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

Revision History

Document History

Date	Version	Author	Changes / Comments
August 14, 2014	0.1	Josie Salvail	Initial draft
August 16, 2014	0.2	Tracy Forbes	Updates as per SK Policy development workshop
August 18, 2014	0.3	Josie Salvail	Minor updates as per internal review
October 9, 2014	1.0	Josie Salvail	Updates to reflect SCI interface
October 15, 2014	1.1	Tracy Forbes	Updates to reflect SCI interface and SK Policy
January 20, 2015	1.2	Tracy Forbes	Remove dates from footers
January 28, 2015	1.3	Tracy Forbes	Updates from Dr. Shauna Hudson to reflect Consent Refusal and Do Not Use Policies

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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

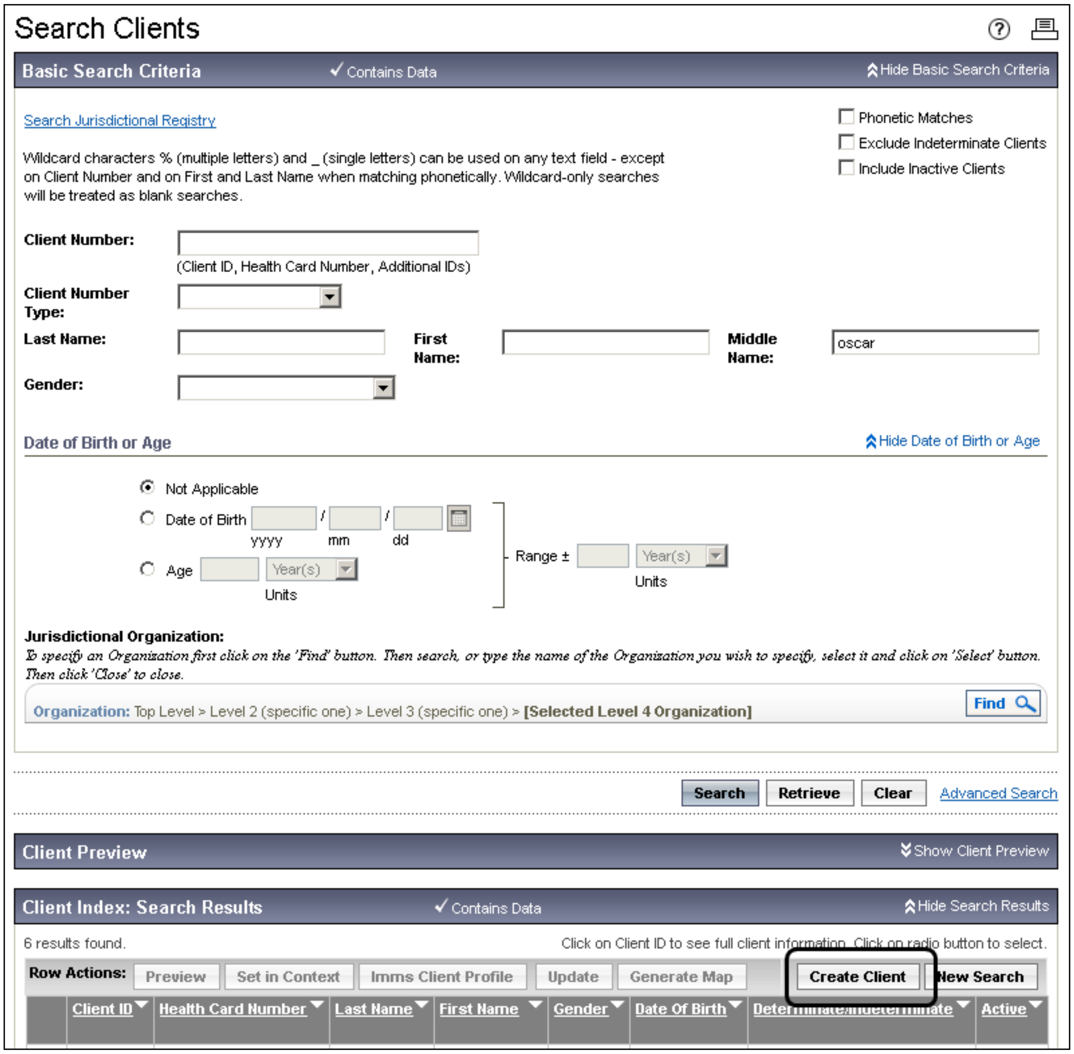
Menu Access: Create Client access is available from:

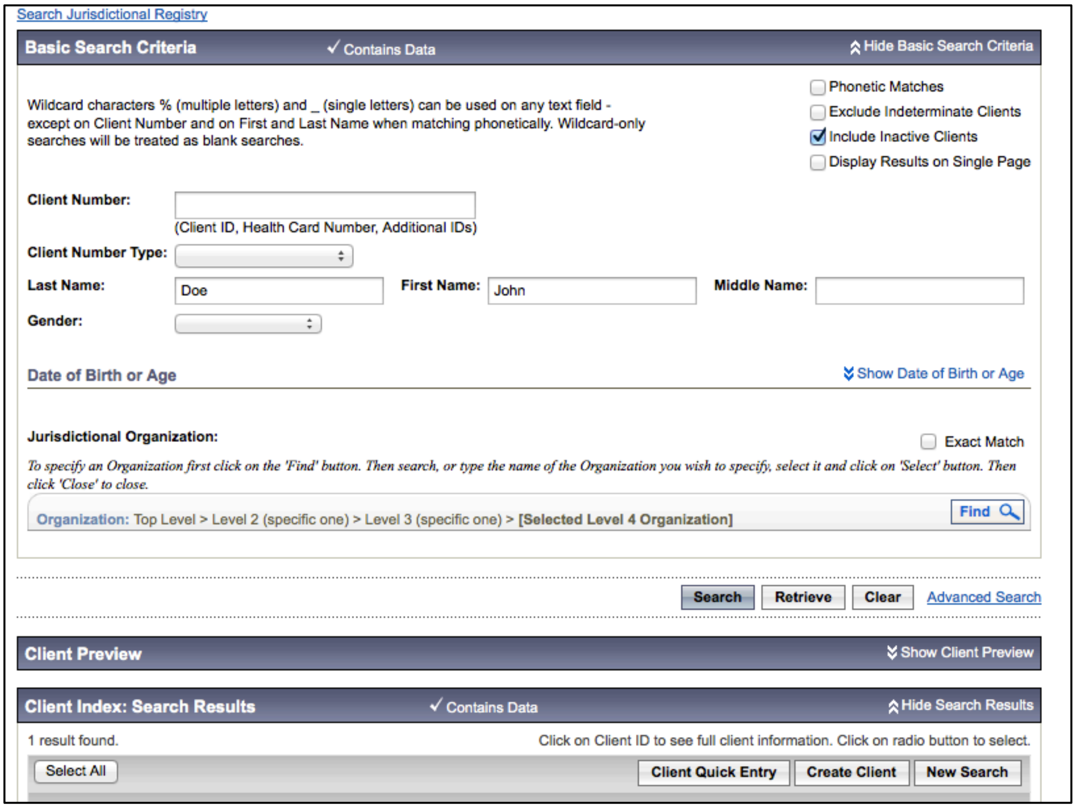
1. The Immunizations Tab, Select Client > Search Clients from left navigation bar. The Create Client button is available from the Client Index: Search Results section.
2. The Search Jurisdictional Client Registry
3. The Client Search Results, Quick Client Entry

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

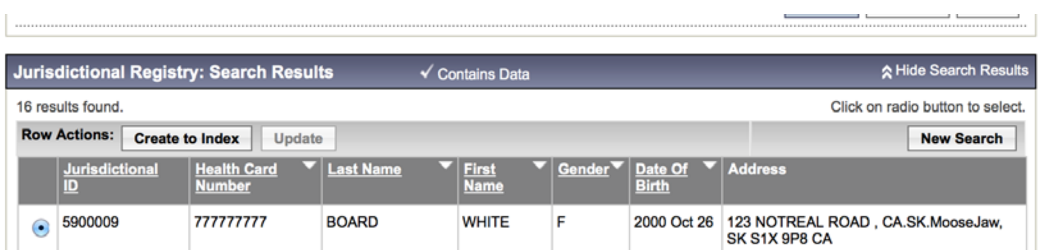
A thorough client search must be performed in both the Panorama Client Index as well as the Jurisdictional Registry (SCI) before creating a client. For more information see the User Guide: **Search Client and Put into Context**.

Search Clients screen.





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.



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.

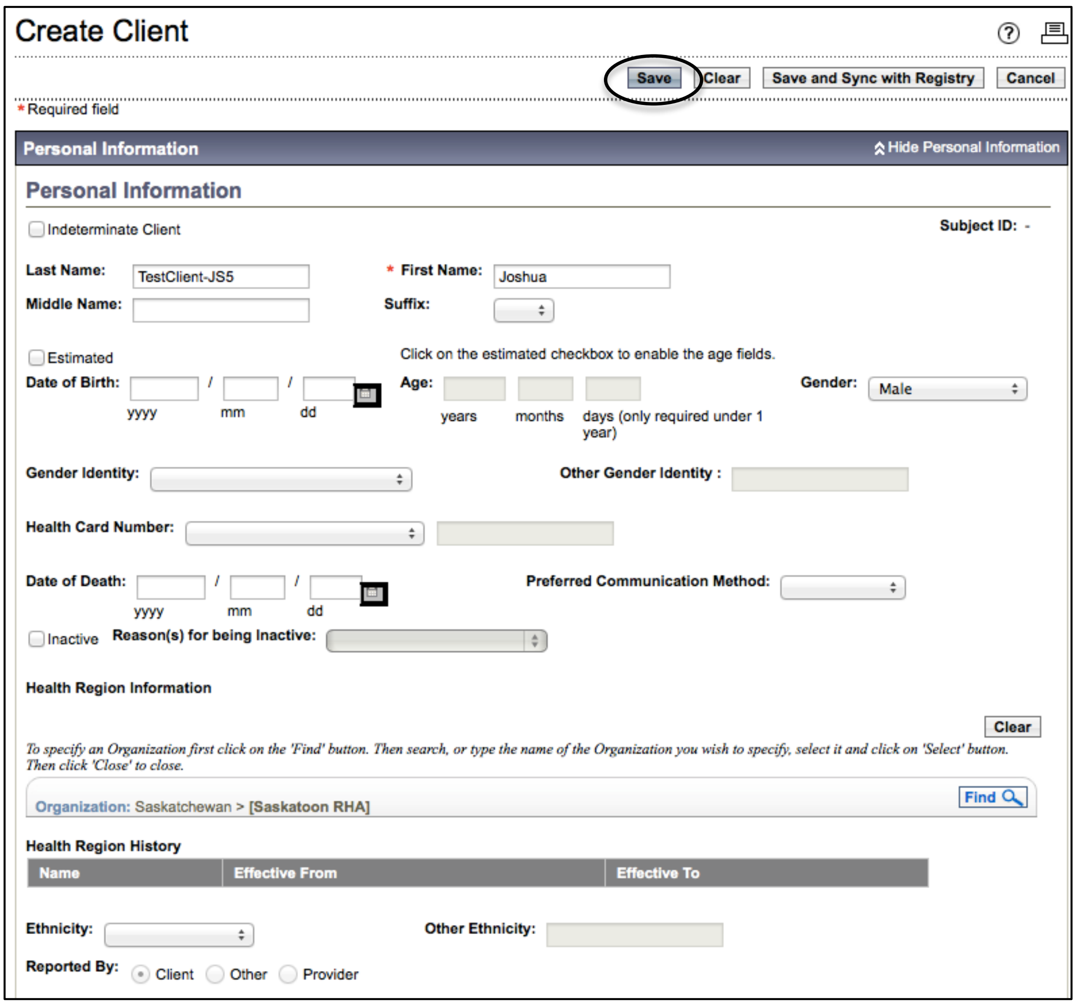
B. Maintain Client

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.



