Search Forecast Status

USER GUIDE

- ✓ **Search Client Forecast**
- ✓ **Forecast Status Queries**
- ✓ **Export the Client List**

Version #2.3

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Revision History

Author	Date	Version	Notes
Kyle Schembri	2017/07/28	V1.0	Initial document based on feedback from eHealth Saskatchewan, the Ministry of Health and the Reminder/Recall Working Group.
Kyle Schembri	2015/08/26	V1.1	Updates based on feedback from the Reminder/Recall Pilot Training group.
Kyle Schembri	2015/09/27	V1.2	Updates to the description of the Health Region field.
Kyle Schembri	2017/03/29	V2.0	Updates for Panorama Release 3.0.1. This document has been renamed Search Forecast Status.
Kyle Schembri	2017/04/06	V2.1	Minor updates based on working group feedback.
Kyle Schembri	2017/07/10	V2.2	Updates to the Export Client List section incorporating the new IR60001 report to fix the formatting issues with the Excel export.
Kyle Schembri	2017/07/26	V2.3	Updates to the Export Client List section to focus on the updated IR60000 report.

Introduction

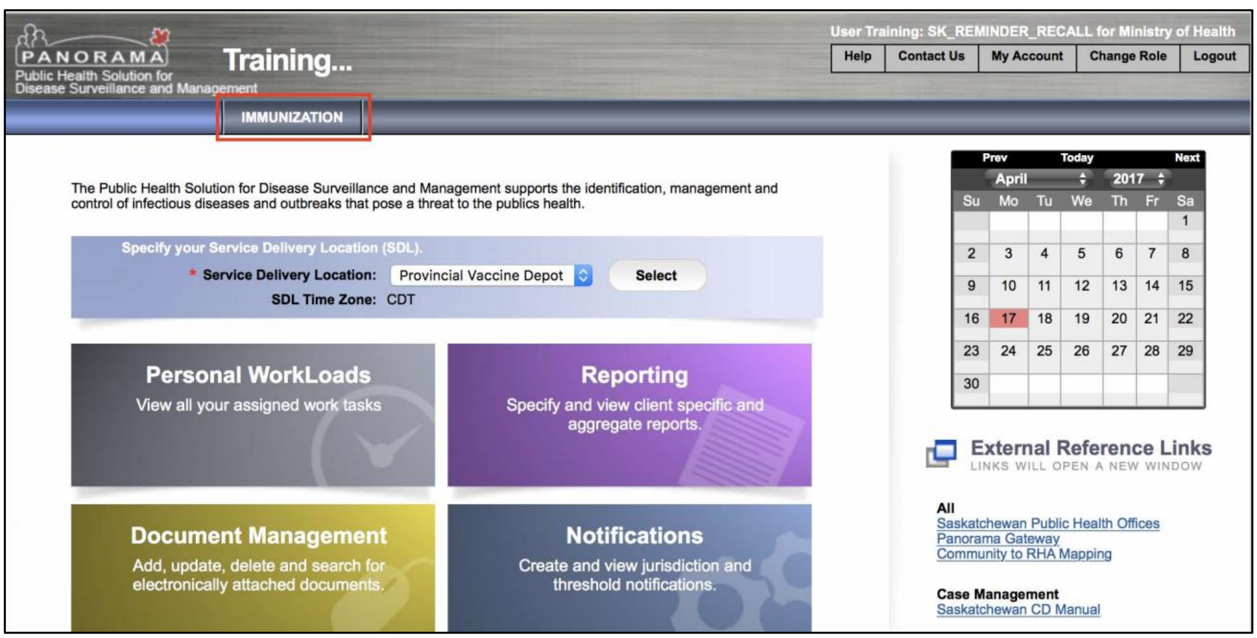
The Search Client Forecast functionality in Panorama (previously called Reminder/Recall) allows a user to search for clients based on their immunization forecast. This includes searching for clients who are eligible, due and/or overdue for specific immunizing agents.

The search criteria used to retrieve clients can then be saved as a Forecast Status Query. The query can be retrieved in the future to generate subsequent client lists at different points in time. These client lists will change over time as clients become immunized, or as their forecast status changes due to age or special considerations.

