

User Guide

GENERAL

Maintain Client

- Create Client
 - Personal Information
 - Occupation/School Information / Language
 - Health Services
 - Financial Assistance
 - Aboriginal Information
 - Immigration Information
- View/Update Client Demographics

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A. Introduction

Panorama is characterized as a client centric system, meaning client data is collected centrally and made available to all users of the system, based on permissions, to allow them to make complex decisions on a continual basis. There are numerous functions within Panorama that provide the user with the ability to collect data for a client. Client demographics and general information regarding the client (e.g. Names, Date of Birth, Gender, Phone Numbers, Addresses, Immigration Information, etc.) are collected within the Panorama Client Index.

This guide lists the steps to create a client and capture general and demographic client data in Panorama.

Note: Saskatchewan Panorama Client Index will be updated nightly from the PHRS and SCI Registry for HCN, Alternate ID's, Name, Address and Telephone as well as Date of Death, or Presumed Dead - Inactivate updates. SCI updates that contain Date of Death.

Assumptions: The user has the appropriate security permissions to perform the assigned tasks. The user has performed a thorough search in both the Panorama Index has not found a client record that matches the Client demographics.

Pre-requisites: The user has successfully logged into Panorama. User is in the Basic (or Advanced) Search screen.

Related User Guides:

Search Client and Put In Context User Guide

Panorama 101 User Guide

Menu Access: Create Client access is available from:

1. The Immunizations Tab, Select Client > Search Clients from left navigation bar. The Create Client button is available from the Client Index: Search Results section.
2. The Search Jurisdictional Client Registry
3. The Client Search Results, Quick Client Entry

Search Clients screen.

NOTE: A client search must be performed first before the Create Client button is displayed.

A thorough client search must be performed in both the Panorama Client Index as well as the Jurisdictional Registry (SCI) before creating a client. For more information see the User Guide: **Search Client and Put into Context.**

Search Clients ?

Basic Search Criteria ✔ Contains Data [Hide Basic Search Criteria](#)

[Search Jurisdictional Registry](#) Phonetic Matches

Wildcard characters % (multiple letters) and _ (single letters) can be used on any text field - except on Client Number and on First and Last Name when matching phonetically. Wildcard-only searches will be treated as blank searches. Exclude Indeterminate Clients

Include Inactive Clients

Client Number:
(Client ID, Health Card Number, Additional IDs)

Client Number Type:

Last Name: **First Name:** **Middle Name:**

Gender:

Date of Birth or Age [Hide Date of Birth or Age](#)

Not Applicable

Date of Birth / /

Age } Range ±

Jurisdictional Organization:
To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > **[Selected Level 4 Organization]**

[Advanced Search](#)

Client Preview ✔ Show Client Preview

Client Index: Search Results ✔ Contains Data [Hide Search Results](#)

6 results found. Click on Client ID to see full client information. Click on radio button to select.

Row Actions:

Client ID	Health Card Number	Last Name	First Name	Gender	Date Of Birth	Determinate Indeterminate	Active

[Search Jurisdictional Registry](#)

Basic Search Criteria ✓ Contains Data ⤴ Hide Basic Search Criteria

Wildcard characters % (multiple letters) and _ (single letters) can be used on any text field - except on Client Number and on First and Last Name when matching phonetically. Wildcard-only searches will be treated as blank searches.

Phonetic Matches
 Exclude Indeterminate Clients
 Include Inactive Clients
 Display Results on Single Page

Client Number:
(Client ID, Health Card Number, Additional IDs)

Client Number Type:

Last Name: First Name: Middle Name:

Gender:

Date of Birth or Age ⤴ Show Date of Birth or Age

Jurisdictional Organization: Exact Match
To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization]

[Advanced Search](#)

Client Preview ⤴ Show Client Preview

Client Index: Search Results ✓ Contains Data ⤴ Hide Search Results

1 result found. Click on Client ID to see full client information. Click on radio button to select.

Where a successful search of SCI returns the Client you want to create, you can click Import to Index by selecting the row and row action button.

Jurisdictional Registry: Search Results ✓ Contains Data ⤴ Hide Search Results

16 results found. Click on radio button to select.

Row Actions:

	Jurisdictional ID	Health Card Number	Last Name	First Name	Gender	Date Of Birth	Address
<input checked="" type="radio"/>	5900009	777777777	BOARD	WHITE	F	2000 Oct 26	123 NOTREAL ROAD , CA.SK.MooseJaw, SK S1X 9P8 CA

Be careful to review all the data in all the Client Detail sections to ensure it is accurate and complete. For example, many SCI phone numbers may not include an area code. The number will not be able to be saved in Panorama, unless an Area Code is entered.

SCI may insert duplicate address and telephone records that should likely be deleted, before Saving the new Client record.

SCI may combine First and Middle Name into the First Name field, users should cut and paste the Middle Name into the Middle Name field in Panorama, before Saving the new Client Record.

B. Maintain Client

NOTE: The search criteria entered in the Search Clients screen gets pre-populated into the Create Client screen. The JORG (Health Region) automatically defaults to the logged in user's JORG but can also be populated from the Search Clients screen if it was used as a search criteria.

The user should enter the lowest level JORG (branch) associated to the client's residential address in the **Organization** field. This is important for reporting purposes. For more information on Saskatchewan's JORG structure, see Panorama 101 User Guide.

1.0 Create Client Personal Information

1. In the Client Index: Search Results section, click the Create Client button.

The Create Client screen displays.

2. Enter data into the required fields (*) in each section, and any other fields as per business standards, and click the Save button.

Create Client

?

* Required field

Personal Information Hide Personal Information

Indeterminate Client Subject ID: -

Last Name: * First Name:

Middle Name: Suffix:

Estimated Click on the estimated checkbox to enable the age fields.

Date of Birth: / / Age: years months days (only required under 1 year) Gender:

Gender Identity: Other Gender Identity:

Health Card Number:

Date of Death: / / Preferred Communication Method:

Inactive Reason(s) for being inactive:

Health Region Information

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Saskatchewan > [Saskatoon RHA]

Name	Effective From	Effective To

Ethnicity: Other Ethnicity:

Reported By: Client Other Provider

Enter data into the required fields (*) in each section, and any other fields as per business standards.

NOTE: To “hide” and “show” components of the screen click the hide or show hyperlinks for the specific component to action or view.

TIP: The Clear button can be used to remove all unsaved changes in each section.

TIP: The Alternate Names are useful for nicknames or for clients with married/ maiden names. Both the first and last names must be entered. For example, a client with a legal name Edna Smith, but is commonly referred to as Sami Smith can be searched and found in the database using either name. This reduces the chance of creating duplicate records.

TIP: The Number Type must be selected in order to save the telephone number to the client record. This is required for many of the demographic entries (e.g. ID Type, Address Type, Email Address Type).

Birth Information [Hide Birth Information](#)

Birth Province: Birth City:

Part of Multiple Birth? Yes No Unknown No. of Children Born at Same Time: Birth Order No.:

Alternate Names [Hide Alternate Names](#)

Name Type: First: Last:

Add **Clear**

Row Actions **Update** **Delete** **Set Preferred**

Name Type	First	Last	Preferred

Additional IDs [Hide Additional IDs](#)

ID Type: ID:

Effective From: / / To: / /

yyyy mm dd yyyy mm dd

Add **Clear**

Row Actions **Update** **Delete**

ID Type	ID	Effective From	Effective To

Don't forget to click the **Add** button to add the information into the factory table

Don't forget to click the **Add** button to add the information into the factory table

Contact Information [Hide Contact Information](#)

Telephone Numbers [Hide Telephone Numbers](#)

Number Type: International () - ext

Effective From: / / To: / /

yyyy mm dd yyyy mm dd

Add **Clear**

Row Actions **Update** **Delete** **Set Preferred**

Number Type	Number	Effective From	Effective To	Preferred

The Create Client screen displays (continued).

NOTE: More than one alternate name, additional ID, telephone number, address, and email address can be added to a client record. Click the Add button in each of the sections to add the information to the client record before saving the record. Saskatchewan is not currently implementing online name functionality – it will be included in a future release.

TIP: The Address Type must be selected in order to save the address to the client record.

Addresses [Hide Addresses](#)

Address Type:

Country:

Address:

Unit No. Street No. Street Name Street Type Street Direction

P.O. Box STN RPO Rural Route

Province / Territory: City: Postal Code:

Geo-Coding Information

Geo-code Status:

Latitude: Longitude:

Other Addresses

Effective

From: / / To: / /

yyyy mm dd yyyy mm dd

Don't forget to click the Add button to add the information into the factory table



Email Addresses [Hide Email Addresses](#)

Address Type: Email:

Row Actions

Address Type	Email	Preferred
<input type="text"/>	<input type="text"/>	<input type="text"/>

Online Names [Hide Online Names](#)

Site/Service: Online Name:

Row Actions

Site/Service	Online Name	Preferred
<input type="text"/>	<input type="text"/>	<input type="text"/>

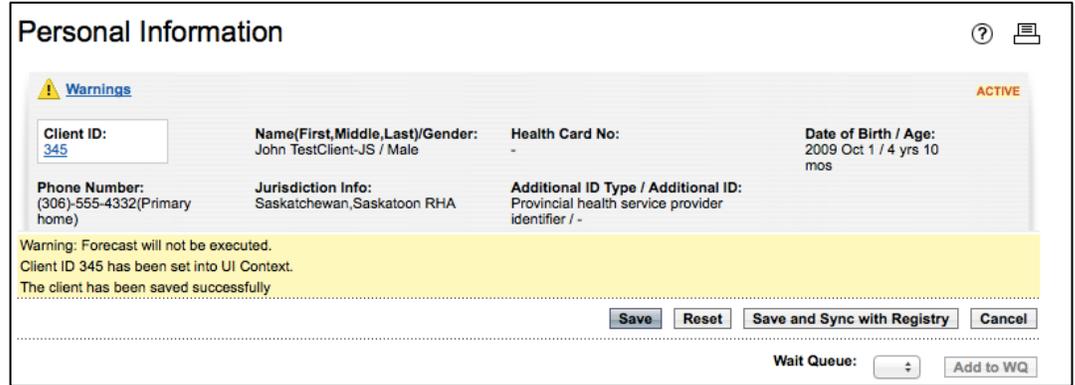
Created By: Created Date/Time: Last Updated By: Last updated Date/Time:

NOTE: As a business practice standard, all clients require First/Last Name, DoB, Gender, PHN/Health Number (if available) and Address (if available).

