

Panorama 101

USER GUIDE

- ✓ Workstation Requirements
- ✓ Logging in to Panorama
- ✓ JOrgs and SDLs
- ✓ The Panorama Dashboard
- ✓ Panorama Screens

Table of Contents

Workstation Requirements.....	4
Internet Web Browser	4
Applications Required for Panorama Reports.....	4
Logging in to Panorama	5
Jurisdictional Organizations and Service Delivery Locations in Panorama	7
The Panorama Dashboard	9
Panorama Screens	11
Screen Banner	11
Left-Hand Navigation (LHN)	11
Recent Work	14
Client or Cohort in Context	15
What does putting a client 'into context' mean?	15
The Header	16
Panorama Screen Layout	18
The Find Button.....	19
The Show and Hide Toggle Buttons	22
The Add Button	22
Contains Data Icon	24

Revision History

Author	Date	Version	Notes
Alexander Dolan	2014/08/01	0.1	Initial draft.
Tracy Forbes	2014/08/05	1.0	Updated draft.
Josie Salvail	2014/08/13	1.2	Minor updates.
Tracy Forbes	2014/08/17	1.3	Workstation requirements update.
Tracy Forbes	2015/01/20	1.4	Removed date footer.
Tracy Forbes	2015/01/28	1.5	Updates from Policies Documentation of Consent Refusal and Do Not Use Functionality from Dr. Shauna Hudson.
Jeff Moser	2017/03/28	2.0	Updates to reflect Panorama version 3.0.1.
Kyle Schembri	2017/07/28	2.1	Updates based on user feedback.

Workstation Requirements

Panorama requires the following:

Internet Web Browser

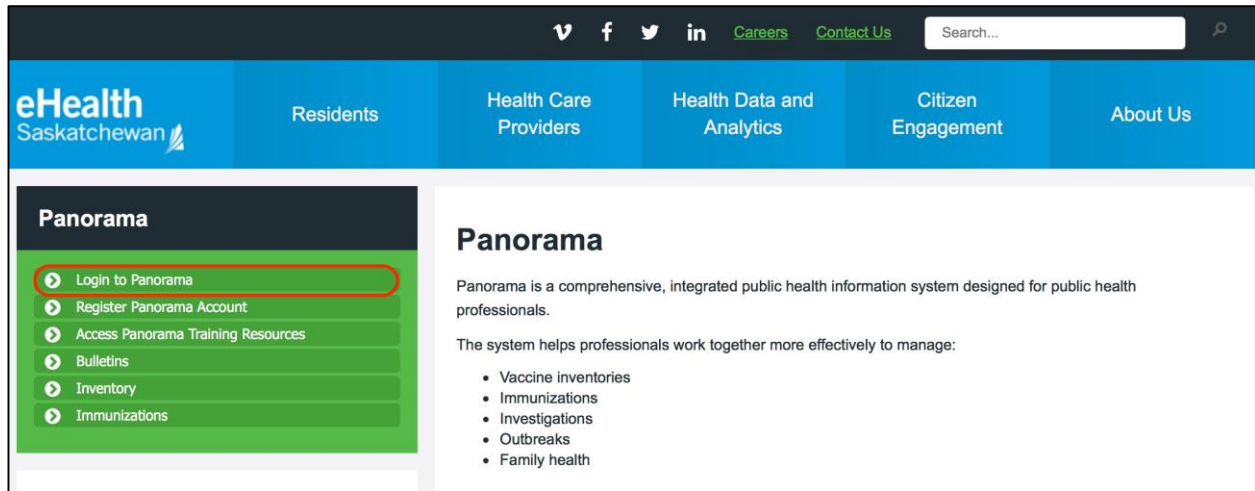
- Internet Explorer 8 (JavaScript enabled)
- Firefox 9 (JavaScript enabled)
- Web Browser JVM Plug-In

Applications Required for Panorama Reports

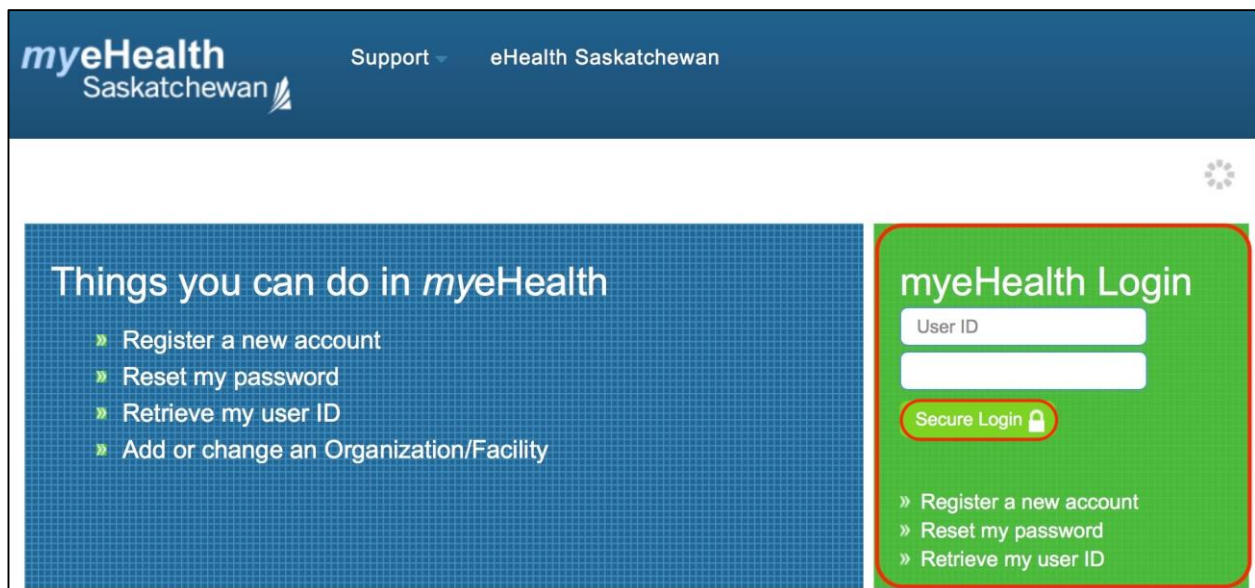
- Java 6
- Adobe Acrobat 9.3.1
- Microsoft Excel
- Business Objects

Logging in to Panorama

- 1) Visit the Panorama Gateway site:
<https://www.ehealthsask.ca/services/panorama/Pages/default.aspx>
- 2) Click **Login to Panorama**.



The myeHealth login screen displays.



- 3) In the myeHealth Login section, enter your User ID and Password and click **Secure Login**.
The Panorama Login screen will display.

- 4) Using the drop-down fields, specify the **Organization**, **Role** and **Language** for your Panorama session.

The screenshot shows the Panorama login interface. At the top left is the PANORAMA logo. The main heading is 'Login / Ouverture de session'. Below this is a form with the following elements:

- A red asterisk and the text '* Required Field / Information Requisite'.
- The instruction: 'Specify your Organization, Role and Language preference / Indiquer votre Organisation, rôle et langue préférée'.
- Three dropdown menus, each with a red asterisk and label:
 - * Organization/Organisation: Saskatchewan Ministry of Health
 - * Role/Rôle: IMMUNIZATION_PROVIDER
 - * Language/Langue: English
- A 'Continue/Continuer' button at the bottom right.

NOTE: If the role you require does not appear in the list, contact your Public Health Nursing Manager or Immunization Key User for details.

- 5) Click **Continue**.

WARNING: Do not open multiple instances of Panorama. If you do, data will not be saved correctly to the Panorama database.

Jurisdictional Organizations and Service Delivery Locations in Panorama

The **Jurisdictional Organization (JOrg)** structure represents a hierarchical view of the public health delivery system within Saskatchewan. As part of the enrolment process for Panorama, each user is assigned a JOrg.

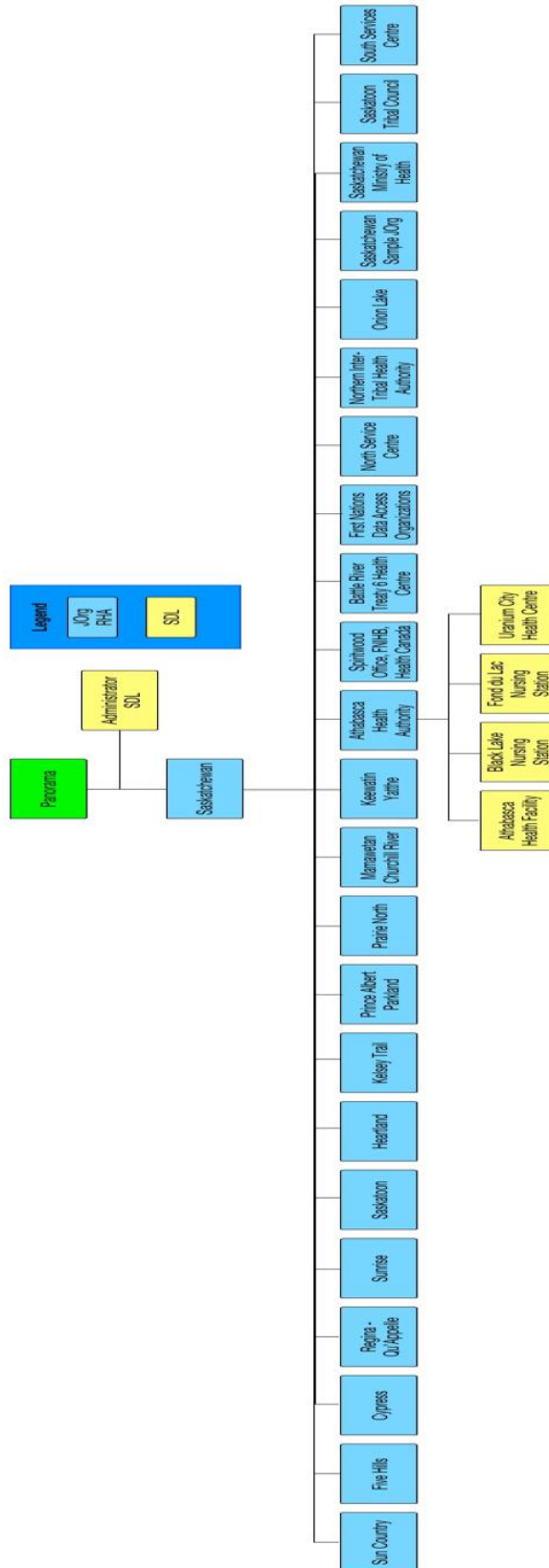
A **Service Delivery Location (SDL)** is a *physical location* where services are delivered; an SDL will therefore have an address, which may include other contact details. An SDL is selected when a user logs in as the place where the user is currently working.

Each SDL is associated with one and only one JOrg. For example, Athabasca Health Authority may have four SDLs: Athabasca Health Facility; Black Lake Nursing Station; Fond du Lac Nursing Station; and Uranium City Health Centre. These locations are where a Provider (doctor, nurse, etc.) delivers a service to a client. It is important that a user chooses their correct SDL when logging in to Panorama, as SDLs are used with Encounter records to indicate where a Client Encounter occurred, and for reporting purposes.

An **Encounter** is a point of service for any type of subject that is defined by date, time, location and the type of activity (e.g., immunization, disease screening, or lab results).

An example of the hierarchy JOrg structure in Panorama is included on the next page.

JOrg Diagram for eHS Panorama 101



The Panorama Dashboard

The screenshot shows the Panorama Dashboard interface. At the top left is the PANORAMA logo and 'Training...' text. The top right shows 'User Training: superuser for Saskatchewan' and 'Threshold Notifications: 0', 'Jurisdiction Notifications: 0'. A navigation bar contains 'WORK MGMT', 'INVESTIGATIONS', 'OUTBREAKS', 'IMMUNIZATION', 'FAMILY HEALTH', 'INVENTORY', and 'ADMIN'. Below this is a main content area with a 'Specify your Service Delivery Location (SDL)' section containing a dropdown menu set to 'Provincial Vaccine Depot' and a 'Select' button. To the right is a calendar for March 2017. Below the calendar is an 'External Reference Links' section with links for 'Saskatchewan Public Health Offices', 'Case Management', 'Immunization', and 'Outbreaks'. A 'Need Help?' link is also present. The footer contains copyright information and a build number: 'Build 3.0.1.2.OP6.20170307-1353'.

- 1) Modules available to you (as determined by your user roles and permissions) run along the top of the screen on the **Module Bar**. Click the name of the module to navigate away.
- 2) **Login Details** are shown at the top-right hand side of the screen.
- 3) The assigned **Service Delivery Location (SDL)** – the location in which you will be working – is shown on this screen. The SDL can be changed by selecting from the drop-down list. If you do change the SDL, be sure to log off and log back in again. The SDLs to which you have access are added to the login details. If, for example, you work at a single SDL two days of the week and you work at another SDL for the remaining three days, you will have access to these SDLs. If you need access to more areas, contact your local Immunization Key User to have them added.

- 4) From this screen, you can click on the relevant Quick Links to access Personal Workloads Reporting and Document Management.
- 5) External Reference Links will point you to Saskatchewan Panorama training materials and other pertinent links.
- 6) Click Logout to end your Panorama session at any time.

Panorama Screens

Screen Banner

The upper area, or banner, of Panorama screens remains the same on every screen as you navigate throughout the system.



The module you are working in is indicated in upper-left corner below the Panorama image (1).

You can also click on the images beside the current user name (2) to access your user profile, immunization defaults, notifications, perform a network speed test, and logout.

TIP: You can change modules you are working in by clicking the current module name in the upper left corner of the screen. Then click on the module you want to navigate to.

The standard banner for other modules shown below. The module you are working on is highlighted in blue and there are different options to view notifications, get help, change account settings (user profile, immunization defaults, network speed test), and log out.

NOTE: The top image displays the banner for the Immunization module. The banner for all other modules is slightly different (see below).



Left-Hand Navigation (LHN)

Below is the Left-Hand Navigation (LHN) for the Immunization module.

Training Instance 3.0 Training, User M Dr

Update Client Immunization Profile [Launch Report] [Add to WQ] [Save] [Reset] [log]

Client ID: 5671 Name(Last, First Middle)/Gender: ADESINA, WILMA / Female Health Card No: 866678620 Date of Birth / Age: 2010 Jul 02 / 6 years 8 months

Phone Number: (306)-555-5555(Primary home) Jurisdiction Info: Prince Albert Grand Council (PAGC), Red Earth Additional ID Type / Additional ID: Provincial health service provider identifier / -

Immunization Details

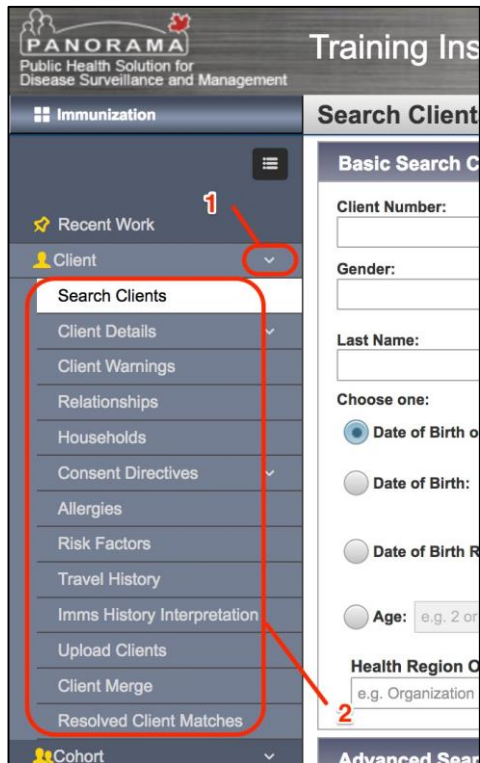
Immunization History - Summary Grid

Agent ^	Date Administered	Date Administered	Date Administered	Date Administered	Date Administered	Date Administered
BCG	2010 Jul 04 (R)					
DTaP-IPV	2014 Jul 16 (R)					
DTaP-IPV-Hib	2010 Nov 03 (R)	2011 Jan 26 (R)	2011 Mar 30 (R)	2012 Mar 12 (R)		
HA	2011 Jul 19 (R)	2012 Mar 12 (R)				
Inf	2013 Nov 07 (R)					
Men-C-unspecified	2011 Jul 19 (R)					
MMR-Var	2011 Jul 19 (R)	2012 Mar 12 (R)				
Pneu-C-13	2010 Nov 03 (R)	2011 Jan 26 (R)	2011 Mar 30 (R)	2012 Mar 12 (R)		

The LHN (1) is used to navigate within areas of the system to which you have access.

You can toggle the view (from icons only to icons and descriptions) of the LHN by pressing the **Menu Resize** icon (2).

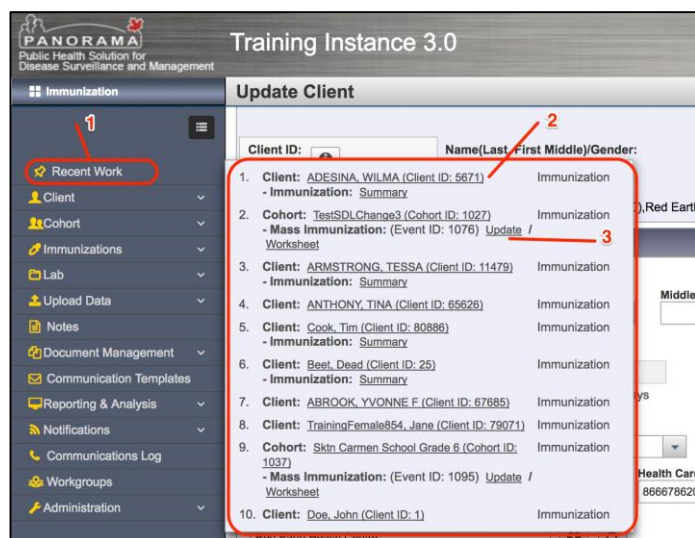
NOTE: The above image displays the LHN for the Immunization module. The LHN for other modules appears textually, but with the same functionality.



Arrows (1) pointing downwards on either of the main or sub-headings indicates further selections are available.

The main function headings are displayed in white text on a dark grey background (2). The current screen that you are in is displayed in black text with a white background.

Recent Work



You may well be interacting with the same client over several visits. Use the **Recent Work** link (1) at the top of the LHN to quickly access your most recent work items and put your client in context without having to search for them.

Once clicked, **Recent Work** expands to show a list of clients or cohorts you have set 'in context' or worked with. This list is tied to your account and will remain current between logins.

NOTE: Recent Work displays only the ten most recent client or cohorts a user encountered.

Click on the **Client Name Hyperlink** (2); the View Client screen displays and your client is in context. You can now select an item from the LHN.

NOTE: When you choose a recent work item from the **Recent Work** pop-up, it becomes the current client/cohort/work item in context and no longer appears in the pop-up.

Clicking on a **Work Item Hyperlink** (3) will navigate you to the associated screen, and both the work item and client will be put into context.

NOTE: A client/cohort/work item must have been 'in context' before it will show in the **Recent Work** pop-up – viewing a screen does not put a work item into the pop-up.

You can close the pop-up at any time by clicking anywhere outside the pop-up window.

Client or Cohort in Context

To carry out most functions in the clinical modules of Panorama, you need to put a client or cohort 'in context' first.

What does putting a client 'into context' mean?

Putting a client or cohort 'into context' is like taking out their physical folder of notes and having it available while you deal with their case. Anything that is done (creating an investigation, encounter, reviewing history, etc.) while a client or cohort is in context is associated to that client or cohort. Having a client or cohort in context is the way Panorama knows whom you are working on at that time.

To put a client or cohort in context, use the Client Search or Cohort Search screens and select the client or cohort you want.

The screenshot shows the 'Search Clients' interface in Panorama. The 'Basic Search Criteria' section includes fields for Client Number, Gender, Last Name, First Name, Middle Name, and Date of Birth (with options for Age or Date of Birth Range). The 'Advanced Search Criteria' section is currently empty. The 'Search Results' table displays one client record:

Preview	Update	Set in Context	Create Cohort	Client Imms Profile	Client ID	Health Card Number	Last Name	First Name	Gender	Date of Birth	Health Region	Active
<input checked="" type="checkbox"/>					67685	MB367911	ABROOK	YVONNE F	Female	2010 Jul 19	Prince Albert Parkland RHA	Active

For example, in the client **Search Results**, select the client by clicking on the box for that client, then click **Set in Context**.

The Header

The header is the information in the grey box(es) found at the top of the Panorama screens. It contains basic identification information about a client or cohort, and/or work item in context. It will display as you navigate through the system, reminding you which client or cohort is being worked on, and identifying when you have selected a different context.

In the Immunization module, the header will display as shown below.

Update Client Immunization Profile			
Launch Report		Add to WQ	Save
Reset		?	log
			Active
Client ID: 5671	Name(Last, First Middle)/Gender: ADESINA, WILMA / Female	Health Card No: 866678620	Date of Birth / Age: 2010 Jul 02 / 6 years 8 months
Phone Number: (306)-555-6666(Workplace)	Jurisdiction Info: Prince Albert Grand Council (PAGC),Red Earth	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Click on the **Client Information Icon** to get more client information. A **Preview Client** window will pop-up.

Preview Client	
Client ID: 5671	
Client Name: ADESINA, WILMA	
Preferred Alternate Name:	
Health Card Number: 866678620 - Saskatchewan, Canada Personal Health Number	
Gender: Female	
Gender Identity:	
Date of Birth: 2010 Jul 02	
Age: 7 years 1 months	
Preferred Address: 240 33rd Street West, Saskatoon, Saskatchewan, S7L6S9, Canada	
Preferred Telephone Number: mobile contact: 306-555-1211	
Health Region: Saskatoon RHA	
Additional ID:	
SIMS Internal ID	771616

To exit the **Preview Client** pop-up window, click the 'x' in the upper right hand corner of the pop-up window.

The other modules have a different look and different functionality, as show below.

Investigation Summary ACTIVE

Client ID: 5671	Name(Last, First Middle)/Gender: ADESINA, WILMA / Female	Health Card No: 866678620	Date of Birth / Age: 2010 Jul 02 / 6 years 8 months
Phone Number: (306)-555-5555(Primary home)	Jurisdiction Info: Prince Albert Grand Council (PAGC), Red Earth	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Investigation ID: 6	Status: OPEN	Disposition: Became a case	Investigator: -
Disease: Measles	PHAC Date/Type: 2017 Mar 22 / Date Reported	Etiologic Agent: -	Authority/Classification: Manual / Case - Person Under Investigation / 2017 Mar 22

Reason for deletion of investigation

The information about a client or cohort (1), and/or work item (2) is available in the other non-immunization modules. Client on the hyperlinks (3) will navigate you to another screen associated with the client in context – whether associated summary information or detail information screen. For example, clicking the number hyperlink underneath the Client ID (5.3) will quickly take you to the **View Client** screen for this client.

Panorama Screen Layout

Update Client 1

Client ID: 5671 Name(Last, First Middle)/Gender: ADESINA, WILMA / Female Health Card No: 866678620 Date of Birth / Age: 2010 Jul 02 / 6 years 8 months

Phone Number: (306)-555-5555(Primary home) Jurisdiction Info: Prince Albert Grand Council (PAGC),Red Earth Additional ID Type / Additional ID: Provincial health service provider identifier / -

Personal Information

Indeterminate

Last Name: ADESINA First Name: WILMA Middle Name: Suffix:

Date of Birth: 2010/07/02 Estimated Age: 6 years 8 months 0 days

Gender: Female Gender Identity: Other Identity:

Health Card Province: Alberta Health Card Health Card Number: 866678620

Health Region Organization: Red Earth Health Centre

Preferred Communication Method:

Inactivate Inactive Reason: Date of Death:

Ethnicity Information 4

Birth Information

The **Name of the Screen** (1) displays at the top of each screen.

The **Header** (2) displays underneath the screen name.

The screen **Sections** (3) are divided by a thick, grey bar, with the name of the section labeled within the bar.

Screen **Sub-Sections** (4) are divided by a thin grey line.

TIP: You can use keyboard keys to quickly jump to different parts of the screen. **Home/End** key jumps to the top/bottom of the page. **PgUp/PgDn** scrolls up/down.

Required Fields (5) are marked with a red asterisk. These are system mandatory fields; clinical business mandatory fields (minimum data entry standards Provincial or HA) are defined separately.

The Find Button

In certain Immunization module fields, the Panorama application will **auto-search** as you type in characters into the field (1). Any results from the auto-search will be populated in a pop-up list. Select the record you want to use to populate the field. In the example below for the Provider field, you can see search results being displayed as characters were entered.

To do an advanced search (on certain fields), click the **Advanced Search Button** (2) to open an advanced search window.

The Advanced Search window will display as shown below. Fill in the search fields (1) as necessary and click the **Search** (2) button.

NOTE: Use the '%' character as a wild card in your searches.

Any results are displayed in a table below the **Search** button (3). Click on the field for the record you want to select.

Provider Advanced Search

Include Inactive

Last Name: First Name: Role:

SDL Name: Identifier Type: Identifier Value:

Province / Territory: City / Town:

1

2 Search Reset

Last Name	First Name	Role	Status	Identifier	Telephone	Service Delivery Location
Provider	Athabasca	Public Health Nurse	Active			
Provider	Cypress	Public Health Nurse	Active			
Provider	Five Hills	Public Health Nurse	Active			
Provider	Heartland	Public Health Nurse	Active			
Provider	Keewatin	Public Health Nurse	Active			
Provider	Kelsey Trail	Public Health Nurse	Active			
Provider	Mamawetan	Public Health Nurse	Active			
Provider	MOH	Public Health Nurse	Active			
Provider	Nitha	Public Health Nurse	Active			
Provider	PA Parkland	Public Health Nurse	Active			

3

Total: 15

The find functionality in the non-immunization screens is different. For some fields, click the Find button as pictured below. A drop-down menu will expand to allow you to search for a value to populate the field with.

*** Responsible Organization:** Saskatchewan

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] **Find**

*** Location:** Saskatchewan Provincial Vaccine Depot

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: Saskatchewan > Saskatchewan Ministry of Health > [Provincial Vaccine Depot] **Find**

Start typing part of value you are searching for and a **drop-down** list will display for you to choose from (1). Click on the value that you need and then click the **Select** button (2).