Clients returned through a Search Client Forecast search can then be used for regional reminder/recall efforts.

Pre-Requisites

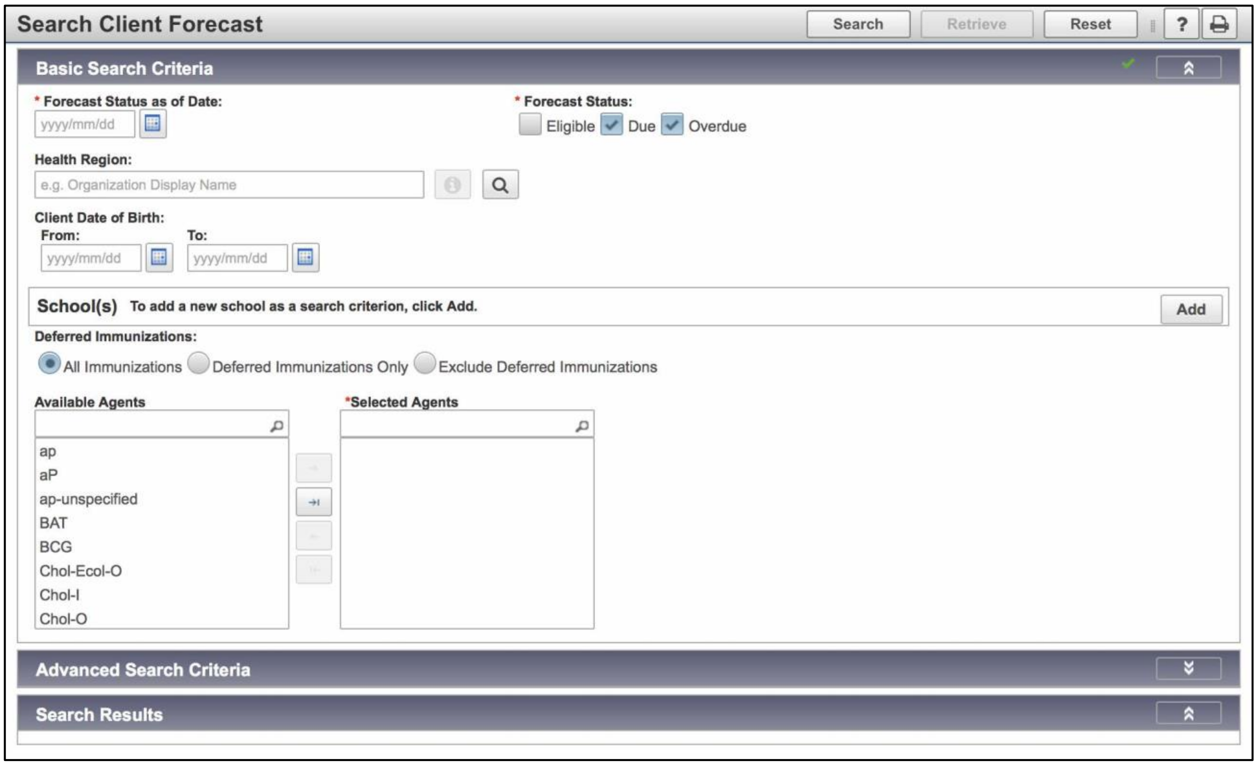
- ✓ You are logged into Panorama, and have the appropriate security permissions to perform the assigned tasks; and,
- ✓ You are currently in the Immunization module, by selecting the Immunization tab from the top bar in Panorama after logging in with the Reminder Recall role.



Search Client Forecast

The Search Client Forecast screen provides search criteria to find clients who are due, overdue and/or eligible for the selected agents. Additional criteria can also be used, such as the client's health region, school registration and date of birth.

1) From the Left-Hand Navigation, select **Reporting & Analysis > Search Client Forecast**. The Search Client Forecast screen appears.



2) Complete all required fields in the Basic Search Criteria section.

   a) Enter a date into the **Forecast Status as of Date** field.

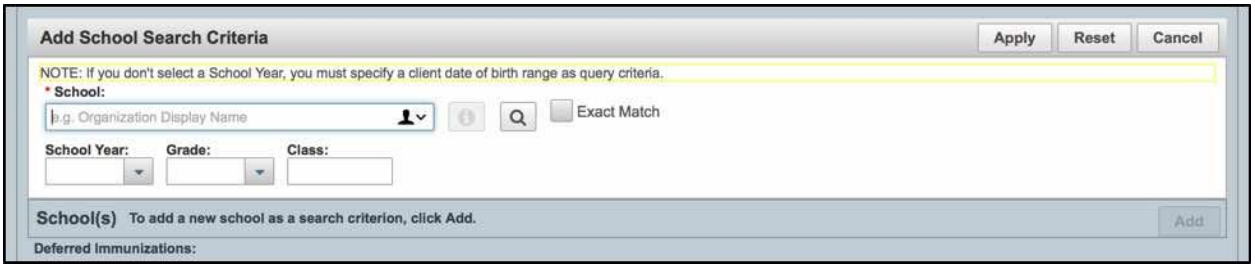
IMPORTANT: The **Forecast Status as of Date** field looks for forecasted immunizations that have an immunization Minimum Valid date, Due Date, and/or Overdue Date that falls before the Forecast Status as of Date.

   b) Select the desired **Forecast Status(es)**. The default values are Due and Overdue.

   c) Ensure your RHA is selected in the **Health Region** field.

   d) Enter an appropriate **Client Date of Birth** range into the date fields provided.

e) If school data is available in Panorama for your region, and you wish to search against specific grades and schools, click the **Add** button next to the School(s) header.



i) Enter the name of the school into the **School** field.

ii) Select a **School Year** and **Grade** from the drop lists. Note that **Class** is currently not supported by Saskatchewan Panorama.

iii) Click **Apply** to add the school search criteria, or click **Cancel** to navigate back.

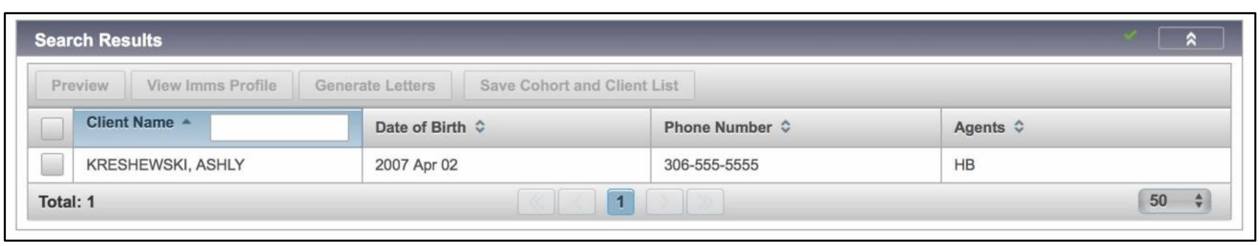
f) Select whether **Deferred Immunizations** should be included in the query. The default is to include **All Immunizations**, which means that clients are included in the query regardless of a deferral. You may wish to choose **Deferred Immunizations Only** to show a list of clients that are deferred for the selected immunization(s).

g) Select the immunizing agents of interest from the **Available Agents** field and click the right arrow. You can add more than one immunizing agents at a time.

i) To remove a selected agent, highlight the agent from the **Selected Agents** field and click the left arrow button.

