Types: | Show Relevant |

Directive Status / Directive ID	Client Instruction / Applied To	Consent Given By / Given How / Consent Given To	Comment(s)	Relevant Document(s)	Effective From / Effective To
☐ Confirmed 3525	Grant For Rot-1	- Implied		Add New Document	From: 2014 Aug 18 01:12 PM To:
☐ Confirmed 3524	Grant For Pneumonia (Pneu-C-u)	- Implied		Add New Document	From: 2014 Aug 18 01:12 PM To:
☐ Confirmed 3523	Grant For Tetanus (T)	- Implied		Add New Document	From: 2014 Aug 18 01:12 PM To:
☐ Confirmed 3522	Grant For Polio (IPV)	- Implied		Add New Document	From: 2014 Aug 18 01:12 PM To:
☐ Confirmed 3521	Grant For Pertussis (aP)	- Implied		Add New Document	From: 2014 Aug 18 01:12 PM To:
☐ Confirmed 3520	Grant For Haemophilus influenzae type b (Hib)	- Implied		Add New Document	From: 2014 Aug 18 01:12 PM To:
☐ Confirmed 3519	Grant For Diphtheria (D)	- Implied		Add New Document	From: 2014 Aug 18 01:12 PM To:

| Select All | Deselect All |

Cancel

TIP: The following columns in the Directives Summary Table are sortable**:**
- **Directive Status**
- **Client Instruction**
- **Effective From-To**

TIP: To delete a confirmed consent directive, select all that are applicable, then click **Expire Now**. The directive(s) will be expired as per the current date.

8   Click **Cancel** to return to the **Client Immunization View/Add Screen**.

Immunization View/Add screen displays.

Client Immunization View/Add   ⑦ 🖨

ACTIVE

| Client ID: 393 | Name(First,Middle,Last)/Gender: Ellie E JS-Elephant / Female | Health Card No: - | Date of Birth / Age: 2010 Jul 23 / 4 yrs 0 mos |
| Phone Number: (306)-222-2233(Primary home) | Jurisdiction Info: Saskatchewan,Saskatoon RHA | Additional ID Type / Additional ID: Provincial health service provider identifier / - | |

Wait Queue [   ]   Add to WQ

9   To continue the vaccine administration process, click **Add Provider Recorded** or **Add Non-Provider Recorded** if recording for another Provider.

Vaccine Detail Add screen displays.

Refer to **Record Immunization User Guide** for more steps on administering a vaccine.

3.0 Recording consent for TB Skin Test

Pre-requisites: The user has successfully logged into Panorama. User is in the Immunization module (tab). Client is in context.

1. From the left-hand navigation, select **Client > Consent Directives > All Services**.

NOTE: Consent is recorded individually for each client prior to the event.

NOTE: Check with your Regional Superuser as some regions wish to record Consent for TB Skin Test (PPD Agent) under Consent Directives> Immunization Service.

Recording TB Skin Test Consent within All Services will cause an alert to the user from the TB Skin Test Give screen, if no valid Consent for TB Skin Test exists. No warning of TB Skin Test Consent status will be triggered if recorded under Consent for Immunization Service.
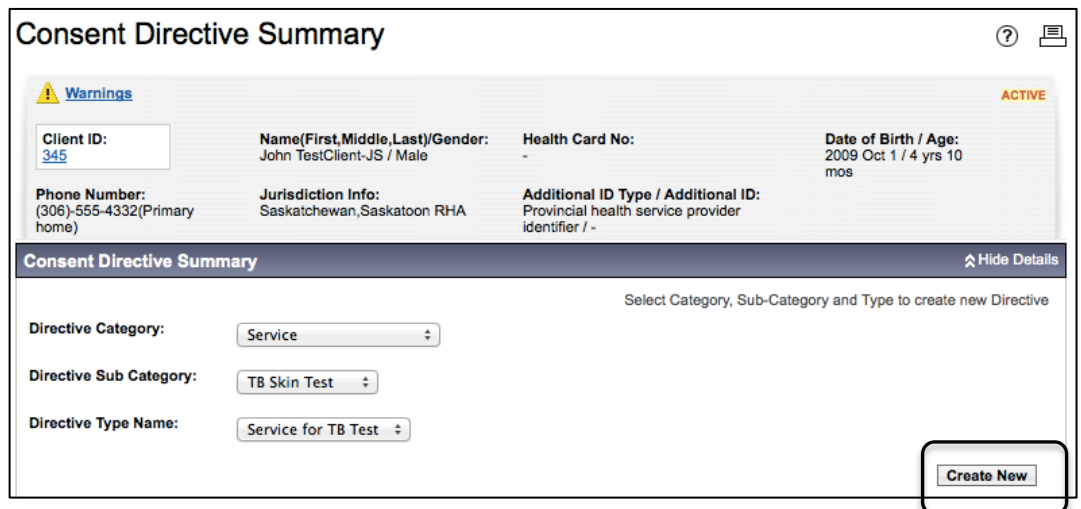

Directive Summary Table screen displays.

