

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 will be immunizing clients and needs to be added to Panorama for Provider recorded events

Steps

- Logon to Panorama with the Superuser role
- Navigate to the Administration Module, Indices Section, 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

N/A

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 	User is logged on and at the splash page.
1.2	Enter username and password: IDM credentials for Click the Ok button	
1.3	Select your Regional Superuser Role	
1.4	Click the Continue button	
<i>Note: The role selection option is only available to users with multiple roles</i>		
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	User on the Maintain Provider screen
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 entries 	
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>		
5	Complete the Provider Information Section	
5.1	Enter the providers First Name	Provider data is entered
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"> Prefix Date of birth Middle name Preferred language Suffix 		

Step	Description	Expected Outcome
6	Save the Provider	
6.1	Click the Submit button	Screen refreshes and a message is displayed at the top of the screen "Provider has been created successfully."
END		