

## Basic Panorama Steps for Demographic Updates

The Client's personal information is updated in Schedule View each time a client makes an appointment in Public Health.

When files are being pulled in preparation for an appointment, support staff will;

- Update the personal information in Panorama using the info in Schedule view.
- Adult clients may also require a Panorama record be created (either new or from jurisdictional registry) and back data entry *if their record was never entered into SIMS.*

To begin; log into Panorama, select role, set user defaults (if needed)

a) [Search](#) client and set into context.

b) c/o [Client details](#) then [Personal information](#)

- \* Enter a 'province' for the HSN and save, if blank. HSN will not be searchable next time if not associated with a province.

- Update personal details (phone, address...) (*eventually school info as well*)

- Enter [Immigration Information](#) as needed

c) Update [Relationships](#) ( i.e. foster mom, father, grandparent, etc)

**PANORAMA** Training Instance  
Public Health Solution for Disease Surveillance and Management

WORK MGMNT IMMUNIZATION

**Recent Work**

- Client
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  - Upload Clients
  - Client Merge
  - Resolved Client Matches
- Cohort
- Immunizations

**Personal Information**

**Warnings**

Client ID: 69576 Name(First,Middle,L): Grass Green / Female

Phone Number: -(-) Jurisdiction Info: Saskatchewan, Five Hi

\* Required field

**Personal Information**

Indeterminate Client

Last Name: Green

Middle Name: