



# Panorama

## SYSTEM UPDATE

DECEMBER 2015

## December System Update

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### Tdap Mass Immunization Clinic Set Up

When setting up your Tdap mass immunization clinics, add both Tdap and Tdap-IPV as immunizing agents.

If only Tdap is added as the immunizing agent for the event, the students who have missed previous IPV immunizations and are due for Tdap-IPV, rather than just Tdap, will present as "not forecasted". Thus, **students due for IPV as well as Tdap may be missed altogether.**

Row Actions: <input type="button" value="Update"/> <input type="button" value="Delete"/>	
	Immunizing Agent
<input type="radio"/>	Tdap
<input type="radio"/>	Tdap-IPV

Adding both agents ensures that the students who need both IPV and Tdap will be presented as forecasted for the appropriate agent.

### Example: Student with incomplete primary series.

<b>Client ID:</b> 72936	<b>Name(First,Middle,Last)/Gender:</b> Susan Jh Smith / Female	<b>Health Card No:</b> -	<b>Date of Birth / Age:</b> 2002 Jan 2 / 13 yrs 11 mos
<b>Phone Number:</b> -(-)	<b>Jurisdiction Info:</b> MB Health,Southern Health	<b>Additional ID Type / Additional ID:</b> - / -	

**ACTIVE**

### Client Event Summary

Immunizing Agent	Forecast Status	Consent Status	Event Status
Tdap	Not Forecasted	Missing	---
Tdap-IPV	Overdue	Missing	---

Client Immunization Profile		Contains Data		Hide Client Immunization Profile	
<b>Immunization History</b> <span style="float: right;">Hide Immunization History</span>					
Immunizing Agent					
DTaP-IPV-Hib	<a href="#">2002 Apr 04</a>	<a href="#">2002 May 05</a>			
HB	<a href="#">2011 Oct 05</a>	<a href="#">2012 Jan 06</a>	<a href="#">2012 May 05</a>		

# Inventory Updates

## QRC 4.2 Creating a Requisition

It has been discovered that the last Save is not required. It does no harm to save, but the steps can end at Submit Requisition. A revised QRC 4.2 has been posted to the Panorama Website to reflect this change.

## QRC 4.4 Receiving a Requisition - Apply Update button shortcut

When receiving an inventory shipment, after you uncheck the Cold Chain Quarantine box and select your Operational HP – click Apply Updates. The items will then be auto-populated with these details eliminating the need to repeat the steps with each line item. A revised QRC 4.4 has been posted to the Panorama Website to reflect this change. The original QRC works, but this process is quicker.

**Receive Shipment Details**

Expand All Collapse All

Cold Chain Quarantine  \* HPL 80077-OP

See Container Contents Container ID

+	1
---	---

Auto-populates this:

Row Actions:		Duplicate Line Item										Add Line Item	
		Con ID	Line Item Status	Product Alternate ID	List Price	Catalogue Item Name	* Lot Number	Shipped Qty	* Received Qty	Unit Of Measure	Cold Chain Quarantine	* HPL	
⊕	⊙	1	Shipped	1715001	-	Pediacef	BA_BN_EPH60-01	28.0	28.0	SKU Units	<input type="checkbox"/>	80077-OP	
⊕	⊙	1	Shipped	1715002	35.00	Quadracef	BA-BN-QUAD-002	28.0	28.0	SKU Units	<input type="checkbox"/>	80077-OP	
⊕	⊙	1	Shipped	1715003	145.50	Recombivax...	BA-BN-REC-003#	28.0	28.0	SKU Units	<input type="checkbox"/>	80077-OP	
⊕	⊙	1	Shipped	1715005	102.20	Gardasil -...	RB05B01	28.0	28.0	SKU Units	<input type="checkbox"/>	80077-OP	