Panorama also supports the concept of 'indeterminate' clients where an assumed name or only the capture of First Name or initials is mandatory. Only Determinate Clients are eligible for immunization and Forecast.

3. Enter data into the required fields (*) in each section, and any other fields as per business standards, and click the Save .

The Personal Information screen displays with the newly created client ID and confirmation message.



Personal Information ? 🖨

Warnings ACTIVE

Client ID: 345	Name(First,Middle,Last)/Gender: John TestClient-JS / Male	Health Card No: -	Date of Birth / Age: 2009 Oct 1 / 4 yrs 10 mos
Phone Number: (306)-555-4332(Primary home)	Jurisdiction Info: Saskatchewan,Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Warning: Forecast will not be executed.
Client ID 345 has been set into UI Context.
The client has been saved successfully

Wait Queue:

NOTE: For children, school information may be entered under the Occupation/Language section, once an Occupation type of Student has been selected.

TIP: Occupation and School Year are type-ahead fields.

TIP: Use the FIND button to select the School Name and School Year are type-ahead fields.

NOTE: It is valuable to have school, grade, and school year information in order to generate Reports indicating the students that are Due/Overdue for Immunizations (Reminder / Recall Reports) and prepare for School Mass Immunizations.

Mass Immunizations and Reminder Recall are planned for implementation post Go Live.

2.0 Occupation/Language (School information)

1. With a client in context, click Client Details > Occupation/Language from the left navigation bar.

The Occupation/Language screen displays.

Occupation/Language ? [Menu]

Warnings ACTIVE

Client ID: 345	Name(First,Middle,Last)/Gender: John TestClient-JS / Male	Health Card No: -	Date of Birth / Age: 2013 Oct 1 / 10 mos 14 days
Phone Number: (306)-555-4332(Primary home)	Jurisdiction Info: Saskatchewan, Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Save **Reset**

* Required field

Occupation/Language

Occupation/Education Hide Occupation/Education

Occupation:

Effective From / / **Effective To** / /

yyyy mm dd

School Name:
To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization] **Find**

School Year:

Grade: **Class:**

Add **Clear**

Row Actions: **Update** **Delete**

	Occupation	School Board	School Name	Grade	Year	Class	Effective From	Effective To
<input type="radio"/>	student		Van Horne	Grade 1	2014 / 2015		2014 Sep 01	2015 Jun 30

Language Information Hide Language Information

Interpreter Required

Language: **Fluency:**

Add **Clear**

Row Actions: **Update** **Delete** **Set Preferred**

	Language	Fluency	Preferred

Save **Reset**

Created By: **Created Date/Time:** **Last Updated By:** **Last updated Date/Time:**

NOTE: More than one occupation / Education information can be added to a client record.

Click the Add button in each of the sections to add the information to the client record before saving the record.

- Enter the occupation and language information into the required fields (*), and any other fields as per business standards, and click the Add button each time an occupation or language is selected. Note: In order to record School information, Occupation = Student must be selected.

The Occupation / Language screen is refreshed and the selected occupation and language is added to the appropriate factory table.

Occupation/Language

Hide Occupation/Education

Occupation/Education

Occupation:

Effective From / / Effective To / /

yyyy mm dd

School Name:
To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization]

School Year:

Grade: Class:

Row Actions:

	Occupation	School Board	School Name	Grade	Year	Class	Effective From	Effective To
<input type="radio"/>	student		Van Horne	Grade 1	2014 / 2015		2014 Sep 01	2015 Jun 30
<input type="radio"/>	student		Van Horne	Kindergarten	2013 / 2014		2013 Sep 01	2014 Jun 30

Hide Language Information

Language Information

Interpreter Required

Language: Fluency:

English

Row Actions:

Language	Fluency	Preferred

Created By: user1, panorama Created Date/Time: 2014 Aug 15 11:43 CST Last Updated By: user1, panorama Last updated Date/Time: 2014 Aug 15 11:44 CST

3. Click the Save button.

The Occupation/Language screen is refreshed and a confirmation message is displayed.

Occupation/Language

ACTIVE

Client ID: 741	Name(First,Middle,Last)/Gender: Createclient Oscar QRG / Male	Health Card No: -	Date of Birth / Age: 1991 Jan 2 / 21 yrs
Phone Number: -(-)	Jurisdiction Info: Panorama	Alternate ID Type / Alternate ID: - / -	

Occupation/Language information successfully saved.

Save Reset

TIP: The **Health Care Provider information** is typically used when it is important to record the client's provider(s). For example, a TB patient may have many different physicians that need to be consulted.

TIP: This **Service Delivery Location Information** section is typically used when the client is residing in a long-term care facility or other health care facility.

3.0 Health Services

1. With a client in context, click Client Details > Health Services from the left navigation bar.

The Health Services screen displays.

Health Services ?

ACTIVE

Client ID: 741	Name(First,Middle,Last)/Gender: Createclient Oscar GRG / Male	Health Card No: -	Date of Birth / Age: 1991 Jan 2 / 21 yrs
Phone Number: (-)	Jurisdiction Info: Panorama	Alternate ID Type / Alternate ID: - / -	

*Required field

Health Services

Health Care Provider Information Hide Health Care Provider Information

Add a Provider who is in the Index

Click Find to select a provider:

Provider:

Last Name: **First Name:**
Role:
Service Delivery Location Name:
Service Delivery Location City:
Phone Numbers:

Enter Information for a Non-Indexed Provider

Last Name: **First Name:**
Phone: - ext. International

Effective Date(s) From: / / **To:** / /

Row Actions							
	Update	Delete	Set Preferred				
Last Name	First Name	Role	Effective From	Effective To	SDL Name, City and Province	Phone No	Preferred

Service Delivery Location Information Hide Service Delivery Location Information

To specify a Service Delivery Location first click on the 'Find' button. Then search, or type the name of the Service Delivery Location you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Service Delivery Location: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 3 Location]

Service Delivery Location Id:
Facility Name:
Address:
Effective Date(s) From: / / **To:** / /

Row Actions						
	Update	Delete	Set Preferred			
SDL Id	Facility Name	Effective From	Effective To	Address	Preferred	

NOTE: More than one service delivery location can be added to a client record.

Click the Add button to add the information to the client record before saving the record.

- Click the Find button to search and select a Service Delivery Location and click the Add button each time a service delivery location is selected.

The Health Services screen is refreshed and the selected service delivery location is added to the factory table.

Service Delivery Location Information Hide Service Delivery Location Information

To specify a Service Delivery Location first click on the 'Find' button. Then search, or type the name of the Service Delivery Location you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Service Delivery Location: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 3 Location]
Find

Service Delivery Location Id:
Facility Name:
Address:
Effective Date(s) From: / / **To:** / /

yyyy mm dd yyyy mm dd

Row Actions	Update	Delete	Set Preferred			
SDL	Facility Name	Effective	Effective	Address	Preferred	
<input type="radio"/>	396	Surrey Memorial Hospital	2011 Apr 04		13750 - 96th Ave NA , Surrey, British Columbia, Canada, V3V 1Z2	

- Click the Save button.

The Health Services screen is refreshed and a confirmation message is displayed.

Health Services ?

ACTIVE

Client ID: 741	Name(First,Middle,Last)/Gender: Createclient Oscar GRG / Male	Health Card No.: -	Date of Birth / Age: 1991 Jan 2 / 21 yrs
Phone Number: (-)	Jurisdiction Info: Panorama	Alternate ID Type / Alternate ID: - / -	

Health Services information successfully saved.

*Required field

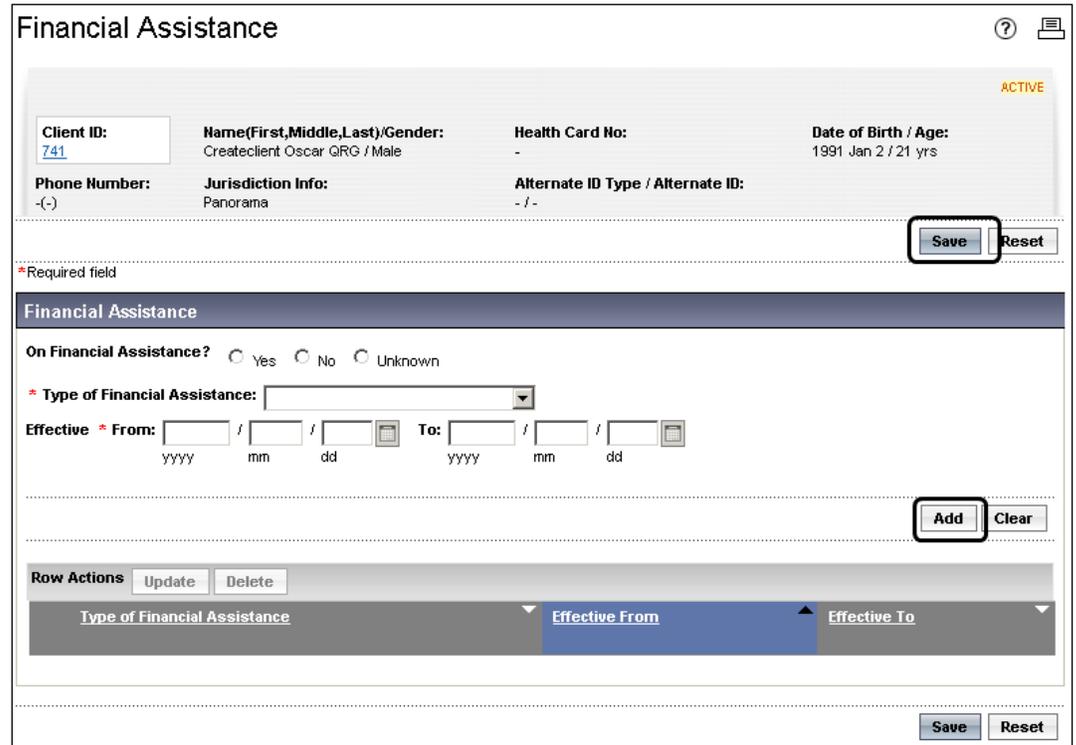
NOTE: The **Financial Assistance** section is useful for reporting against specified programs.

Saskatchewan policy prevents use of Financial Assistance data at this time.

4.0 Financial Assistance

1. With a client in context, click Client Details > Financial Assistance from the left navigation bar.

The Financial Assistance screen displays.



Financial Assistance ? [Print]

ACTIVE

Client ID: **Name(First,Middle,Last)/Gender:** Createclient Oscar GRG / Male **Health Card No.:** - **Date of Birth / Age:** 1991 Jan 2 / 21 yrs

Phone Number: **Jurisdiction Info:** Panorama **Alternate ID Type / Alternate ID:** - / -

Save **Reset**

*Required field

Financial Assistance

On Financial Assistance? Yes No Unknown

*** Type of Financial Assistance:**

Effective * From: / / **To:** / /

Add **Clear**

Row Actions

Type of Financial Assistance	Effective From	Effective To

Save **Reset**

2. Enter the financial assistance information into the required fields (*), and any other fields as per business standards, and click the Add button each time a new type of assistance is selected.

The Financial Assistance screen is refreshed and the selected assistance information is added to the factory table.

NOTE: More than one type of financial assistance can be added to a client record. Click the Add button to add the information to the client record before saving the record.

TIP: The Reset button can be used to remove all unsaved changes in the section. Clicking the Reset button will activate a warning dialogue that the user is about to lose all unsaved changes, allowing the user to proceed or change their mind.

Financial Assistance

Warnings ACTIVE

Client ID: Name(First,Middle,Last)/Gender: John TestClient-JS / Male Health Card No: - Date of Birth / Age: 2009 Oct 1 / 4 yrs 10 mos

Phone Number: (306)-555-4332(Primary home) Jurisdiction Info: Saskatchewan, Saskatoon RHA Additional ID Type / Additional ID: Provincial health service provider identifier / -

Financial Assistance successfully saved.

Save **Reset**

* Required field

Financial Assistance

On Financial Assistance? Yes No Unknown

* Type of Financial Assistance:

Effective * From: / / To: / /

Add **Clear**

Row Actions: **Update** **Delete**

Type of Financial Assistance	Effective From	Effective To
<input type="radio"/> Other public social benefits	2011 Aug 10	
<input type="radio"/> Provincial social assistance	2012 Aug 03	

Save **Reset**

Created By: user1, panorama Created Date/Time: 2014 Aug 13 14:52 CST Last Updated By: user1, panorama Last updated Date/Time: 2014 Aug 15 12:03 CST

3. Click the **Save** button.

The Financial Assistance screen is refreshed and a confirmation message is displayed.

Financial Assistance

Warnings ACTIVE

Client ID: Name(First,Middle,Last)/Gender: Createclient Oscar GRG / Male Health Card No: - Date of Birth / Age: 1991 Jan 2 / 21 yrs

Phone Number: (-) Jurisdiction Info: Panorama Alternate ID Type / Alternate ID: - / -

Financial Assistance successfully saved.

Save **Reset**

* Required field

NOTE:

Saskatchewan Policy does not permit use of Aboriginal Information at this time.

NOTE: Ensure you are following the business practice guidelines when completing the Aboriginal Information page.

Every client should be asked:

- Do you wish to self-identify as an Aboriginal person?
- Do you live on a First Nation reserve, and if so, which one?

TIP: The “Do you live on a FN reserve, and if so, which one?” text box is a type-ahead format so begin with the first letter of the reserve and choose the appropriate reserve name from the list that populates.

5.0 Aboriginal Information

Caution: Ensure you are following business practice guidelines when completing the Aboriginal Information page.

1. With a client in context, click Client Details > Aboriginal Information from the left navigation bar.

The Aboriginal Information screen displays.

Aboriginal Information ? [Print]

ACTIVE

Client ID: 1815	Name(First,Middle,Last)/Gender: QRG AI CreateClient / Male	Health Card No: -	Date of Birth / Age: 1964 Feb 3 / 49 yrs
Phone Number: -(-)	Jurisdiction Info: Vancouver,Vancouver	Alternate ID Type / Alternate ID: Yukon HCIP# / -	

* Required field

Aboriginal Information

Do you wish to self-identify as an Aboriginal person:

First Nations Status:

do not use Yes No Don't Know

do not use

Do you live on a FN reserve, and if so which one?

do not use

Aboriginal Organization Information:
To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization]

Aboriginal Organization History	Name	Effective From	Effective To

2. Enter the aboriginal information into the required fields (*), and any other fields as per business standards, and click the *Save* button.

The Aboriginal Information screen is refreshed and a confirmation message is displayed.

Aboriginal Information ?

ACTIVE

Client ID: 741	Name(First,Middle,Last)/Gender: Createclient Oscar GRG / Male	Health Card No: -	Date of Birth / Age: 1991 Jan 2 / 21 yrs
Phone Number: -(-)	Jurisdiction Info: Panorama	Alternate ID Type / Alternate ID: - / -	

Aboriginal Information successfully saved.

*Required field

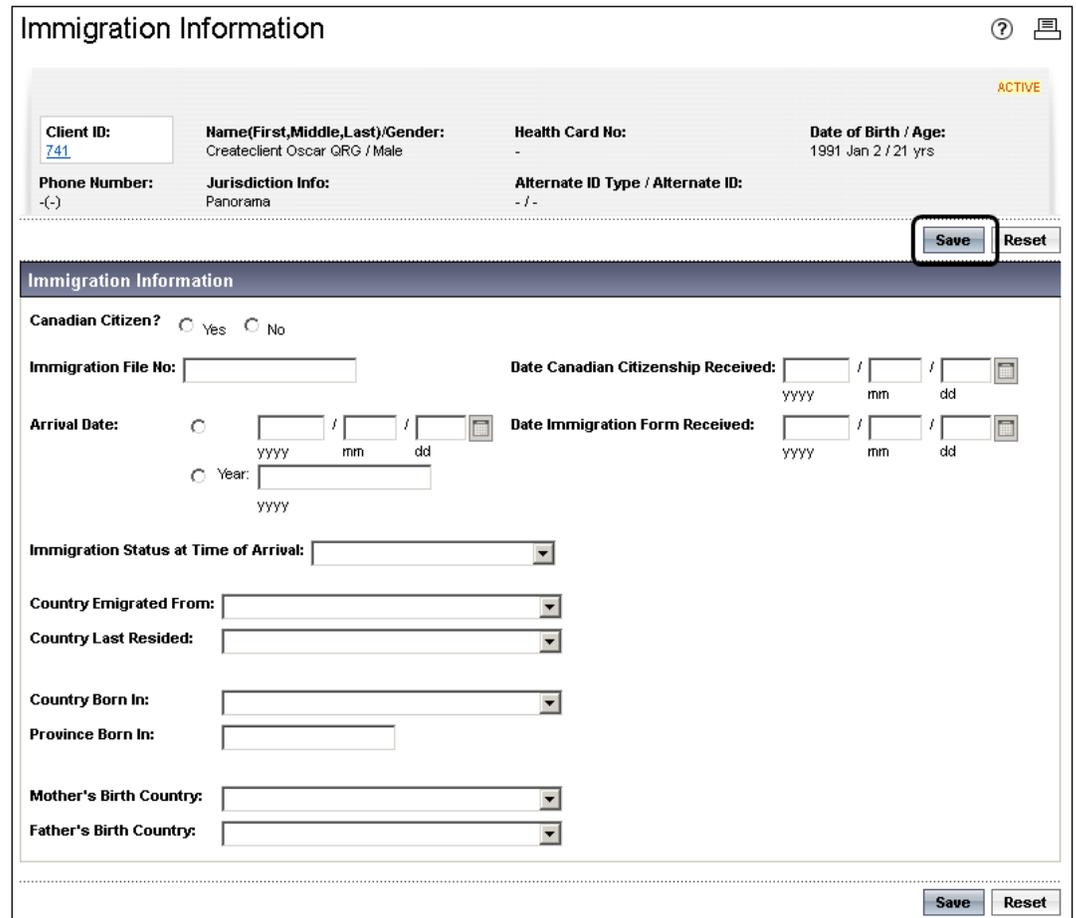
NOTE: Saskatchewan Policy states only **Country Emigrated From** and **Arrival Date – Year** will be used at this time.

NOTE: Immigration information is important for interpreting an immunization history as well as Case Management of communicable diseases.

6.0 Immigration Information

1. With a client in context, click Client Details > Immigration Information from the left navigation bar.

The Immigration Information screen displays.



Immigration Information ? [Print]

ACTIVE

Client ID: 741	Name(First,Middle,Last)/Gender: Createclient Oscar QRG / Male	Health Card No: -	Date of Birth / Age: 1991 Jan 2 / 21 yrs
Phone Number: (-)	Jurisdiction Info: Panorama	Alternate ID Type / Alternate ID: - / -	

Save **Reset**

Immigration Information

Canadian Citizen? Yes No

Immigration File No:

Arrival Date: / /
yyyy mm dd

Year:
yyyy

Date Canadian Citizenship Received: / /
yyyy mm dd

Date Immigration Form Received: / /
yyyy mm dd

Immigration Status at Time of Arrival:

Country Emigrated From:

Country Last Resided:

Country Born In:

Province Born In:

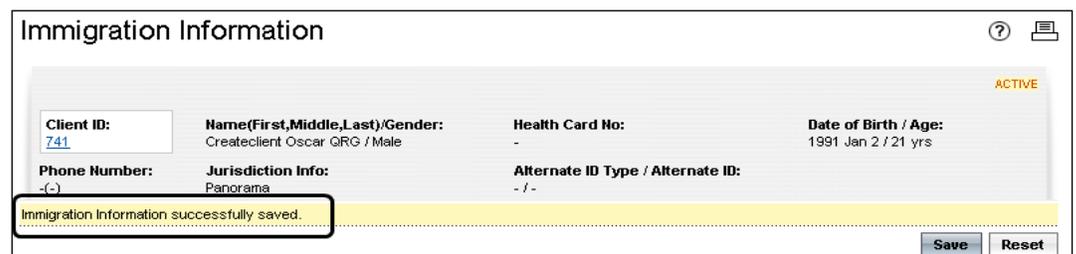
Mother's Birth Country:

Father's Birth Country:

Save **Reset**

2. Enter the immigration information into the required fields (*), and any other fields as per business standards, and click the Save button.