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.

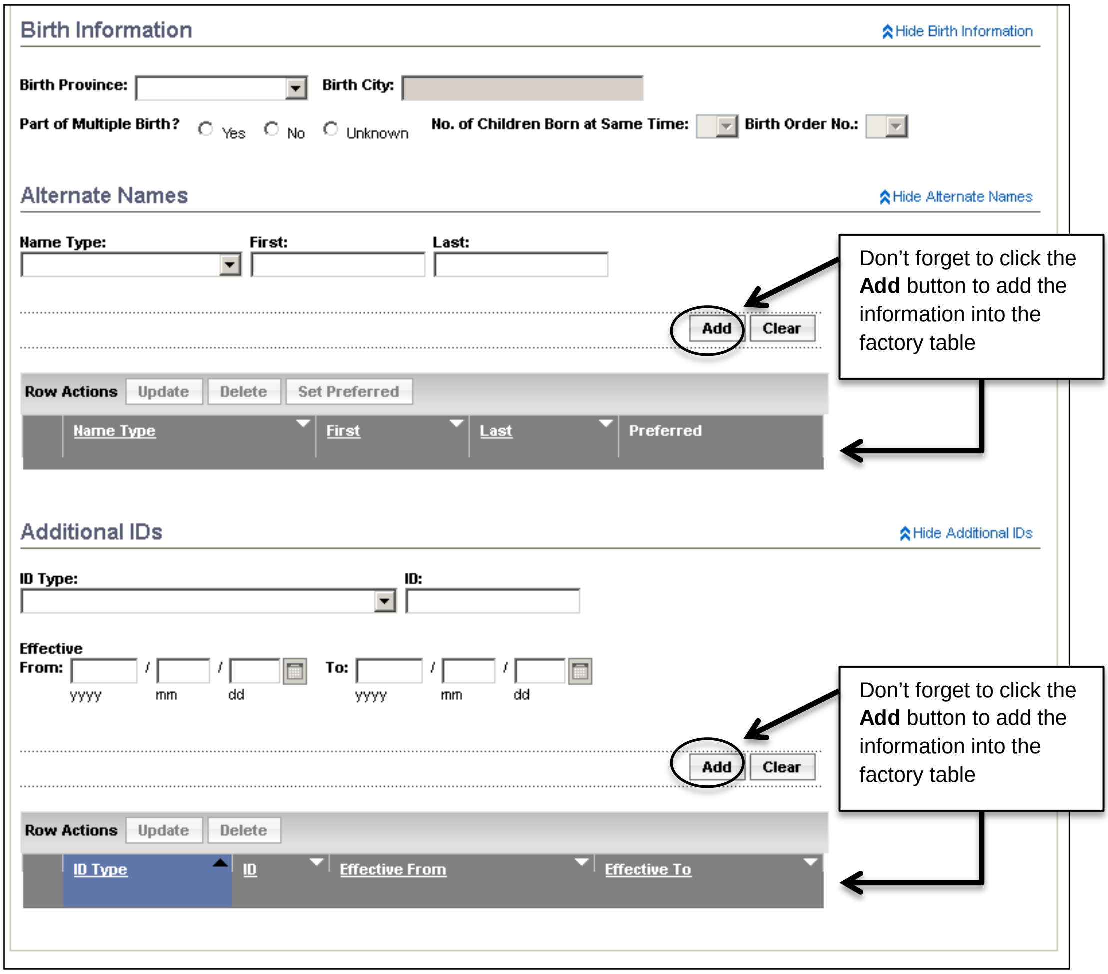
NOTE: To “hide” and “show” components of the screen click the hide or show hyperlinks for the specific component to action or view.

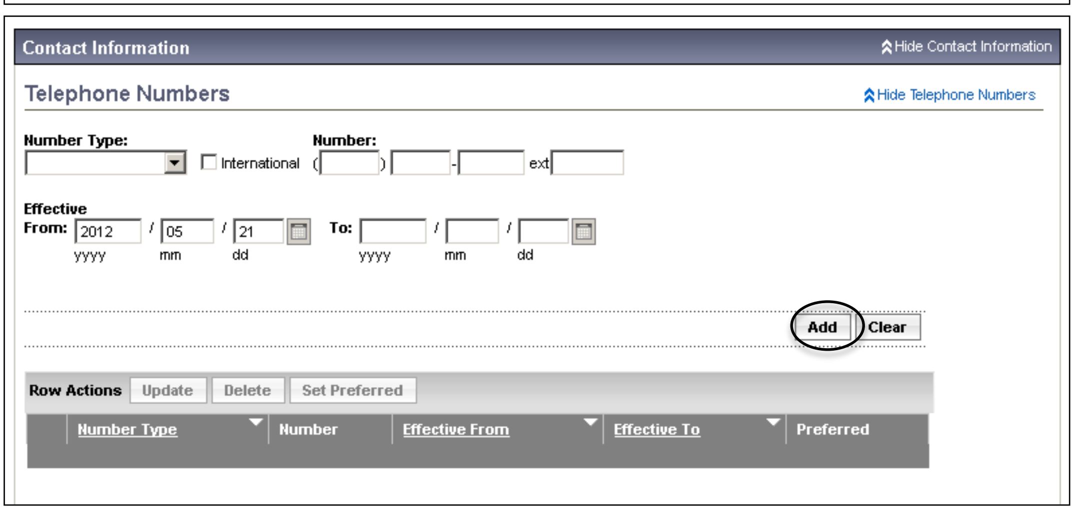
TIP: The Clear button can be used to remove all unsaved changes in each section.

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).

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

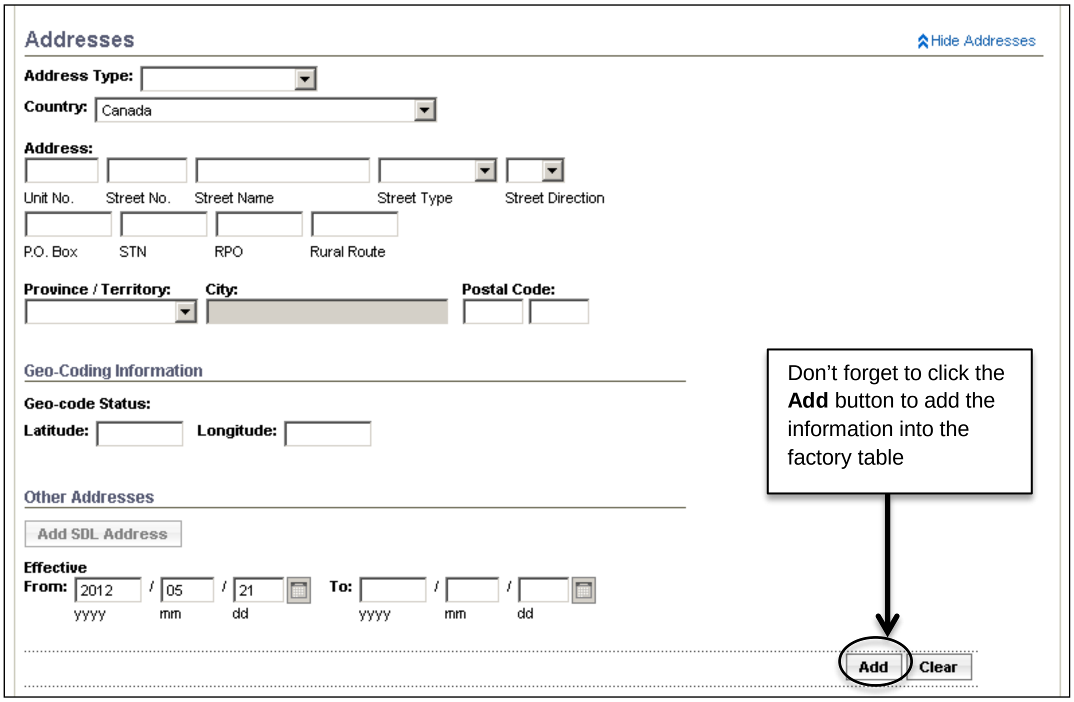


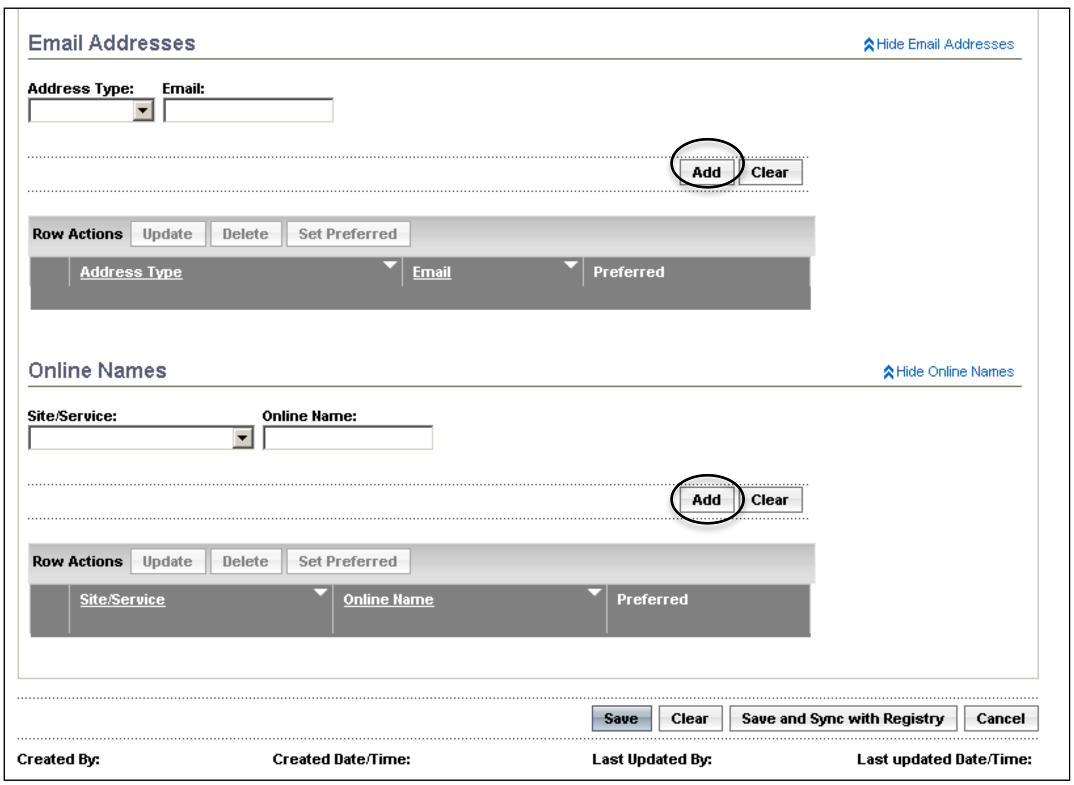


NOTE: More than one alternate name, additional ID, telephone number, address, and email address can be added to a client record. Click the Add button in each of the sections to add the information to the client record before saving the record. Saskatchewan is not currently implementing online name functionality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

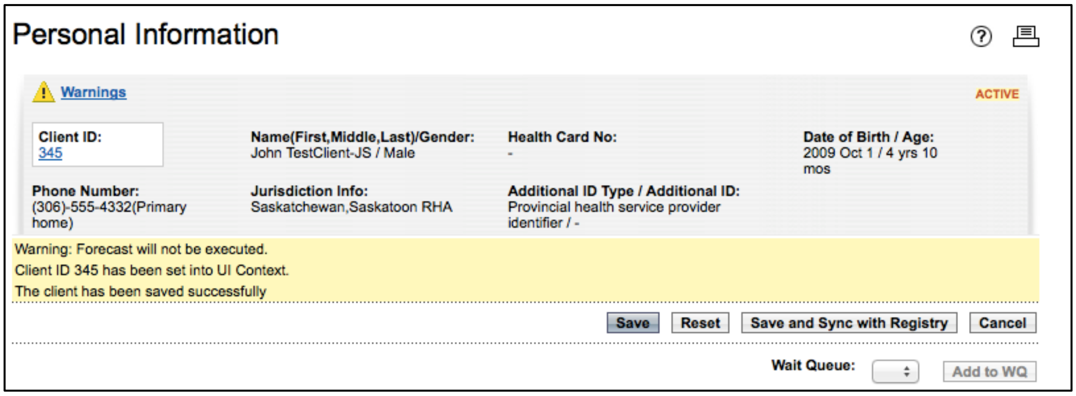
The Create Client screen displays (continued).





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.



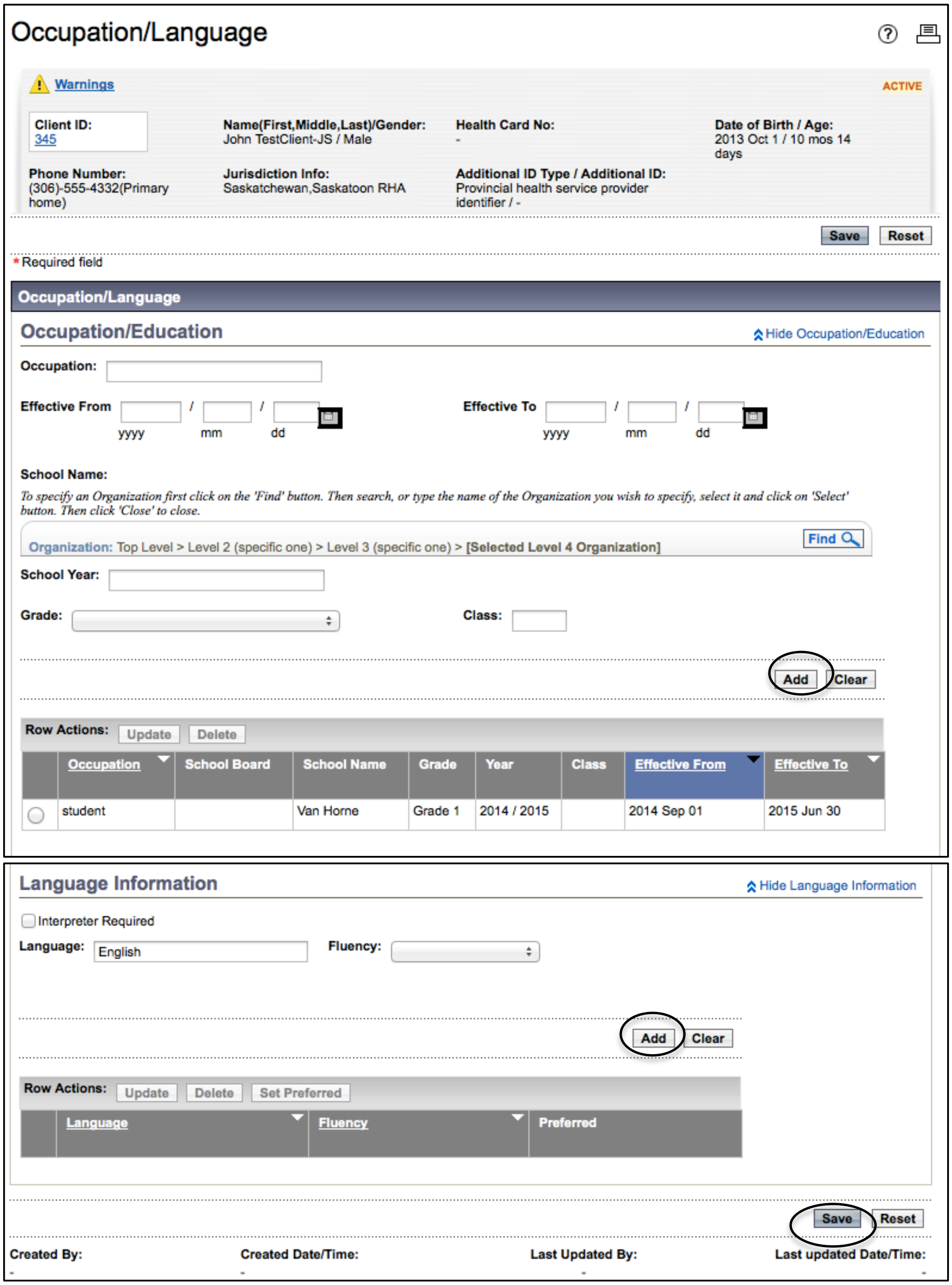
NOTE: As a business practice standard, all clients require First/Last Name, DoB, Gender, PHN/Health Number (if available) and Address (if available).

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.

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.



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.

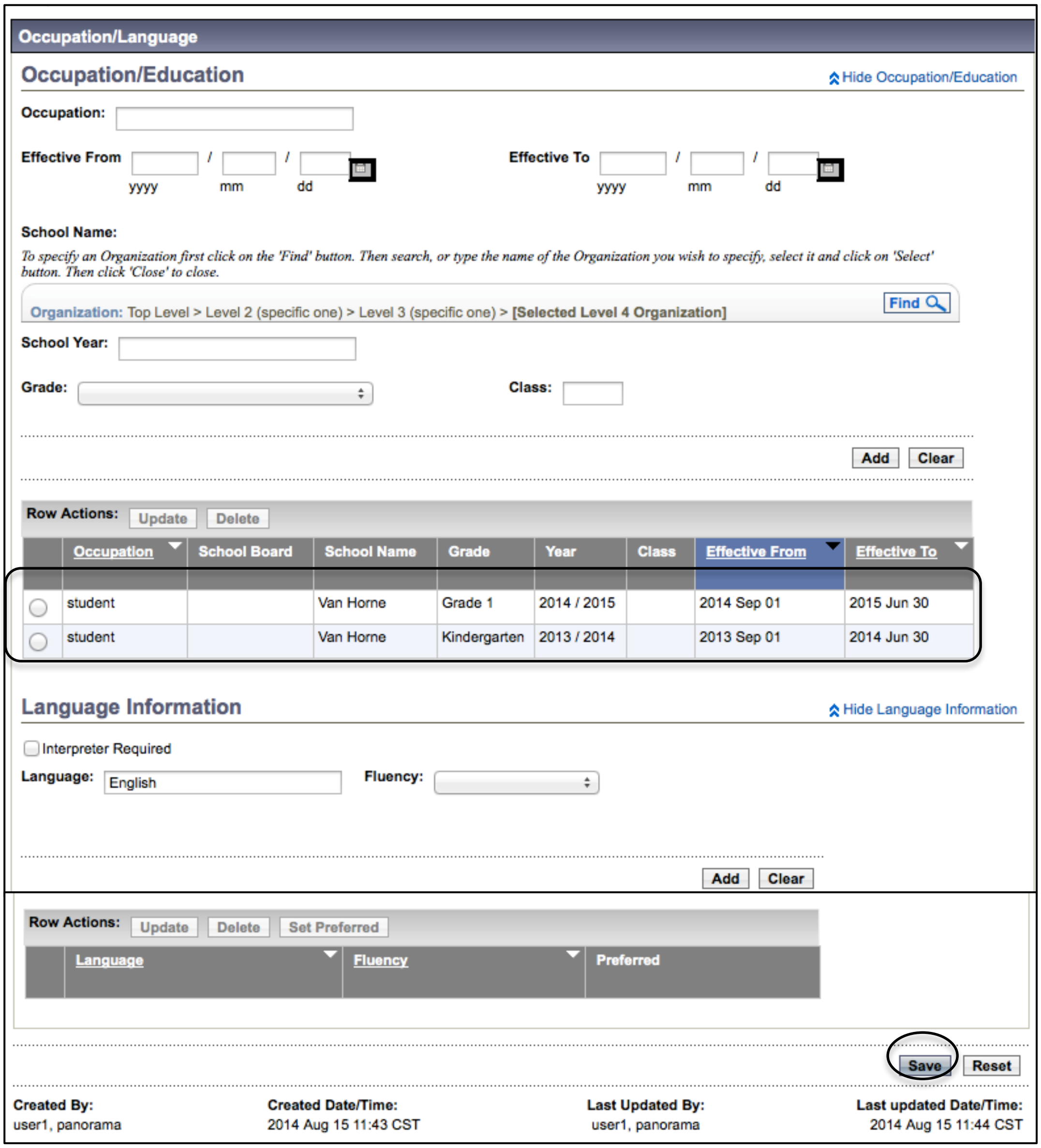
Mass Immunizations and Reminder Recall are planned for implementation post Go Live.

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.

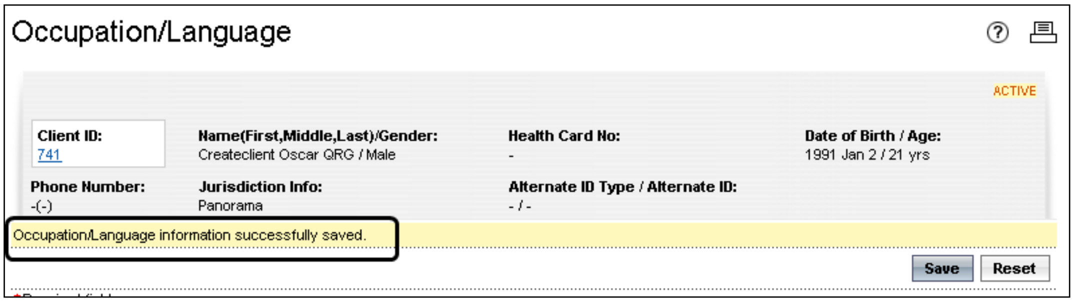
2. Enter the occupation and language information into the required fields (*), and any other fields as per business standards, and click the Add button each time an occupation or language is selected. Note: In order to record School information, Occupation = Student must be selected.

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



3. Click the `Save` button.

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



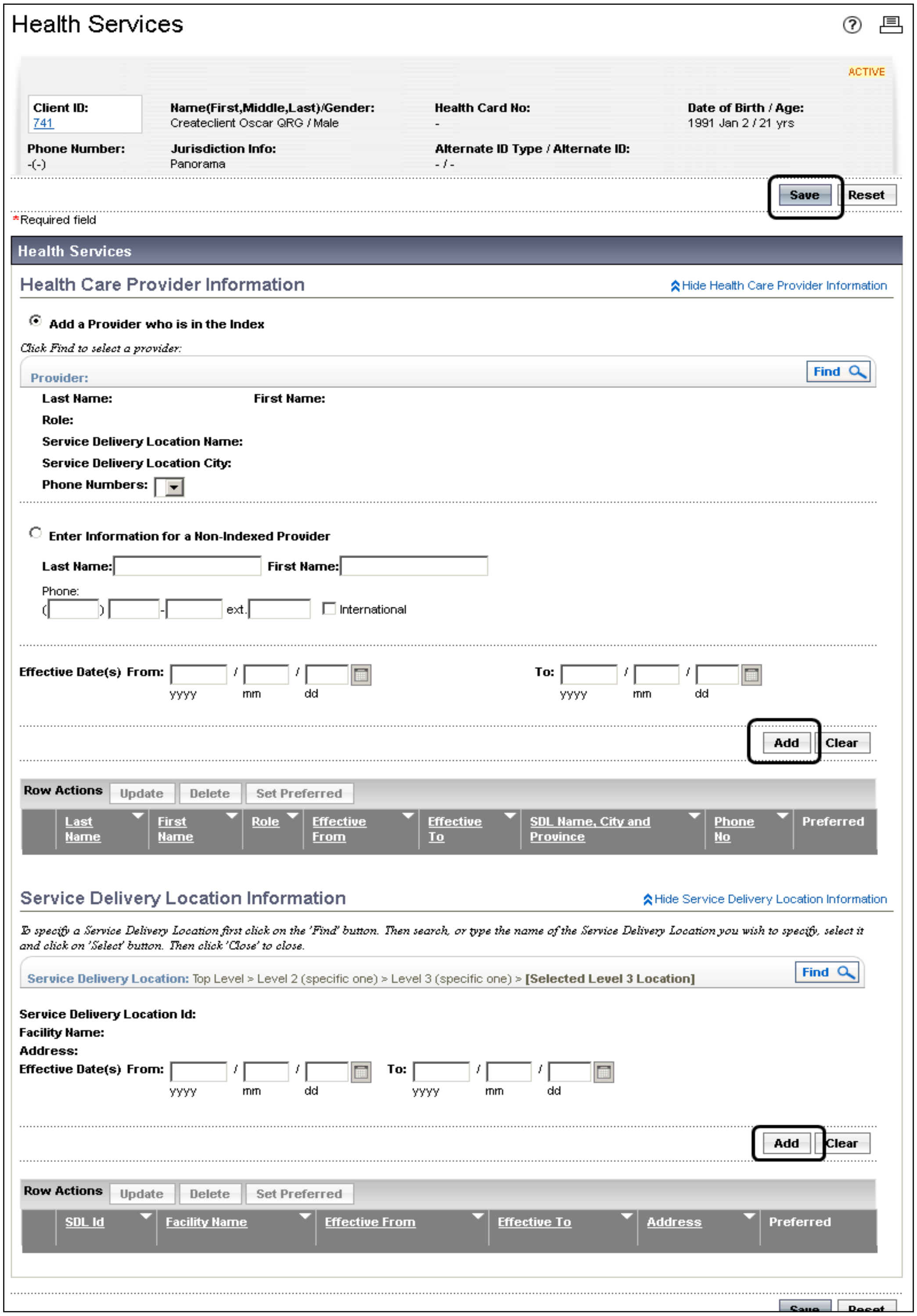
TIP: The **Health Care Provider information** is typically used when it is important to record the client's provider(s). For example, a TB patient may have many different physicians that need to be consulted.

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.



NOTE: More than one health care provider can be added to a client record.
Click the Add button to add the information to the client record before saving the record.

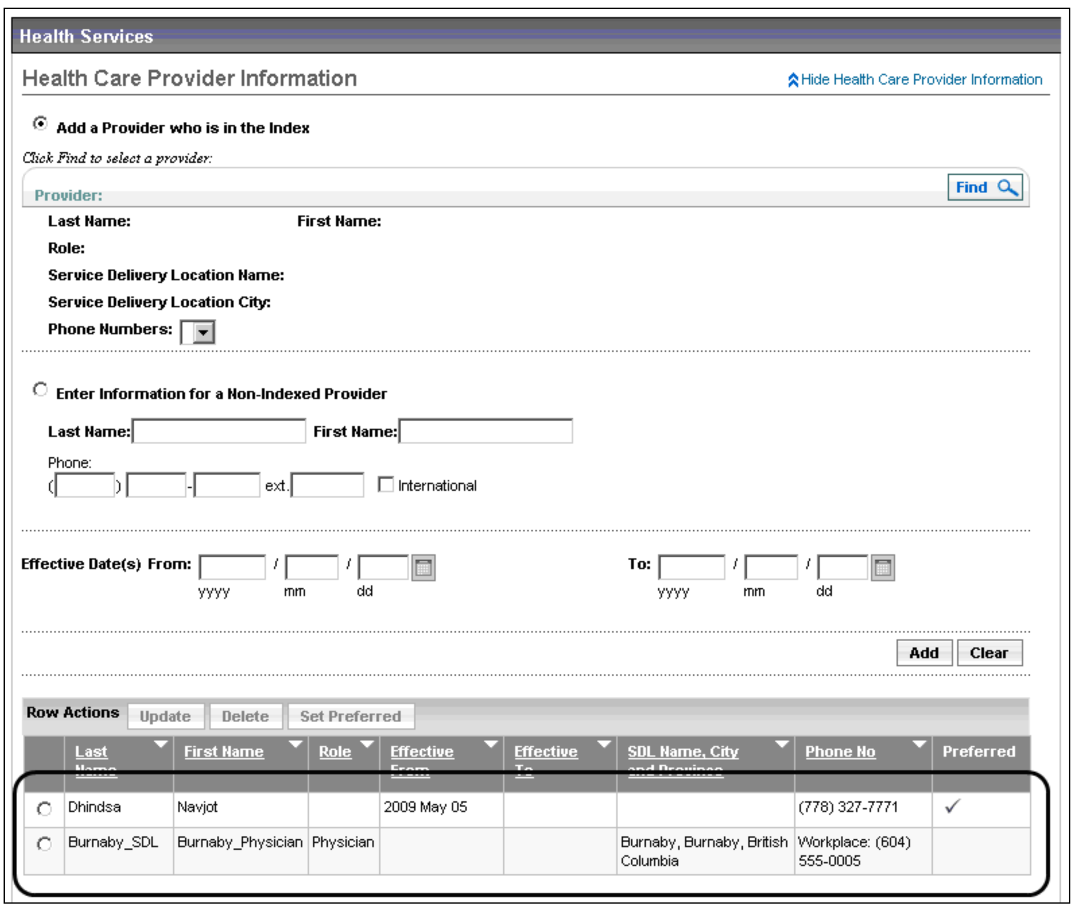
2. Click a radio button to select either a Provider who is in the Index or a Non-Indexed Provider.

For a Provider who is in the Index, click the Find button to search for and select a provider.

To add a Non-Indexed Provider, enter the Health Care Provider and Service Delivery Location information into the required fields (*), and any other fields as per business standards.

Click the Add button each time a provider is selected.

The Health Services screen is refreshed and the selected health care provider is added to the factory table.

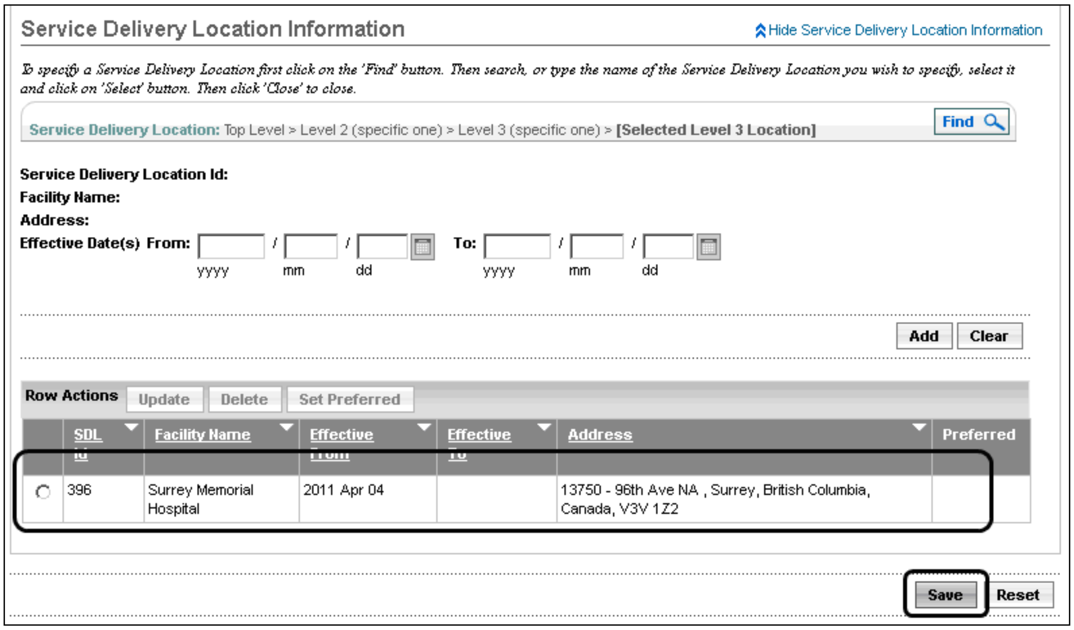


NOTE: More than one service delivery location can be added to a client record.

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

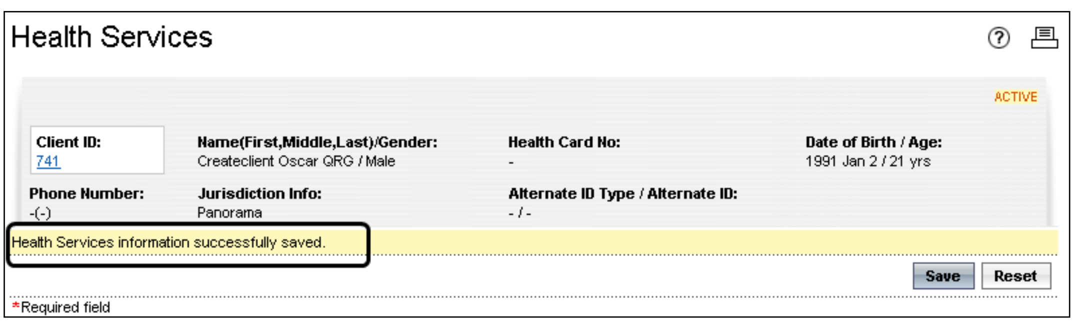
3. Click the Find button to search and select a Service Delivery Location and click the Add button each time a service delivery location is selected.

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



4. Click the Save button.

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



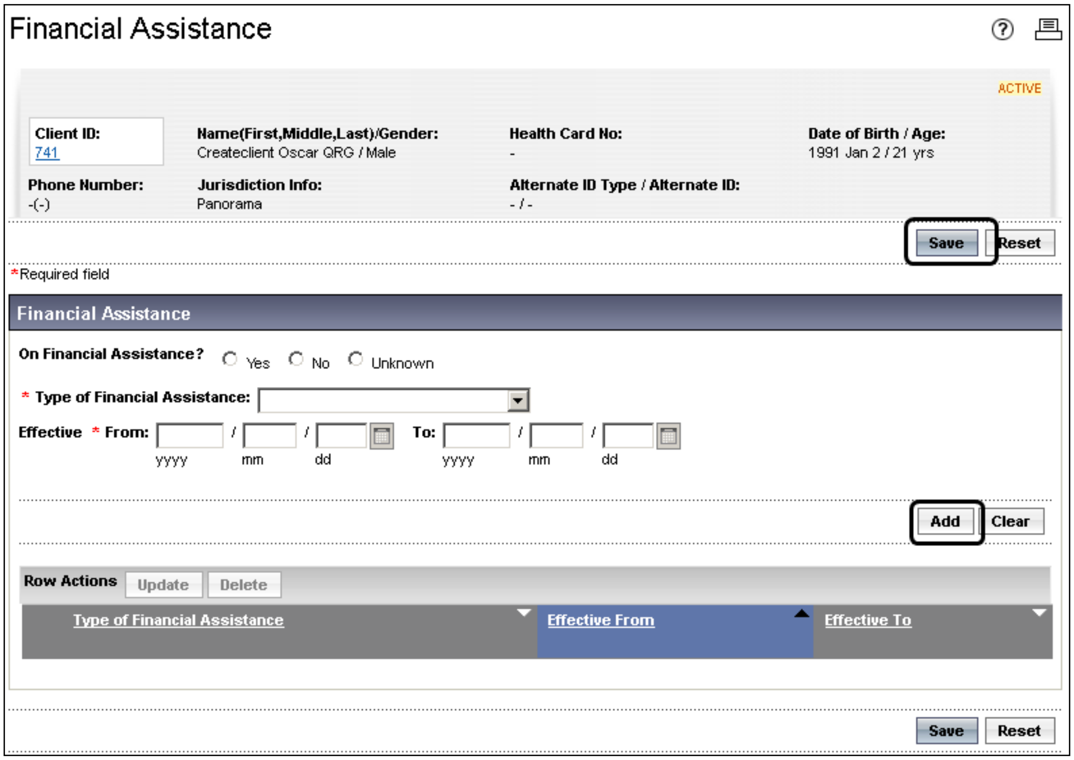
NOTE: The **Financial Assistance** section is useful for reporting against specified programs.

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.

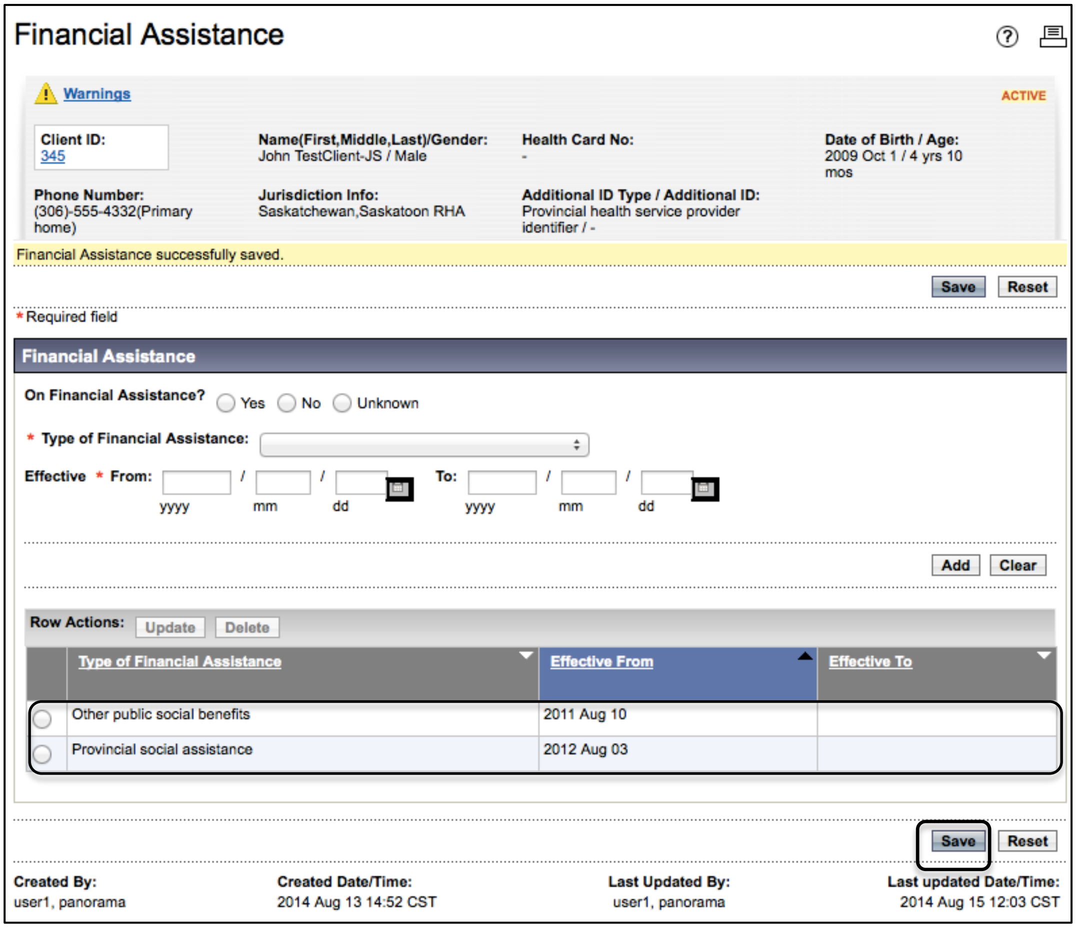


2. Enter the financial assistance information into the required fields (*), and any other fields as per business standards, and click the Add button each time a new type of assistance is selected.

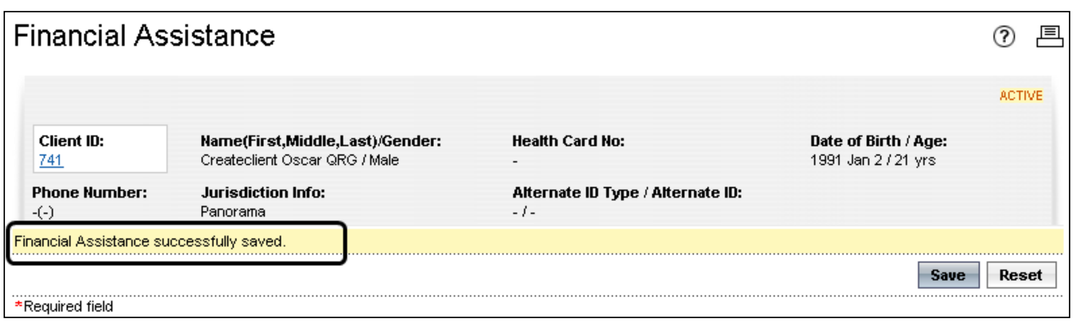
   The Financial Assistance screen is refreshed and the selected assistance information is added to the factory table.

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.



3. Click the **Save** button.
   The Financial Assistance screen is refreshed and a confirmation message is displayed.



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?

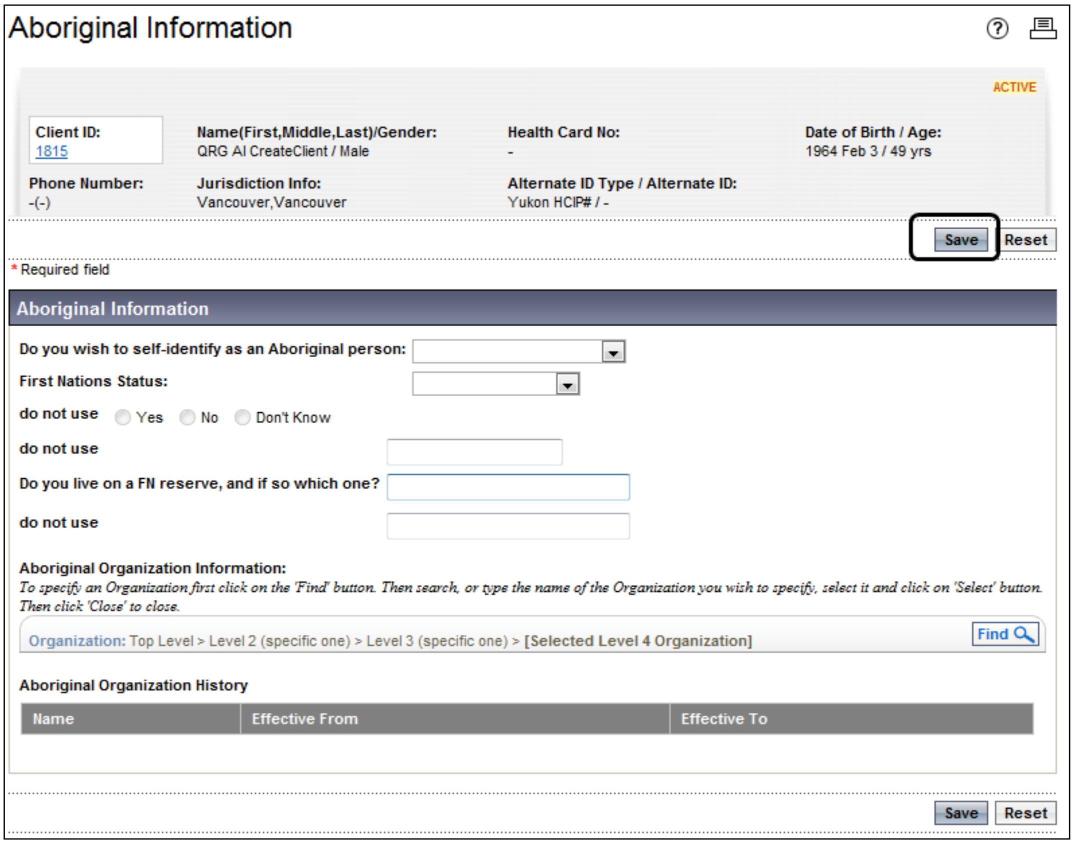
TIP: The "Do you live on a FN reserve, and if so, which one?" text box is a type-ahead format so begin with the first letter of the reserve and choose the appropriate reserve name from the list that populates.

5.0 Aboriginal Information

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

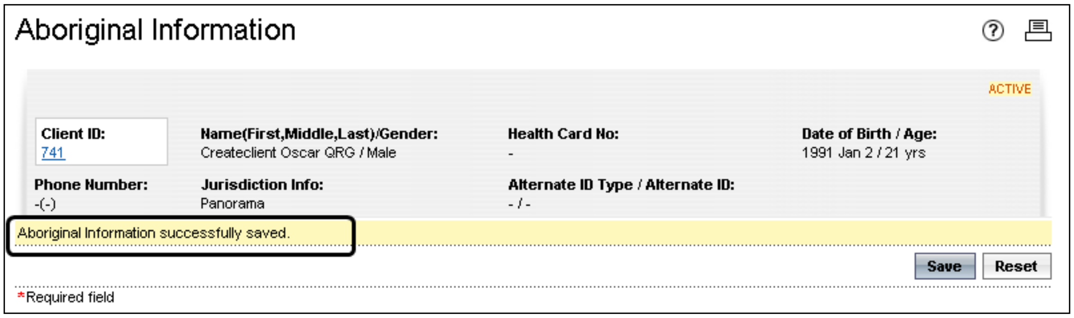
1. With a client in context, click Client Details > Aboriginal Information from the left navigation bar.

   The Aboriginal Information screen displays.



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.



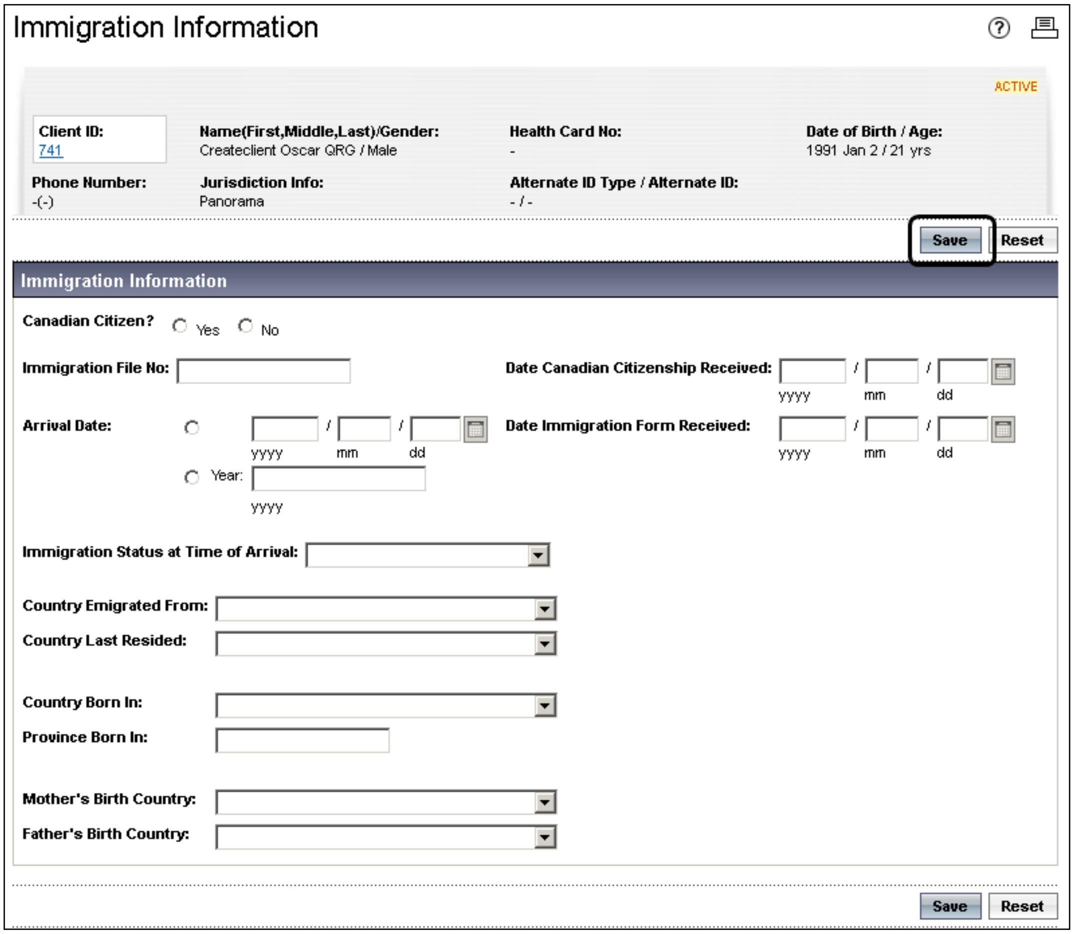
NOTE: Saskatchewan Policy states only **Country Emigrated From** and **Arrival Date – Year** will be used at this time.

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

6.0 Immigration Information

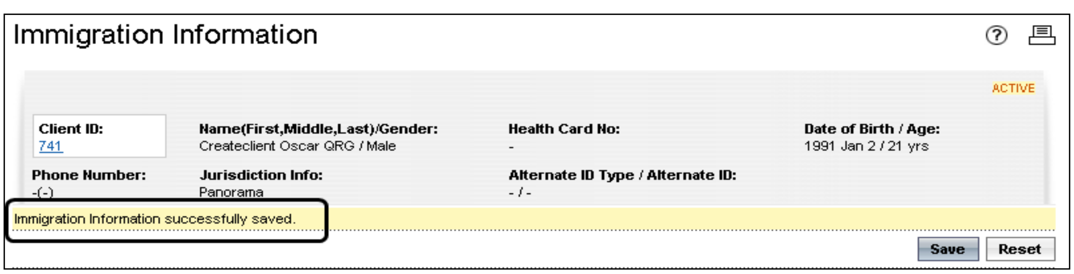
1. With a client in context, click Client Details > Immigration Information from the left navigation bar.

   The Immigration Information screen displays.



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

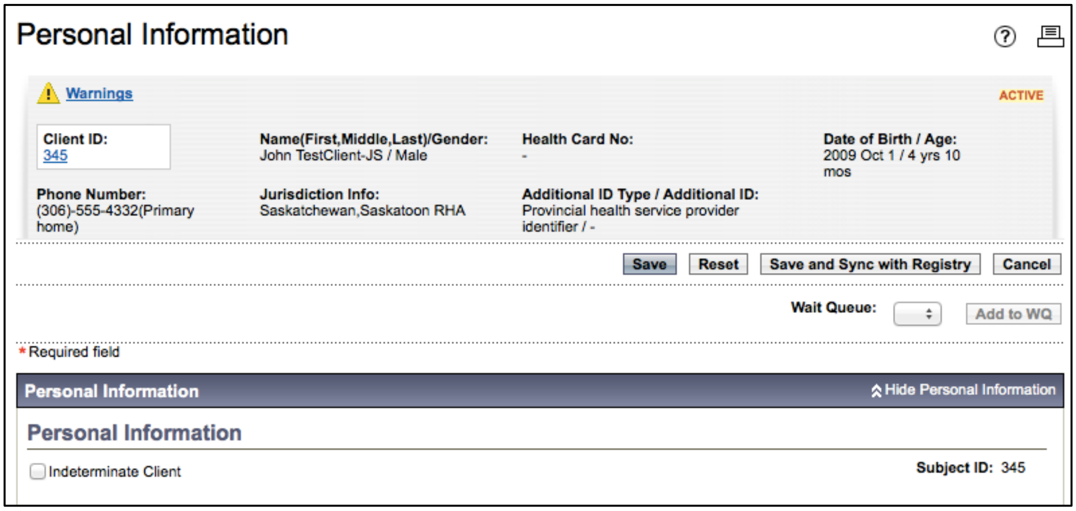
   The Immigration Information screen is refreshed and a confirmation message is displayed.



7.0 View/Update Client Demographics

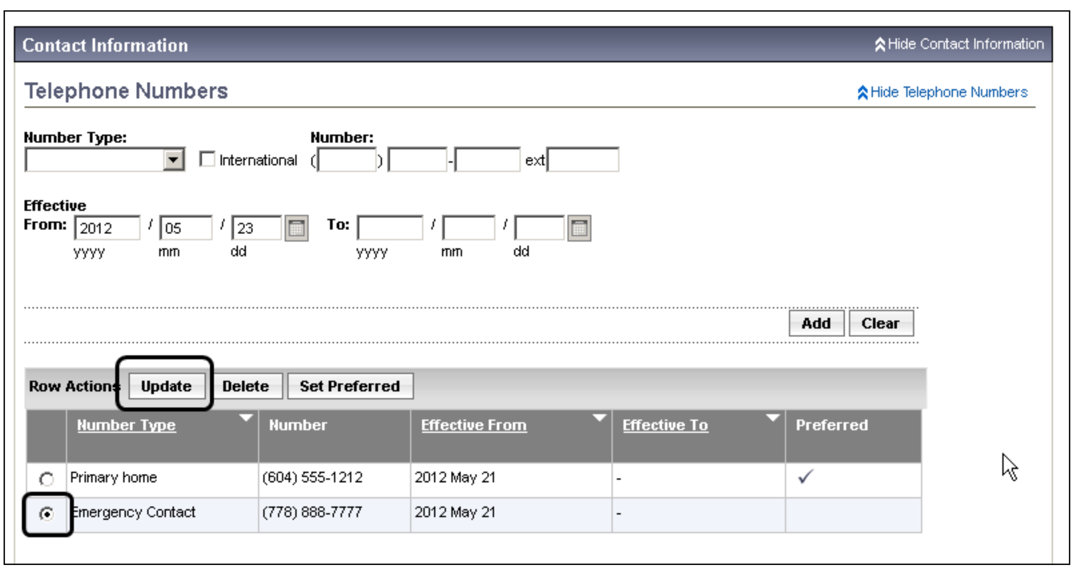
1. With a client in context, click Client Details > (Personal Information, Occupation/Language, Health Services, Financial Assistance, Aboriginal Information, or Immigration Information) from the left navigation bar.

   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).

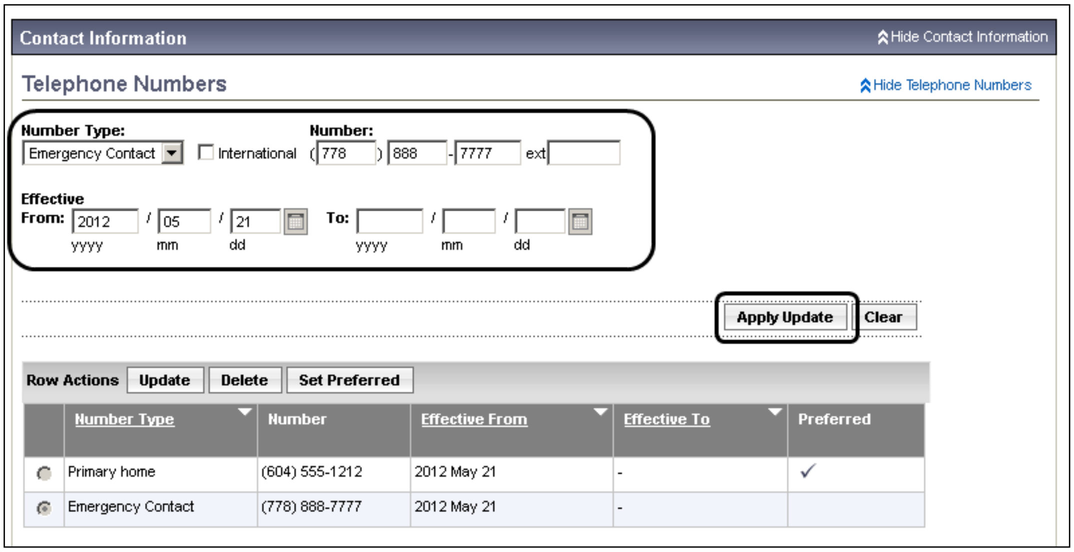


3. To update a factory table, select the radio button next to the information to be updated and click the Update button.

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.

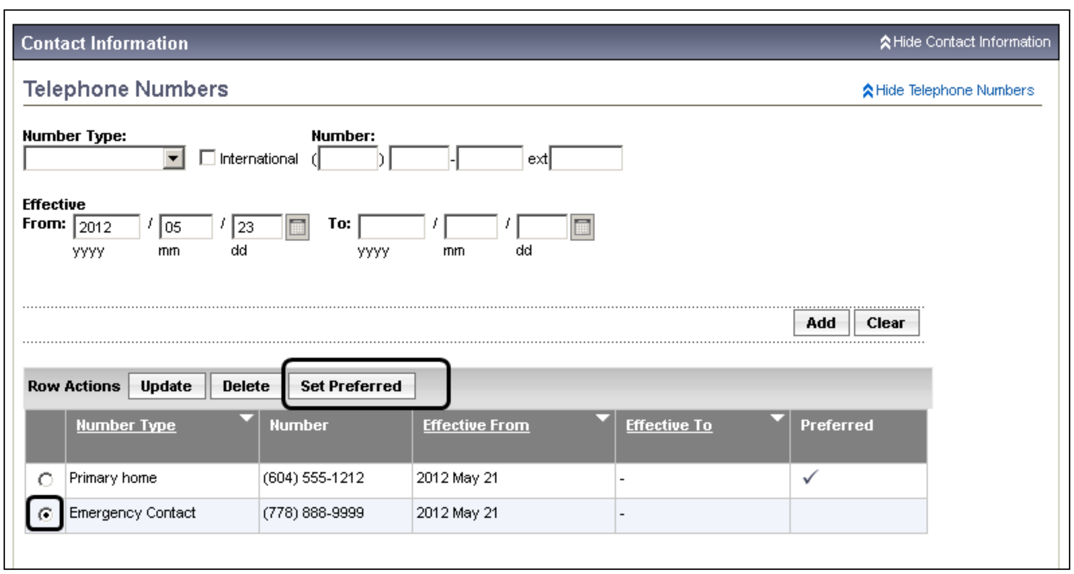
NOTE: The Update, Delete and Set Preferred buttons are inactive until a radio button is selected next to a value in the factory table.

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



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

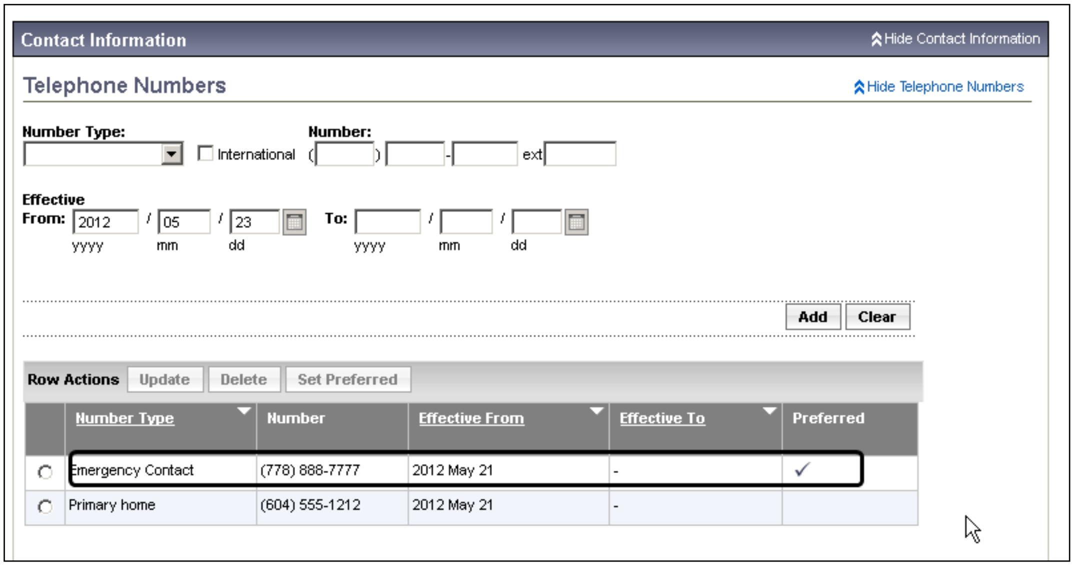
The screen is refreshed and the updated information is replaced in the factory table.



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

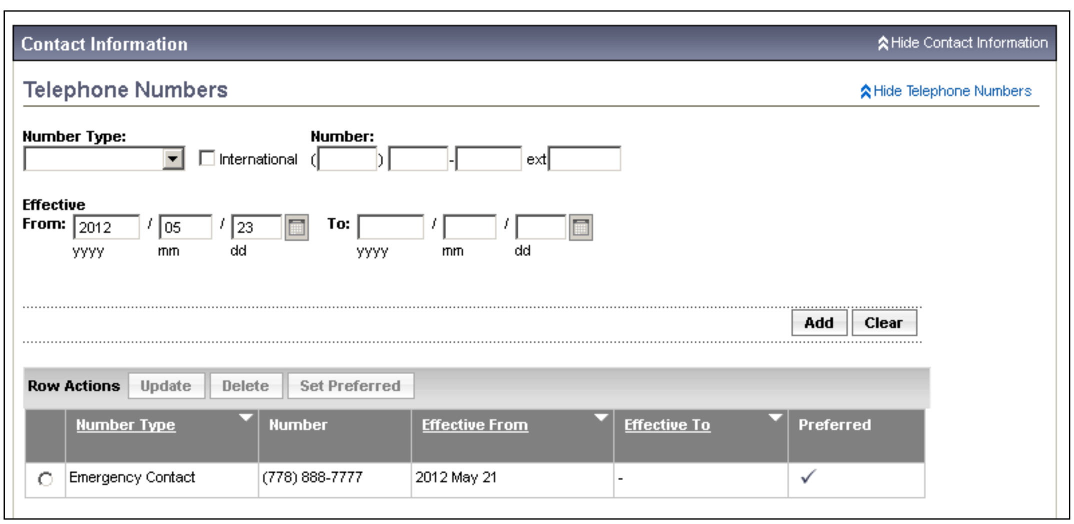
4. To set one item as preferred in a factory table, select the radio button next to the desired item and click the Set Preferred button.

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



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

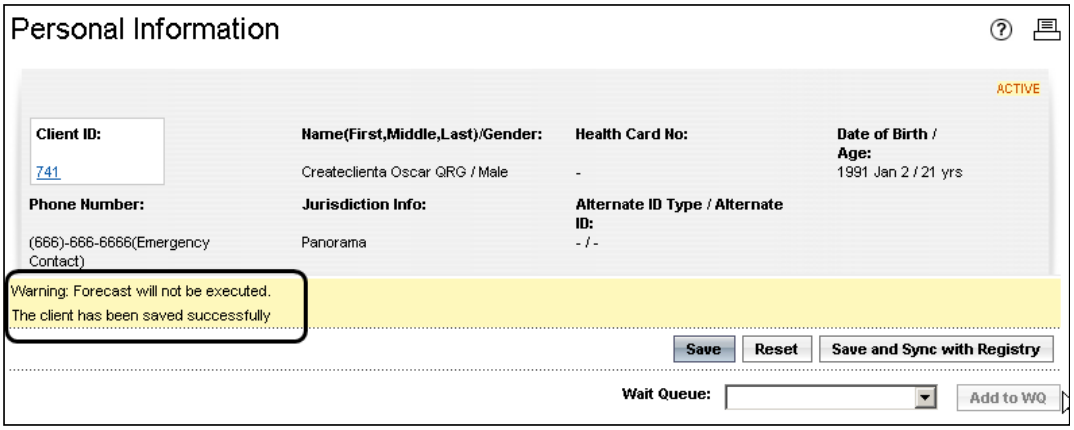
   The screen is refreshed and the selected information is removed from the factory table.