Save as Draft Receiving Completed Cancel

## QRC 4.9 Returns -Tips

- Always move any item that is awaiting return into the **For Disposal HPL (DIS)** as soon as you know it will be returned, even if the return date is in the future and unknown. This will save you time when you are ready to process the return.
- When completing the return, print off a list of all the items in your disposal HPL to use as a guide when entering them into the Return.
  - ◆ Steps: Use **View Inventory**. Enter your **Holding Point**. Enter the **HPL Code** for disposal for your HP. Click **Search**. Print the page.
    - ⇒ E.g. Altona HP is 80077 and the HPL code For Disposal is 80077-DIS.
- Search for expired products. Use this to ensure you are returning all expired products.
  - ◆ Steps: Use **View Inventory**. Enter your **Holding Point**. **Enter Expiry Date To:** "yesterday's date". Click **Search**. Print the page.

## Creating New Client Records in Panorama

### Who creates a client record in Panorama?

- Only Peer Supporters are to create new client records.

### When should a client record be created in Panorama?

- For clients who live out-of-province, who will not be moving to Manitoba, who will not be applying for Manitoba Insured Health Benefits, but with whom public health has an ongoing therapeutic relationship with e.g. lives in Saskatchewan but accesses public health services in Flin Flon; out-of-province students residing in Manitoba for a number of years.

### When should a client record NOT be created in Panorama?

- If Manitoba Insured Health Benefits have been applied for and are pending (MFRN and PHIN) e.g. new babies, new Manitoba residents. Document these immunizations on paper and check back in Panorama on a bi-weekly basis. Enter the immunizations into Panorama when the client record appears in Panorama via the link from Client Registry.
- Out-of-province clients receiving one time immunizations. Continue with current non Panorama documentation processes according to organizational policies and procedures.

### What is the process for new creating client records?

Starting January 1, 2016 if you have a client that fits the inclusion criteria:

- Complete the 'Create Client Request Form' posted with QRC 1.1 on the Panorama website at <http://www.panoramamanitoba.ca/res-mcr.html> . Ensure that all the mandatory fields are complete.
- Send the completed form to your organizational Peer Supporter via your organization's secure communication process for Personal Health Information.
- Your peer supporter will inform you when the client record has been created in Panorama. You can then document the client's immunization(s) in the client record.

**For more information, visit:**

[www.panoramamanitoba.ca](http://www.panoramamanitoba.ca)



## Creating New Client Records in Panorama — con'd

Note: If a public health unit has an out-of-province client that they have been providing ongoing service for, they have the option to enter immunizations prior to January 1, 2016 for this client to enable the forecaster to provide accurate information.

### Mass Immunization Events

Mass immunizations events no longer being used, need to be either closed or cancelled in order to complete the documentation process in Panorama and to reduce errors when searching for current or open events. Do not archive mass immunization events.

### Closing a Completed Mass Immunization Event QRC 3.18

If a mass immunization event has occurred, if all the immunizations have been documented completely and if all Event Status' are correct, then the event can be closed. Before closing the event, make sure to generate a final Event Report because a mass immunization event can only be accessed when the status is 'open'. After an event is closed, users can view the Event Worksheet but cannot make any changes to the event.

Follow the directions in QRC 3.18 to close a completed mass immunization event.

<http://www.panoramamanitoba.ca/files/pan-qrc-3.18.pdf>

### Cancelling or Deleting a Mass Immunization Event QRC 3.19

If a mass immunization event has been created in error, you can delete the event. Events cannot be deleted if clients are associated with the event. If no immunizations are documented, the clients can be removed from the event and then the event can be deleted.

If a mass immunization event has been cancelled, you can cancel the event. Events can only be cancelled if no immunizations have been documented.

Cancelled and deleted events can be searched and will appear in the search results factory table but they are no longer accessible to view or edit.

Follow the directions in QRC 3.19 to cancel or delete a mass immunization event.

<http://www.panoramamanitoba.ca/files/pan-qrc-3.19.pdf>

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