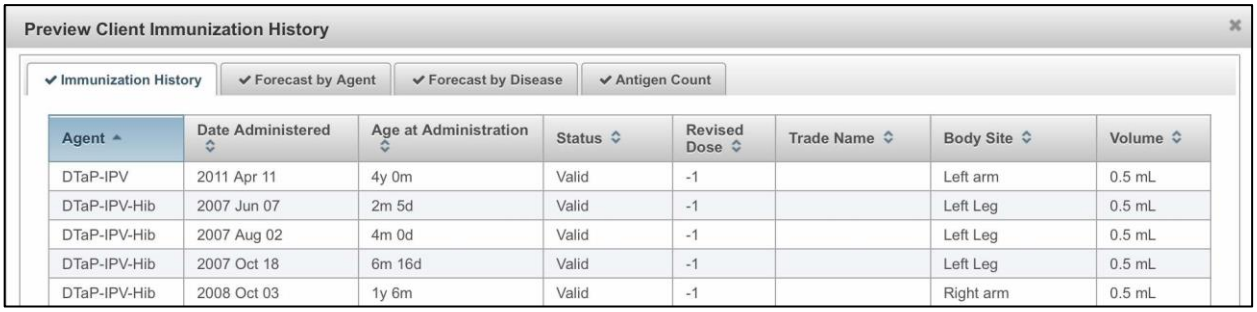
TIP: Multiple agents can be selected at once by holding the control key on your keyboard while selecting from the list.

3) Click **Search** from the top of the screen.
Clients matching your search results are displayed in the Search Results section.



TIP: If the system displays a message indicating there are too many search results, try restricting your birth range.

From the Search Results section, client immunization profiles can be reviewed by selecting the appropriate client row and clicking the **View Imms Profile** button.



Preview Client Immunization History

✔ Immunization History | ✔ Forecast by Agent | ✔ Forecast by Disease | ✔ Antigen Count

Agent	Date Administered	Age at Administration	Status	Revised Dose	Trade Name	Body Site	Volume
DTaP-IPV	2011 Apr 11	4y 0m	Valid	-1		Left arm	0.5 mL
DTaP-IPV-Hib	2007 Jun 07	2m 5d	Valid	-1		Left Leg	0.5 mL
DTaP-IPV-Hib	2007 Aug 02	4m 0d	Valid	-1		Left Leg	0.5 mL
DTaP-IPV-Hib	2007 Oct 18	6m 16d	Valid	-1		Left Leg	0.5 mL
DTaP-IPV-Hib	2008 Oct 03	1y 6m	Valid	-1		Right arm	0.5 mL

Additionally, select the client and clicking the **Preview** button to display basic demographic details, including the client's health care number.

Preview Client

Client ID: 21883
Client Name: KRESHEWSKI, ASHLY
Preferred Alternate Name:
Health Card Number: 180053442 - Saskatchewan Health Card
Gender: Female
Gender Identity:
Date of Birth: 2007 Apr 02
Age: 10 years
Preferred Address: General Delivery, Ile a la Crosse, Saskatchewan, S0M 1C0, Canada
Preferred Telephone Number: Workplace: 306-555-6666
Health Region: Saskatoon RHA
Additional ID:

SIMS Internal ID	325187

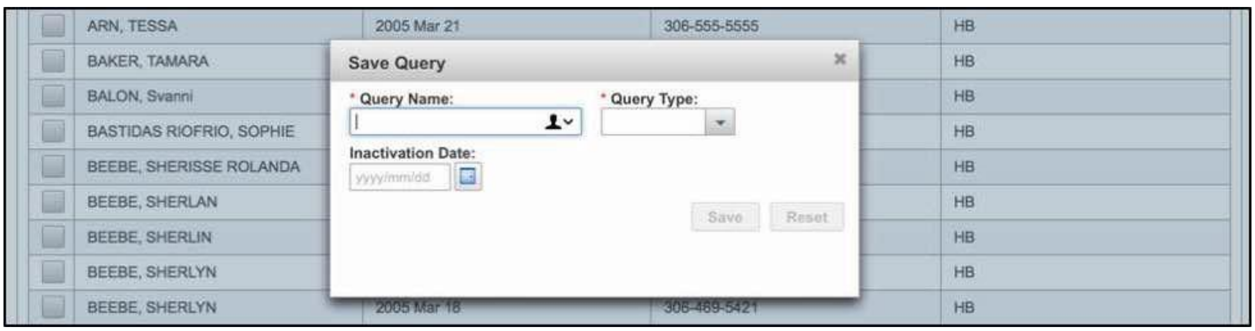
Saving the Forecast Status Query

The search criteria used in the previous section can be saved as a Forecast Status Query, which can be used to quickly run the search again in the future.