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.

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: 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:

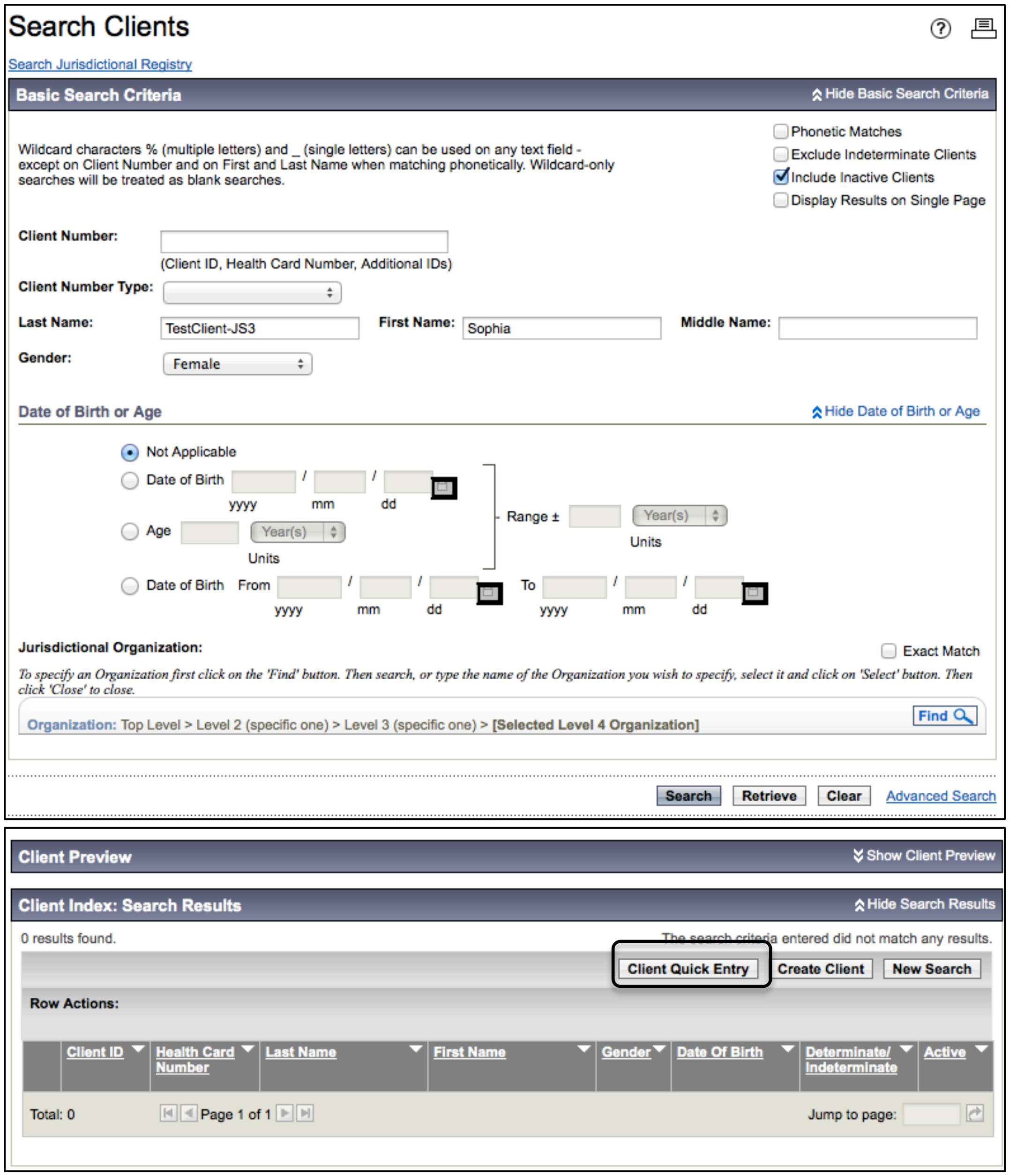
- Personal information (e.g. Name, Gender, DOB, Health Card Number)
- Contact Information (e.g. telephone number, address)
- Student Information (School name, Year, Grade, Class)
- Relationship (custodial and phone number). (Important note: If other than custodial parent, use Relationships from the left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

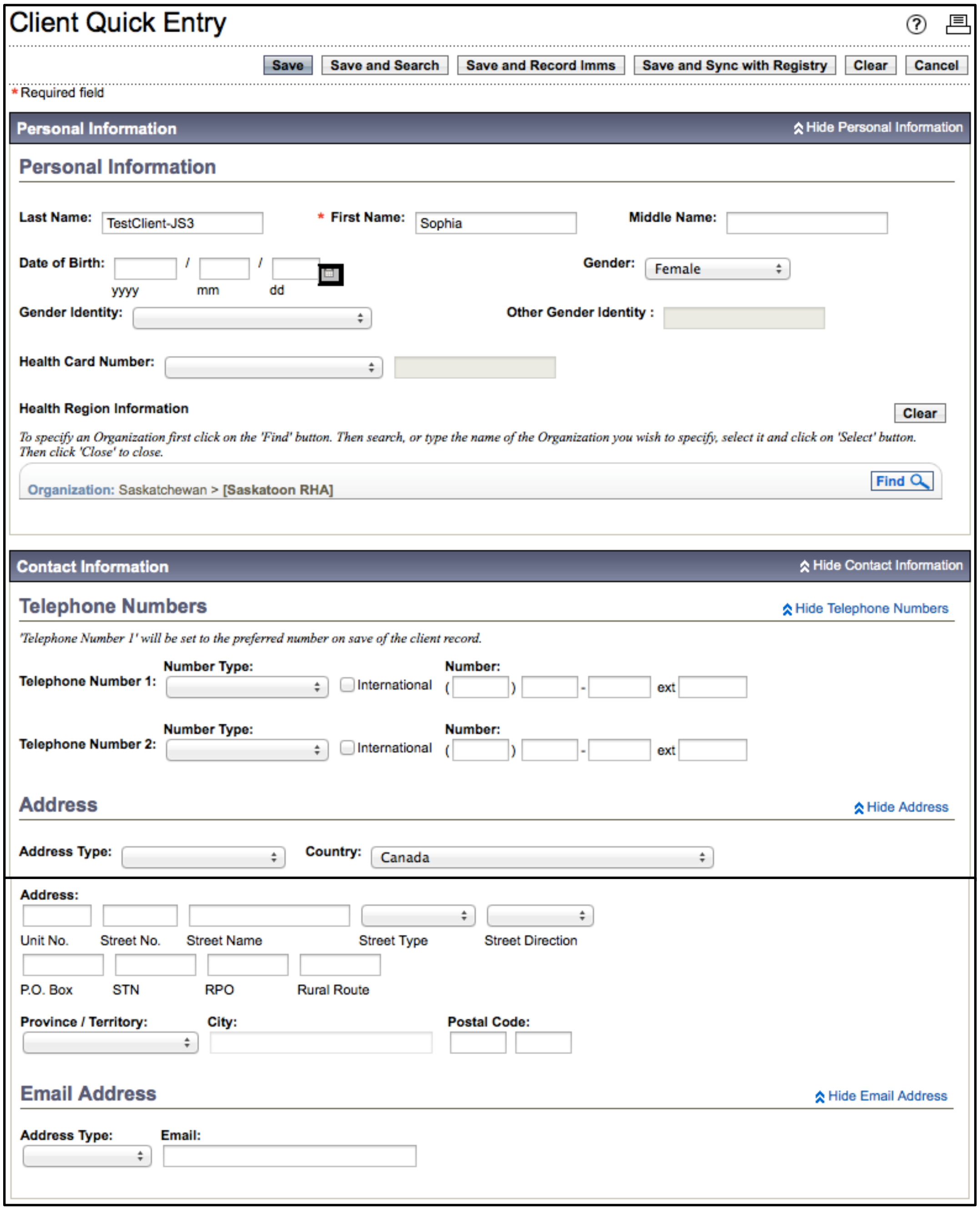
The Client Quick Entry button is now available in the Search Results section.



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.

3. 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.



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: TestClient-JS3 | * First Name: Sophia | Middle Name:

Date of Birth: yyyy / mm / dd | Gender: Female

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 — Hide 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: Canada

Address:

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

P.O. Box | STN | RPO | Rural Route

Province / Territory: | City: | Postal Code:

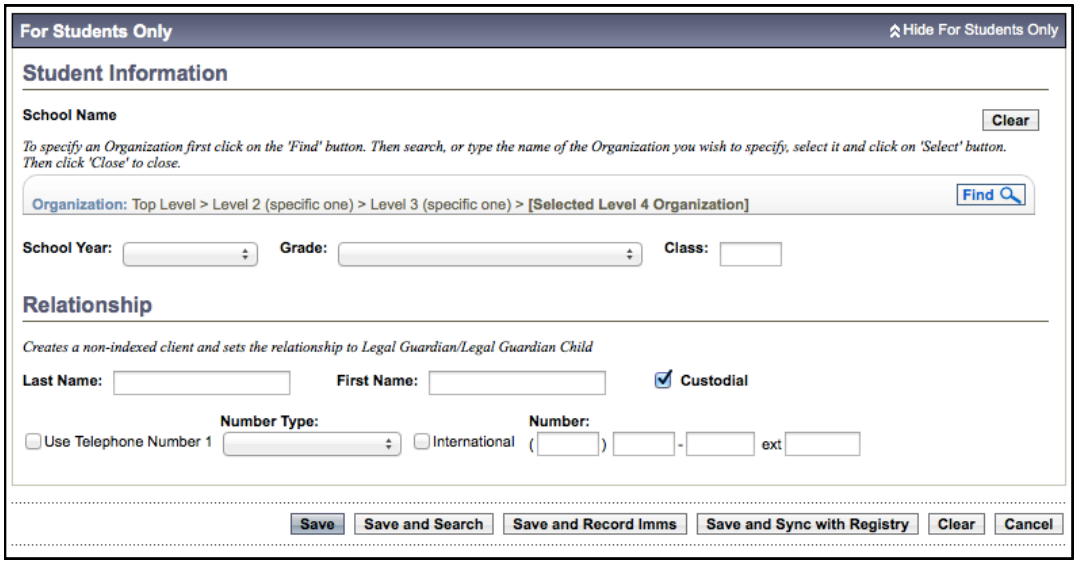
Email Address — Hide Email Address

Address Type: | Email:

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

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.`



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.

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.