The Immigration Information screen is refreshed and a confirmation message is displayed.



Immigration Information ? [Print]

ACTIVE

Client ID: 741	Name(First,Middle,Last)/Gender: Createclient Oscar QRG / Male	Health Card No: -	Date of Birth / Age: 1991 Jan 2 / 21 yrs
Phone Number: (-)	Jurisdiction Info: Panorama	Alternate ID Type / Alternate ID: - / -	

Immigration Information successfully saved.

Save **Reset**

7.0 View/Update Client Demographics

1. With a client in context, click Client Details > (Personal Information, Occupation/Language, Health Services, Financial Assistance, Aboriginal Information, or Immigration Information) from the left navigation bar.

The appropriate screen displays (e.g., the Personal Information screen).

2. To add new information to factory tables, enter the new information and click Add.

The screen is refreshed the new information is added to the factory table (e.g., Telephone Numbers in the Contact Information section).

Row Actions	Number Type	Number	Effective From	Effective To	Preferred
<input type="radio"/>	Primary home	(604) 555-1212	2012 May 21	-	✓
<input checked="" type="radio"/>	Emergency Contact	(778) 888-7777	2012 May 21	-	

3. To update a factory table, select the radio button next to the information to be updated and click the Update button.

NOTE: Users can use the **Search Jurisdiction Registry** to seek updates to Client information that may not have yet come through in the nightly batch – once the Client is found in SCI, the **Update** button will be enabled, and the **Import Client to Index** will be disabled.

NOTE: The Update, Delete and Set Preferred buttons are inactive until a radio button is selected next to a value in the factory table.

The screen is refreshed and the selected information is loaded into the entry fields.

Contact Information
Hide Contact Information

Telephone Numbers
Hide Telephone Numbers

Number Type: Emergency Contact International **Number:** (778) 888-7777 ext

Effective From: 2012 / 05 / 21 **To:** / /

Apply Update Clear

Row Actions Update Delete Set Preferred

	Number Type	Number	Effective From	Effective To	Preferred
<input type="radio"/>	Primary home	(604) 555-1212	2012 May 21	-	✓
<input checked="" type="radio"/>	Emergency Contact	(778) 888-7777	2012 May 21	-	

Update the information as required and click the Apply Update button.

The screen is refreshed and the updated information is replaced in the factory table.

Contact Information
Hide Contact Information

Telephone Numbers
Hide Telephone Numbers

Number Type: International **Number:** () - ext

Effective From: 2012 / 05 / 23 **To:** / /

Add Clear

Row Actions Update Delete Set Preferred

	Number Type	Number	Effective From	Effective To	Preferred
<input type="radio"/>	Primary home	(604) 555-1212	2012 May 21	-	✓
<input checked="" type="radio"/>	Emergency Contact	(778) 888-9999	2012 May 21	-	

NOTE: The Update, Delete and Set Preferred buttons are inactive until a radio button is selected next to a value in the factory table.

- To set one item as preferred in a factory table, select the radio button next to the desired item and click the Set Preferred button.

The screen is refreshed and the selected information is marked as preferred in the factory table.

Contact Information
Hide Contact Information

Telephone Numbers
Hide Telephone Numbers

Number Type: International () - ext

Effective From: 2012 / 05 / 23 **To:** / /

yyyy mm dd yyyy mm dd

Row Actions
Update
Delete
Set Preferred

	Number Type	Number	Effective From	Effective To	Preferred
<input type="radio"/>	Emergency Contact	(778) 888-7777	2012 May 21	-	✓
<input type="radio"/>	Primary home	(604) 555-1212	2012 May 21	-	

- To delete an item in a factory table, select the radio button next to the desired item and click the Delete button.

The screen is refreshed and the selected information is removed from the factory table.

Contact Information
Hide Contact Information

Telephone Numbers
Hide Telephone Numbers

Number Type: International () - ext

Effective From: 2012 / 05 / 23 **To:** / /

yyyy mm dd yyyy mm dd

Row Actions
Update
Delete
Set Preferred

	Number Type	Number	Effective From	Effective To	Preferred
<input type="radio"/>	Emergency Contact	(778) 888-7777	2012 May 21	-	✓

6. Add new information and update existing information in any remaining fields as required and click the Save button.

The screen is refreshed with the updated information and a confirmation message is displayed.

NOTE: When a user updates any client demographic information without updating DOB or gender information, the message "Warning: Forecast will not be executed" will display to inform the user that the update they made to the client record will not trigger a forecast/reforecast.

Personal Information ?

ACTIVE

Client ID: <input type="text" value="741"/>	Name(First,Middle,Last)/Gender: Createclienta Oscar GRG / Male	Health Card No: -	Date of Birth / Age: 1991 Jan 2 / 21 yrs
Phone Number: (666)-666-6666(Emergency Contact)	Jurisdiction Info: Panorama	Alternate ID Type / Alternate ID: - / -	

Warning: Forecast will not be executed.
The client has been saved successfully

Wait Queue:

NOTE: To access the Client Quick Entry screen, the user must first **SEARCH** for the client. Once a search has been performed, the **Client Quick Entry** button appears.

