

# Getting Started in Panorama

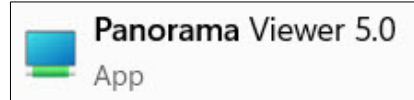
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This guide is an orientation to Panorama. Panorama is an eHealth system that enables authorized public health care providers to document and securely store all public health services and care programs in BC and Yukon. These programs include immunization, communicable disease and outbreak management, and immunization inventory/supply management. In BC, Panorama also stores family health information such as maternal child health, early child health and sexual health.

The *Immunization* module of Panorama is also called the Provincial Immunization Registry (PIR) and is BC's central repository for immunization records.

## A. Log In



1. In the Windows Start menu, open Panorama Viewer, an application built into the Firefox browser. If you do not have Panorama Viewer on your computer, contact your local support team. Access using other browsers is not supported.
2. A *Welcome to Panorama* screen will display.

**BCCDC/PHSA/RHA:** select **Log in with Health Authority ID MFA**.

**FNHA:** select **Log in with FNHA MFA**.

**FNHSO:** select **Log in with BC Provider**.

**Yukon:** select **Log in with Yukon MFA**

If you are already logged in by the method you selected, the Panorama log in screen will display. If not, log in, then the Panorama log in screen will display.

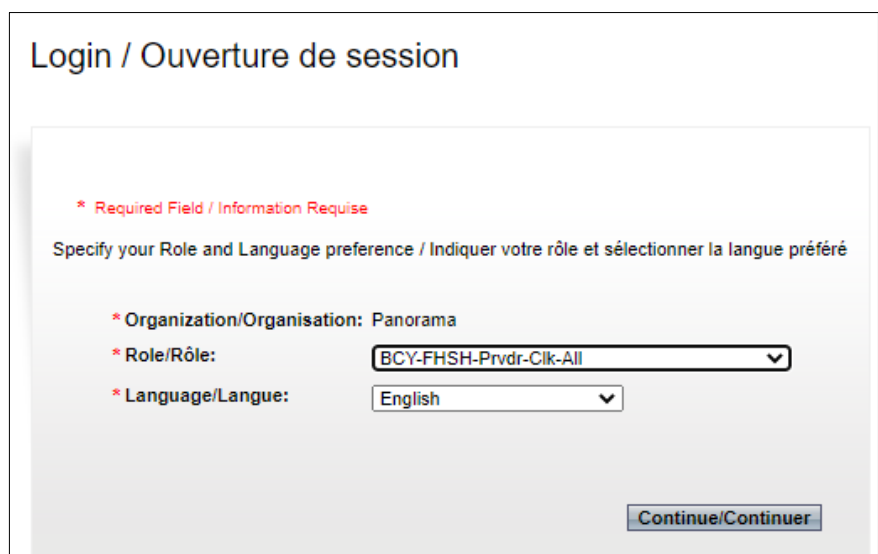


Panorama login screen

3. On the Panorama login screen, select your **Organization** if you have more than one.
4. Select a **Role** from the drop down list, if you have more than one.

If the *Role* you need isn't in the list, contact your local support team. For more about *Roles*, see *Appendix A*.

5. Click **Continue**. The dashboard will display.


 The screenshot shows the 'Login / Ouverture de session' form. It has a red asterisk indicating a required field: '\* Required Field / Information Requisite'. Below this, it says 'Specify your Role and Language preference / Indiquer votre rôle et sélectionner la langue préféré'. There are three dropdown menus: '\* Organization/Organisation: Panorama', '\* Role/Rôle: BCY-FHSH-Prvdr-Clk-All', and '\* Language/Langue: English'. At the bottom right, there is a 'Continue/Continuer' button.

**IMPORTANT** Do not open Panorama in more than one tab at a time. It increases the chance of entering data into the wrong record.

## B. Dashboard

After you log in, the dashboard will display. It provides quick access to most work areas and useful external links.

The screenshot shows the Panorama dashboard interface. At the top, there is a banner with the 'PANORAMA' logo and the text 'Public Health Solution for Disease Surveillance and Management'. The environment is identified as 'PROD'. A navigation bar below the banner contains modules: WORK MGMT, INVESTIGATIONS, OUTBREAKS, IMMUNIZATION, FAMILY HEALTH, INVENTORY, and ADMIN. A user profile bar shows 'Bartoszewski CSTSUP, Dorot...: BCY-CST-Sys...m-Suppo...' with links for Help, Contact Us, My Account, Change Role, and Logout. The main content area includes a 'Specify your Service Delivery Location (SDL)' section with a dropdown menu set to 'Administrator SDL' and a 'Select' button. Below this are four main functional blocks: 'Personal WorkLoads' (View all your assigned work tasks), 'Reporting' (Specify and view client specific and aggregate reports), 'Document Management' (Add, update, delete and search for electronically attached documents), and 'Notifications' (Create and view jurisdiction and threshold notifications). On the right side, there is a calendar for March 2023 and a section for 'External Reference Links' with a list of links under categories: All, Immunization, and Work Management. A 'QUICK LINKS' callout points to a 'Need Help?' link, and an 'EXTERNAL REFERENCE LINKS' callout points to the external links section.

**Logo** – Click from any screen to return to the dashboard.

**Banner** – Identifies the Panorama environment you’re in. The live data work environment, Production displays ‘PROD’ on a gray banner. Other environments used by Solution Partners, such as TRAIN1 or TRAIN2, have a pink/orange banner, to help prevent data from being entered in the wrong environment.

The screenshot shows a pink banner for the 'TRAIN1' environment. It includes the 'PANORAMA' logo on the left, the text 'TRAIN1' in the center, and the user identifier 'PHSATRAINER001, Trainer' on the right. On the far right, there are icons for user profile, notifications, settings, and refresh.

**Module Bar** – lists your available modules, as determined by your user *Role* and *Permissions*. For more about the *Module Bar* and modules, see section 3. *Navigating Panorama*.

**Service Delivery Location (SDL)** – identifies the physical location where a service is provided. You can change the *SDL* by selecting from the drop-down list. For details, see *Appendix A*.

**Quick Links** – provide one-click access to personal work management areas.

**External Reference Links** – Access to these depends upon your *Role*.

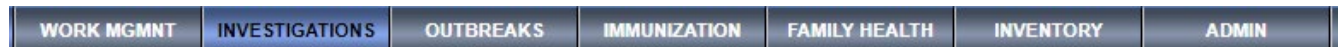
- [PPHIS Confluence](#): site which hosts most PPHIS reference materials and other information.
- [PPHIS JIRA](#): site where Panorama user accounts are requested, Panorama issues are documented, and resolutions are tracked.
- [JCR HCIM Webservice](#): HBC’s authoritative registry of health care client demographic information. Also called EMPI (Enterprise Master Patient Index). JCR stands for Jurisdictional Client Registry. HCIM stands for Healthcare Client Identity Management.
- [Branch Locator Tool](#): provides the JOrg for an address or postal code in BC and Yukon. For details, see *Client Maintain-Reference Guide-Shared Services*.
- [PPHIS Reference Materials](#): webpage hosting Panorama reference materials for front-line users.
- [FN Community List for RHA Use](#): list of First Nations communities used by regional health authorities.
- [Student Information Exchange \(STIX\)](#): application which integrates student information from external sources into Panorama.
- [Public Health Information Exchange \(PHIX\)](#): application enabling health authorities to easily upload demographic information and immunization receipts/records to Panorama.

## C. Navigation

On the dashboard, click a module button to enter a screen. Most screens have common navigation elements, described below. There are two screen styles: *Classic*, used for most of the screens in *Family Health, Inventory, Investigations, Outbreaks*; and *Next Gen*, used for *Immunization* and *Client/Subject* search and data entry screens.

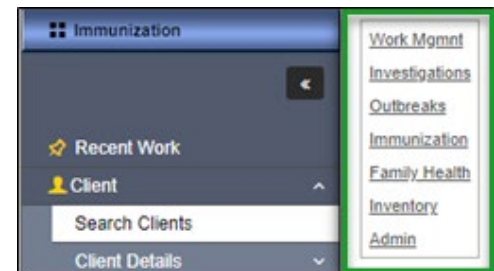
### Modules

Classic Module Bar



NextGen Module Bar

Panorama is organized into modules or program areas. The dashboard and *Classic* screens have a blue/grey *Module Bar* under the banner, with the module you're in in lighter blue.



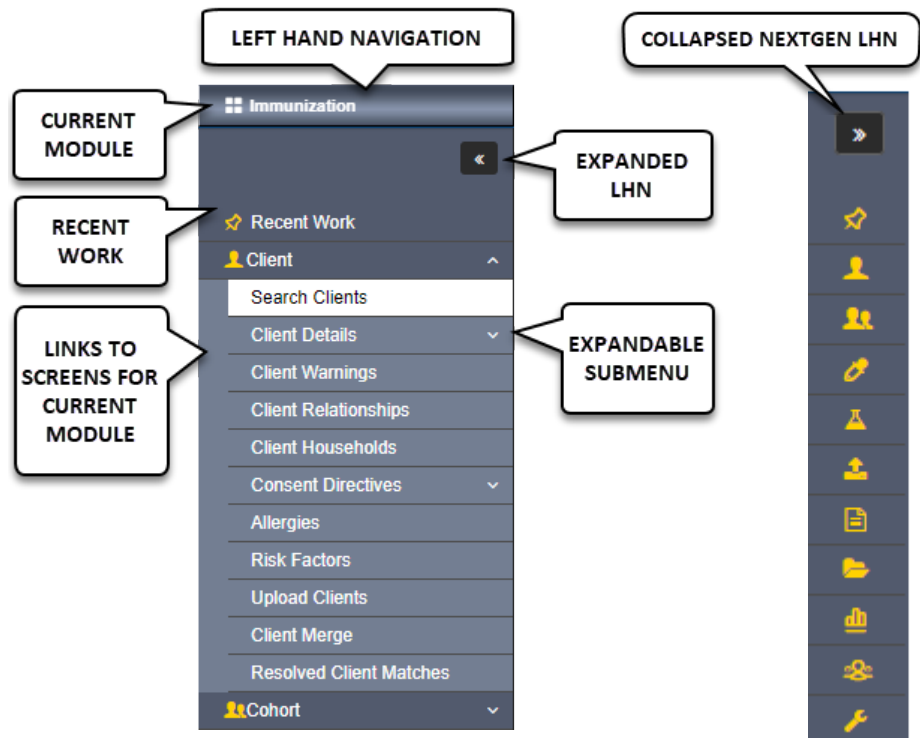
On *NextGen* screens, the module you're in displays under the logo in the *Left Hand Navigation*. Click it to display hyperlinks to other modules.

### Left-Hand Navigation

The *Left Hand Navigation (LHN)* is the dark blue/gray column on the far left of the screen. It lists screens for the current module. Click on the screen name to be taken to that screen.

Some headers with submenus are not clickable. Instead, click the associated arrow to see the submenu.

In *NextGen* screens, the *LHN* can be collapsed or expanded by clicking the arrow under the header.



## Recent Work

Click on *Recent Work* in the *LHN* to see a list of up to ten records you put in context most recently. (Records you only viewed won't display.) *Recent Work* is tied to your user account and 'remembers' your work from previous logins.

You can change the *Client* record you're working on by selecting a different record from *Recent Work*.

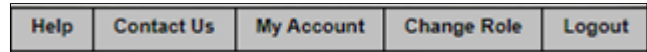
**NOTE** *Recent Work* may display confidential information, so be mindful of this when using it.

Search Clients	
Basic Search Criteria	
<b>Recent Work:</b>	
1. Client: <a href="#">FNTRAINER28, GOLDEN (Client ID: 2456857)</a>	Immunization
2. Client: <a href="#">BCCDC-VIEW-ONLY, TB-NTM-1 (Client ID: 2455633)</a>	Immunization
3. Client: <a href="#">CAMTEST, SIX (Client ID: 2456704)</a>	Immunization
4. Client: <a href="#">Avene, PPHIS test Thermal springs (Client ID: 2457594)</a>	Immunization
5. Client: <a href="#">IHASTATIC, CAREPLANCLIENT (Client ID: 2448352)</a>	Immunization
6. Client: <a href="#">FNTRAINER01, MOM18YRS1 (Client ID: 2448474)</a>	Immunization
7. Client: <a href="#">PHSAVIEWONLY, NEW BABY (Client ID: 2457054)</a>	Immunization
8. Client: <a href="#">IHASUPERUSER01, ONEYEAR (Client ID: 2456578)</a>	Immunization
9. Client: <a href="#">VIHASTUDENT12, ECHA5YR1 (Client ID: 2453039)</a>	Immunization
10. Client: <a href="#">VCHSTUDENT002, NEW BABY (Client ID: 2457018)</a>	Immunization

## D. Screen Navigation

### Function Buttons/Icons

#### Classic Function Buttons



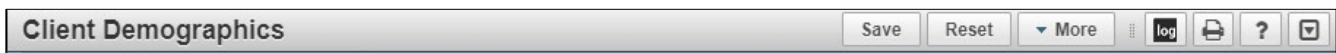
On *Classic* screens, these items are buttons, and the functions are *Help*, *Contact Us*, *My Account*, *Change Role* and *Logout*.

On *NextGen* screens they are icons, and the functions are *Change User Account Settings*, *User Notification*, *Check the Network*, *Change Language* and *Logout*. See *My Account-Reference Guide-Shared Services* for details.

#### NextGen Function Icons



### Screen Header



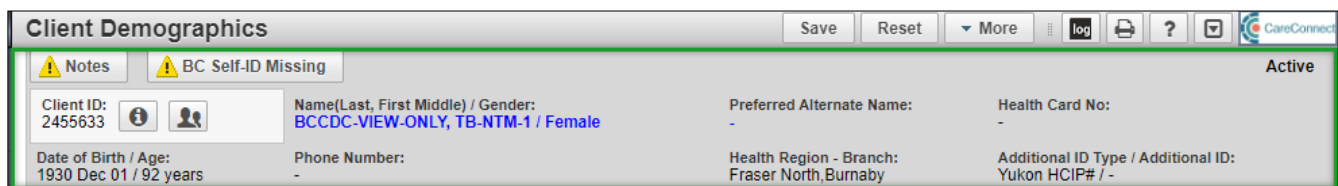
The screen header is the grey bar near the top of the screen. It shows the screen you’re in on the left and the actions you can take on the right, displayed as buttons. These vary with the screen you’re on. The table below lists common buttons and what they do.

BUTTON	ACTION
<b>Save</b>	saves the record
<b>Reset</b>	clears unsaved data
<b>More</b>	adds items to the <i>Wait Queue</i>
	displays the transaction log
	opens the print dialogue box
	opens Panorama Online Help in a new window
	collapses or expands all the sections in a screen at once
	links to CareConnect, an application providing patient information. All users can see the CareConnect icon, but access is only available by request, and FNHA and Yukon users can’t get access. See <i>CareConnect and Panorama—Reference Guide—Shared Services</i> for details.

## Client Context Header

Before you can modify a record in Panorama, you must put it ‘in context.’ Putting a record ‘in context’ is like taking out a physical file folder so it’s available while you care for a client. Anything you do while a *Client* record is ‘in context’, such as creating an *Investigation* or *Encounter*, or reviewing history, is linked to that *Client* record.

When a *Client* record is in context, the *Client Context* header will display on certain screens, such as the screens in *Immunization* or *Family Health*. The *Client Context* header is the grey box outlined in green in the screenshot below.



The table below lists buttons/words which may display in the header and what they mean:

BUTTON	MEANING
	An <i>Alert</i> is active which may affect how client services should be provided. Click to see a summary of <i>Alerts</i> for the <i>Client</i> in context.
	<i>Notes</i> exist for the <i>Client</i> . Click to see the <i>Notes</i> screen for the <i>Client</i> .
	The <i>Client</i> ’s self-identification as Indigenous information is missing. Click to see the <i>Indigenous Information</i> screen for the <i>Client</i> .
	The number is Panorama ID for the <i>Client</i> . Click  to see the <i>Client Profile</i> in a read-only window while staying on the current screen. Click  to change the <i>Client</i> in context.
<b>Active/Inactive</b>	The word <i>Active</i> displays if the <i>Client</i> record is active, otherwise <i>Inactive</i> will display.

These *Client Context* header fields display the information recorded for the *Client* in context: *Name (Last, First, Middle) / Gender*, *Preferred Alternate Name*, *Health Card No*, *Health Region Organization*, *Additional ID Type / Additional ID*, *Date of Birth/Age*. *Phone Number* displays the primary phone number recorded.

## Multiple Levels in Context

You can have more than one level of information in context. In the screenshot, a *Client*, an *Investigation* related to the *Client*, and an *Encounter* related to that *Investigation*, are all in context. The screen title indicates the open record type.

**Encounter Details**

**Client ID:** 2457505  
**Name (Last, First Middle) / Gender:** PROTECTED, D16321 ADULT / Female  
**Preferred Alternate Name:** PROTECTED, D16321  
**Health Card No:** 9187518785

**Date of Birth / Age:** 1978 Jul 14 / 44 years  
**Phone Number:** Primary home: 604-777-7771  
**Health Region - Branch:** Vancouver, Vancouver Westside  
**Additional ID Type / Additional ID:** Yukon HCIP# / -

**Investigation ID:** 70841  
**Status:** OPEN  
**Disposition:** Pending  
**Age at time of Investigation:** 44 years

**Disease:** Hepatitis B  
**PHAC Date/Type:** 2023 Mar 29 / Date Reported  
**Etiologic Agent:** -  
**Authority/Classification:** Provincial / Case - Probable / 2023 Mar 29

**Encounter Date:** 2023 Mar 31  
**Encounter Group / Type:** Communicable Disease Investigation, excluding TB and STI / Clinic Visit  
**Encounter Activity:** Consultation - Client

**Report:** [Dropdown] [Launch] [Encounter UDF] [Save] [Reset]

**Encounter 4356873 Details** [Hide Encounter]

\* Required field  
**Encounter Group:** Communicable Disease Investigation, excluding TB and STI  
**\* Encounter Date:** 2023 / 03 / 31

## Screen Sections

Screen sections for the record you’re working with display under the *Client Context* header(s). Section headers are blue-grey bars. Sections with data have a checkmark in the header and open when the screen opens. Click the **chevron** to expand/ collapse the section.

**Client Demographics** [Save] [Reset] [More] [Log] [Print] [Help] [GmailConnect]

**Notes** [Warning Icon] BC Self-ID Missing [Active]

**Client ID:** 2455633 [Info Icon] [Person Icon]  
**Name (Last, First Middle) / Gender:** BCCDC-VIEW-ONLY, TB-NTM-1 / Female  
**Preferred Alternate Name:** -  
**Health Card No:** -

**Date of Birth / Age:** 1930 Dec 01 / 92 years  
**Phone Number:** -  
**Health Region - Branch:** Fraser North, Burnaby  
**Additional ID Type / Additional ID:** Yukon HCIP# / -

**Personal Information** ✓ [Chevron]

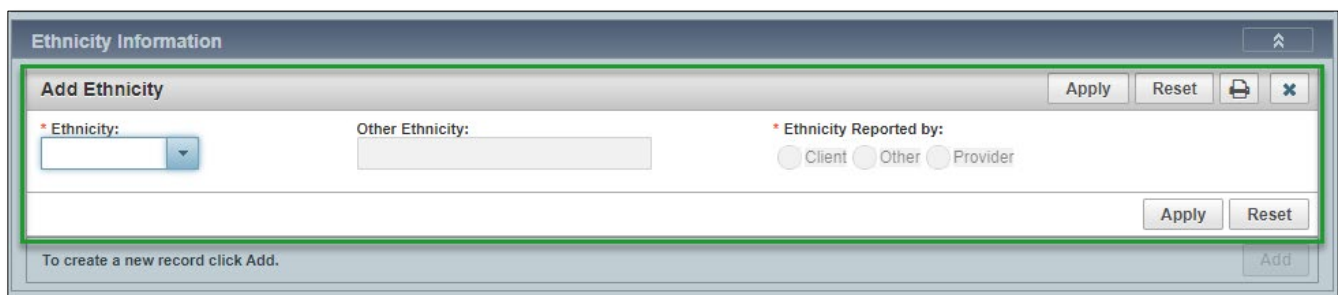
**Ethnicity Information** [Chevron]

## Modals

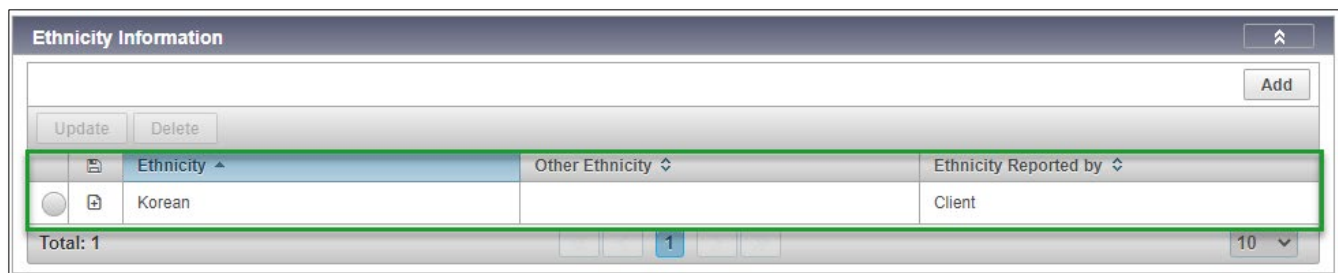
Some sections have an *Add* button or an option to select a record and modify it.



When the *Add* button is clicked, or when a record has been selected and *Update* is clicked, a modal (pop up window) will open as a layer on top of the current screen. The screen in the background will grey out. In the example below, the *Add* button in the *Ethnicity Information* section was clicked and the *Add Ethnicity* modal opened.

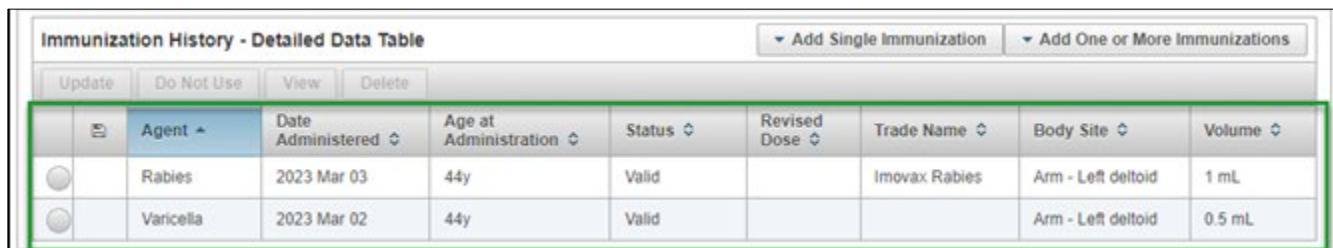


Data entered in the modal and saved will display in the table.



## Tables

Tables show multiple records of the same type. Table actions display in the light grey header bar above the table. The actions available depend on the table and whether a table item is selected.



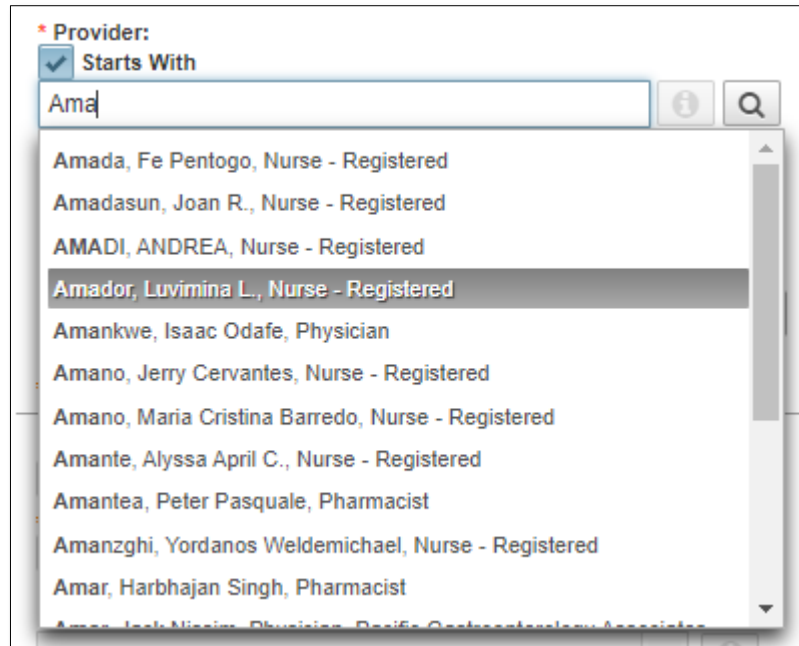
## Embedded Find Component

The *Embedded Find Components (EFCs)*, allow you to search for *Providers, Organizations, or Service Delivery Locations*.

### NextGen EFC

In *NextGen EFCs* you can:

1. Type the desired value in the field. Values matching the initial characters entered will display. Click on the desired value. Leave *Starts With* checked (the default) to search by the first letters of what you're searching for. Uncheck *Starts With* to search by characters that appear anywhere; or



2. Click the magnifying glass icon on the right of the field. The *Advanced Search* dialogue box will display. Enter data in the any of the fields. Click **Search**.