Organization: [Saskatchewan] Find

Close X

Type Search

*Start typing the name of the Organization. Matches will begin to appear below.
Select the match with the keyboard or mouse.*



Organization Name: Show Info

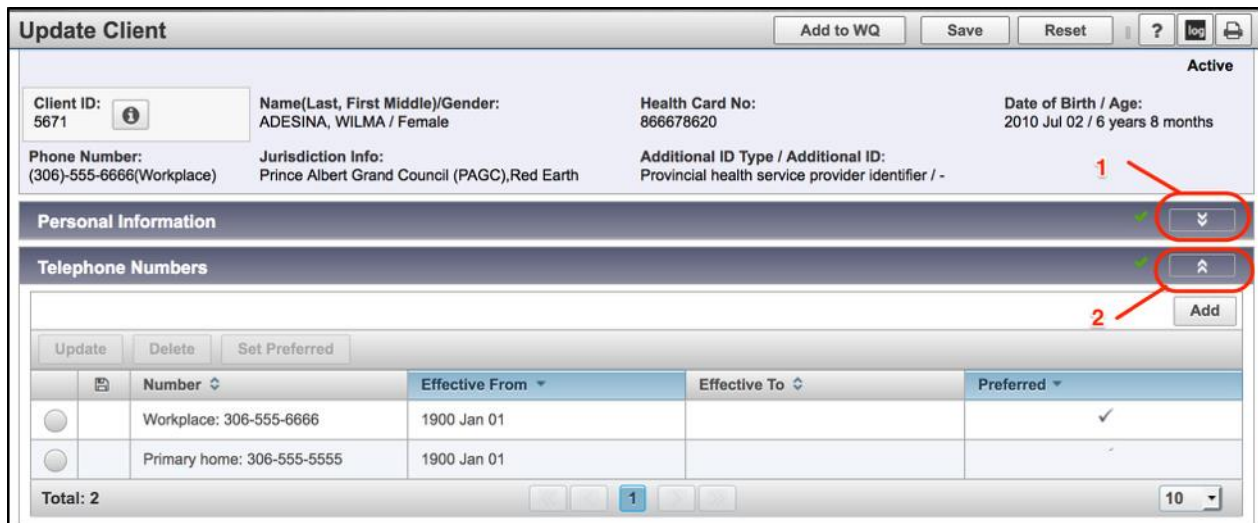
- Radville Public Health, Radville, Saskatchewan
- Raymore School, Raymore, Saskatchewan

1 2 Select

* Location: Saskatchewan Provincial Vaccine Depot

The Show and Hide Toggle Buttons


The **Show**  (1) and **Hide**  (2) toggle selection shows and hides the content of main sections and sub-sections.




Update Client [Add to WQ] [Save] [Reset] [?] [log] [print] Active

Client ID: 5671 Name(Last, First Middle)/Gender: ADESINA, WILMA / Female Health Card No: 866678620 Date of Birth / Age: 2010 Jul 02 / 6 years 8 months

Phone Number: (306)-555-6666(Workplace) Jurisdiction Info: Prince Albert Grand Council (PAGC),Red Earth Additional ID Type / Additional ID: Provincial health service provider identifier / -

Personal Information  (1)

Telephone Numbers  (2) [Add]

[Update] [Delete] [Set Preferred]

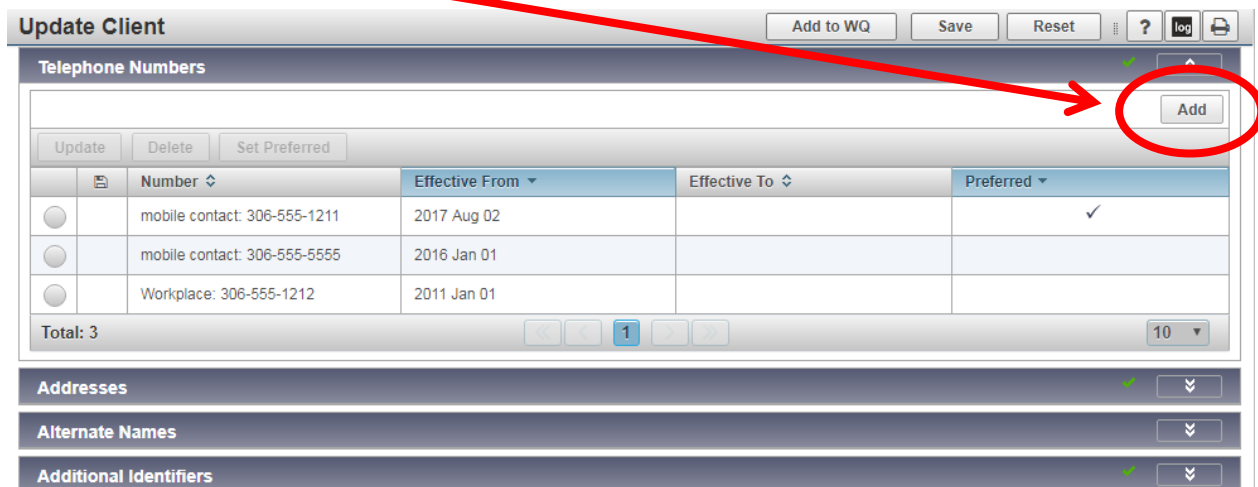
	Number	Effective From	Effective To	Preferred
<input type="radio"/>	Workplace: 306-555-6666	1900 Jan 01		<input checked="" type="checkbox"/>
<input type="radio"/>	Primary home: 306-555-5555	1900 Jan 01		<input type="checkbox"/>