2. In the **Directive Summary Table** section, select appropriate values for **Directive Category**, **Directive Sub Category**, and **Directive Type Name** from the drop-down lists, then click **Create New**.

The **Consent Directive Detail Page** displays.

3   Scroll to the **Create/Update Directive Details** section to confirm the **Directive Status** and to enter more information on the consent being recorded.

NOTE: If the client has a Consent for Service directive refusing TB Skin Tests, the system will not permit the user to create new TB Tests until the directive is overridden.


4   Select the **Directive Status** and **Instruction** from the drop-down list (if consent is complete, select **Confirmed**). The default value is DRAFT. If **Instruction** is **Refused**, fill in the mandatory **Reason** from the list and enter comments.

5   Fill details for **Consent Given By** and enter more information if necessary in the text box provided next to it.

6   Select the **Form of Consent** from the drop-down list.

7   Enter/select the **Effective From Date** (default is current date). Enter **Effective To Date** if applicable.

8   Select the appropriate radio button to record **Consent Given To**. Enter **Last Name, First Name** in the text box, if applicable.

9   Attach any relevant documents in the **Attached Document** section. Follow steps 10-16 to attach a document, or skip these steps and go to Step 17.

10   Click on **Manage Documents**.

Note that Saskatchewan is not currently implementing document management functionality – it may be included in a future release.

Context Documents screen displays.
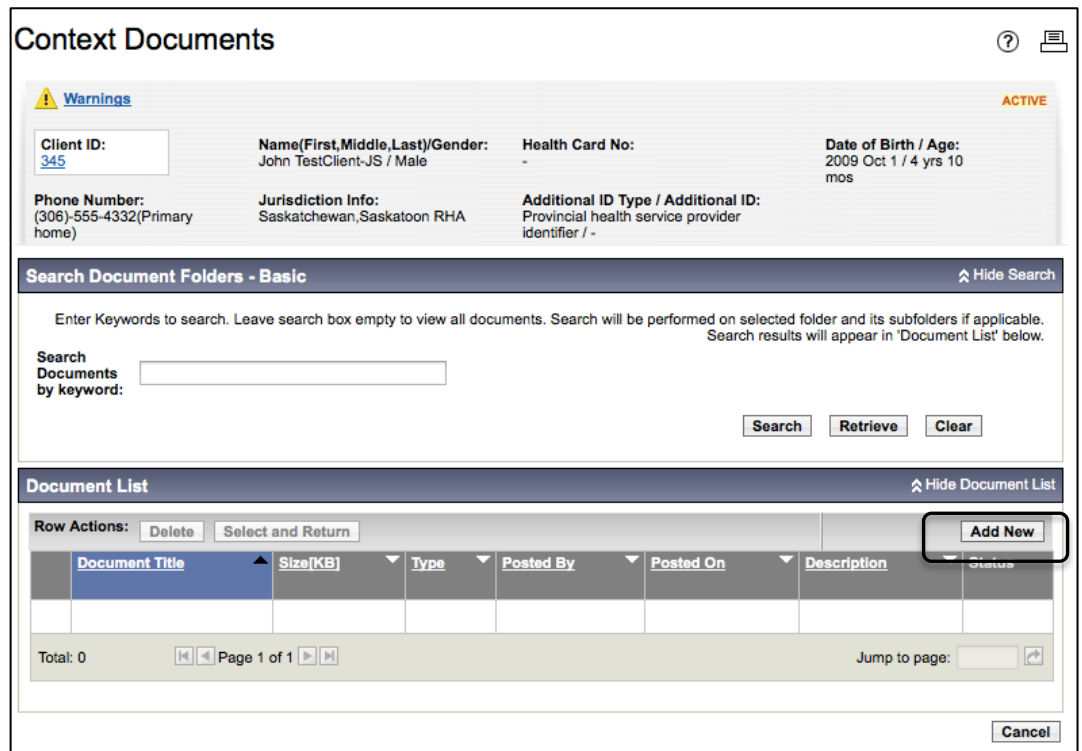
11   In the **Document List** section, click **Add New**. **Document Management** screen displays.

NOTE: The file must be of an acceptable type as per system configuration (e.g. .pdf)

TIP: If you decide to **cancel** the upload, just click Cancel until you return to the **Consent Directives Detail** screen.

12   Click on **Browse** and select the document to be attached from your system. Click **Upload** to upload the file.

13   Fill in required and mandatory fields.

14   Click **Submit**. **Document Management** screen redisplays. Note that **File Uploaded** is now seen with the uploaded file name as shown in the screenshot below.