### Classic EFC

To use a classic *EFC*, click the **Find** button. A search box will open.

Leave *Starts With* checked (the default) to search by the first letters of what you’re searching for. Uncheck *Starts With* to search by letters that are anywhere in the word(s) you’re searching for. Type the desired value in the field. Options will display. Click on the desired value. Click **Show Info** to see more information about the item. Click **Select** to select the option.

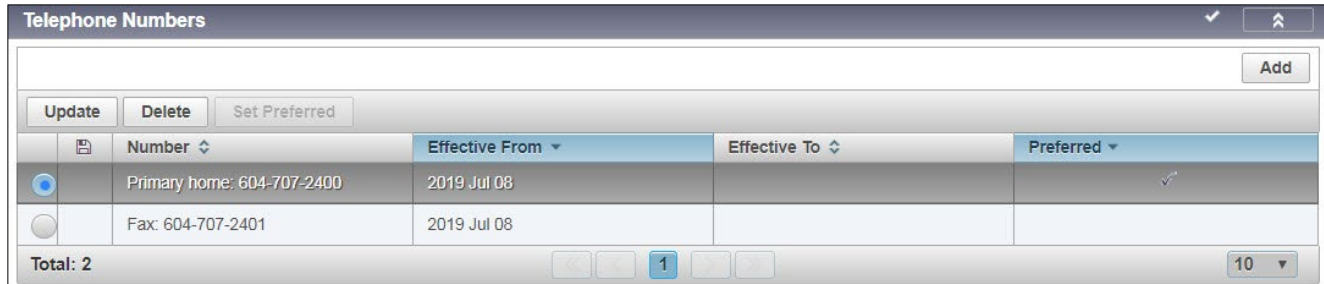
## Field Types

### Mandatory Fields

Mandatory fields, indicated by a red asterisk \* must be completed to proceed. However sometimes they are only mandatory if you’re completing that section, as noted by text under the section header. In the example below, *Outbreak Name* is mandatory when creating an *Outbreak* but *Alternate ID* and *Alternate Source* are only mandatory if you are adding or updating an *Alternate ID*.

## Radio Buttons

Fields with associated radio buttons allow you to add information or select a row/record to update. For example, to update a number in the *Telephone Numbers* modal, click the radio button beside the telephone number in the table row and click **Update**.

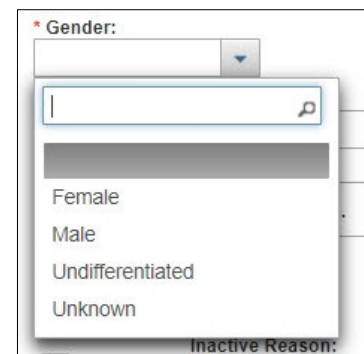


	Number ↕	Effective From ▼	Effective To ↕	Preferred ▼
<input checked="" type="radio"/>	Primary home: 604-707-2400	2019 Jul 08		<input checked="" type="checkbox"/>
<input type="radio"/>	Fax: 604-707-2401	2019 Jul 08		<input type="checkbox"/>

Total: 2

## Drop Down Lists

Drop down lists let you select from predetermined options. For example, to complete the *Gender* field in the *Client Demographics* screen, select *Female*, *Male*, *Undifferentiated* or *Unknown*.



\* Gender:

Female

Male

Undifferentiated

Unknown

Inactive Reason:

## Free Text Field

In free text fields, you can paste or enter text.



Comments:

(4000 characters remaining.)

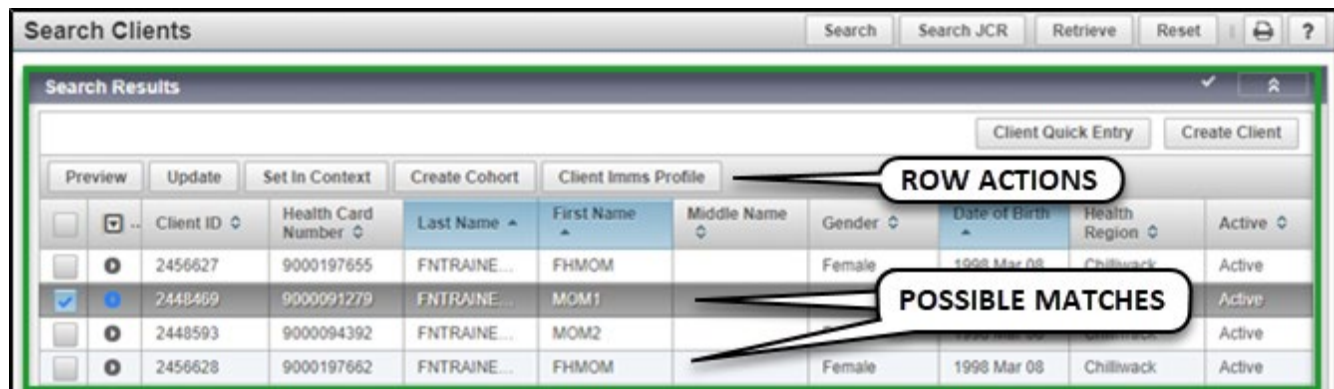
## E. Search for a Client, Lab or Intervention Record

You can search for a record in most modules.

- You can *Search Clients* in *Work Management*, *Investigations*, *Immunizations* or *Family Health*.
- You can *Search Lab* or *Search Interventions* in *Investigations* or *Outbreaks*.

For search details, see [Client Search-Reference Guide-Shared Services](#), [Search Lab-Reference Guide-Outbreaks](#), [Search Lab-Reference Guide-Investigations](#) and [Search Investigations-Reference Guide-Investigations](#).

If Panorama finds matches for your search, the *Search Results* section will display them in a table with *Row Action* buttons above.



The screenshot shows the 'Search Clients' interface. At the top, there are buttons for 'Search', 'Search JCR', 'Retrieve', and 'Reset'. Below this is the 'Search Results' section, which contains a table of search results. The table has columns for Client ID, Health Card Number, Last Name, First Name, Middle Name, Gender, Date of Birth, Health Region, and Active status. Above the table, there are buttons for 'Client Quick Entry' and 'Create Client'. Below the table, there are buttons for 'Preview', 'Update', 'Set in Context', 'Create Cohort', and 'Client Imms Profile'. Two callout boxes are present: one pointing to the row action buttons labeled 'ROW ACTIONS' and another pointing to the selected row labeled 'POSSIBLE MATCHES'.

Preview	Update	Set in Context	Create Cohort	Client Imms Profile	Client ID	Health Card Number	Last Name	First Name	Middle Name	Gender	Date of Birth	Health Region	Active
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2456627	9000197655	FNTRAI...	FHMOM		Female	1998 Mar 08	Chillwack	Active
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2448469	9000091279	FNTRAI...	MOM1					Active
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2448593	9000094392	FNTRAI...	MOM2					Active
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2456628	9000197652	FNTRAI...	FHMOM		Female	1998 Mar 08	Chillwack	Active

The buttons vary depending on the record type searched and the module you're in. They activate when a record is selected. Common buttons include:

**Preview** – displays the selected record as view only. Click 'X' to return to the *Search Results* table.

**Update** – sets the selected record in context and takes you to where the record can be updated. Click *Return* to return to the *Search Results* table.

**Set in Context** – sets the selected record in context.

**Client Imms Profile** – displays if you search from the *Immunizations* module. Click it to display the *Client's Immunization Profile*, where you can update the *Client's* immunization information.

**Subject Summary** – displays if you search from the *Investigations* module. Click it to display the *Client's Subject Summary* screen, listing *Investigations* and *Encounters* associated with the *Client*.

**Family Health Client Summary** – displays if you searched for the *Client* record from the *Family Health* module. Click it to see the *Client's Family Health Client Summary*, listing the *Client's Encounters*, *Focus Areas* and *Care*.

## F. Summary Screens

The *Investigations*, *Immunization* and *Family Health* modules have summary screens which display key information about a *Client*, *Investigation*, *Encounter* or other type of record. The *Outbreaks* module summary screen isn't covered in this guide.

### Investigation Summary

The *Investigations* module has two summary levels: *Subject Summary* and *Investigation Summary*.

#### Subject Summary

The *Subject Summary Screen* displays the *Client Context* header followed by section bar for each *Encounter Group* and one for *Appointments*. A checkmark in the section header means the section contains data. Click **Show** to open the section. The section contains links to the *Investigation IDs* and to *Encounters* related to the *Investigation*.

**Subject Summary**

**BC Self-ID Missing** ACTIVE

<b>Client ID:</b> 2457505	<b>Name (Last, First Middle) / Gender:</b> PROTECTED, D16321 ADULT / Female	<b>Preferred Alternate Name:</b> PROTECTED, D16321	<b>Health Card No:</b> 9187518785
<b>Date of Birth / Age:</b> 1978 Jul 01 / 44 years	<b>Phone Number:</b> Primary home: 604-777-7771	<b>Health Region - Branch:</b> Vancouver, Vancouver Westside	<b>Additional ID Type / Additional ID:</b> Yukon HCIP# / -

Report:

- Communicable Disease Investigation, excluding TB and STI Encounter Group Show
- Environmental Contaminant Investigation Encounter Group Show
- Sexually Transmitted Infections Investigation Encounter Group Show
- Tuberculosis Disease Investigation Encounter Group Show
- Immunization Encounter Group Show
- Appointments Show Appointments

## Investigation Summary

When the *Investigation ID* hyperlink for an *Investigation* is clicked, the *Investigation Summary* screen will display with a context header for the *Investigation* and a summary of the *Investigation*.

WORK MGMT
INVESTIGATIONS
OUTBREAKS
IMMUNIZATION
FAMILY HEALTH

**Recent Work**

Search

- Search Investigations
- Search Lab
- Search Exposures
- Search Interventions
- Search Clients
- Search Non-Human Subjects

Investigation

- Subject Summary
- Investigation Summary
- Investigation Quick Entry
- Investigation Details
- Disease Summary
- Recommendations
- Investigation Information
- Resp. Org / Investigator
- Reporting Notifications
- External Sources
- Links & Attachments
- Close Investigation
- Lab
- Encounter Details
- Signs & Symptoms
- Complications
- Outcomes
- Basic Assessment

### Investigation Summary

? 🖨️

**⚠️ BC Self-ID Missing** ACTIVE

Client ID: <a href="#">2457505</a>	Name (Last, First Middle) / Gender: <b>PROTECTED, D16321 ADULT / Female</b>	Preferred Alternate Name: <b>PROTECTED, D16321</b>	Health Card No: 9187518785
Date of Birth / Age: 1978 Jul 01 / 44 years	Phone Number: Primary home: 604-777-7771	Health Region - Branch: Vancouver, Vancouver Westside	Additional ID Type / Additional ID: Yukon HCIP# / -

Investigation ID: <a href="#">70831</a>	Status: OPEN	Disposition: Complete	Age at time of Investigation: 44 years
Disease: Adenovirus	PHAC Date/Type: 2023 Mar 31 / Date Reported	Etiologic Agent: -	Authority/Classification: Provincial / Case - Confirmed / 2023 Mar 31

Report:   Reason for deletion of investigation:

**Investigation Details** ✓ Contains Data

[Investigation Details](#)

Investigation ID: 70831      Status: OPEN      Investigator: [Anny Fang SYSSUP](#)

Disease Event 71321 - Adenovirus						
Disease	Etiologic Agent	Epi Markers	Authority / Classification   Classif. Date (✓ Primary Classification, Δ Set by Case Def)	Site(s)	Staging	Staging Date
Adenovirus	-	-	✓ Provincial / Case - Confirmed    2023 Mar 31	-	-	-

## Immunization Profile

Instead of an *Immunization Summary* screen, the *Immunization* module has an *Immunization Profile* screen.

Immunization
Save Reset More
log ?
CareConnect

**BC Self-ID Missing** Active

Client ID: 2457505 Name(Last, First Middle) / Gender: PROTECTED, D16321 ADULT / Female Preferred Alternate Name: PROTECTED, D16321 Health Card No: 9187518785

Date of Birth / Age: 1978 Jul 14 / 44 years Phone Number: Primary home: 604-777-7771 Health Region - Branch: Vancouver, Vancouver Westside Additional ID Type / Additional ID: Yukon HCIP# / -

**Immunization Details**

Immunization History - Summary Grid

Agent	Date Administered	Date Administered	Date Administered	Date Administered	Date Administered	Date Administered
HPV-2	2023 Mar 17					
Rabies	2023 Mar 16					

**Immunization History - Detailed Data Table**

Immunization History - Detailed Data Table Add Single Immunization Add One or More Immunizations

Agent	Date Administered	Age at Administration	Status	Revised Dose	Trade Name	Body Site	Volume
HPV-2	2023 Mar 17	44y	Valid			Arm - Left deltoid	0.5 mL
Rabies	2023 Mar 16	44y	Valid		Imovax Rabies	Arm - Left deltoid	1 mL

**Tab Panel**

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

**Antigen Count**

**Immunization Forecast by Agent/Antigen**

Last Forecast Ran On: 2023 Mar 21

Forecast Status calculated as of: 2023 Mar 31 Refresh Forecast

## Family Health Client Summary

	WORK MGMT	INVESTIGATIONS	OUTBREAKS	IMMUNIZATION	FAMILY HEALTH								
<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="width: 20%;"> <p><b>Recent Work</b></p> <ul style="list-style-type: none"> <li>Client</li> <li>Search Clients</li> <li>Client Details</li> <li>Client Warnings</li> <li>Client Relationships</li> <li>Client Households</li> <li>Consent Directives</li> <li>Allergies</li> <li>Risk Factors</li> <li>Upload Clients</li> <li>Client Merge</li> <li>Resolved Client Matches</li> </ul> </div> <div style="width: 80%;"> <h3>Family Health Client Summary</h3> <div style="text-align: right;"> <span>?</span> <span>🖨️</span> </div> <div style="text-align: right;"> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <span style="color: orange;">⚠️ BC Self-ID Missing</span> <span style="float: right; color: orange;">ACTIVE</span> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;"> <b>Client ID:</b>  <input type="text" value="2457505"/> </td> <td style="width: 25%;"> <b>Name (Last, First Middle) / Gender:</b>                      PROTECTED, D16321 ADULT / Female                 </td> <td style="width: 25%;"> <b>Preferred Alternate Name:</b>                      PROTECTED, D16321                 </td> <td style="width: 25%;"> <b>Health Card No:</b>                      9187518785                 </td> </tr> <tr> <td> <b>Date of Birth / Age:</b>                      1978 Jul 14 / 44 years                 </td> <td> <b>Phone Number:</b>                      Primary home: 604-777-7771                 </td> <td> <b>Health Region - Branch:</b>                      Vancouver, Vancouver Westside                 </td> <td> <b>Additional ID Type / Additional ID:</b>                      Yukon HCIP# / -                 </td> </tr> </table> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div> <b>Link to Children:</b>                      -                 </div> <div> <b>Care Plan Priority:</b>                      -                 </div> <div> <b>Immunizations:</b>  <a href="#">Overdue</a> </div> </div> <hr/> <div style="display: flex; justify-content: space-between; align-items: center; margin-bottom: 10px;"> <div> <b>Report:</b> <input type="text"/> <span>Launch</span> </div> <div> <b>Wait Queue:</b> <input type="text"/> <span>Add to WQ</span> </div> </div> <div style="text-align: right;"> <span>Last Visited WQ</span> </div> </div> <div style="width: 20%;"> <ul style="list-style-type: none"> <li><b>Family Health</b></li> <li>Client Summary</li> <li>Encounter Details</li> <li>Maternal Birth Event</li> <li>Baby Birth Details</li> <li>Immunization Profile</li> <li>Notes</li> <li>Document Management</li> <li>Reporting &amp; Analysis</li> </ul> </div> </div>						<b>Client ID:</b> <input type="text" value="2457505"/>	<b>Name (Last, First Middle) / Gender:</b> PROTECTED, D16321 ADULT / Female	<b>Preferred Alternate Name:</b> PROTECTED, D16321	<b>Health Card No:</b> 9187518785	<b>Date of Birth / Age:</b> 1978 Jul 14 / 44 years	<b>Phone Number:</b> Primary home: 604-777-7771	<b>Health Region - Branch:</b> Vancouver, Vancouver Westside	<b>Additional ID Type / Additional ID:</b> Yukon HCIP# / -
<b>Client ID:</b> <input type="text" value="2457505"/>	<b>Name (Last, First Middle) / Gender:</b> PROTECTED, D16321 ADULT / Female	<b>Preferred Alternate Name:</b> PROTECTED, D16321	<b>Health Card No:</b> 9187518785										
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<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <b>Encounters</b> <span style="float: right;">⌵ Show Encounters</span> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <b>Focus Areas Summary</b> <span style="float: right;">⌵ Show Focus Areas Summary</span> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <b>Care Plans</b> <span style="float: right;">⌵ Show Care Plans</span> </div> <div style="border: 1px solid #ccc; padding: 5px;"> <b>Appointments</b> <span style="float: right;">⌵ Show Appointments</span> </div>													

## Notes

A *Note* allows you to document information about a *Client*, *Encounter* or *Investigation* that can't be easily entered in other fields. The *Note* can be created at the *Client* level, or, depending on your security profile, you can attach *Notes* to entities including *Subjects*, *Investigations*, *Encounters*, *Family Health Care Plans* and *Outbreaks*. You can view all *Notes* associated to a specific record (i.e., *Notes* for an *Encounter*), or *Notes* for a group of clinically related records (i.e., *Notes* for an *Investigation* and its *Encounters*). *Notes* is in the *LHN* and is also on key screens as an embedded component.

You can select which module to display *Notes* for. To display *Notes* for a *Client*, click **Display Notes For**, select the *Client* and click **Display**.

The screenshot displays the PANORAMA interface for viewing notes. The top navigation bar includes tabs for WORK MGMT, INVESTIGATIONS, OUTBREAKS, IMMUNIZATION, and FAMILY HEALTH. The left sidebar shows a navigation menu with categories like Client, Cohort, Family Health, Notes, Document Management, Reporting & Analysis, and Administration.

The main content area is titled "Notes" and shows client information for Client ID 2457505. The client's name is PROTECTED, D16321 ADULT / Female. The interface includes fields for Name, Gender, Preferred Alternate Name, Health Card No., Date of Birth, Age, Phone Number, Health Region - Branch, and Additional ID Type. There are also buttons for "Link to Children", "Care Plan Priority", and "Immunizations: Overdue".

Below the client details, there is a "Notes" section with a dropdown menu labeled "Display Notes For:" set to "Client: PROTECTED, D16321". There are also checkboxes for "Include Related Entities" and "Hide Notes".

The "Notes" form includes fields for Subject Line, Status, Workgroup for Author, Workgroup for Transcriber, Author, Transcriber, Note Type, and Note Date (From and To). There are "Display" and "Clear" buttons at the bottom of the form.

At the bottom, a table shows 1 result found. The table has columns for Created Date/Time, Note Date/Time, Note Type, Subject Line, Author, Attached To, Status, and Corrected. The table contains one row with the following data:

Created Date/Time	Note Date/Time	Note Type	Subject Line	Author	Attached To	Status	Corrected
2023 Mar 31 13:56 PDT	2023 Mar 31 13:56 PDT		here is a note	PHSATRAINER002, Trainer	Client 2457505	Complete	

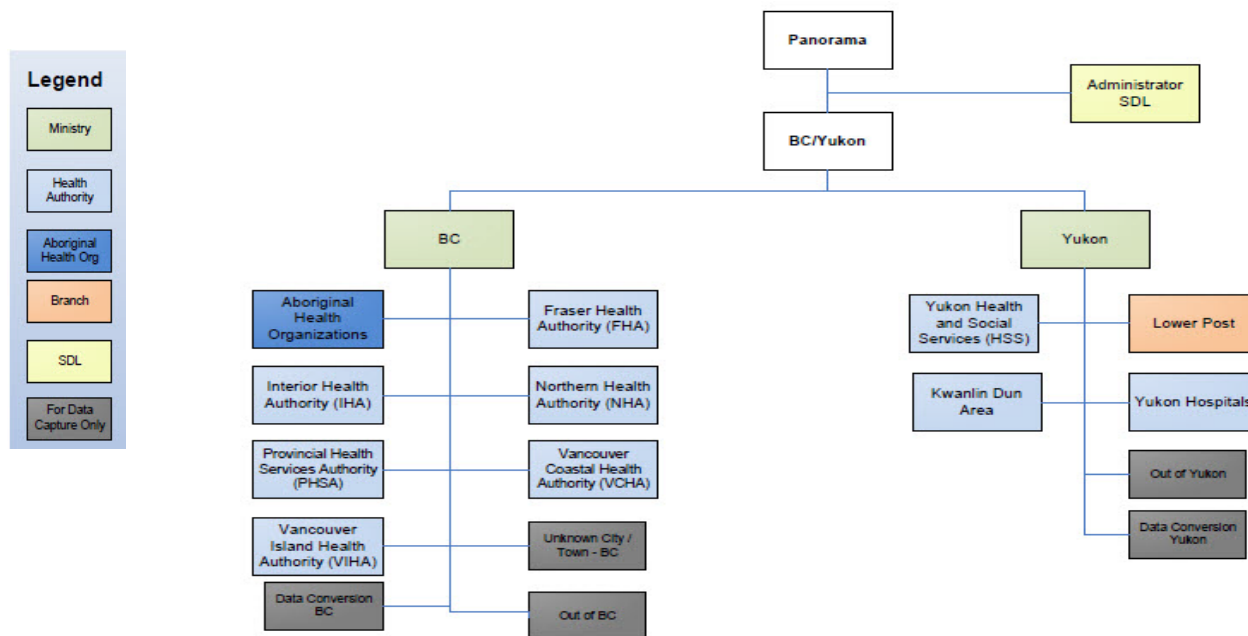
The bottom of the interface shows "Total: 1" and "Page 1 of 1". There is also a "Jump to page:" field.

## Appendix A: Jurisdictional Organizations and Service Delivery Locations

### Jurisdictional Organization

The BC and Yukon public health delivery systems are organized by jurisdictions. The diagram shows the jurisdictional organization (*JOrg*) structure. You may be assigned several *JOrgs* when you are enrolled. Ensure you have selected the correct one when you log in. See the Panorama Confluence site ([www.wiki.phsa.ca](http://www.wiki.phsa.ca)) for the full list of *JOrgs*.

**NOTE** In the *Family Health, Investigations, Outbreaks, Work Management, Inventory* and *Admin* modules, when searching for a *JOrg* on a *Classic* screen, click **Show Info** to see information such as the *JOrg* address, contact information and status, if it's available.



### Service Delivery Location

The *Service Delivery Location (SDL)* is the physical location where a *Provider* (such as a doctor or nurse) provides *Health Services* to *Client*. Each *SDL* is associated with only one *JOrg* called the *Owner Organization*. For example, the Interior Health Authority *JOrg* has four Health Service Delivery Areas (HSDAs). Each HSDA has associated branches and *SDLs* associated to those branches.

The *SDLs* you can access are linked to the *Role* you logged in with. To access additional *SDLs*, contact your local support team.

## NOTES

In *Family Health, Investigations, Outbreaks, Work Management, Inventory* and *Admin*, when searching for a *SDL*, you can click **Show Info** to view additional information if it's available, such as the *SDL* address, contact information and status.

In the *SDL* drop list, names ending with "PHCY" indicate a BC pharmacy location (relevant when entering an *Immunization* record). For the *Organization*, select the health authority where the pharmacy is located.

## Related Documents

- Client Maintain-Reference Guide-Shared Services
- My Account-Reference Guide-Shared Services

## Revision History

DATE	#	AUTHOR	CHANGES
16-Jan-20	3.1	M. Kozma	Removed App. B: Branch Locator Tool. Updates to references to Branch Locator Tool. Added Related Documentation. Corrections to <i>Client Context Header</i> section. Formatted to reduce total pages. Incremented version to 3.1 to align with documentation following the R3.2 upgrade.
16-June-20	3.2	M. Kozma; A. Muja	Section 1: Added Note to 'Logging in to Panorama' re: Maintenance screen for schedule. Added info re: Enviro Name (non-PROD) on browser tab & banner colour. Updated screenshots and details throughout. Section 4: Revised CareConnect info & Added Appendix B: CareConnect. Section 6: Updated Notes.
14-Apr-21	3.3	M. Kozma; G. Tsoi	Added Note to Appendix A: Service Delivery Location ( <i>SDL</i> ) section re: new <i>SDL</i> values with "PHCY" suffix. Added document header and logo.
26 May 23	4.0	D. Bartoszewski R. English, A. Muja, R. Wang, M. Moses	Updated for Panorama R4.4. Updated formatting and language throughout. Made CareConnect appendix into stand alone document.
4 Dec 2023	4.1	D. Bartoszewski, R. Wong	Added information about Chrome as a supported browser.
2025MAY16	5.0	D. Bartoszewski	Updated log in information to align with Panorama 5.0.4 upgrade.
2025JUL22	5.1	D. Bartoszewski	Updated PPHIS Confluence and JIRA links.