Total: 2 [1] [10]


The Add Button

The Add button appears throughout the Panorama system, often at the side of Comments boxes. You must click Add as the first step to creating any additional information, and then click Save to save the changes to the database.

For example, when you are adding a new telephone number in the **Update Client** screen, click the **Add** button.




Update Client [Add to WQ] [Save] [Reset] [?] [log] [print]


Telephone Numbers 


[Update] [Delete] [Set Preferred]

	Number	Effective From	Effective To	Preferred
<input type="radio"/>	mobile contact: 306-555-1211	2017 Aug 02		<input checked="" type="checkbox"/>
<input type="radio"/>	mobile contact: 306-555-5555	2016 Jan 01		<input type="checkbox"/>
<input type="radio"/>	Workplace: 306-555-1212	2011 Jan 01		<input type="checkbox"/>

Total: 3 [1] [10]

Addresses 

Alternate Names 

Additional Identifiers 

Enter the information to add a new record and click the **Apply** button (2).

The screenshot shows the 'Update Client' interface. At the top right, there are buttons for 'Add to WQ', 'Save', and 'Reset'. Below these are fields for 'Inactive Reason' and 'Date of Death'. The 'Ethnicity Information' and 'Birth Information' sections are visible. The 'Telephone Numbers' section is expanded, showing an 'Add Telephone Number' form. This form includes fields for 'Country' (Canada), 'Number' (306-555-1234), 'Usage' (workplace), and 'Effective From' (2017/03/28). The 'Apply' button is circled in red and labeled with a red '2' and an arrow. Other buttons in this section include 'Reset' and 'Cancel'. An 'Add' button is located at the bottom right of the form.

NOTE: To cancel out of adding the data for a section. Click the **Cancel** button. To clear the section and re-enter the information, click the **Reset** button.

TIP: Do not use the Back and Forward buttons on your browser to navigate between screens. This may result in an error message, or simply nothing will happen. Please use the Panorama buttons as links, like the **Cancel** button.

The screen will return to the list of **Telephone Numbers**. The newly added record will be visible. The add record symbol in the list (3) indicates that the record has not been permanently saved to the database. Click the **Save** button (4) at the top of the main screen title page to commit the record to the database.

Update Client Add to WQ Save Reset ? log

Inactivate Inactive Reason: Date of Death:

Ethnicity Information

Birth Information

Telephone Numbers

Update Delete Set Preferred Add

	Number	Effective From	Effective To	Preferred
<input type="radio"/>	workplace: 306-555-1234	2017 Mar 28		
<input type="radio"/>	Workplace: 306-555-6666	1900 Jan 01		<input checked="" type="checkbox"/>
<input type="radio"/>	Primary home: 306-555-5555	1900 Jan 01		

Total: 3

Contains Data Icon

The **Contains Data** icon (1) appears to let you know there is content within a screen section that has been collapsed.

As per the example below, click **Show** (2) to show the hidden content.

The content displays, and the **Hide** (3) selection becomes available to hide the content again should you decide to do so.

Update Client Immunization Profile Launch Report Add to WQ Save Reset ? log

<input type="radio"/>	Pneu-C-13	2011 Jan 26	6m 24d	Valid		Left Leg	0.5 mL
<input type="radio"/>	Pneu-C-13	2011 Mar 30	8m 28d	Valid		Left Leg	0.5 mL
<input type="radio"/>	Pneu-C-13	2012 Mar 12	1y 8m	Valid		Left arm	0.5 mL

Special Considerations AEFI Allergies Deferrals Risk Factors TB Skin Test IGRA Tests Mass Imms Event View Consent IHI

Antigen Count

Immunization Forecast by Agent/Antigen

Last Forecast Ran On: 2017 Mar 18
Forecast Status calculated as of: 2017 Mar 28