Document Management

Add New Document

* File name: [   ] [Browse...] [Upload File]

File uploaded: **Consent Form for TST.doc**

Selected Document:
* Document Title:

Consent Form for TST

* Effective Date: 2012 / 06 / 27   yyyy mm dd

Expiration Date: [   ] / [   ] / [   ]   yyyy mm dd

Status: * complete

Use CTRL key for multiple selections.

Enter Keyword: [   ] [Add] [Remove] Selected Keywords:

Description:

Consent Form obtained in person.

Document Added by: ephs.TRAINERooT   on: 2012 Jun 27

[Submit] [Clear] [Cancel]

15   Click **Submit**. **Context Documents** screen displays. Note that the file attached is now listed in the **Document List**.

Context Documents

ACTIVE

| Client ID: 1382 | Name(First,Middle,Last)/Gender: Cassandra QRG Aikos / Female | Health Card No: - | Date of Birth / Age: 1982 Jun 2 / 30 yrs |
| Phone Number: (778)-882-3241(Primary home) | Jurisdiction Info: Panorama | Alternate ID Type / Alternate ID: - / - | |

Search Document Folders - Basic ⌃ Hide Search

Enter Keywords to search. Leave search box empty to view all documents. Search will be performed on selected folder and its subfolders if applicable. Search results will appear in 'Document List' below.
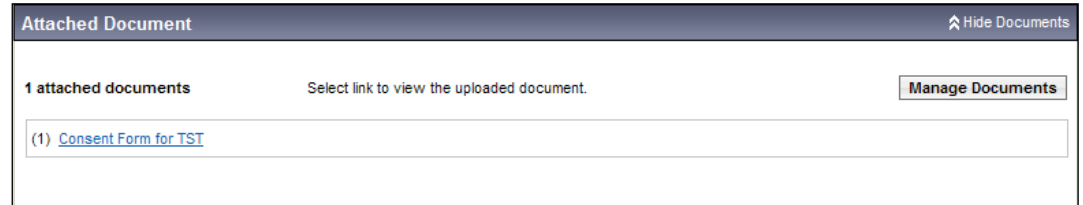
Search Documents by keyword: [   ]

[Search] [Retrieve] [Clear]

Document List ⌃ Hide Document List

Row Actions: [Delete] [Select and Return]   [Add New]
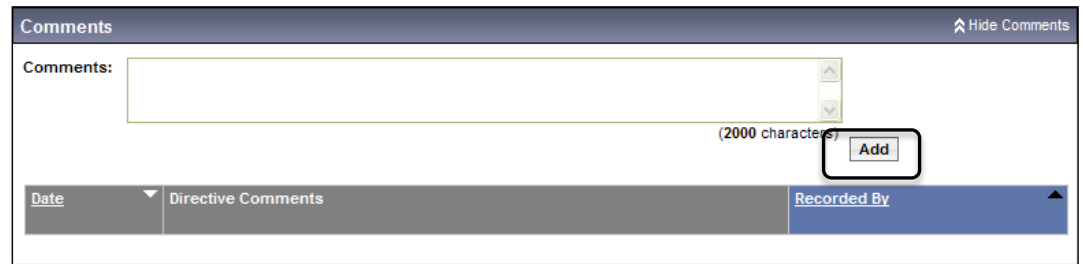
	Document Title ▲	Size[KB]	Type	Posted By	Posted On	Description	Status
☐	Consent Form for TST	29	MSWORD	TRAINERooT	2012 Jun 27	Consent Form obtain	complete

Total: 1 |◄ ◄ Page 1 of 1 ► ►| Jump to page: [   ]

[Cancel]

16   Click **Cancel**. **Consent Directive Details Page** displays. Note that the file attached is now seen in the **Attached Document** section.

Attached Document   ⌃ Hide Documents

1 attached documents   Select link to view the uploaded document.   **Manage Documents**

(1) Consent Form for TST

17   Scroll to the Comments section and enter **Comments** if any and click **Add**.

Comments   ⌃ Hide Comments

Comments: [   ]

(2000 characters)   [**Add**]

Date ▼	Directive Comments	Recorded By ▲

18   Click **Submit**. A message box pops up and confirms whether you want to
        proceed. Click **OK**.

https://efd-services.ehealthsask.ca

Are you sure you want to proceed and save?

[Cancel]   [OK]
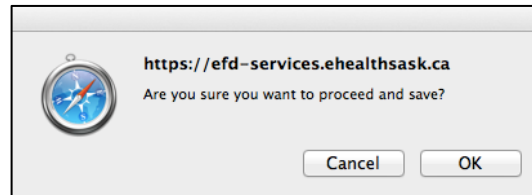
19   **Directive Summary Table** screen displays. Note that the Consent granted is
        now listed.

        Also, the column **Last Comment(s) Relevant Document** displays **Contains
        Data**, implying that a document or comment may be included.