When the Forecast Status Query is saved, Panorama will provide additional functionality to save the list of clients generated by the query. This client list, or cohort, can then exported from Panorama to be used within your region for reminder/recall efforts.

4) From the Search Client Forecast screen, click the **Save Query** button.

The Save Query section will appear.



5) Enter an appropriate name for the query into the **Query Name** field. The query name should follow the standard naming convention: [RHA Acronym] [Query Criteria]. For example, “RQHR MMR-Var 1st Dose”.

6) Select an option from the **Query Type** field.

7) If applicable, enter an **Inactivation Date**. This is the date when the Forecast Status Query will become inactive. It’s good practice to set an inactivate date, as the query uses a single forecast status search date that may not be relevant in the future.

8) Click the **Save** button.
The system will display a message that the query has been successfully saved. The query name and type will be displayed at the top of the screen.


Search Client Forecast
Search
Retrieve
Reset
?
Query Name:
RQHR MMR-Var 1st Dose
Query Type:
Reminder
Basic Search Criteria
Advanced Search Criteria
Search Results
Preview
View Imms Profile
Generate Letters
Save Cohort and Client List
Client Name
Date of Birth
Phone Number
Agents
ARMSTRONG, TESSA
2005 Mar 08
306-469-5421
HB
ARMSTRONG, TESSA
2005 Mar 13
306-555-6666
HB
ARMSTRONG, TESSA
2005 Mar 14
306-555-6666
HB

Forecast Status Query

The query can be retrieved and a new client list can be generated using the search criteria saved within the query. Once the client list is created, it can be exported from Panorama to be used in reminder/recall efforts throughout your region.

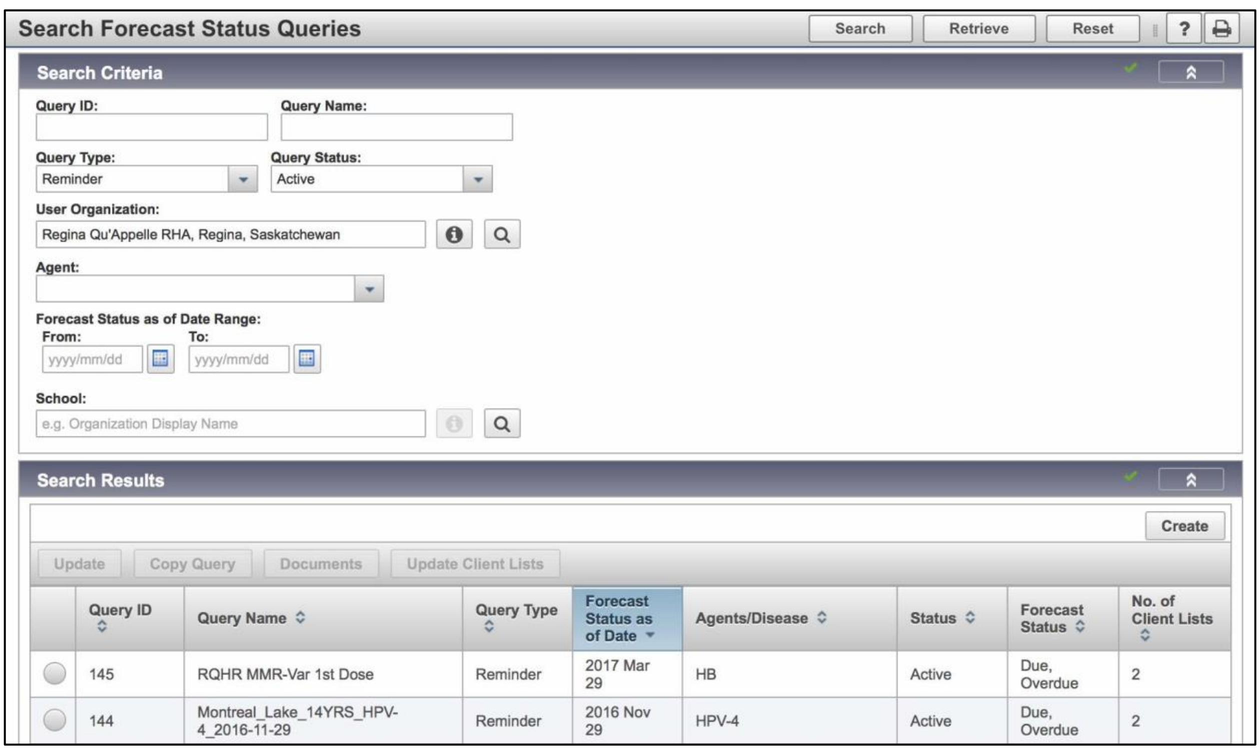
PRE-REQUISITES:

- ✓ You have previously saved a Forecast Status Query.

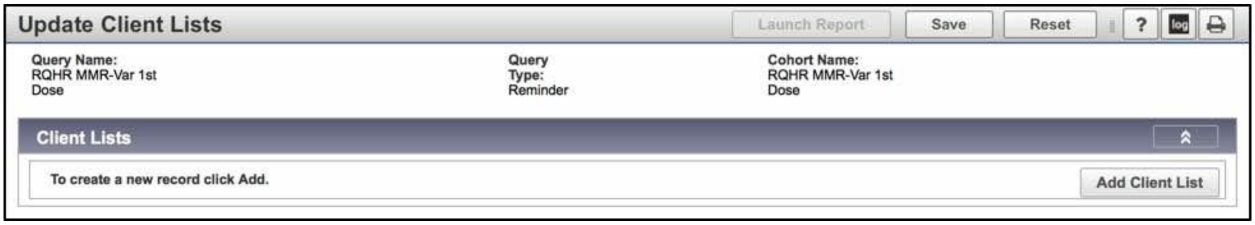
Searching Forecast Status Queries

1) From the Left-Hand Navigation, select **Reporting & Analysis > Search Forecast Status Queries**.
   The Search Forecast Status Queries screen will appear. Forecast Status Queries in your region that are active will automatically display in the Search Results section.

   a) If the desired Forecast Status Query is not listed, update the Search Criteria section and click the **Search** button from the top.



2) Select the desired Forecast Status Query and click the **Update Client Lists** button.
   The Update Client Lists screen will appear. If this is a new Forecast Status Query, the Client Lists section will be empty, as displayed below.

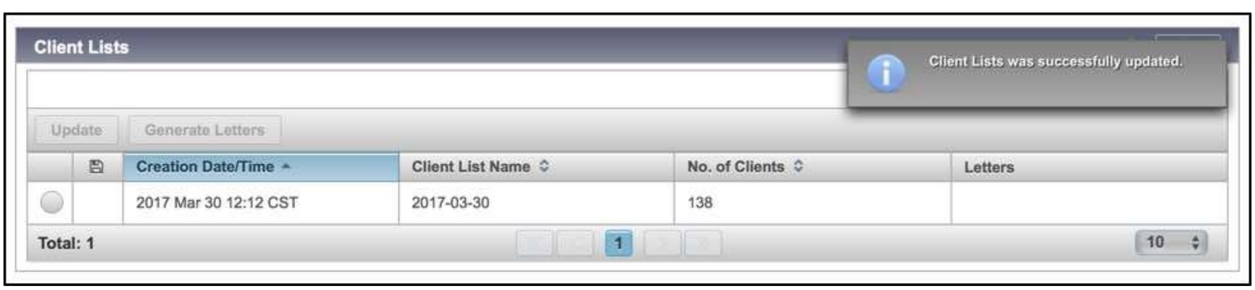


3) Click the **Add Client List** button.
   The Add Client List section will display, and clients matching the forecast status query will display in the Client List section.

4) Enter an appropriate name for this list in the **Client List Name** field. The name should follow the standard naming convention: [YYYY]-[MM]-[DD]. For example, “2017-03-30”. By adding a date to the client list name, you will be able to quickly identify the most recent list.