A thorough client search must be performed in both the Panorama Client Index as well as the Jurisdictional Registry (SCI) before creating a client. For more information see the User Guide: **Search Client and Put into Context**.

8.0 Client Quick Entry

The Client Quick Entry screen allows a user to quickly and easily enter client demographic data into Panorama, particularly when a client needs to receive service (e.g. an immunization) right away. It is streamlined in that many common fields are on one screen, rather than multiple screens within the Client Details section. It includes:

- Personal information (e.g. Name, Gender, DOB, Health Card Number)
- Contact Information (e.g. telephone number, address)
- Student Information (School name, Year, Grade, Class)
- Relationship (custodial and phone number). (Important note: If other than custodial parent, use Relationships from the left hand menu to create and identify the type of Relationship.)

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

1. Select Clients > Search Clients from left hand navigation. Search Clients screen displays.
2. Enter basic search criteria to locate the client and then click **Search**.

The Client Quick Entry button is now available in the Search Results section.

Search Clients ? [Print]

[Search Jurisdictional Registry](#)

Basic Search Criteria
↑ Hide Basic Search Criteria

Wildcard characters % (multiple letters) and _ (single letters) can be used on any text field - except on Client Number and on First and Last Name when matching phonetically. Wildcard-only searches will be treated as blank searches.

Phonetic Matches
 Exclude Indeterminate Clients
 Include Inactive Clients
 Display Results on Single Page

Client Number:
(Client ID, Health Card Number, Additional IDs)

Client Number Type:

Last Name: **First Name:** **Middle Name:**

Gender:

Date of Birth or Age ↑ Hide Date of Birth or Age

Not Applicable
 Date of Birth / /
yyyy mm dd

Age
Year(s) Units

Date of Birth From / / To / /
yyyy mm dd yyyy mm dd

} Range ±
Units

Jurisdictional Organization: Exact Match

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization]
Find

[Advanced Search](#)

Client Preview
↓ Show Client Preview

Client Index: Search Results
↑ Hide Search Results

0 results found. The search criteria entered did not match any results.

Row Actions:

	Client ID	Health Card Number	Last Name	First Name	Gender	Date Of Birth	Determinate/Indeterminate	Active
Total: 0 <input type="button" value="◀"/> <input type="button" value="▶"/> Page 1 of 1 <input type="button" value="▶"/> <input type="button" value="▶"/>								

Jump to page:

- Enter data into the required fields (*) in each section, and any other fields as per business standards, and click the Save button or the Save and Sync with Registry button.

TIP: The Client Quick Entry screen does not require the **Add** button as there are no factory tables in this screen. This means that only one address and two telephone numbers may be added.

If the client has multiple numbers, enter the data, click **SAVE**, and then click on the appropriate **Client Details** screen on the left hand navigation menu to add additional information.

Client Quick Entry

? 📄

Save Save and Search Save and Record Imms Save and Sync with Registry Clear Cancel

* Required field

Personal Information ⤴ Hide Personal Information

Personal Information

Last Name:
*** First Name:**
Middle Name:

Date of Birth: / /
Gender:

yyyy mm dd

Gender Identity:
Other Gender Identity :

Health Card Number:

Health Region Information Clear

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Saskatchewan > [Saskatoon RHA] Find 🔍

Contact Information ⤴ Hide Contact Information

Telephone Numbers

Telephone Number 1' will be set to the preferred number on save of the client record.

Telephone Number 1: **Number Type:** International **Number:** () - ext

Telephone Number 2: **Number Type:** International **Number:** () - ext

Address ⤴ Hide Address

Address Type: **Country:**

Address:

Unit No. Street No. Street Name Street Type Street Direction

P.O. Box STN RPO Rural Route

Province / Territory: **City:** **Postal Code:**

Email Address ⤴ Hide Email Address

Address Type: **Email:**

[See next page for the continuation of the **Client Quick Entry** Screen].

TIP: Once data has been entered for the client, select **Save and Search** and the user will be taken directly back to the **Search** screen. This is a streamlined approach for data entry of multiple students.

But remember, a thorough client search must be performed in both the Panorama Client Index as well as the Jurisdictional Registry (SCI) before creating a client. For more information see the User Guide: **Search Client and Put into Context**.

TIP: Once data has been entered for the client, select **Save and Record Imms** and the user will be taken directly to the **Client Immunization View/Add** screen. This is a streamlined approach for walk-in immunization clients.

Continuation of the **Client Quick Entry** Screen...

Enter data into the required fields (*) in each section, and any other fields as per business standards, and click the **Save** button.

For Students Only
⤴ Hide For Students Only

Student Information

School Name

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization]

School Year: Grade: Class:

Relationship

Creates a non-indexed client and sets the relationship to Legal Guardian/Legal Guardian Child

Last Name: First Name: Custodial

Number Type: Use Telephone Number 1 International () - ext

Click **Save and Search** – the client demographics will be saved and the user is returned to the Search screen in order to enter a new client.

Click **Save and Record Imms** – the client demographics will be saved and the user is taken to the **Client Immunization View/Add** screen.