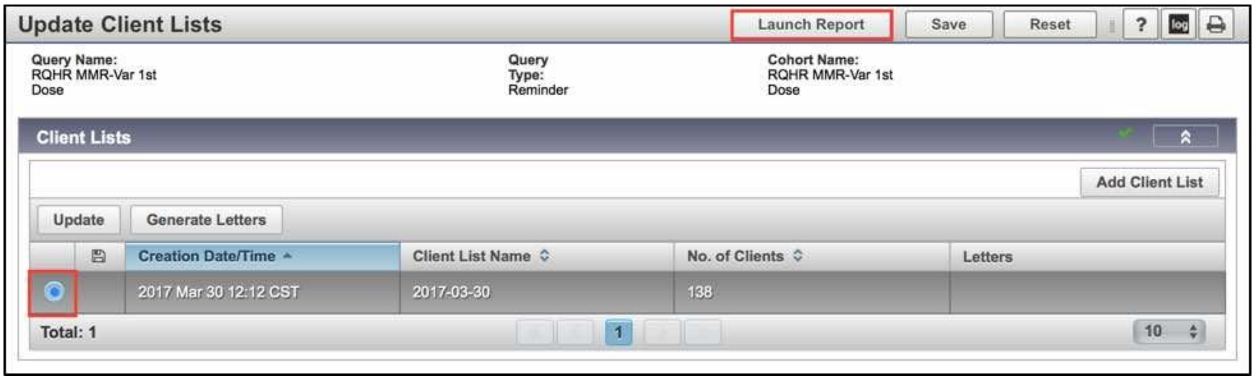
5) Click the **Apply** button, or click the **Cancel** button to close the window.

6) Click the **Save** button at the top of the screen to commit the changes to the database.
   The Client List will be saved and the new list will appear in the Client Lists section.

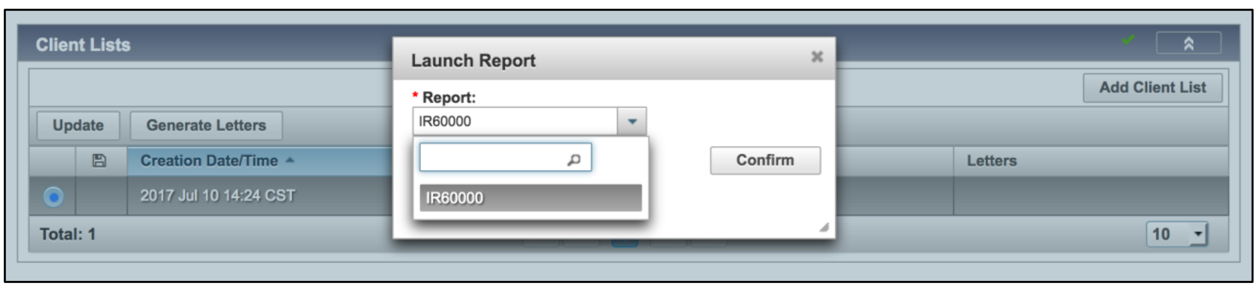


Exporting the Client List

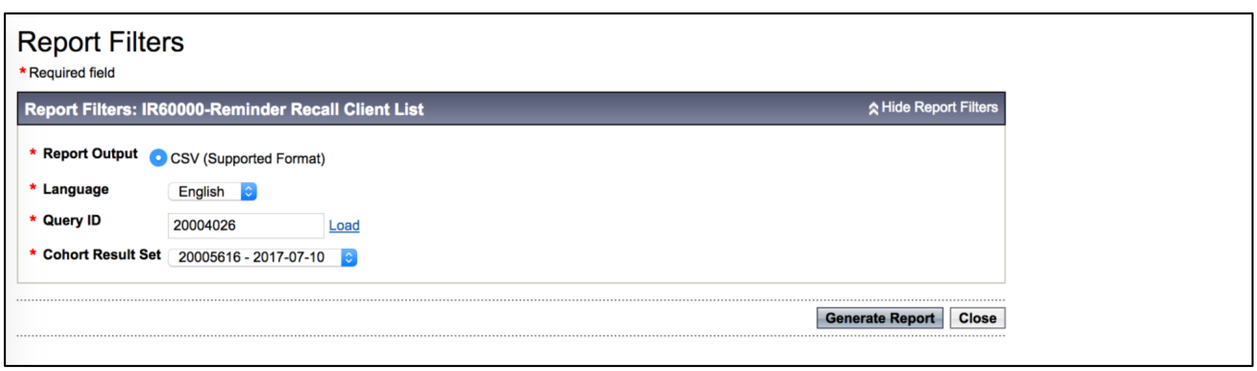
7) From the Update Client Lists screen, select the radio button next to the Client List you want to export in the Client Lists section. Make sure this is the most recent client list by reviewing the Client List Name column. Click the **Launch Report** button.



The Launch Report pop-up will appear.



8) Select “IR60000” and click the **Confirm** button to export the client list.
The system will display the report filters screen.

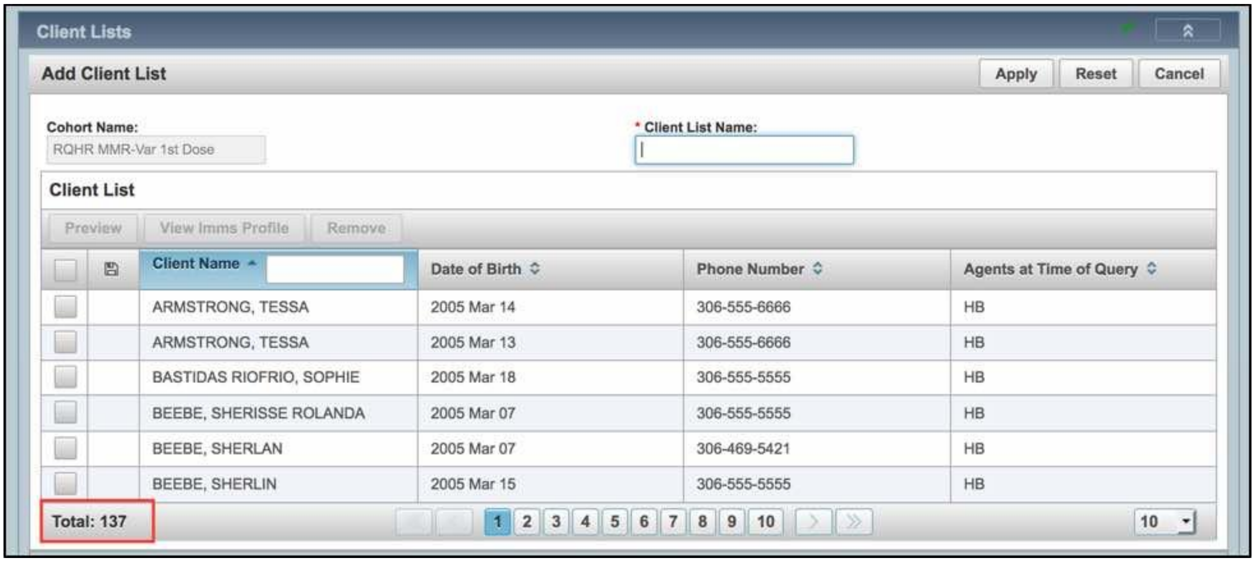


9) Click the **Generate Report** button.
The Reminder/Recall Client List will be generated and the system will prompt you to save the list to the desired location on your computer.

Updating the Client List

Clients matching the forecast status search criteria may periodically drop off the client list as they are immunized, or as their forecast status changes. It's important to add a new client list periodically to ensure these changes are captured in the Forecast Status Query.

10) From the Update Client Lists screen, click the **Add Client List** button.
    The Add Client List section will display, and the new list of clients matching the forecast status query will display in the Client List section. Note the new total.



11) Enter an appropriate name for this list in the **Client List Name** field. The name should follow the standard naming convention: [YYYY]-[MM]-[DD]. For example, "2017-03-30". By adding a date to the client list name, you will be able to quickly identify the most recent list.

12) Click the **Apply** button, or click the **Cancel** button to close the window.

13) Click the **Save** button at the top of the screen to commit the changes to the database.
    The Client List will be saved and the new list will appear in the Client Lists section.